# Documentation

## OpenScape UC Application V6
## OpenScape Desktop Client Enterprise Web Embedded Edition

User Guide

A31003-S5060-U102-4-7619

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# History of Changes

| Date | Changes | Reason |
|---|---|---|
| 2011-03-03 | Creation | |
| 2011-11-07 | ADDED:<br>Encrypted data transmission via SRTP with negotiation of the keys on the basis of SDES and key exchange via TLS (**SIP Service Provider > Connection**) is supported. | CQ00175432, CQ00175436 |
| 2011-12-05 | REMOVED:<br>The “Request Web Conference” feature is not supported. You cannot expand a call and consultation call with a Web Collaboration session. | CQ00190157 |
| 2011-12-06 | CHANGED:<br>“Quality-of-Service (QoS)” settings of the SIP Service and HiPath Provider. | CQ00190157 |
| 2012-02-13 | ADDED:<br>In case of a HiPath 4000 connection you cannot configure any **Named Device Lists** or use them as preferred device.<br><br>In case of a HiPath 4000 connection the ring tone is switched to the voicemail box after the ring time set for the device has elapsed. | CQ00197506 |
| 2012-03-15 | ADDED:<br>Restrictions on configuring a preferred device by OpenScape UC Application users who are also members of a Multi-Line Hunt Group (MLHG). | CQ00199762 |

# 1 About this Manual

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

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

## 1.1 Target Group of this Manual

This manual addresses:

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

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

## 1.2 Contents of this Manual

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

The information is structured as follows:

**Chapter 1: About this Manual**

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

**Chapter 2: Configuration and Settings**

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

**Chapter 3: Operation Reference**

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

**Chapter 4: General Main Menu Settings**

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

**Chapter 5: Communicating with Contacts**

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

**Chapter 6: Step-by-Step**

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

**Chapter 7: Rule interpreter - Routing Calls via Rules**

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

**Chapter 8: Voicemail Settings**

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

## 1.3 Representation Conventions

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

### 1.3.1 Formats and Display Forms

In the manual on hand the following conventions apply:

| Purpose | Appearance | Example |
|---|---|---|
| Product and company names | *Italic* | *OpenScape UC Application* |
| Special emphasis | **Bold** | **Name** must not be deleted. |
| User interface elements | **Bold** | Click on **OK**. |
| Menu sequence | **>** | **File > Exit** |
| Textual cross reference | *Italic* | You find further information in the *Configuration and Administration* manual. |
| Path and file names | Font with fix character spacing, e. g. `Courier` | `c:\Program Files\...` or `Example.txt` |

| Purpose | Appearance | Example |
|---|---|---|
| Specifications that may have individual content, e.g. variables. | *Italic* in angle brackets | Enter your <*user name*> and the <*password*> to log on to the system. |
| System entry and output | Font with fix character spacing, e. g. `Courier` | `Command not found.` |
| Key combination | **Bold** | **[Ctrl]+[Alt]+[Esc]** |

## 1.3.2 Notes

**Types of notes**

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

***NOTICE:*** Notes indicated in this way point to information worth knowing or useful tips.

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

## 1.3.3 Figures

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

# 1.4 Continuative Documentation

You find further information about OpenScape Desktop Client Enterprise Web Embedded Edition in the following documentation:

- *OpenScape UC Application V6 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*, installation guide
  Contains information about setting up and uninstalling *OpenScape Desktop Client Enterprise Web Embedded Edition* and as well as detailed information about program configuration and the tools supplied for administrators of *OpenScape Desktop Client*.

- *OpenScape UC Application V6 OpenScape Desktop Client Enterprise Web Embedded Edition*, quick guide
  Describes the basic *OpenScape Desktop Client Enterprise Web Embedded Edition* features.
- *OpenScape UC ApplicationV6 Client Applications* , operating instructions
  This manual offers an overview of all *OpenScape UC Application* V6 clients.

## 1.5 Acronyms

**Table:** Acronyms used

| Abbreviation | Meaning |
|---|---|
| ACD | Automatic Call Distribution |
| BLF | Busy-Lamp Field |
| CCBS | Completion of Calls to Busy Subscriber |
| CCNR | Completion of Calls on No Reply |
| CLA | Customer License Agent |
| CSV | Comma Separated Value |
| DLC | DLS Client |
| DLS | DepLoyment Service |
| DMC | Direct Media Connect |
| DNS | Domain Name System |
| DTMF | Dual -Tone Multi-Frequency |
| GAL | Global Address List |
| HFA | HiPath Feature Access |
| HLM | HiPath License Management |
| IPC | InterProcess Communication |
| LAN | Local Area Network |
| LDAP | Lightweight Directory Access Protocol |
| LED | Light-emitting Diode |
| LIN | Local Identification Number |
| MWI | Message Waiting Indicator |
| NANP | North American Numbering Plan |
| OCS | Office Communications Server |
| QoS | Quality-of-Service |
| RNA | Ring-No-Answer |
| SIP | Session Initiation Protocol |
| TCSPI | Telephony Conferencing Service Provider Interface |

| Abbreviation | Meaning |
|---|---|
| UC | Unified Communications |
| URI | Uniform Resource Identifier |
| VPN | Virtual Private Network |

# 2 Configuration and Settings

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

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

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

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

## 2.1 "Audio Schemes" Tab

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

So that you can conduct phone calls, your PC must be equipped with speaker and microphone, e.g. in the form of a headset.

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

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

You can add audio schemes and modify or delete single audio schemes. This makes it easy to program different audio options (for example, on different hardware) and then select the appropriate scheme you want to use.

### Adding an Audio Scheme

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

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

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

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

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

### Selecting/Activating Audio Schemes

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

### Changing an Audio Scheme

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

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

### Deleting an Audio Scheme

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

### Sequence of Audio Schemes

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

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

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

## 2.2 “Modules” Tab

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

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

***NOTICE:*** A guide to adding or removing modules is given in the setup manual *OpenScape UC Application V6 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*.

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

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

| Module | Description | Setup type | |
|---|---|---|---|
| | | SIP | HFA |
| Communications Provider | Enables SIP Service Provider operation. | ✓ | ✗ |
| HiPath Provider | Provides the connection to a *HiPath 4000* PBX. | ✗ | ✓ |
| IPC Manager[1] | This module is required for initiating calls from *Microsoft Outlook* via the *OpenScape Desktop Client*. | ✓ | ✓ |
| Notifier Toast (Desktop Alerts)[1] | This module is responsible for the display of status or connection changes in the form of desktop alerts. | ✓ | ✓ |
| SIP Service Provider | This module enables SIP telephony with the *OpenScape Desktop Client*. | ✓ | ✗ |

| Module | Description | Setup type | |
|---|---|---|---|
| | | SIP | HFA |
| Sound control[1] | This module is in charge of the audio control (audio buttons, volume menu, volume control). | ✓ | ✓ |
| Video Viewer | This module enables representing video images in the video window. You can perform the settings of this module in the dialog **Settings > Advanced > SIP Service Provider**. | ✓ | ✗ |
| WebClient Embedded | This module represents the *OpenScape Web Client* in the Desktop Client window view. Furthermore, the module provides the presence, conference and journal functionality as well as enables the contact list and device management. | ✓ | ✓ |
| Status and Event Display[1] | This module serves as indicator plugin and enables the display of various events and statuses, e.g. secure or non-secure SIP connection, in the main bar. | ✓ | ✗ |

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

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

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

## 2.3 "Advanced" Tab

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

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

## 2.3.1 General Settings

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

### 2.3.1.1 General

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

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

- In the **Color scheme** combo box you can select the desired color scheme.

> ***NOTICE:*** For the time being, only the color scheme **DarkGray** is available.

- Activating the **Automatically run program when I log on to Windows** checkbox starts the *OpenScape Desktop Client* automatically when you perform your Windows logon to the system.
- **Opening the main window and dialing selected text**
  In this input field you can define a key or hotkeys considered **System-wide keyboard tokens (hotkeys)** that will open the main window again or move it to the foreground when its hidden or minimized. The cursor is automatically positioned in the **<Name or Number>** input field of the main menu.
  If you have selected a phone number in another application and then press the hotkey defined here, the phone number appears in the **<Name or Number>** input field of the main menu and is automatically dialed by the program.

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

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

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

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

### 2.3.1.2 User Data

***NOTICE:*** The user data can only be set or modified while you log in and not while the system is in operation.

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

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

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

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

### 2.3.1.3 Starting the Program

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

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

You can define the following settings for the program start:

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

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

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

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

  The following options are available:

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

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

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

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

### 2.3.1.4 Connection Status Change

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

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

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

The following connection statuses exist:

- **Without connection**
  There is not connection (no connection request, no connection setup, no active connection).
- **Connection setup**
  You set up a connection to another station, for example, a call connection, by dialing a phone number.
- **Active Connection**
  There is an active connection. This may be an active call.
- **Connection request**
  You receive a connection request, for example, an incoming call.

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

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

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

### 2.3.1.5 Task Bar and Notification Area

***NOTICE:*** Options for editing settings for the Windows task bar and notification area of the Windows task bar are only available in the case of activation when logging on, not in the case of activation during operation.

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

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

### 2.3.1.6 Program Update

***NOTICE:*** You find detailed information about the automatic program update of *OpenScape Desktop Client* in the manual *OpenScape UC Application V6 OpenScape Desktop Client* Installation and Administration.

***NOTICE:*** Options for editing settings for program updating are only available in the case of activation when logging on, not in the case of activation during live operation.

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

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

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

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

### 2.3.1.7 Central Configuration

> ***NOTICE:*** Options for editing the central configuration settings are only available in the case of activation during live operation, not in the case of activation when logging on.

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

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

The following settings are required for using the central configuration:

- **Connection**
  If you have configured using a central configuration during the installation, select the required setting under **Connection**. The following options are available:
  - **No use**
    No central configuration.
  - **Complete use**
    Complete use of the central configuration.
  - **Only for encryption**
    The central configuration is exclusively used for encoding the voice signaling.
- **Server (DLS)**
  Enter the IP address in the **Server** field and the port number of the DLS server in the **Port** field. The DLS port is the port number used for accessing the central server.
- **Client (DLC)**
  - Select the client **Address**. You can either use **Detect automatically** for the entry or select the IP address(es) specified in the client PC configuration. Furthermore, you can enter an IP address manually.

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

  - In the **Port** field , enter the number of the local port under which the *OpenScape Desktop Client* responds to queries from the central server.

– In the **Network card** combo box select the network card ID used for DLS-server exchange. The options available here are **Detect automatically** or the network card IDs configured on the PC.

***NOTICE:*** IDs of network cards that are no longer available in the PC are depicted in brackets ( ) in this list.

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

– Under **DLS E.164 (client extension number)** you see the **phone number** configured for your *OpenScape Desktop Client* in the CMP and specified in the **Profile creation** dialog in normalized format. You can change the phone number at this point and it enables accessing the parameters of the DLS configuration.

***NOTICE:*** You can obtain further details from your system administrator.

## 2.3.2 HiPath Provider Settings

***NOTICE:*** You cannot activate the **HiPath Provider** module in combination with the **Communication Provider**.

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

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

### 2.3.2.1 Device

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

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

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

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

### 2.3.2.2 Main Connection

---

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

---

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

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

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

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

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

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

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

### 2.3.2.3 Main Network Access

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

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

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

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

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

### Test

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

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

### 2.3.2.4 Fallback Connection

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

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

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

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

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

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

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

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

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

### 2.3.2.5 Fallback Network Access

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

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

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

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

- **Country code**
  Enter here the international prefix for your location, e.g. for Germany `49`.
- **Area code**
  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.
- **System identification number**
  Enter the system identification number. This system ID number identifies internal call numbers in the directories that only set up internal connections when selected.

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

### Test

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

- **Extension to be dialed**
  Enter the number to be dialed in this entry field. Based on the currently set parameters the *OpenScape Desktop Client* determines the phone number in international format.
- **Converted internationally**
  The phone number entered in the above field is automatically displayed in this field.

- **Effectively dialed**
  This field displays automatically the actually dialed number. Depending on the set network access parameters the number may be shorter, e.g., if an internal phone number has been recognized.

### 2.3.2.6 Failover

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

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

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

Determine the values for the following parameters:

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

- With the **No automatic switch back to primary system** option you determine whether *OpenScape Desktop Client* automatically switches back to the main communication system as soon as it is operable again. If you activate the checkbox of this option, the *OpenScape Desktop Client* does not automatically switch back to the main communication system.

### 2.3.2.7 Ring Tones

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

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

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

---

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

---

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

---

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

---

### 2.3.2.8 Bandwith Reduction

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

---

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

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

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

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

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

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

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

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

**Specialties when selecting the Jitter Buffer**

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

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

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

## 2.3.2.9 Port Restrictions

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

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

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

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

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

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

### 2.3.2.10 VPN

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

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

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

**Virtual Private Network (VPN)**

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

- **none** – No VPN is used or you use a VPN where the VPN client provides a virtual network adapter for the VPN tunnel.

- **automatic** – VPN is used, the IP address is determined by the *OpenScape Desktop Client*.

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

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

### 2.3.2.11 Quality of Service (QoS)

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

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

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

The QoS settings depend on the operating system used.

- **Layer 2: User priority acc. to IEEE802.1p**
  - Under Microsoft Windows XP Professional SP2 and later you cannot perform any settings for **Layer 2**.
  - Under Microsoft Windows Vista/7 you cannot perform any settings for **Layer 2**. The configuration of the **Mark Packets** option is automatically adjusted to the setting for **Layer 3**.
- **Layer 3: Priority classes (Codepoint acc. to DiffServ)**

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

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

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

***HINWEIS:*** The PC needs to be rebooted for the QoS settings changes to become active.

### 2.3.2.12 Operation Settings

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

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

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

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

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

### 2.3.2.13 Security

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***NOTICE:*** These settings are centrally configured and cannot be modified in the *OpenScape Desktop Client*. More details about how to display these settings is provided in the manual *OpenScape UC Application* V6 *OpenScape Desktop Client* Installation and Administration.

---

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

---

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

---

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

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

- **Current activation (UTC)**
  This entry field specifies the time when the current mode was activated in UTC (= GMT).
- **Current activation (local)**
  This entry field specifies the time when the current mode was activated in local time.
- **Next mode**
  The next applicable encryption mode is displayed in field.
- **Next activation (UTC)**
  This entry field specifies the time when the next mode was activated in UTC (= GMT).
- **Next activation (local)**
  This entry field specifies the time when the next mode was activated in local time.

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

## 2.3.3 SIP Service Provider Settings

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

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

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

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

### 2.3.3.1 System Services

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

### Server Type

- **OpenScape Voice/hiQ4200**
  Select this server type if the *OpenScape Desktop Client* is connected to an *OpenScape Voice* or a hiQ4200.
- **OpenScape Voice/hiQ4200 without video**
  Select this server type if the *OpenScape Desktop Client* is connected to an *OpenScape Voice* or a hiQ4200 without video support.
- **HiPath 3000/OpenOffice EE**
  Select this server type if the *OpenScape Desktop Client* is connected to this server.
- **HiPath 3000 >=V8**
  Select this server type if the *OpenScape Desktop Client* is connected to an *HiPath3000 V8* or later.
- **HiPath 4000 >=V6**
  Select this server type if the *OpenScape Desktop Client* is connected to an *HiPath 4000 V6* or later.
- **Default without Video/Instant Messaging**
  Select this server type if the *OpenScape Desktop Client* is connected to any SIP-protocol-based SIP server. In this case the video and instant-messaging features are not supported.
- **Custom**
  If you select this server type, you can individually activate the support for the following features for the connected communications system (if available):

### Server services

- **Video connections**
  Enables connections for exchanging video images.
- **Instant Messaging connections**
  Enables connections for exchanging instant messages.
- **Additional lines/stations**
  Enables the **Lines** module window.

- **Extended call functions/call forwardings**
  Enables extended features and functions, such as Transfer.
- **Suppress blind transfer**
  The "Blind Transfer" feature (**transfer to** a device or subscriber) is not supported by this PBX.

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

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

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

### 2.3.3.2 Connection

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

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

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

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

  ***NOTICE:*** You find more information about data encryption in the manual *OpenScape UC Application V6 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*.

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

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

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

### SIP Session Timer

- **Time limitation**
  Activate this option to specify whether the validity of active sessions is to be monitored by means of heartbeat procedures.
- **Duration (90-3600 Sek.)**
  Specify here the duration of the timer in seconds (admissible range `90 - 3600 sec.`). Value `0` means the timer is off.

### Transaction Timer

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

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

### TLS Connectivity Check

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

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

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

### 2.3.3.3 Main Line

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

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

- **User**
  Enter the unique *OpenScape Desktop Client* phone number/user address.
- **Display**
  Enter the complete name. The text is displayed by the free or integrated phone when idle and is also transferred as name information to your connection partners. This text is also used as a description of the primary line in the **Lines** window or menu.
- **Tooltip text**
  The Tooltip text appears when the mouse pointer is moved close to the main connection line in the **Lines** window.
- **Login**
  Enter here your SIP ID that has been configured for authenticating at the SIP communications system.
- **Password**
  Enter here the SIP password that has been configured for the SIP ID specified under **Login**.
- **Private usage**
  When using the *OpenScape Desktop Client Enterprise Web Embedded Edition* this checkbox has no function and cannot be ticked off.

### 2.3.3.4 Line Parameters

***NOTICE:*** The **line parameters** settings are only required in combination with configured **additional lines**. Otherwise, e.g. when using the *OpenScape Desktop Client Enterprise Web Embedded Edition*, keep the default-set options.

Select under **Advanced > SIP Service Provider** the **Line parameters** option. In the displayed dialog you can perform the following settings:

#### Accept calls automatically

Select an option in this combo box to define which criteria are used for accepting calls on a specific line by lifting the handset or pushing the headset key or .

The following settings are available:

- **From the preferred line or the line that has been ringing the longest** (default)
- **From the line that has been ringing the longest**
- **From the preferred line or the line that was called the longest**
- **From the line that was called the longest**
- **Only from the preferred line for incoming calls**

#### Line selection for outbound calls

Select an option in this combo box to define which criteria are used for accepting calls on a specific line by lifting the handset or pushing the headset key or .

The following settings are available:

- **On the preferred line** (default)
- **On the next free line** (lines always considered from first to last)
- **On the last line used**
- **No automatic line seizure**

**Signaling type for second call waiting on another line**

Select an option in this combo box to define if and how the *OpenScape Desktop Client* should signal inbound connection requests if an active call is in progress when you receive a second connection request on another line.

You can choose between:

- **Special alert tone** (default)
- **Normal alert tone**
- **No Alert tone**

**Behavior on switching the line**

Select an option in this combo box to define what is to happen to an active call in the *OpenScape Desktop Client* when you answer another connection request:

- **Places active call on hold** (default)
- **Ends (disconnects) the active call.**

In the **Immediate connection for the device** section you can configure an instant connection for your device.

- **Address**
  Use this entry field to specify a number to which a connection is automatically set up independent from the line-specific immediate-connection settings.
- **Delay (sec.)**
  This entry specifies the delay after which the number specified under **Address** is to be dialed. 0 seconds here means an immediate connection without delay.

---

***NOTICE:*** If values have been configured for a device-specific and a line-specific immediate connection, the lower delay setting is used. If the delay time settings are identical for the line and device, the immediate connection is set up first for the line.

---

## 2.3.3.5 Registrar

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

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

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

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

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

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

### 2.3.3.6 Proxy

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

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

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

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

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

- **Use Custom Port**
  If you select this option, you must enter the port number under **Port**.

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

### 2.3.3.7 Outbound Domain

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

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

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

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

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

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

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

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

- **Delete port entries in INVITE headers**
  Activating this option removes the ports from the INVITE headers for the domain names entered. This is necessary, for example, in the case of ACME/ Session Border Controller configurations.
- If, for example, *OpenScape Desktop Client* is used with an *OpenScape Voice* in a survivable branch solution (e.g. *OpenScape Branch*), enter the IP address or the server name of the gateway server or of the Survivable SIP Proxy in the **Server** field of the **Gateway** section.

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

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

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

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

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

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

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

### 2.3.3.8 Network Access

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

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

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

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

### Test

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

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

### 2.3.3.9 Address Conversion

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

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

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

- **Remove domain specification in display texts**
  Activate this option to suppress the domain port for a SIP-URI to be displayed (e.g. display the calling station) on the display.
- **Remove same domain address**
  Activate this option to suppress the domain port in the case of SIP-URIs from the same/own registrar in addresses, e.g. call lists.

- **Add international prefix ("+") to SIP address**
  Activate this option if the *OpenScape Desktop Client* is to indicate the SIP address as international.
  ***Example:***
  The SIP Service Provider delivers the address *sip:4924049087666@siemens.com* and the *OpenScape Desktop Client* converts it in *sip:+4924049087666@siemens.com*.
- **Handle SIP-addresses as call numbers**
  If this option is active, the domain portion is ignored and the text that precedes the domain considered a phone number.
  ***Example:***
  *sip:+4924049087666@enterprise.com* is considered *+4924049087666*.
- **Input and selection option of SIP-addresses**
  Activate this checkbox to allow the input and selection option of SIP-addresses.

### 2.3.3.10 Additional Functions

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

**DTMF Tone Dialing**

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

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

### 2.3.3.11 System Functions

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

---

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

---

**Automatic acceptance of calls for server-controlled connections**

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

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

**Voice recording**

- **Disable Voice Recording**

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

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

## 2.3.3.12 Codes

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

### Callback

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

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

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

### Call pickup

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

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

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

  ***NOTICE:*** The PBX *OpenScape Voice* used to be called *HiPath 8000*.

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

### Hunting group

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

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

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

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

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

## 2.3.3.13 Sounds

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

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

## 2.3.3.14 Ring Tones

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

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

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

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

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

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

## 2.3.3.15 Video Schemes

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

### Adding a Video Scheme

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

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

### Selecting/activating a Video Scheme

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

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

### Changing a Video Scheme

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

### Deleting a Video Scheme

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

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

#### Optimizing the Video Connection

To optimize the video transmission you can use the slider to set a higher resolution or a higher image frequency. Each unit on the slider represents a video frame per second. Based on the slider position and the configured connection bandwidth, the *OpenScape Desktop Client* agrees with the connection partners the ideal video codec for the upcoming video connection.

### 2.3.3.16 Bandwidth

Communication between the *OpenScape Desktop Client* and the communications system is based on defined compression algorithms (codecs) for the transmission of audio and video signals via network. To this, you can select the following settings under **Advanced > SIP Service Provider > Bandwidth**:

#### Network connection

- **Download (kbit/s)**
  Use this combo box to select one of the velocities available in your system for the download.
- **Upload (kbit/s)**
  Use this combo box to select one of the velocities available in your system for the upload. The minimum value we recommend for this setting is 256kBit/s.
- **Load Default Profile**
  Use this button to open a window in which the different profiles (tariffs) are listed. You can select your tariff/profile there. Although the associated speeds for **Download** or **Upload** are preset by default, they can be modified.

#### Audio Codecs

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

- **Priority 1**
  Use this combo box to select the audio codec to be used for your voice connections with the highest priority.
- **Priority 2**
  Use this combo box to select the audio codec to be used for your voice connections if the audio codec with the highest priority is not available.
- **Priority 3**
  Use this combo box to select the audio codec to be used for your voice connections if the audio codecs with **Priority 1** and **Priority 2** are not available.
- **Packet length (ms)**
  Select **Auto** here or enter the desired value (in milliseconds).
- **Jitter Buffer (ms)**
  To avoid voice packet loss, which can result in poor voice quality and dropouts, set the buffer size in this field. We recommend to set the jitter buffer to value `60`. The jitter buffer caches all incoming voice packets for the period set and then forwards them to the audio device's sound output. The jitter buffer continues to forward voice packets until none are left, even if the network does not deliver new voice packets quickly enough. This avoids dropouts.
  When selecting the optimum setting for the jitter buffer the following applies:
  - The better the network quality, the smaller the jitter buffer may be.
  - The bigger the jitter buffer, the more the voice output will be delayed.

#### Video Codecs

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

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

### 2.3.3.17 Port Restrictions

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

**Port restrictions**

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

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

**SIP signaling**

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

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

## 2.3.3.18 Quality of Service (QoS)

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

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

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

The QoS settings depend on the operating system used.

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

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

***HINWEIS:*** The PC needs to be rebooted for the QoS settings changes to become active.

### 2.3.3.19 Mobile User

***NOTICE:*** You can use the SIP Mobile User functionality only if a DLS server is available in your SIP communications system. Furthermore, the **Use central configuration** option must have

been activated when setting up *OpenScape Desktop Client*. In addition, you need to enter the DLS configuration parameters for the central configuration on the tab **Advanced > General > Central Configuration**.

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

### SIP Mobile User Logon

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

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

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

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

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

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

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

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

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

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

---

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

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## 2.3.4 Settings for the WebClient Embedded

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

The following settings can be made via this dialog:

**OpenScape Web-Access**

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

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

**Chat message**

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

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

**Screensaver and locked workstation**

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

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

---

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

---

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

---

# 3 Operation Reference

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

## 3.1 Starting the Program

The program can be started as follows:

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

The program always starts under the user profile used last.

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

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

### 3.1.1 Error Signaling at the Program Start

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

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

## 3.2 User Login

Users may log on in the following ways:

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

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

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

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

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

## 3.2.1 Initial Program-Login

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

In this dialog you can perform the following settings:

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

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

## 3.2.2 Default Login

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

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

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

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

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

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

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

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

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

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

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

## 3.3 Ending the Program

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

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

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

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

## 3.4 Administering the Configuration Settings

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

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

You open the configuration settings via the **Manage** button in the login dialog.

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

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

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

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

## 3.5 Notes for efficiently using the OpenScape Desktop Client

**Your status information - the basis for ideal communication**

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

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

---

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

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

You define the devices for voice on which you want to be reached. The *OpenScape UC Application* keeps track of all devices monitored by *OpenScape Voice*, determines the overall availability of those devices and then routes calls, e-mails, or instant messages appropriately.

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

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

---

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

---

## 3.6 Main Window

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

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

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

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

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

## 3.7 Main Menu

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

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

- **Pearl menu**
  This is an application menu icon for accessing the basic features of the integrated web interface.
- < Name or Number > **Input field**
  Input field for phone numbers or names combined with the combo box for displaying the phone numbers you have dialed last. With a click in this entry field and after entering a phone number or name you can initiate a call or look for contact information.
  - After you have entered a number, click on to initiate the call.
  - If you want to obtain the contact data of a subscriber from all configured directories, click on or simply press the **return key** after you have entered the contact's name. The **Directory Search** function window with search results already found opens.
  - To call a contact from the contact list click on the contact's number(s) displayed under the input field **<Name or Number>**.
  - If you have defined a **hotkey** in the Settings dialog on the **Advanced** tab under **General > General** and selected a phone number in another application, this number is automatically displayed in the **<Name or Number>** input field and dialed by the program.

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

## 3.7.1 Pearl Menu

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

- **Status Information**

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

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

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

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

### 3.7.1.1 Status Information

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

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

---

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

---

**Missed Calls**

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

---

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

---

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

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

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

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

  The following figure exemplifies this.

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

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

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

- , **Send e-mail**
  Click on one of the two depicted icons to send an e-mail to the contact.
- **Send instant message**
  Click on if you want to send an instant message to the selected person.
- **Open a note**
  Click on to add a note to the contact or journal entry.

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

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

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

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

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

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

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

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

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

- **Number** of the caller

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

### Voicemail

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

---

***NOTICE:*** If the **Voicemail Box** dialog issues the message:

"Connection to Voicemail server is not configured!", please consult your system administrator so that he/she can solve the problem.

---

---

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

---

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

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

  ---

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

  ---

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

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

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

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

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

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

### Presence prompting list

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

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

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

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

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

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

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

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

### 3.7.1.2 View

The **View** feature provides fast access the following function windows:

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

- **Conferences**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Conferences** function window as separate window. This function window contains a list of all conferences you have created, of all active conferences and/or of all conferences you have been added to as participant. From here you can create a new scheduled conference, remove selected conferences from the conference list (only if you are the creator), and edit and start them.
- **Directory Search**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Directory Search** function window as separate window. In the Directory Search function window you can access your company directory, the *OpenScape UC Application* user directory, and your private contacts to search for contact names.
- **Journal**
  With a click on this menu entry in the right area of the **Pearl** menu you open the **Journal** function window. This window logs all of your incoming and outgoing calls, even if you are offline.

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

### 3.7.1.3 Personal Settings

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

#### 3.7.1.4 Help...

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

#### 3.7.1.5 About

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

### 3.7.2 Presence Display

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

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

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

---

***NOTICE:*** Whenever an *OpenScape UC Application* user adds another *OpenScape UC Application* user to his/her contact list, the system automatically sends a presence prompt to this user. The user addressed in this way can then use this prompt to decide whether he/she allows the requesting user to see his/her presence status.

---

The following presence statuses are available:

- **Available**
  Signal for the other *OpenScape UC Application* users that you can be reached at your workstation.
- **Unavailable**
  Signal for the other *OpenScape UC Application* users that you cannot be reached at your workstation.

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

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

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

## 3.7.3 Device Display

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

> ***IMPORTANT:*** You cannot configure/select a device that is already monitored by another CSTA application, e.g. *OpenScape Contact Center*.

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

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

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

The device currently used is indicated by an arrow.

- The **Change Setting** menu option lets you directly perform the settings for the rule profile, the *one-number service* – display of your phone number on the calling or called subscriber's side independently from the device used – as well as configure a call forwarding and add further devices to the device list.
- A click on the **Outgoing Calls** menu option opens the following dialog for you to quickly set your preferred device for the *one-number service* for making outgoing calls.

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

---

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

---

## 3.7.4 Rule Profile Display

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

The active rule profile is additionally indicated by an arrow.

When you click on the display the following menu opens.

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

## 3.7.5 menu

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

The following settings can be made:

- **General**
  Select **General** to perform the basic settings for the web interface. In this menu you can use dialogs for defining general parameters and administering addresses.
- **Rules...**
  Select **Rules** to configure a profile and routing rules for rerouting incoming calls to the devices you have specified.
- **Conference...**
  Select **Conference** to open the entry mask for scheduling a conference.
- **Voicemail...**
  Select **Voicemail** to open the configuration pages to set your voicemail parameters.
- **Change Password**
  Select **Change Password** to change your existing *OpenScape UC Application* password for logging on to the *OpenScape UC Application* system.
- **Log off**
  Select **Log off** to quit the *OpenScape UC Application* server.

## 3.8 Tab Bar

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

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

- **Missed Calls**
- **Journal**
- **Voicemail Box**
- **Conferences**
- **Contacts**
- **Instant Messaging**
- **Forwarding**
- **Directory Search**

- **Bookmarks**

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

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

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

The following functions are available in this dialog in addition:

- Changing the tab order

  With a click on ▲ or ▼ you can move the previously marked tab up or down in the list, which displays it further to the left or to the right in the tab bar.
- Creating a new bookmark

  A click on ✚ or on the **Add** button opens the **Bookmark Settings** dialog, in which you can create a new bookmark. This bookmark appears on the tab bar after you have closed the dialog. You can edit ✎ and delete ✕ all private bookmarks. You cannot change the default tabs or remove them from the list.

## 3.9 Workspace Function Windows

The workspace contains the following function windows:

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

- **Forward Call**
- **Bookmarks**

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

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

## 3.9.1 General Controls

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

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

## 3.9.2 Call Control

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

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

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

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

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

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

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

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

In this function window you find the following information:

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

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

### 3.9.2.1 Inbound Call

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

- **Change device/forward incoming call**

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

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

In this dialog the following options are available:

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

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

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

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

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

### 3.9.2.2 Active Call

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

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

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

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

In this dialog the following options are available:

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

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

- **Set active call to "on-hold"**

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

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

- **Pick up held call**

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

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

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

### 3.9.2.3 Outbound Connection

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

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

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

- **Drop a call**
  The connection setup is abandoned.
- **Request callback**
  - Completion of Calls to Busy Subscriber (CCBS) - If you receive the busy sign from the desired subscriber, you can click on to automate a connection setup in the PBX to the previously busy target subscriber before hanging up. If the previously busy target subscriber becomes

available again, the *OpenScape Desktop Client* is informed by the PBX accordingly. The *OpenScape Desktop Client* then lets you know by a call signal in the **Call Control** window that the target subscriber is no longer busy. If you accept this return call with a click on , the target subscriber is called by the PBX again.

– Completion of Calls on No Reply (CCNR) - If the line of the other subscriber is free but he/she does not accept the call, you can click on to automate the connection setup to the desired subscriber in the PBX. When the target subscriber hangs up the next time, the PBX informs the *OpenScape Desktop Client* accordingly. The program then lets you know by a call in the **Call Control** window that the subscriber is available. If you accept this call (return call) with a click on , the PBX connects you to the desired subscriber again.

---

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

---

### 3.9.2.4 Consultation Call

**Controls of the held Call**

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

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

**Controls of the consultation call**

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

- **Transfer active call**

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

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

  

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

- **Set active call to "on-hold"**

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

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

- **Pick up held call**

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

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

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

### 3.9.2.5 Conference Connection

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

**In the header**

- **Lock/unlock conference**
  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.

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

**While the connections of the conference participants are displayed**

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

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

  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.

### 3.9.2.6 Controlling a Conference via Telephone

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

---

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

---

#### Activating the Control Menu

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

---

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

---

#### Control Commands

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

- * **Prompt menu**
  The available menu options are announced to you.
- abc 2 **Lock/unlock conference**
  Once the conference has been locked, no further participants may dial in. Pushing this key once more undoes the restriction.
- def 3 **Mute self**
  Via this key you can temporarily deactivate the microphone of your telephone. The conference connection is maintained. Pushing this key once more reactivates the microphone.
- ghi 4 **Mute conference**
  This feature mutes all microphones of the conference participants. Only the voice signal of the conference participant who triggers this function is still transmitted to all conference participants.

- **jkl 5 Initiate device handover**
  This function allows you to change the device you use in the conference. After you have pushed this key, enter the phone number of the device you want to switch to. You need to complete the phone number entry with the # key. For further proceedings, please follow the voice prompts.
- **wxyz 9 Toggle music-on-hold**
  If you currently are the only conference participant and hear music-on-hold, you can push this key to switch off the music. Pushing this key once more reactivates the music-on-hold.

### DTMF control of a video conference

You can use the following key commands during a video conference in addition to the above control options of a voice conference by default. To control a conference via the keys of your configured preferred device you first need to activate the operating menu by pushing the tuv 8 key.

- **tuv 8 Display participant list**
  Enabling this key displays a list of all conference participants in the **Video** window. The participants are listed with their names or phone number, for example. Pushing this key once more hides the participant list again.
- **pqrs 7 Enable/disable info bar**
  Via this key you display an info bar in the **Video** window. This bar may contain information about the number of connected video or audio participants, the muting status (muting on or off) as well as the conference status (locked/unlocked).
  Pushing this key again hides the info bar.
- **def 3 Show/hide connection information**
  When you push this key, specific connection information such as the required bandwidth for enabling the image transmission to the client is displayed in the **Video** window. To hide the connection information, push this key again.
- **1 Increase image quality**
  Each time you push this key, the quality of the received video image increases by 10 %.
- **0 Decrease image quality**
  Each time you push this key, the quality of the received video image decreases by 10 %.

---

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

---

## 3.9.3 Contacts

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

### Compact view

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

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

### Extended View

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

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

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

### 3.9.3.1 Information in the “Contacts” Function Window

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

- A radio button for selecting the entry
- The presence icon of the relevant contact:
  - **Available**
  - **Unavailable** or the contact does not allow monitoring his/her presence status
  - **Do not disturb**
  - **Be right back**
  - **Busy**
  - **In a meeting**
  - Presence information is invisible or not displayed
- The name of the contact,
- The department of the company that employs the contact ( **Contacts** only)
- The company that employs the contact ( **Contacts** only)
- The contact's business number,
- An instant-messaging (IM) icon for opening a chat with this contact:
  - The instant-messaging (IM) status of the contact is *Unknown*. The contact has rejected your presence request or not replied to it yet.
  - The IM status of this contact is *Online*. The contact is logged in at the system and the IM mode *Online* has been assigned to his/her set *OpenScape UC Application* presence status. You can immediately start a chat with this contact.
  - The IM status of this contact is *Offline*. The contact is not logged on to the IM server or system.

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

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

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

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

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

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

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

- - See the function description for . This contact has been assigned various phone numbers. You can determine the phone number to be used for the upcoming call via the small triangle.
- - The maximum number of active connections for the desired contact has been reached or exceeded. It is not possible to establish a connection to the contact.
- - See the function description for . The small triangle means that several phone numbers are available for the person.
- - There is no presence information available for the contact; thus, it is not possible to specify whether or not the contact can be reached by phone.
- - The contact has been assigned various voice devices. However, there is no presence information available for the contact at the moment; thus, it is not possible to specify whether the he/she can be reached by phone or not.

---

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

---

### 3.9.3.2 Controls in the "Contacts" Window

You can reach the following features via the toolbar of the **Contacts (compact)** as well as of the **Contacts** window.

---

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

---

- **Create new contact entry**

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

- **Delete contact entry**

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

- **Change contact entry**

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

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

---

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

---

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

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

- **Change address book entry**
  Click on if you want to edit the contact entry. The contact entry mask with the available contact data opens.
- , , **Call**
  Click on the icon that matches the desired phone number to set up a connection to this device.
- , **Send e-mail**
  Click on one of the two depicted icons to send an e-mail to the contact.
- **Send instant message**
  Click on if you want to send an instant message to the selected person.
- **Open a note**
  Click on to add a note to the contact or journal entry.

- **Configure conference**
  To configure a new, scheduled conference, select the desired conference participant from your contact list and click on . The **Create conference** dialog opens.

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

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

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

- **Configure**

  A click on opens the following configuration dialog for the address data:

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

- **More functions**

  After a click on this icon, you can choose the following features from a list:

  – **Set Tell-Me-When**
    Select this option to activate the *Tell-Me-When* function for the selected contact.

  – **Edit Tell-Me-When**
    This option is only available to you after you have selected a contact with active *Tell-Me-When* function. You can use this option to change the *Tell-Me-When* settings for the selected contact.

  – **Delete Tell-Me-When**
    Select this option to deactivate the active *Tell-Me-When* function for the selected contact.

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

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

  – **Print ...**
    Select this feature to print the complete contact list. The contact information is printed out in table form.

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

• **"Filter by address group" combo box**
Address groups enable the structuring of the contact list content to provide a clear overview. You can assign an attribute to a contact entry, which labels the contact as member of a group you have specified. For example, you can group your contacts according to company membership, departments or as private. Via the contact list you can then selectively access these groups.
By clicking on this combo box in the toolbar you can have the contacts displayed filtered by an address group. You can also create new groups and delete or rename existing address groups.
The following options:

- **Display all**
  shows all contacts in alphabetic order, either ascendingly or descendingly,
- ***<Address group names>***
  and the address groups you have already created.
- **Edit...**
  A click on this option opens the configuration dialog for the address groups. In this dialog you can define new address groups and rename or delete existing ones.

### 3.9.3.3 Input Mask of a Contact

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

In this dialog you can perform the following settings:

- **Last name**
  Enter a last name up to 64 characters.

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

- **First name**
  Enter a first name up to 64 characters.
- **Address group**
  If required, assign an **address group** to the contact with a click on .
- **Display name**
  Enter a street address up to 64 characters.
- **Company**
  Enter a company name up to 64 characters.
- **Department**
  Enter a department name up to 64 characters.
- **Location**
  Enter a location name up to 64 characters.
- **Building/Room**
  Enter a room number up to 32 characters.
- **Business Phone**
  Enter a phone number up to 32 characters.

- **Home Phone**
  Enter a phone number up to 32 characters.
- **Mobile Phone**
  Enter a phone number up to 32 characters.
- **Fax**
  Enter a fax number up to 32 characters.
- **Business e-mail**
  Enter an e-mail address up to 64 characters.
- **Private e-mail**
  Enter an e-mail address up to 64 characters.
- **URL**
  Enter a URL up to 64 characters.
- **IM address**
  Enter an instant-messaging address up to 64 characters.
- **Comment**
  Enter a comment up to 255 characters.

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

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

## 3.9.4 Instant Messaging

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

You reach the **Instant Messaging** function window via the tab bar under the main menu.

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

---

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

---

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

- **recent IM partners**
  This feature opens a selection dialog displaying your recent chat partners. To invite a person for a chat, select him/her by activating the checkbox that precedes the respective name entry. A click on the **OK** button closes the selection dialog. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected contact.
- **a search**
  This feature opens the **Directory Search** window. Enter the data of the user with whom you would like to start a new chat in the search form. Click on the **Search** button. The search results are displayed in the lower section. Select the desired person. Then click on the **Add** button in the **Directory Search** dialog or on . The **Directory Search** dialog closes. A new tab opens in the **Instant Messaging** function window. On this tab you can write an instant message and send it to the selected participant.

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

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

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

### 3.9.4.1 Controls in the “Instant Messaging” Dialog

#### Controls on the Tab of an Active Chat Connection

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

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

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

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

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

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

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

### Controls on the "Overview" tab

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

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

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

## 3.9.5 Conferences

You reach the **Conferences** function window by selecting the **Conferences** tab in the main window. The Conferences function window remains empty until you create at least one conference or have been invited for a conference. Thereafter, it contains a list of all conferences you have created, of all active conferences and/or of all conferences you have been added to as participant.

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

---

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

---

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

---

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

### 3.9.5.1 Conference Types

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

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

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

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

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

  ***NOTICE:*** Meet Me conferences with video preparation are currently only possible via the *OpenScape Extensions for Microsoft Outlook* application.

  Depending on the conference control privileges that the participants have, the following two types of Meet Me conference are possible:

  – **Open conference**
    An *open conference* is a planned or scheduled conference that need not be started by a moderator and during which all conference participants have the same rights to start and control the conference. The conference creator is called by the system by default (dial-out) . All other conference participants have to dial into the conference individually (dial-in) . However, you can configure the system to also call single partici-

pants (dial-out) . The conference starts as soon as the first conference participant has dialed into the conference. At the same time, a call is initiated to all conference participants for whom this invitation by the system has been configured.

---

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

---

– **Moderated conference**
A *moderated conference* is started after a conference moderator has joined the conference. The conference creator/moderator is called by the system by default (dial-out) . Depending on the configuration, the conference participants can dial into the conference or are called by the system . After the moderator has left the conference, it comes automatically to an end for the other participants, too.

---

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

---

You can expand every Meet Me conference to a web conference or configure it as such when creating it. For the time being, you cannot expand an active Meet Me voice conference to a video conference.

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***NOTICE:*** You can create Meet Me conferences with video support currently only via the *OpenScape Extensions for Microsoft Outlook* application.

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- **Web conferences**
You can use a web conference to show elements and actions represented on your monitor to other users in real time during an online session. By means of this “desktop sharing” you can thus demonstrate operating steps or present

an application and work on documents in cooperation with other users. This is particularly useful in training projects, demonstrations and conferences joined by participants who are far away from each other.
In an *OpenScape UC Application* system you can integrate different web conferencing providers. The *OpenScape Web Collaboration* web conferencing application is shipped with *OpenScape UC Application* by default.

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

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

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You see the web conference providers you can use in the **Web conference** combo box in the dialog for configuring a new Meet Me conference.
The web conferencing application is installed on an individual server. Neither the moderator nor the participants need to install or configure any additional application before using the web conferencing application. After the start of a web conference, the participants can download a program via a user-specific Internet address. The online session is opened after the conference participants have started this program.
Web conferencing applications support two user roles:

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

The following user modes are possible during a web conference:

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

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

in the conference list of the **Conferences** function window. If configured by the administrator, a conference invitation with the dial-in data is sent to all participants by e-mail.

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

- **Video conferences**
  For the time being you can only take part in video-compatible Meet Me conferences that have been created with the *OpenScape Extensions for Microsoft Outlook* application.

  > ***NOTICE:*** Alternatively, you can initiate a MeetNow! conference via the **Call Control** or via the main menu. This type of conferences is configured as video-compatible conferences by default.

  To ensure video streaming, specific requirements must be met in addition. These comprise e. g. free video licenses and operable video cameras. As soon as a video conference has been started, the video window opens automatically. As long as only one participant is in the conference, a so-called "video-on-hold" is played by default. The user only needs to release transmitting his/her video image for starting the video streaming.
- **MeetNow!**
  This term describes video-compatible conferences that you can quickly configure via a special service access number with *OpenScape UC Application* participants only. The conference room is exclusively defined by entering an arbitrary PIN. In other words, all conference participants that dial the service access number and enter the same PIN are in the same conference room. This, however, may lead to unwanted persons dialing into the conference if the participants agree on a too simple PIN, for example *123*. To avoid this, you can use e.g. the extension of a conference participant as PIN.

  > ***NOTICE:*** By default, the system is configured to play a short signal tone to all conference participants when somebody enters or leaves the conference. Because this tone would be disturbing with a large number of entering or leaving conference participants, it is not played any more when the number of participants exceeds 15.

### 3.9.5.2 Controls in the "Conferences" Function Window

#### Controls in the Toolbar

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

- **Create new conference**

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

- **Edit selected conference**

  Select the conference you want to edit from the list. Then click on . The Conferences entry mask with the data for the selected conference opens for editing.

- **Delete selected conference**

  To remove a configured conference from the list, select it and click on .

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

#### Controls of a Conference List Entry

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

- **Extended representation**

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

  – Presence status of the participants
  – Name of the conference participants
  – Type of connection setup: (participant dials in himself/herself) or (participant is called)
  – Sends an e-mail with the conference information (name, PIN, etc.) to the respective conference participant.
  – Opens the **Directory Search** dialog in a separate window and displays the contact information of the respective participant available in all defined directories.

- **Start time**
  Specifies the time at which the system starts a scheduled Meet Me conference.

- **Name**
  Conference name

- **Creator**
  Name of the inviting person

- **Start conference**

  Click on to start a conference. A list with the options **View Conference** and **Join to Conference** opens. Select **Join to Conference** here.
  You can use the **View Conference** feature to see the connection data and controls of the conference in the **Call Control** window during the conference.

- **Existing conference**

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

### 3.9.5.3 Settings of a Meet Me Conference

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

**Configuration options of a new Meet Me conference**

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

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

- **Name**

  This is the conference's name. It is displayed under this name in the **Conferences** window. The name must not exceed 30 characters.

- **Creator**
  Here you can see the name of the person that configures the conference. This person is also the moderator of a moderated conference.
- **Start time**
  When you activate this checkbox, the system starts the conference at a specific time automatically. An input field for setting date and time as well as for determining the conference duration is displayed. With a click in these fields you can define the time specifications. The start time set here appears in the conference list after you have created the conference.
  - Configuring date and time
    Default for the start time is the current time at which the **Conferences** dialog was invoked. You can change the start time with a click in the input field next to the checkbox or on . A calendar dialog opens, in which you define data and time.
    To set the conference day, click on it in the displayed month. You can browse the months using the two up and down arrow icons. The double arrows ("<<" and ">>") let you browse the year dates. The centering icon in the middle displays the current month.
    You can set the time via the icons next to the time display. The two left-hand clock icons serve for configuring the hours (counting up (+) or down (-). The two right-hand clock icons serve for setting the minutes (counting up (+) or down (-)).
  - **Duration**
    In the **Duration** input field you can determine how long the conference is to last. You can make entries from 10 to 9999 minutes. The default setting is 60 minutes.
- **Participants**
  This section lists all conference participants. The inviting participant (moderator) is automatically placed in the list as first entry.
  A participant entry in the list of conference participants contains the following information (from left to right):
  - Presence status (for *OpenScape UC Application* users only):

    **Available**

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

    **Do not disturb**

    **Be right back**

    **Busy**

    **In a meeting**

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

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

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

- Edit participant entry
  A click on opens the **Add participant** dialog in which you can change the **Display name**, the **Phone** number and the **E-mail** address of the selected conference participant. A click on **OK** copies your modifications and the **Add participants** dialog closes.
- or. Type of the conference setup
  These icons indicate whether the participant needs to dial in by himself/herself ( ) or is called by the system ( ). Moreover, you can reverse the call behavior by clicking the button.
- Delete entry
  A click on this icon removes the corresponding conference entry from the conference list. All conference participants, except for the creator, can be removed from the conference.

• **Add participant**
  Use one of the following options to select conference participants:
  - Enter the phone number or name of the desired contact in the **Add participant** combo box. Then click on . The **Add participant** dialog to complete the participant data opens. Specify the missing data (name, phone number or e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.
  - Click on the triangle icon on the right margin of the **Add participant** combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on . The **Add participant** dialog to complete the participant data opens. Specify here the **Display name** for the conference list. Finally click on **OK** in this dialog. The selected contact is added to the participant list.
  - Click on to initiate a contact search in the available directories. The entry mask with the search criteria opens. Select the desired contact from the hits and click on **OK** in the **Directory Search** dialog. The selected contact is added to the participant list.

  - Click on . The **Add participant** dialog opens. Specify here the **Display name**, the **Phone** number as well as (optionally) the **E-mail** address of the conference participant. Finally click on **OK** in this dialog. The contact is added to the list of conference participants.

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

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

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

- **PIN**

  When you create the conference with a click on the **Apply** button, a **PIN** is automatically generated and displayed in this field. Using the PIN the conference participants authorize themselves to join the conference.
  Via the **Regenerate** button you can create a new PIN.

- **Bridge number**

  This field displays the **bridge number**, which the system automatically sets when you click on the **Apply** button. Under this phone number the conference participant needs to log on to the conference. A bridge number supports several callers under a single phone number.

- **Toll-free**

  The **Toll-free** field displays an alternative bridge number for logging on to the conference free of charge. This feature needs to be configured, so that the system can automatically display this number after you have clicked on the **Apply** button.

- **Other number**

  The **Other number** field displays an alternative number for logging on to the conference. This feature needs to be configured, so that the system can automatically display this number after you have clicked on the **Apply** button.

- **Web conference**

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

- **Related information**

  In this field you can enter information as comment on the conference. All invited participants can see this additional text in the list entry of the relevant conference in the **Conferences** window. Furthermore, this text is sent via the **E-Mail to all participants** function. A click on next to the **Related information** combo box opens the following dialog in the text field of which you can enter the additional text.

You can save your entry with **OK** and close the dialog.

- **Join Option**
  You can use this option to define which options are configured with this conference for the conference participants:
  - **Open Conference** (default) or moderated conference
    If this option is set, all conference participants have equal rights to control the conference. If this option is not set, the conference can only be started and controlled by the moderator (conference creator).
  - **Record name**
    Activate this option if only participants are allowed to join the conference who have previously stated their names. If a name recording has not been performed yet, the system prompts the relevant conference participants to first record their name.
- **Apply** button
  A click on this button saves your entries and the configuration dialog for the conference stays open. Subsequently, you can perform further configuration steps. The conference you have just created appears in the conference list of all OpenScape UC Application participants. An e-mail with conference dial-in data is automatically sent to all participants for whom an e-mail address has been specified.
- **Start** button
  With a click on this button you can initiate the conference after you have applied the settings determined in the template.
- **OK** button
  With a click on this button you can save the conference settings and close the configuration dialog.
- **Cancel** button
  With a click on this button you can close the configuration dialog without creating a conference or to dismiss all modifications you have made to an existing conference that are not applied yet.

### Configuration Options of an existing Conference

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

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

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

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

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

## 3.9.6 Directory Search

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

### Compact View

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

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

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

### Extended View

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

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

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

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

---

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

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### 3.9.6.1 Information in the "Directory Search" Window

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

- A radio button for selecting the entry.
- An icon displaying in which address directory the contact that has been found is.

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

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

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

### 3.9.6.2 Controls in the "Directory Search" Window

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

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

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

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

- **Delete user entry**

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

  To remove the contact searched for from your private contact list, select the appropriate search hit. Then click on .

- **Change user entry**

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

  To edit a user entry searched for from your private *OpenScape UC Application* contact list, select the appropriate search hit and then click on . The dialog **Contacts** (**Edit entry from contact list**), which contains already available contact data, opens. Perform the desired modifications. Click on **OK** to save the modifications and to close the **Contacts** (**Change entry in the contact list**) dialog.

- **Display user entry**
  To view the information that associates the user searched for, select the appropriate search hit. Then click on . The data that associates this user is displayed in the separate **Lookup Person** window.

- **Save addresses on local system**

  To save the found contact entries locally on your computer, click on . A new window opens that displays the found contact data in **tabular form**. Click on the **Save** button. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.

- **Print addresses**

  To print the found contact entries, click on . The contact information is printed out in table form.

- **Reset search entry**

  To delete all entries in the **Search** input field, click on .

## 3.9.7 Journal

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

### Compact View

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

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

### Extended View

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

## 3.9.7.1 Information in the “Journal” Window

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

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

  - - Conference invitation specifying that the system will call you to join the conference.
  - - Conference invitation specifying that you need to log on to the conference.
- **Date** and time when the call arrived or was made
- **Duration** of the inbound or outbound call (in the extended view only)
- **Name** of the caller or callee

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

- The **Number** you have dialed or that was transmitted by the caller (in the extended view only).
- , to display the contact information that associates the selected journal entry. A click on opens the **Lookup Person** dialog with the subscriber's contact data (if available).
- or Enables calling the displayed phone number or another phone number of the subscriber. You can access the additional phone numbers of a user by clicking on the respective receiver icon that is flagged by an additional little triangle. The voicemail row is then enlarged and shows all phone numbers under which this subscriber can be reached.

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

### 3.9.7.2 Controls in the "Journal" Window

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

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

- **Integrate as new user entry in the address book**
  To transfer the contact data of this call to your contact list, select the corresponding call from the journal. Then click on . The contact entry mask opens with the contact information already known. If required, supplement the information and click on **OK** to store the data in your contact list.
- **Display user entry**
  To view the information available for a journal entry, select the corresponding call from the journal. Then click on . The data that associates this user is displayed in the separate **Lookup Person** window.

- **Delete journal entries**
  To delete a journal entry, select the corresponding entry. Then click on . If you want to delete several journal entries simultaneously, select the corresponding entries and click on . You can make a selection via **[Ctrl]** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.
- **Print journal entries**
  To print the complete journal information, click on . The journal information is shown in a separate window in tabular form. With a click on the **Print** button the list is put out on your printer.
- **Adjust the time**

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

  This is useful when you are in a different time zone, working with the program from there. The event time is then displayed in local time.
- **Configure**
  A click on  opens the following dialog with the settings for creating the journal entries and for the notification features.

  In this dialog you can activate/deactivate creating journal entries. Furthermore, you can determine whether to send a missed-calls notification, and if so, to which **e-mail address**, in which **Language** and in which **Format**.
- **Per caller** checkbox
  To display only one entry per caller in the **journal** you can set the **Per caller** option. If a caller tried to reach you several times, only the last attempt will be logged.
- **Combo box**
  Via the combo box on the right margin you can filter the journal entries according to the call type:
  – **All Calls** Default setting that shows all calls in the journal.

- **Missed Calls** shows the unaccepted calls only. If a connection is established to this user at a later date, the call is no longer displayed as "missed".
- **Incoming Calls** displays the inbound calls only.
- **Outgoing Calls** displays the outbound calls only.

## 3.9.8 Missed Calls

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

### Compact View

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

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

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### Extended View

The extended view of the **Missed Calls** function window is available via the **Pearl menu > Status Information > Missed Calls**. It opens in a separate window and, in addition to the information represented in the compact view, displays the **Duration** of the call or conference.

### 3.9.8.1 Information in the "Missed Calls" Window

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

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

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

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

### 3.9.8.2 Controls in the "Missed Calls" Window

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

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

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

- **Print journal entries**

  To print the complete journal information, click on . The journal information is shown in a separate window in tabular form. With a click on the **Print** button the list is put out on your printer.

- **Adjust the time**

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

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

- **Configure**

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

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

- **Per caller** checkbox

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

## 3.9.9 Voicemail Box

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

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

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

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

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

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

### 3.9.9.1 Information in the "Voicemail Box" Window

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

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

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

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

- The originator's **Name**.

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

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

### 3.9.9.2 Controls in the "Voicemail Box" Window

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

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

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

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

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

### 3.9.9.3 How to Control Voicemail Playback (Voicemail Player)

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

### Voicemail Player for Playback via Phone

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

- - Start playback or continue playback after pause.
- - Stop voicemail playback (pause). The icon changes to .
- - Stop playback / reset to beginning.
- - Rewind message for e.g. playing a passage again.
- - Fast-forward message for e.g. skipping parts of the message.

### Voicemail Player for Playback using the *Windows Media Player*

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

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

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

## 3.9.10 Call Forwarding

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

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

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

### 3.9.10.1 Options in the "Forwarding" Window

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

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

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

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

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

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

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

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

## 3.9.11 Bookmarks

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

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

### 3.9.11.1 Options of the “Bookmarks” Window

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

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

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

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

- **Please select**
  You can use this combo box to select a bookmark for editing.
- **Bookmark URL**
  Enter the internet address of the page that you want to save as bookmark.
- 
  Click on to check the URL just entered. The configured internet page opens in a separate window.
- **Display name**
  Enter here a name under which this bookmark is itemized in the list.
- **Description**
  Enter here a short text that describes the bookmark. This text is also displayed in the list entry for this bookmark.
- **Display Icon**
  Select an icon for this bookmark. A click on this icon opens this internet page in a separate browser.
- **Scrollbars**
  If this option is set, vertical and horizontal scrollbars that may exist are displayed in the browser. If you do not want to use scrollbars, you can hide them by disabling this option.
- **Width/Hight**
  Here you can default the size of the browser in which the internet page opens. Useful values for this setting range between 500 and 1000, respectively for width and hight. Once the browser is open, you can bring the screen to any size by dragging the frame.

- **Delete bookmark**
  You use this feature to remove a selected bookmark from the list.
- **Change bookmark**
  Via this feature you can edit a selected bookmark. The **Bookmark Settings** dialog opens with the already available settings.

- **Open bookmark**
  This option lets you open an internet page you have already configured as bookmark. The corresponding internet page opens in a separate browser.

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

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

## 3.10 Video Telephony (SIP only)

Parallel to a voice connection you can also exchange images of the connection partners. This requires an operable video camera at yours and your communication partner's as well as the configuration of a video scheme in the **SIP Service Provider** settings.

If the above requirements are complied with at your station, you can add the video image to the conversation. When your connection partner complies with the video transmission requirements, you receive the video image of your connection partner automatically, no matter whether a video camera is installed or switched on at your station. This requires the **Video Viewer** module to be active. Your own video image or the one sent to your connection partner as well as the video image of your connection partner appear in the **Video** window.

***NOTICE:*** You can also take part in Meet Me video conferences that were configured with the *OpenScape Extensions for Microsoft Outlook* application.

### 3.10.1 Video Features

The video telephony feature enables using the following functions:

**Displaying your own video image**

You switch your own camera image and the camera on or off via the icon in the Softphone menu. Your connection partner does not see this image.

***NOTICE:*** You see your own video image mirrored, but it is transmitted unmirrored to the connection partner.

### Receiving a video image

Received video images are always accepted and represented, independent from an installed or active video camera. This, however, requires the **Video Viewer** module to be active. The representation of received video images cannot be suppressed or switched off.

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

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

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

You start sending your own image with a click on . Your own video image appears in a red frame. The icon changes to .

A click on or pressing the icon in the Softphone menu aborts sending your video image. You can then still see the image of your connection partner. After the active call has been terminated, the video streaming comes automatically to an end, too, and you see only your own image in the **Video** window.

---

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

---

### Controls in the "Video" Window

Depending on the connection status, the following controls are available in the **Video** window:

- This icon appears at the bottom margin of the **Video** window during an active call. You use it to start transmitting your own video image. When you click the icon, it changes to .
- You use this icon to end transmitting your own video image. When you click the icon, it changes to .
- A click on this icon displays your own video image in addition to the image of the connection partner in the **Video** window minimized and in a red frame. When you click the icon, it changes to .
- A click on this icon hides your own video image from the **Video** window. When you click the icon, it changes to .

- When you position the mousepointer onto this icon, a tooltip is displayed. It informs about options to initiate specific functions of the **Video** window via PC keyboard.

**Operating with the PC keyboard**

- **[Spacebar]** - Pressing the **[spacebar]** you can toggle different layouts of the **Video** window.
- **[F11]** key - Enabling the **[F11]** key you can maximize or restore the **Video** window.

During a video conference or an active call with video streaming you can use the keys of your PC keyboard (or of your configured preferred device) to give control commands to the communications system by sending DTMF tones. You can, for example, enter the conference PIN via PC keyboard for dialing into the conference with active video window displayed in the foreground.

## 3.10.2 Behavior of the Video Streaming

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

- **Call is on-hold**
  When a call is held, the video streaming stops as well. The held subscriber does not see a video screen. If the video streaming status changes during a held call, the restoration of the connection follows this change. If, for example, the camera is switched off, the video streaming is inactive when the call is resumed.
- **During a consultation call**
  For modifications to the video streaming status during a consultation call the same applies as for a held call.
- **Toggling**
  When you toggle the active and held subscriber, the video streaming to the active subscriber is held and resumed to the held subscriber also. The **Video** window shows only your own video image and the one of the respective subscriber. The video statuses of the two connections are independent from each other in this case. In other words, if the video streaming status of one connection is changed, it does not affect the other connection.
- **Transferring a call**
  When a call is transferred, the video installation and configuration of the subscriber to be transferred and of the new subscriber decides whether no, a unilateral or a bidirectional video connection exists.
- **Video conference**
  You can take part in video conferences that were configured with the *OpenScape Extensions for Microsoft Outlook* application. For the time being you cannot schedule and configure video conferences with *OpenScape Desktop Client* .
  After the video conference start, the **Video** window opens automatically. As long as only one participant is in the conference, a so-called "video-on-hold" is played by default. The conference participant only needs to release trans-

mitting his/her video image for starting the video streaming. The **Video** window represents two video images: your own in a red frame and one in which you can mix up to six video images of the other participants.

## 3.10.3 Views of the Video Window

The video feature of *OpenScape Desktop Client* offers various default views for the video window depending on the number of active video images (one or two) and on the currently selected perspective. You can toggle the default views by pushing the **space bar**. In addition, the video feature of *OpenScape Desktop Client* enables you to customize video window views.

---

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

---

***NOTICE:*** *OpenScape Desktop Client* offers altogether 27 predefined **Video** window views. The number of available default views depends on the current connection type: unilateral, bidirectional or trilateral video connection.

---

**Views of an Image in the Video Window**

If the **Video** window contains only one image - your own image or the one of the connection partner - the window view remains almost unchanged when you modify the angle. The following views are pre-set:

- Your own image is positioned in the middle of the video window. The connection to the connection partner is not up yet.

- The image of the connection partner is positioned in the middle of the video window. Your own image is being sent but it's preview in the **Video** window is switched off.

- Your own image or the received one is represented as full image in the video window.
- Your own image or the received one appears in the center of the video window and is slightly turned.

### Views of two Video Images in the Video Window

During a point-to-point video connection the **Video** window contains two images: your own (sent image) and the one of the connection partner (received image). These images may be arranged in the video window as follows:

- Your own image is minimized and appears in a red frame at the bottom left window margin.

- Your own image is minimized and appears in a red frame at the top right window margin.

- Both images appear slightly rotated.

- Both images appear on top of each other.

- Both images appear next to each other.

### Customized Views

The video feature of the *OpenScape Desktop Client* enables you to customize pre-defined video window views.

- Moving a video image in the video window
  To change the position of an image in the video window, click in the center of the video image. The mousepointer appears in the center of the image. Keep the left mousebutton pressed and drag the image to the desired position in the video window. Then release the mousebutton.
- Maximizing/minimizing the video image
  Click on one margin of the image frame, keep the mousebutton pressed and drag the mousepointer in the desired direction to maximize or minimize the image.
  You can also rightclick the center of an image, keep the right mousebutton pressed and move the mouse up and down. The proportions of the selected video image become smaller or larger.
- Turning the video image
  Rightclick the center of an image, keep the mousebutton pressed and move the mouse to the left or right. The image turns to the corresponding direction.

***NOTICE:*** While you adjust a video image, it appears transparent as you can see in the below figure.

The changes to the default view automatically apply for current operation and are dismissed when you shut down the program. After a reboot of *OpenScape Desktop Client* only the pre-set views are available.

## 3.11 Softphone Menu

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

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

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

**Softphone functions**

- / Muting on/off
  Activates and deactivates the muting of an existing connection.
- **Voice recording (SIP only)**
  Activates and deactivates the voice recording function.
- **Speaker**
  Activates and deactivates the speaker in case of an active call or in idle state
- **Headset**
  Switches the headset on/off in case of an active call or in idle state

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

- **Additional speaker**
  Switches the additional speaker on/off in case of an active call or in idle state. The additional speaker must be configured in the settings for the currently used audio scheme.
- **Volume menu**

Open the above volume menu with a click on to set the volume of **Microphone**, **Ring tone** and **Speaker** independently from your respective conversational state. Here you can adjust the volume of the relevant audio device.

> ***NOTICE:*** Depending on the operating system these icons are not visible since these settings are only possible via the operating system settings.

- **DTMF dialing**

  Click on . The following keypad is displayed.

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

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

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

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

### Status information

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

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

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

## 3.12 OpenScape Icon in the Notification Area

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

## 3.13 Context Menu of the Program

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

This context menu provides the following features:

- **Personal Settings**
  This option allows configuring an individual ringtone (`WAV` or `MP3` format) for signaling incoming calls. It opens the **Advanced** tab in the **Settings** dialog. On this tab you can, depending on the communications system (SIP or HFA) used, select the desired ring tone under **SIP Service-** or **HiPath Provider > Ring tones**.
- **About**
  You use this option to open the **Product Information** window and to display the program's version number.
- **Update**
  Establishes a connection to the latest program version that your system administrator has downloaded. A message tells when no update is available.
- **Help**
  Opens the help file for the entire application.
- **Errors and Warnings**
  When loading a module is accompanied with an error, the **Errors and Warnings** item appears in the list of context menu options. Selecting this option displays the **Current Error Report** window. This report contains further information about these errors.
- **OpenScape Open**
  Selecting this option or doubleclicking the icon in the notification area of the Windows taskbar moves the program's main window to the foreground of the desktop.

- **OpenScape Options**
  Selecting this option opens the **Settings** dialog and the current configurations of the program are displayed. You can only change the **Audio Schemes** and the following settings on the **Advanced** tab:
  - **General > General**
  - **General > Program Start**
  - **General > Task Bar and Notification Area**
- **Exit OpenScape**
  This option serves for closing the application.

## 3.14 Audio Control Operating Elements

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

| Button | Function / Meaning |
|---|---|
| | **Lift receiver**<br>(handset or another provided audio device)<br>• In case of an active connection request, e. g. an incoming call: accept call and set up connection.<br>• In idle state: activate handset or another provided audio device. |
| | **Hang up**<br>(handset or another provided audio device)<br>• In case of an established connection: close connection.<br>• In the system menu: finish scrolling, return to idle state. |
| | **Microphone on/off**<br>• In case of an established connection: activate or deactivate audio device muting. |
| | **Loudspeaker on / off**<br>• In case of an established connection or in idle state: activate or deactivate speaker. |
| | **Headset on / off**<br>• In case of an established connection or in idle state: activate or deactivate headset operation. |
| | **Volume control**<br>Move control to the right (louder) or to the left (softer) to set the volume:<br>• **Ring tone** - when the OpenScape Desktop Client is in idle state or a connection request is received.<br>• **Speaker** - in case of an established connection with activated speaker.<br>• **Handset** - in case of an established connection with activated handset and deactivated speaker.<br>• **Headset** - in case of an established connection with activated headset and deactivated speaker. |
| Microphone<br>Ring tone<br>Speaker | **"Volume" menu**<br>Open the "Volume" menu with a click on the "Volume" button (to the right of the slider) to set the **microphone**, **ring tone** and **speaker** volume independent from your respective call state in OpenScape Desktop Client. Here you can adjust the volume of the relevant audio device.<br>Depending on the operating system these icons are not visible since these settings are only possible via the operating system settings. |
| | **Additional speaker on / off**<br>If your PC has an operable additional speaker and this speaker is configured in the settings for the current audio scheme, you can activate or deactivate it with a click on the "additional speaker" icon. |

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

## 3.15 Microsoft Outlook Integration

If *Microsoft Outlook* 2003/2007/2010 was already present on the PC when *OpenScape Desktop Client* was installed, the *Microsoft Outlook* toolbar contains the **Dial** button.

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

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

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

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

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

## 3.16 Browser Integration

When installing *OpenScape Desktop Client*, the *OpenScape Click-to-Dial-Browser-Plug-in* is automatically set up for the *Microsoft Internet Explorer* and for *Mozilla Firefox*. With this plug-in you can click a phone number represented as link to dial it directly from your web browser. After the setup, the plug-in is inactive by default. You need to activate this feature before you can use it.

**Activating the Browser Integration for Microsoft Internet Explorer**

***NOTICE:*** You find detailed information about activating/deactivating the feature for *Mozilla Firefox* in the manual *OpenScape UC Application V7 Client Applications.*

You activate the *OpenScape Click-to-Dial-Browser-Plug-in* with a click on the **Enable IE Integration** or **Disable IE Integration** button in the following dialog:

You reach this dialog via the icon in the toolbar of the *Microsoft Internet Explorer*.

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

Further information about installing (for the *OpenScape Web Client*), configuring and operating the *OpenScape Click-to-Dial-Browser-Plug-in* provides the manual *OpenScape UC Application V7 Client Applications*.

## 3.17 Operation in Local Mode

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

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

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

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

- Terminate an initiated/active call
- / Accept/reject incoming call
- Set active call to on-hold
- Retrieve held call
- Making a consultation call
- Toggling
- Connect consultation call subscriber with waiting subscriber

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

---

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

---

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

# 4 General Main Menu Settings

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

These settings are combined in three groups:

- **Common**
  Basic settings for representing the web interface, for managing the configured devices and named device lists as well as for defining call forwardings. Via this tab you can additionally define the call types to be logged in the journal and whether you wish to be notified about missed calls by e-mail.
- **Presence**
  This tab serves for setting your presence status and controlling the display of your presence status to other *OpenScape UC Application* users.
- **Addresses**
  Settings for importing/exporting address data from and to other directories and for managing address groups.

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

## 4.1 General Considerations

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

This tab is split up in the following tabs:

- **Appearance**
  On this tab you set the theme you prefer for the user interface. In addition, you can select the mobile time zone to be currently used.
- **Journal**
  On this tab you perform the settings for logging calls and for the missed-call notifications.
- **Forwarding**
  On this tab you perform the call forwarding settings.
- **Devices**
  On this tab you manage your devices. You can add further devices to be used, modify device settings and delete device definitions that are no longer required from the device list.
- **Named device lists**
  On this tab you can create phone number lists that you can select as preferred device. Via the named device lists you can flexibly administrate the call order of the preferred devices.

## 4.1.1 Appearance

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

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

In this dialog the following options are available:

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

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

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

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

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

## 4.1.2 Journal

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

The following options are available:

- **Create Journal entries**
  Select one of the following options for your journal entries:
  - **For all calls**
    Creates journal entries for all calls
  - **Not activated**
    Disables creating journal entries.
- **Notification for missed calls**
  Here you can specify where to, in which language and in which format a notification for missed calls shall be sent. You can set the following combo boxes:

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

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

– **Language**
Use this combo box to select the notification language.

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

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

## 4.1.3 Forwarding

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

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

The following options are available:

### Activate rule profile

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

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

### Preferred device

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

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

In this dialog you can:

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

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

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

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

### Forward incoming calls

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

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

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

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

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

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

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

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

## 4.1.4 Devices

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

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

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

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

You can execute the following actions on this tab:

- **Configuring a new device**

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

  In this dialog you can perform the following settings:

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

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

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

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

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

  – **No redirection timeout**
    The ring tone is not switched over to another configured device.

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

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

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

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

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

## 4.1.5 Named Device Lists

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

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

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

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

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

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

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

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

### Controls in the "Named device list" section

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

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

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

- ✕ - Click this icon to remove a named device list from the list. The named device list is removed from the list after a confirmation prompt.
- **New** - Click this button to create a new named device list.

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

**Controls in the "Devices of list" section**

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

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

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

## 4.2 Presence

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

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

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

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

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

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

## 4.2.1 My Status

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

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

- **Available**
  Signal for the other *OpenScape UC Application* users that you can be reached at your workstation.
- **Unavailable**
  Signal for the other *OpenScape UC Application* users that you cannot be reached at your workstation.

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

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

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

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

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

## 4.2.2 Preferences

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

The following settings are available:

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

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

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

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

- **Behavior after Presence status changes**
  You can specify a preferred device and an Instant-Messaging (IM) mode for each presence status. By setting the respective checkbox define for which statuses a preferred device is to be used for status changes. Then use the corresponding combo box to select the device you would like to deploy in this

case for your incoming calls. In addition, select in the corresponding combo box the desired IM mode - *Online* or *Offline* - , which is switched to in case of a presence status change.
The IM status *Online* is default set for the presence statuses Available and Busy. The IM mode *Offline* is assigned to the other presence statuses by default. You can customize these settings.

---

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

---

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

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

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

## 4.2.3 Access Control List

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

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

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

## 4.3 Addresses

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

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

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

### 4.3.1 Import

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

In this dialog the following setting options are available:

- **Import file (in CSV Format)**
  In this field you can specify the storage location plus the name of the file you wish to import.

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

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

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

  ***NOTICE:*** So that the data can be correctly imported it is necessary to know from which data source the import file was created. If you are not sure about the data source or if you cannot find the correct file format, please consult your system administrator.

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

  ***NOTICE:*** Duplicates refer mostly to the matching of names and phone numbers. If no phone numbers are available, the e-mail addresses are used to identify duplicates. For all other data new data records are created; they will not be searched for duplicates.

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

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

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

### 4.3.1.1 File Exchange Formats

**File exchange via the CSV format**

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

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

**Specialties when importing and exporting with Lotus Notes**

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

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

– Select Structured Text as import format.

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

– Import the file as “Main Document”.

## 4.3.2 Export

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

The following options are available in this dialog:

- **The exported addresses will be imported again in**
  Select the desired data format via this combo box. The exported addresses shall be re-imported in this format.
  In this context please note the following:
  – It is important to know for which application the address data are exported so that they can be successfully reimported. If you are not sure about the format to use or the desired format is not offered in the combo box, please consult your system administrator.
  – If you would like to export the address data as backup copy so that you can import it later on and thus restore your address list, select the *OpenScape* format.
  – If the export is performed for a reimport in Lotus Notes, the export file must not have a file extension. Otherwise, the Lotus Notes import feature will not accept this file.

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

## 4.3.3 Address Groups

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

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

The following controls are available on this tab:

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

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

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

- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

# 5 Communicating with Contacts

*OpenScape UC Application* simplifies the communication with your contacts. You are enabled to manage several communication devices so that you can communicate with all the contacts from your contact list via one telephone number. You can create, edit, and delete access to your communication devices to initiate and receive voice communication messages. Configurable devices can include your cell phone, home phone, office phone, and soft (PC) phone.

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

*OpenScape Desktop Client* processes the different presence states. If you change your presence state, the device that you have selected for incoming and outgoing calls changes according to the information for the customizable *OpenScape Desktop Client* routing lists. If you do not select a device for a presence status, incoming calls automatically go to your voicemail system.

## 5.1 One-Number Service

The *One-Number Service* feature enables the user to combine mobility, optimal availability and transparency towards third parties. Defining one *One-Number Service* for incoming and one for outgoing calls in the *OpenScape UC Application*.

Use the *One-Number Service* for outgoing calls to define the preferred device to be used for outgoing calls initiated via your client. The callee always sees the defined number on his/her display.

The *One-Number Service* for incoming calls enables the direct rerouting/forwarding of a call to a definable target. Such a target may be a cell phone or the voicemail box. That means, a caller always sees the number he/she has dialed on his/her phone display and not the number of the device on which the call was actually accepted.

---

***NOTICE:*** In the **Device display** of the main menu you can quickly select a device for making calls using the *One-Number Service*. In addition, you can invoke the **Forwarding** settings dialog there.

---

### 5.1.1 How to Configure the One-Number Service

Using the *One-Number Service* feature requires the following settings:

***Step by Step***

1) In the main menu, click **menu > General ... > Common tab > Devices tab**.
2) Click the **New** button.

The following dialog opens.

***3)*** Use this dialog box to add devices, e. g. cell phone, voicemail number etc., via which you can be reached to your device list.

***4)*** Click on the **Apply** button.

Your entries are saved. The dialog box remains open and you can add more devices to your device list.

***5)*** Switch to the **Forwarding** tab.

***6)*** Click the corresponding combo box for the **Preferred device** feature to select your preferred device for the *One-Number Service* for **incoming** and **outgoing calls**.

---

***NOTICE:*** If you have added your voicemail box number to your device list for using the voicemail box as redirection target, do not configure this number as preferred device for the outbound *one-number service*. The reason is that you cannot make any calls from your voicemail box. The *OpenScape UC Application* server cannot recognize phone numbers you have added yourself as unsuitable for making calls.

---

***7)*** Click the **Close** button.

The settings are saved and the settings dialog closes. Now you can use your *One-Number Service*.

## 5.2 Reaching a Contact by Phone, E-mail, or IM

The icons to the right of a contact's name in the **Contacts** window show you whether that person can be reached by phone, instant message or e-mail:

- , - The contact is available for a voice call.
- , - The contact is busy on one of his/her voice devices.
- , - There is no presence information available; thus, it is not possible to specify whether the contact can be reached by phone or not. There can be several reasons for this. The presence information is not wanted by the user, the contact has rejected the presence subscription, the contact has not accepted the presence subscription, or the contact is not an *OpenScape UC Application* user. In every case it is possible to revert to voicemail.

- , , - The contact can always be reached by instant messaging. When the IM icon is missing, the contact is unavailable for instant messaging and no IM can be sent.
- The e-mail icon is always available if an e-mail address has been configured for the contact.

This information is also available in the form of a tool tip when you hold the cursor over the icon.

> ***NOTICE:*** The icon and tool tip display the overall availability for each media type (voice, e-mail, instant message) that is supported by any of the devices owned by a user. The general availability considers the state (busy, online, offline or unknown) of each device supporting the respective media type. These states are subsequently combined to determine the general availability.

To call a contact or send an e-mail or instant message to a contact from your contact list, click the appropriate icon next to the contact's name in the **Contacts** function window.

You can use the following options to call a subscriber who is not entered in your contact list:

- Via the **main menu**
  In the **main menu**, click the **<name or number>** entry field to enter the desired number by using your PC keyboard. Then click on or push the **return key**. The connection to the desired contact is established. The **Call Control** window opens automatically and shows the connection initiated as well as the operating elements to control this connection.
- Via the **Call Control** window
  Your can also open the **Call Control** window manually via **Pearl menu > View > Call Control**. Enter a phone number in the **New Call** combo box. Click on or push the **return key** to initiate the call.

> ***NOTICE:*** Click the icon in the **New call** combo box to view a list containing the last 20 phone numbers dialed. Select the desired number and click on .

## 5.3 Tell-Me-When

Sometimes it's hard to reach a specific contact. In this case you can make the *Tell-Me-When* feature of *OpenScape UC Application* perform actions or to notify you as soon as the respective person is available again.

For example, if you want to call a contact but or is displayed next to his/her name in the contact list or his/her presence status differs from status **Available**, you know this contact is currently unavailable. In this case you can use the *Tell-Me-When* feature to be informed when the contact is available again. You can select one of the following notifying types:

- A **notification pop-up** displayed, which informs you about the voice or presence availability modifications of the contact.
- A **return call** initiated. This is another attempt to set up a connection to the desired contact, triggered automatically.
- An **e-mail notification** sent to you. This e-mail informs you that the desired person is now available.

You can reach this notification feature via the **More functions** option in the toolbar of the **Contacts** function window.

---

***NOTICE:*** A list of the *Tell-Me-When* entries you have made can be viewed additionally via the **Pearl menu > Personal Settings > Tell-Me-When**.

---

## 5.3.1 Tell-Me-When Feature Settings

Click **More Options** and select the **Set Tell-Me-When ...** option to configure the *Tell-Me-When* feature for a selected *OpenScape UC Application* contact and activate it subsequently.

Use the following dialog box to adapt the *Tell-Me-When* feature to suit your requirements by performing the following settings.

- In the **When** combo box, define if you would like to monitor the voice availability or the presence status of the selected contact.
  - The telephone status of the selected contact is monitored via the Voice Availability.
  - The presence status of the selected contact is monitored via Presence Availability.

- The **Action** combo box defines the action to be performed when the voice or presence availability changes or which type of notification is to be used to inform you about these changes. The following options are provided in this combo box:
  - **Notify via screen pop-up**
    You are informed about changes to the voice or presence availability of a contact by a notification window.
  - **Place a call**
    A new connection is automatically set up to the desired contact. you are called by the system. After you have accepted this system call you are connected to the contact.
  - **Notify via e-mail**
    You are notified about the person's availability by e-mail.
- Determine the desired timeout for the *Tell-Me-When* feature in the **Expires in** combo box. The following options are provided in this combo box:
  - **15 minutes**
  - **30 minutes**
  - **1 hour**
  - **4 hours**
  - **8 hours**
  - **Until event happens**
- Click the **OK** button to save the settings made and close the dialog box. The *Tell-Me-When* feature is thus activated for the selected contact.
  According to the current presence status of this person, one of the following presence icons is displayed in the **Contacts** function window.

| Icon | Meaning |
|---|---|
| | The *Tell-Me-When* feature is active for a contact with status **Be right back**. |
| | The *Tell-Me-When* feature is active for a contact with status **Busy**. |
| | The *Tell-Me-When* feature is active for a contact with status **Do not disturb**. |
| | The *Tell-Me-When* feature is active for a contact with status **In meeting**. |
| | The *Tell-Me-When* feature is active for a contact with status **Available**. In this case, the voice availability of the contact is monitored. |
| | The *Tell-Me-When* feature is active for a contact with status **Not available**. |

- Click the **Cancel** button to close the *Tell-Me-When* dialog box without saving the settings made.

### 5.3.1.1 Features of the Tell-Me-When notification window

The notification window informs you about changes to the voice or presence availability of the contact selected.

In the **Tell-Me-When Notification** window you can trigger the following actions in addition:

- Lookup Person
  A click on this icon opens the Lookup Person window, which contains information related to the selected contact.
- Start a chat with the displayed contact
  A click on this icon opens the Instant Messaging window. You can enter an instant message and sent it to the contact.
- Send an e-mail to the displayed contact
  A click on this icon opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- Call displayed contact
  Click on this icon to initiate a call to the displayed contact.

Click the **Close** button to close the *Tell-Me-When* notification window.

## 5.3.2 List of all Tell-Me-When Entries

The **List of all Tell-Me-When entries** provides an overview of all active *Tell-Me-When* features. You can access this dialog box via the function window **Contacts** by clicking in the toolbar on **More features > Show all Tell-Me-When ...**.

---

***NOTICE:*** You can also access the dialog box **List of all Tell-Me-When entries** via the **Pearl menu > Personal Settings > Tell-Me-When**.

---

A list entry contains the following elements (from left to right):

- A *Tell-Me-When* presence icon
- Contact Name
  If you place the mousepointer on the contact's name in the list of *Tell-Me-When* entries, the *Tell-Me-When* settings for this list entry are displayed as tooltip.
- Notification type or action to be performed when the voice or presence availability changes
  Possible are the following notification options and actions:
  - Notification pop-up
  - E-mail
  - Callback

For each list entry, the following features are available:

- Lookup Person
  A click on this icon opens the Lookup Person window, which contains information related to the selected contact.
- Show/modify *Tell-Me-When* entry
  A click on this icon opens the *Tell-Me-When* dialog, which lists the current settings of the selected active *Tell-Me-When* feature. You can also edit the settings there.
- Delete *Tell-Me-When* entry
  A click on this icon removes the associated *Tell-Me-When* entry from the list. Thus, the *Tell-Me-When* feature for this contact is also deactivated.

Furthermore, this dialog box provides the following two buttons:

- **Delete All**
  A click on this button removes all *Tell-Me-When* entries from the list.
- **Close**
  A click on this button closes the **List of all Tell-Me-When entries** window.

## 5.3.3 Modifying Tell-Me-When Settings

You can modify the settings of an already activated *Tell-Me-When* feature during its runtime in the following dialog box.

To reach this dialog box, proceed as follows:

- Via the **Contacts** function window
  Click ▸▸ **More Options** and select the **Modify Tell-Me-When ...** option.

  ***NOTICE:*** The **Modify Tell-Me-When ...** option is displayed in the **More options** list only if you have selected the contact for which you would like to modify the *Tell-Me-When* feature already set.

- Via the button ✎ of the corresponding *Tell-Me-When* list entry in the **List of all Tell-Me-When entries** dialog box.

All settings that can be modified in this dialog box are identical to the settings you can configure when activating the *Tell-Me-When* feature.

***NOTICE:*** If the *Tell-Me-When* feature has been set for the selected contact, the **Expires in** combo box displays additionally the remaining time.

Furthermore, you can use the **Delete** button to deactivate the *Tell-Me-When* feature for the selected contact.

## 5.4 Notifier Toast

Notifier Toasts inform the *OpenScape UC Application* user about an incoming instant message or show an incoming call. They always appear in the bottom right area of the desktop.

### Incoming call

An incoming call displays the notifier toast depicted here on the first ring and for as long as the call continues to ring.

The notifier toast displays the name and/or number of the calling party if it is available. It displays unknown if it is not available. The notifier toast will stick and stay if you hover the cursor over it.

This type of desktop notification provides you with the following features:

- **Accept call**
  If your preferred device is on your desktop, you can either pick up the handset to answer the incoming call or click the icon to activate the speaker.
  If you have a softphone, click the icon to use the headset.
- **Forward call/Handover to**
  - **Forward Call**
    Use this option to forward the incoming call to another device or another contact. To do this, enter the name or the phone number of the relevant person in the corresponding input field in the displayed dialog box **Forwarding call**. After pushing the return key (**OK**), the **Call Control** window closes. The call is accepted by the person specified. The call control features have been transferred to this person.
  - **Handover to**.
    With a click on this option you can select the device for accepting the call. The call is redirected. You will keep the control over the connection/the call control.
- **Reject call**
  Click on this icon to cancel the connection setup. The **Call Control** window is closed.

### Receiving a new Instant Message (Instant-Messaging Chat)

Another type of desktop notification informs the user that he/she has received a new instant message. This notification displays the sender's name and parts of the message body/the entire text. When you click on an area in the notification, the **Instant Messaging** function window opens, the top area of which showing the complete instant-message text.

---

***NOTICE:*** To display this notifier toast even when the *OpenScape Desktop Client* or the *OpenScape Web Client* is shut down, the *OpenScape Desktop Integration* must have been installed and started on the system.

Please obtain more detailed information about the installation, function, and operation of the *OpenScape Desktop Integration* from the *OpenScape UC Application V6 Client Applications* manual.

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# 6 Step-by-Step

The information contained in this chapter helps the user to quickly familiarize himself/herself with the basic features of this software solution.

## 6.1 General Information

This section informs you about how to start and end the program as well as how to log on.

### 6.1.1 How to Start the Program

How to start the program:

***Step by Step***

› Click on **Start** in the Windows task bar and select **OpenScape Desktop Client**.

> ***NOTICE:*** The program always starts under the user profile used last. The dialog for the user login appears right after the program start by default. Depending on the program start settings (the **LIN** field may be hidden, for example), the program starts without any further login actions required. To change the user profile then, you need to push the **shift key** at the program start.

### 6.1.2 User Login

> ***NOTICE:*** The program always opens the **Logon** dialog if a user profile already exists under the current Windows account.

How to log on to the program:

***Step by Step***

***1)*** Start the *OpenScape Desktop Client*.

The **Logon** dialog opens.

***2)*** Select the desired profile from the **Profile** combo box.

***3)*** Confirm the default **language** used to display the controls and online help or select another language from the list of available languages.

***4)*** Afterwards, click on **OK**.

The login dialog closes.

The program is started.

## 6.1.3 Ending the Program

The program can be shut down as follows:

***Step by Step***

***1)*** Rightclick the *OpenScape* icon in the notification area of the Windows taskbar.

The *OpenScape* context menu is displayed.

***2)*** Select **Exit OpenScape**.

The main window closes. You are logged off from the program.

# 6.2 First Steps after the Installation

This section contains information about configuration adjustments to be performed at the initial program start after the setup.

---

***NOTICE:*** You find detailed information about the installation and uninstallation of *OpenScape Desktop Client* in the manual *OpenScape UC Application V7 OpenScape Desktop Client Enterprise Web Embedded Edition Installation and Administration*.

---

## 6.2.1 Initial Login

How to log on to the program for the first time:

***Step by Step***

***1)*** Start the program.

The **Profile creation** dialog opens.

***2)*** Enter the name of the new profile in the **Profile Name** field.

***3)*** Click on **OK**.

The **First Login** dialog closes.

The program creates the specified profile and switches automatically to the **Settings** dialog in which you can configure the profile settings.

## 6.2.2 Initial Configuration

When you perform the initial configuration in the **Settings** dialog you set the user data for connecting the communications system as well as the audio device for signaling connection requests and for conducting calls.

---

***NOTICE:*** When you log on as user for the first time, you need to configure user-specific program settings, e.g. to connect to the communication system, in addition to the user-specific login information. You cannot operate the program without these settings.

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### 6.2.2.1 How to Configure the Audio Device

So that you can conduct phone calls, your PC must be equipped with speaker and microphone, e.g. in the form of a headset. The hardware settings are grouped in audio schemes.

How to configure an audio device:

***Step by Step***

*1)* Click on the **Add...** button on the **Audio Schemes** tab of the **Settings** dialog.

The following dialog opens:

*2)* Specify the **Description** of the audio scheme.

*3)* Define the audio hardware for the following features:

- **Voice recording**
  Microphone for voice recording
- **Audio response**
  Primary playback speaker
- **Additional speaker**
  Speaker for the *"open listening*" feature. If an additional speaker has been selected here and this audio scheme is active, the softphone menu displays the icon for the *"open listening"* feature.
- **Signal response**
  Speaker for the signal output (ringing).
- **Controller**
  Select the hardware you use. If this hardware is not contained in the selection list, then use **Soundcard**.

*4)* Click on **OK**.

The **Add Scheme** dialog closes.

The new audio scheme is the top entry in the list of configured audio schemes on the **Audio Schemes** tab. This sets it automatically as the currently used hardware for audio connections.

## 6.2.2.2 How to Configure an HiPath Connection

***Prerequisites***

- When installing the program you selected the HiPath Provider as default provider.

How to configure the **HiPath Provider** module, thus the softphone functionality of *OpenScape Desktop Client*:

***Step by Step***

1) Start the *OpenScape Desktop Client*.

   The login dialog opens.

2) Click on the **Manage** button.

   A selection menu opens.

3) Select the **Settings** menu option.

   The **Settings** dialog opens.

4) Switch to the **Advanced** tab.

5) Under **HiPath Provider > Device** you select your **Phone type** and your **Key module type** if required.

6) Under **HiPath Provider > Main connection** set the following parameters:

   - **Type**: <Select your PBX here.>
   - **Gatekeeper**: <Enter here the IP address of the communications system gatekeeper.>
   - **Extension number**: <Enter here the number under which you can be reached on the connected communications system.>
   - **Password**: <Specify here the password configured for your extension number.>
   - **Own IP address**: <Select the **Detect automatically** option.>

7) Under **HiPath Provider > Main network access** determine the following parameters:

   - **Country code**: <Enter here the international prefix for your site, e.g. `49` for Germany.>
   - **Area code**: <Enter here the area code of your location without leading zero.>
   - **System identification number**: <Enter here the system identification number.>
   - **Trunk code:** <Enter the code configured on your system for allocating outbound trunks, e.g. 0.>
   - **Prefix for long distance calls:** <Enter here the network operator code for long distance calls, e.g. 0.>
   - **Prefix for international calls**: <Enter the network operator code for international calls, e.g. `00`.>

8) Click the **Test** button to check your entries.

   The following dialog opens.

*9)* Enter the **Extension to be dialed**. Based on the parameters set for the **Main network access**, the *OpenScape Desktop Client* automatically determines the phone number in the international number format in the **Converted internationally** field.

*10)* When the test has confirmed your entries for the main network access parameter as correct, click on the **Close** button.

The test dialog closes.

You have configured the *OpenScape Desktop Client* as your softphone with connection to a HiPath communications system.

### 6.2.2.3 How to Configure an SIP Connection

***Prerequisites***

- When installing the program you selected the SIP Provider as default provider.

How to configure the **SIP Service Provider** module, thus the softphone functionality of *OpenScape Desktop Client*:

***Step by Step***

*1)* Switch to the **Advanced** tab in the **Settings** dialog.

*2)* Under **SIP Service Provider > Main line** enter the following parameters:

- **User**: <enter your phone number here>
- **Display**: <enter your name here>
- **Tooltip text**: <enter something like `SIP Phone` optionally>
- **ID**: <enter your phone number or e-mail address.>
- **Password**: <Enter here the password provided by your system administrator.>

*3)* Under **SIP Service Provider > Registrar** set the following parameters:

- **Server**: <Enter here the IP address provided by your system administrator>
- You determine the port for the server connection in the **Connection**. Your system administrator will provide further information.

*4)* Under **SIP Service Provider > Proxy** set the following parameters:

- **Server**: <Enter here the IP address provided by your system administrator>
- You determine the port for the server connection in the **Connection**. Your system administrator will provide further information.

*5)* Under **SIP Service Provider > Network access** enter the network access data provided by your system administrator.

> ***NOTICE:*** Make sure that the **Normalize call numbers** option has been set under **SIP Service Provider > Address conversion**. The network access data are otherwise not required.

You have configured the *OpenScape Desktop Client* as your SIP softphone.

## 6.2.3 Initial Program Start

The following dialog opens at the initial program start.

> ***NOTICE:*** This dialog is also displayed when you have quit the system via the main menu **menu > Logout**.

You use this dialog to log with the integrated *OpenScape Web Client* at the *OpenScape UC Application* system. After you have successfully logged in at the system you can use the *OpenScape UC Application* features.

> ***IMPORTANT:*** If the *Single Sign-on* feature has been configured for your Windows user account, the above dialog is not displayed. *Single Sign-on* enables you to use the features of the *OpenScape UC Application* via the *OpenScape Desktop Client* after logging in at your workstation without having to additionally authenticate against the *OpenScape UC Application* system. You find continu-

ative information about *Single Sign-on* in the administrator documentation *OpenScape UC Application V7 Configuration and Administration*.

***Step by Step***

***1)*** Enter your **User name**.

***2)*** If required, select your domain via the **Domain** combo box.

***NOTICE:*** The combo box for selecting a domain is only available when several domains have been configured. Selecting a domain is necessary only then.

***3)*** Enter your user password in the **Password** field.

***4)*** Click on **OK** or push the **return key** (Enter).

The user interface of the integrated *OpenScape Web Client* opens.

## 6.3 Overview of the User Interface

After you have successfully logged in at the system, the main window opens by default. It features the following elements:

### Main Menu

You find the program's main menu at the top margin of the main window. It enables quick program operation.

### Pearl Menu

This is an application menu icon for accessing the program's basic features.

### Tab Bar

Under the main menu you find a bar that displays the single function windows of the workspace as tabs.

With a click on the tabs you can toggle the following function windows:

- **Missed Calls**
- **Journal**
- **Voicemail Box**
- **Conferences**
- **Contacts**
- **Instant Messaging**
- **Forward Call**
- **Directory Search**
- **Bookmarks**

### Workspace

The workspace offers access to the features of the different function windows:

- **Call Control**
  The **Call Control** function window lets you look for and call a contact, shows information about in- and outbound calls and provides telephony features during an active call.

- **Contacts**
  The **Contacts** function window represents your private contact list. You can add single contacts to this contact list manually or import such contacts from various directories and then group them in the list to suit your own requirements. You can also directly call single contacts, edit and remove existing contact data as well as send e-mails and instant messages from the contact list.

- **Instant Messaging**
  The **Instant Messaging** function window enables sending and receiving instant messages. It also provides an overview of the active chat connections.

- **Conferences**
  The **Conferences** function window provides the controls for creating a new conference or for starting a configured conference. If you have a configured web conference connection, you can select whether this connection is to be started at a conference also.

- **Journal**
  No matter whether you are logged on or off, the *OpenScape UC Application* server logs all in and outbound calls in the **Journal** function window. Furthermore, you can initiate connections to logged communication partners from the **Journal**.

- **Directory Search**
  The program supports integrating several directories. You can search these directories for specific contacts and directly get in touch with them by e-mail or phone as well as integrate these contacts in your private contact list.

- **Missed Calls**
  The **Missed Calls** function window enables fast access to all missed calls.

- **Voicemail Box**
  The **Voicemail Box** function window enables fast access to received voice-mails and provides controls for playing them.

- **Forward Call**
  The **Forwarding Call** function window enables diverting incoming calls from the office phone to other configured devices.

- **Bookmarks**
  The **Bookmarks** function window enables configuring new bookmarks or displaying internet pages via bookmarks already defined.

**Softphone Menu**

You find the softphone menu at the bottom margin of the main window.

It provides various softphone functions, enables controlling the volume and shows the status of the connection to the communications system and to the *OpenScape UC Application* server.

## 6.3.1 How to Open Function Windows

You reach the workspace function windows via the tab bar, which is displayed in the main window under the main menu.

***Step by Step***

› Click on the desired tab in the tab bar.

The selected function window appears in the workspace of the main window.

---

***NOTICE:*** If you cannot see your desired tab, click on ◀ or ▶ in the tab bar under the main menu.

---

## 6.4 Settings-related Actions

You can perform the following individual settings for each user:

### 6.4.1 How to Create a new Profile

You can change the user profile only during the default logon to the program by proceeding as follows:

***Step by Step***

***1)*** Start the *OpenScape Desktop Client*.

The **Login** dialog opens.

***2)*** Click on the **Add Profile...** button.

The **Add Profile** dialog opens.

***3)*** Enter a **Profile Name**.

***4)*** Confirm your entries with **OK**.

The **Add Profile** dialog closes.

You have successfully created the new user profile.

### 6.4.2 How to Change your Password

How to change your password for logging on to the *OpenScape UC Application* server:

***Step by Step***

***1)*** Click **menu** in the main menu and select the **Change Password** menu option.

The following dialog opens:

2) Enter your current password in the **Old Password** input field.

3) Enter the new password in the **New Password** input field.

4) Confirm your new password and click on **OK**.

   The **Login Message** dialog opens. This dialog confirms the successful password alteration. Your modification now applies.

5) Select **menu > Log off** in the main menu.

   You are logged off of the *OpenScape UC Application* server. The *OpenScape Web Client* login dialog opens.

6) Log on to the system with your user name and new *OpenScape UC Application* password.

---

***NOTICE:*** Verify that the *OpenScape UC Application* password you have entered complies with the following requirements: It must comprise at least one special character, one digit and one capital letter as well as not more than three of the same character in succession.

---

***IMPORTANT:*** The *OpenScape UC Application* password must not be changed again within the next 24 hours after the last alteration.

---

## 6.4.3 How to Change the Language

The language in which the controls and the online help of the program are represented is defined during the default login. How to change the language:

***Step by Step***

1) Shut down the *OpenScape Desktop Client*.

2) Reboot the *OpenScape Desktop Client*.

3) Select the **Language** you want to set from the language list in the Login dialog.

4) Afterwards, click on **OK**.

   The login dialog closes. The language change has been saved and the program starts.

The currently configured language is used for representing the user interface and the online help.

## 6.4.4 How to Set your own Presence Status

How to set your current presence status:

***Step by Step***

1) Click on the combo box of the **Presence display** in the main menu.
2) Select the desired presence status from the presence status list.

## 6.4.5 How to Add an Audio Scheme

***NOTICE:*** You can configure a new audio scheme in the **Settings** dialog while logging on to the program as well as during operation.

How to add an audio scheme to the program configuration:

***Step by Step***

1) In the **Logon** dialog click on the **Manage** button and select **Settings**.

   The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.
2) Click on the **Add** button.

   The **Add Scheme** dialog opens.

3) Assign a name to the new audio scheme in the **Description** field.
4) In the **Voice recording** combo box select the audio hardware of the user computer to be used by *OpenScape Desktop Client* for voice recording.
5) In the **Audio Response** combo box select the audio hardware of the user computer to be used by *OpenScape Desktop Client* for voice playback.
6) In the **Additional speaker** combo box select an additional speaker for voice output if required.

   ***NOTICE:*** The hardware for the **additional speaker** must be different from the **audio response** hardware.

7) In the **Signal response** combo box select the audio hardware of the user computer to be used by *OpenScape Desktop Client* for ringtone output.
8) Select the audio hardware of the user computer to be used for controlling special hardware in the **Controller** field.

*9)* Confirm the settings of the new audio scheme with **OK**.

The **Add Scheme** dialog closes.

The newly defined audio scheme appears as first entry in the list of the configured audio schemes on the **Audio Schemes** tab.

## 6.4.6 How to Change an Audio Scheme

You can change the configuration of an already configured and/or currently used audio scheme during login or operation. You are thus always able to select the hardware that matches the respective situation.

How to change the configuration of an already defined audio scheme during login:

***Step by Step***

*1)* In the **Logon** dialog click on the **Manage** button and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

*2)* Select the audio scheme the settings of which you want to change.

*3)* Click on the **Change...** button.

The **Change Scheme** dialog with the current configuration of the selected audio scheme opens.

*4)* Perform the desired modifications.

> ***NOTICE:*** The settings you can change in this dialog are identical with the settings of a new audio scheme.

*5)* Confirm the changes with **OK**.

The **Change Scheme** dialog closes. Your settings are saved.

## 6.4.7 How to Control the Presence Monitoring

You can use the features described in the following to allow or suppress the display of your presence status in the contact list of other users.

### 6.4.7.1 How to Allow Presence Monitoring

How to allow the display of your presence status in the contact list of other users:

***Step by Step***

***1)*** Click on **menu** in the main menu and select the **General** option.

The **General settings** dialog opens.

***2)*** Switch to the tab **Presence > Access Control List**.

The following setting dialog opens.

***3)*** On the **Access Control List** tab you find the **These users are not allowed to see your presence status** list. Select an entry in there.

***4)*** Click on the **Accept** button.

The selected user is moved to the **These users are allowed to see your presence status** list.

The selected user may now see your presence status.

### 6.4.7.2 How to Block the Presence Monitoring

How to block the display of your presence status in the contact list of other users:

***Step by Step***

1) Click on **menu** in the main menu and select the **General** option.

   The **General settings** dialog opens.

2) Switch to the tab **Presence > Access Control List**.

3) On the **Access Control List** tab you find the **These users are allowed to see your presence status** list. Select an entry in there.

4) Click on the **Block** button.

   The selected user is moved to the **These users are not allowed to see your presence status** list.

Your presence information is not displayed to the selected user.

## 6.4.8 How to Set the Preferred Device

How to set your preferred device for in or outbound calls:

***Step by Step***

1) Click on the combo box of the **device display** in the main menu.

2) Select the desired device from the device list.

You can use the configured device for in and outbound calls from now on.

***IMPORTANT:*** You cannot configure/select a device that is already monitored by another CSTA application, e.g. *OpenScape Contact Center*.

***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure a named device list as preferred device for incoming and/or outgoing calls.

***IMPORTANT:*** The members of a Multi-Line Hunt Group (MLHG) must not configure their voicemail box as preferred device for incoming and/or outgoing calls.

## 6.4.9 How to Define a new Device

How to add a new device to the device list:

***Step by Step***

1) Click on **menu** in the main window and select the **General** ... option.

   The **General settings** dialog opens.

*2)* Switch to the tab **Common > Devices**.

*3)* Click on the **New** button or on ✚.

The following setting dialog opens.

*4)* Enter the desired **Name** and the **Phone** number.

*5)* Perform the settings for the **redirection timeout**.

---

***NOTICE:*** This **timeout** specifies the ring time (sec.) after which the ring tone is automatically redirected to the next configured device.

In case of a connection to a HiPath 4000 PBX the ring tone is redirected to the voicemail box after the ring time specified in this field.

---

*6)* Click on **OK**.

The **Devices** dialog closes and the newly created device appears in the device list.

*7)* Click on the **OK** button in the **General Settings** dialog.

The dialog closes and your entries are saved.

You can define the new device as your preferred one via the **device display** in the main menu.

---

***NOTICE:*** You cannot configure/select a device that is already monitored by another CSTA application, e.g. *OpenScape Contact Center*.

---

## 6.4.10 How to Configure/Activate a Call Forwarding

How to forward calls from your preferred device to another device from your device list:

***Step by Step***

1) Open the **Forward Call** function window by selecting the **Forward Call** tab in the tab bar under the main menu.
2) Depending on whether or not the calling person is to be informed about the call forwarding, continue with one of the following actions:
   - In the **Forward calls to** combo box you select the desired device from your device list. Your incoming calls are forwarded to the device you have just set. The caller then sees the address of the forwarding target.
   - Select the desired device from your device list via the **Preferred device** combo box. Your incoming calls are forwarded to the device you have just set. The forwarding is not displayed to the caller, i.e. he/she can only see your *One-Number Service*.

The call forwarding has been configured and is active.

## 6.4.11 How to Deactivate a Call Forwarding

How to disable an active call forwarding:

***Step by Step***

1) Open the **Forward Call** function window.
2) Depending on the active forwarding option, select **Not activated** in the combo box **Forward calls to** or **Preferred device**.

The performed settings become immediately active. Call forwarding is now disabled.

## 6.4.12 How to Set an Individual Ring Tone

***NOTICE:*** You can edit the settings for the individual ring tone via the **Settings** dialog during the program start or during live operation. For this purpose, click on the **Manage** button in the login dialog and select in the **Settings** dialog on the tab **Advanced > HiPath Provider > Ring tones**. Alternatively, right-click the *OpenScape* icon in the notification area of the Windows taskbar and select under **Personal Settings > Ring tones**.

How to select an individual ring tone for signaling incoming connection requests at an HiPath communications system while operating *OpenScape Desktop Client*:

***Step by Step***

1) Rightclick the *OpenScape* icon in the notification area of the Windows taskbar.

   The *OpenScape* context menu opens.

2) Select the **Personal Settings > Ring tones** option.

   The **Settings** dialog opens. The **Advanced** tab with option **HiPath Provider > Ring tones** is displayed.

3) Activate the **Use individual ring tones** checkbox.

4) Click on the **...** search button.

   The **Open** window is displayed.

5) In the **Open** window switch to the folder that contains the desired `WAV` or `MP3` file.

6) Select the desired file.

7) Click the **Open** button.

   The **Open** dialog is closed.

The selected audio file has been adopted as the ring tone of your *OpenScape Desktop Client*.

## 6.4.13 How to Change the Default Ring Tone (HiPath Provider)

***NOTICE:*** These settings are only available while the *OpenScape Desktop Client* is active, you are logged in and no individual ring tone has been configured.

If you operate *OpenScape Desktop Client* at a HiPath communications system and use the default ring tones of the system, you can change the pitch in the following way:

***Step by Step***

1) Open the Pearl menu.

2) Click on the **OpenScape Options** button.

   The **Settings** dialog opens.

3) Switch to the tab **Advanced > HiPath Provider > Operation settings**.

4) Click the **Change Ring Tone** button.

   A dialog is displayed and the current ring tone sounds.

5) Click on **Next Ring Tone** or **Previous Ring Tone** to select the desired ring tone.

*6)* Click the **Close** button to complete the setting.

The selected setting is immediately active.

## 6.4.14 How to Set the Mobile Time Zone

If you are on the road, for example, and in a different time zone, you can configure a mobile time zone. This makes the **Journal** display the arrival of calls in the current local time. Furthermore, your *OpenScape UC Application* contacts can see the **current time** of your location via the quick-info of your presence icon in your contact list.

How to define your mobile time zone:

***Step by Step***

*1)* Start the program and log on to the system.

*2)* In the main menu select **menu > General ... > Common tab > Appearance tab**.

The following dialog opens:

*3)* Click on ✎ to the right of **Mobile time zone**.

The following selection dialog opens:

*4)* Select your current location.

*5)* Confirm the performed settings with **OK**.

The selection dialog closes. The set time zone is displayed.

*6)* Press the **OK** button.

The settings dialog closes. Your settings are saved.

## 6.4.15 How to Create a new Bookmark

How to define a frequently visited internet page as bookmark:

***Step by Step***

*1)* On the **Bookmark** tab click on .

The following dialog opens:

*2)* Perform the bookmark settings.

*3)* Click on **OK**.

Your settings are saved. The **Bookmark Settings** dialog closes.

## 6.5 Contact Management

The following features are available for managing the contacts in your contact list.

### 6.5.1 How to Create a New Contact

***Prerequisites***

- The program is correctly configured and you are logged in at the communications system.

How to add a new contact to your contact list:

***Step by Step***

*1)* Click on in the **Contacts** function window.

The following dialog opens.

*2)* Enter the contact data of the new contact in the appropriate fields.

*3)* Click on if you wish to assign an **Address group** to the contact.

The following dialog opens.

*4)* Set the checkbox of the desired address group.

If you have not yet defined an address group, a corresponding message is issued in the above dialog. Using the + icon you can spontaneously create a new group in this dialog.

*5)* Click on **OK** to confirm you entries.

The dialog closes.

Your entries are saved. The new contact entry appears in the contact list of the **Contacts** function window.

## 6.5.2 How to Add a Contact from a Directory

***Prerequisites***

- The program is correctly configured and you are logged in at the communications system.

How to search a directory for a contact and add him/her to your contact list:

***Step by Step***

*1)* Click on in the **Contacts** function window.

The **Contacts** window opens.

*2)* Enter the person's **Surname** and/or **First name** in the respective fields.

*3)* Click on .

The dialog with the search results from different directories opens.

*4)* Click on the desired contact entry to select it.

*5)* Click on the **Add** button.

The dialog with the search hits closes. The available contact data has been copied to the **Contacts** dialog. If desired, you can complete the contact data here.

*6)* Click on **OK** to confirm your entries.

The dialog closes.

Your entries are saved and the new contact entry appears in the contact list.

## 6.5.3 How to Edit Contact Data

***Prerequisites***

- The program is correctly configured and you are logged in at the communications system.

How to edit the contact information of an already configured contact:

***Step by Step***

***1)*** Click on a contact's name to select him/her in the **Contacts** function window.

***2)*** Click on .

The following (example) dialog opens with already available contact data.

***3)*** Make any changes in that dialog box.

***4)*** Click on **OK**.

Your modifications have become valid and the dialog closes.

## 6.5.4 How to Import Microsoft Outlook Contacts

How to import address data from your *Microsoft Outlook* contact list in your *OpenScape UC Application* contact list:

***Step by Step***

***1)*** Select in the *Microsoft Outlook* menu bar **File > Import/Export...**.

The *Microsoft Outlook* wizard for importing or exporting files starts.

***2)*** Choose in the selection field the **Export to a file** option.

***3)*** Then click on the **Next** button.

***4)*** In the **Create a file of type** field of the next dialog select the **Comma Separated Values (Windows)** option.

*5)* Confirm your selection with a click on **Next**.

*6)* In the **Select folder to export from** field of the next dialog select the **Contacts** folder.

*7)* Click on the **Next** button.

The **Export to a File** dialog opens.

*8)* Click on the **Browse...** button.

The file selection dialog **Browse** opens.

*9)* Select the storage location in this dialog and enter the name you wish to assign to the file to be created.

*10)* Click on **OK**.

The file selection dialog closes. The storage location is displayed in the **Save exported file as** field.

*11)* Click on **Next** and in the following dialog on **Finish**.

The export process begins. When the file export is complete, the Outlook Wizard closes automatically.

*12)* Click in your *OpenScape UC Application* client in the **main menu** on **menu > General ... > Addresses tab > Import tab**.

*13)* Click on the **Browse...** button for selecting the file to be imported.

*14)* Select in the **The address data was exported from** combo box the data source **MS Outlook** <**language**> from which the data to be imported is to be obtained.

*15)* Set one of the **Options** available for importing.

*16)* Click on the **Import** button to start the import process.

*17)* Confirm the displayed message with **OK**.

*18)* Click on the **Close** button.

The **General settings** dialog closes. Importing addresses is now complete and the imported contact data is displayed in the **Contacts** window.

## 6.5.5 How to Back up/Export a Contact List

***Prerequisites***

- The program has been configured correctly and completely.
- You are logged on to the communications system.

How to create a backup copy of your contact list:

***Step by Step***

1) Click in the main menu on **menu > General ... > Addresses** and select the **Export** tab.
2) Select the desired file format via the **The exported addresses will be imported again in** combo box.

   ***NOTICE:*** If you would like to export the address data as backup copy so that you can import it later on and thus restore your address list, select the ***OpenScape Web Client*** format.

3) Then click the **Export** button.

   The export process starts with the **File download** browser dialog opening for saving a file.
4) In the browser dialog click the **Save** button.

   The file selection dialog opens.
5) Select the directory in which the export file is to be saved and assign a name to the file.
6) In the file selection dialog click on **Save** to complete the export process.

You can access the export file in the specified folder in the selected format.

## 6.5.6 How to Import a Contact List

***Prerequisites***

- You have previously exported the contact list to be imported to a file of the format `*.csv` or `*.txt`.

How to integrate contact data from other address books in your *OpenScape UC Application* contact list:

***Step by Step***

1) Start the program and log on to the system.
2) In the main menu select **menu > General ... > Addresses tab > Import tab**.
3) Click on the **Browse** button.

   The file selection dialog opens.
4) Select the file that you wish to import.
5) Specify the data source from which the data to be imported is to be obtained in the **The address data was exported from** combo box.
6) Set one of the following import options for the import:
   - **Replace duplicates with items imported**
   - **Allow duplicates to be created**

- **Do not import duplicate items**
- **Delete all items in list prior to importing data**

*7)* Click on the **Import** button to start the import process.

The system accepts the import job and queues it in its job list.

*8)* Click the **Close** button.

The **General settings** dialog closes.

Importing addresses is now complete and the imported contact data is displayed in the **Contacts** window.

## 6.5.7 How to Edit Presence Prompts

As soon as an *OpenScape UC Application* user has added you to his/her contact list, you receive a presence prompt as *OpenScape UC Application* user. In this dialog you can decide whether or not to allow the prompting user to see your presence information.

How to edit a presence prompt:

***Step by Step***

*1)* Click on **presence prompt list**.

The **Presence Prompting** dialog opens.

*2)* Set the **When accepted, add inquiring users to the contact list** option if required.

This copies the contact data of the prompting users automatically to your contact list when you accept the request.

*3)* Accept the request by clicking the **Accept** button or reject it by clicking **Block**.

The respective setting is configured in the system and the **Presence Prompting** dialog closes.

## 6.5.8 How to Create a new Address Group

Proceed as follows to define a new address group:

***Step by Step***

***1)*** Click in the combo box of the **Contacts** function window. The **Display all** option is set in this combo box by default.

The list of already existing address groups is displayed.

***2)*** Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

***3)*** Click on the **New group** button.

The **Address groups** list features a new entry named **new address group**.

***4)*** Click on the defaulted name **new address group**.

The name of the address group is represented as entry field.

***5)*** Enter an expressive name for the new address group.

***6)*** Click on the **Apply** button.

The new name has been copied for the newly configured address group.

***7)*** Press the **OK** button.

The address group is saved and the **General settings** dialog closed.

Specifying the address group is thus accomplished. You can now select this group under the entered name in the combo box of the **Contacts** dialog.

## 6.5.9 How to Delete an Address Group

Proceed as follows to delete an address group:

***Step by Step***

***1)*** Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

***2)*** Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

***3)*** Select the address group that you want to delete.

***4)*** Click on × . The address group will be removed from the list.

***5)*** Press the **OK** button.

Your modification is saved and the **General settings** dialog closed.

## 6.5.10 How to Filter a Contact List by Address Group

How to display the contacts of an existing address group in the contact list:

***Step by Step***

***1)*** Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

***2)*** Select the desired address group.

The address group is displayed in the combo box and the associated contacts appear in the **Contacts** dialog.

## 6.5.11 How to Rename an Address Group

Proceed as follows to rename an address group:

***Step by Step***

***1)*** Click in the combo box of the **Contacts** dialog.

The list of already existing address groups is displayed.

***2)*** Select here the **Edit** feature.

The **General settings** dialog opens. You can already see the **Address groups** tab.

***3)*** Select the address group that you want to rename.

***4)*** Click on the address group name or on Aí.

The cursor appears in the name entry.

***5)*** Change the address group name.

***6)*** Push the **return key**.

The changed name is itemized in the list of configured address groups.

***7)*** Click on **OK**.

Your modification is saved and the **General settings** dialog closed.

---

***NOTICE:*** When you complete the renaming with **OK**, the address group will be modified in all data records that access it.

---

## 6.5.12 How to Assign an Address Group to a Contact

Proceed as follows to assign an address group to a contact:

***Step by Step***

1) Open the **Contacts** function window.
2) Click on the name of the contact who you wish to assign to a previously defined address group to select him/her.
3) Click on .

   The **Change entry in the contact list** dialog opens with the already available contact data.
4) Click on .

   The **Assign address groups** dialog opens.
5) Set the checkbox of the desired address group.
6) Afterwards, click on **OK**.

   The **Assign address groups** dialog closes. Your settings are applied.
7) Click on **OK** in the **Change entry in the contact list** dialog.

Your settings are saved and the dialog closes.

## 6.6 Communicating with your Contacts

The following features are available for communicating with other subscribers:

### 6.6.1 How to Call a Contact

***Prerequisites***

- The program has been configured correctly.
- You are logged on to the communications system.

How to call a contact from your contact list:

***Step by Step***

› Click in the **Contacts** function window on in the row of the desired contact entry.

> ***NOTICE:*** If more than one number is specified for the contact, click on to select the desired one.

> ***IMPORTANT:*** If the device you have set as the preferred one is not your office phone, the PBX will first set up a connection to this configured device. After your call has been accepted on this device, the connection to the other subscriber is set up.

The connection is established and displayed in the **Call Control** function window.

## 6.6.2 How to Dial a Phone Number

***Prerequisites***

- The program has been configured correctly.
- You are logged on to the program.

How to set up a connection to any phone number:

***Step by Step***

***1)*** Enter the desired phone number in the **<name or number>** field of the main menu.

***2)*** Click on in the main menu.

The call is initiated and listed in the **Call Control** frame.

> ***IMPORTANT:*** If you use the *ONS* number assigned to you in the CMP by your system administrator as preferred device and the *auto-answer* feature is active in the PBX for this number, the desired conversational partner is directly connected. In contrast, if you have set e. g. your mobile phone as preferred device, a connection from the PBX to your preferred device is set up first. You need to accept this call before the connection to the conversational partner can be established.

## 6.6.3 How to Dial by Copy & Paste

You can use the copy & paste method to set up a connection to a phone number that you have entered in another application (e.g. a word processing program):

***Step by Step***

1) Select the phone number in the application (e.g. in a word processing program) and copy it with **[Ctrl] + [C]** or with the features provided by the application to the clipboard.
2) Paste the phone number with one of the following hotkeys from the clipboard into the **<Name or Number>** combo box in your client's main menu:
   a) **Shift key + [Ins]** without office code
   b) **[Ctrl] + [V]** without office code
3) Click on in the main menu.

The connection is immediately set up and displayed in the **Call Control** function window.

## 6.6.4 How to Accept a Call

***Prerequisites***

- The program has been configured correctly and completely.
- You are logged on to the communications system.

How to accept an icoming call displayed in the **Call Control** function window:

***Step by Step***

› Click on in the **Call Control** function window.

> ***IMPORTANT:*** If you do not have set your office phone as preferred device but another one, the icon is not available in the **Call Control** function window. In this case you can accept the call only on the configured device but not via the **Call Control** function window.

You are connected to your conversation partner. The **Call Control** function window shows call control features.

## 6.6.5 How to Transfer an incoming/active Call to another Subscriber

This action transfers the control of an incoming or accepted call to another subscriber. Proceed as follows:

***Step by Step***

1) Click on in the area of the displayed call in the open **Call Control** window.

   The **Redirecting Call** dialog opens.

*2)* Enter the phone number of the desired subscriber in the input field of this dialog.

*3)* Select the **Handover to** option.

The caller is connected to the new subscriber. Your connection is automatically closed. The **Call Control** function window closes.

## 6.6.6 How to Call a Microsoft Outlook Contact

How to initiate a call from your *Microsoft Outlook* address book using the *Microsoft Outlook* integration:

***Step by Step***

*1)* Switch to the address book of your *Microsoft Outlook* client.

*2)* Select the desired contact and click in the *Microsoft Outlook* toolbar on the **Dial** icon.

*3)* If the selected contact includes several phone numbers, a selection dialog opens. In this dialog mark the phone number that you would like to use for the call.

*4)* Then click on the **Connect** button in the selection dialog.

The call is initiated and the selection dialog closed.

## 6.6.7 How to Change the Preferred Device during an Active Call

This action allows you to stay in control of the call.

***Step by Step***

*1)* Click on in the area of the displayed call in the open **Call Control** window.

The **Redirecting Call** dialog opens.

*2)* Select the **Transfer to** option.

*3)* Select the desired device in the displayed device list.

The call has been transferred to the new device and must be continued at this device.

## 6.6.8 How to Make a Consultation Call

If you are in an active call and wish to call another subscriber for consulting him/her, proceed as follows:

***Step by Step***

1) In the **Call Control** function window, enter the phone number of the subscriber you wish to consult in the **New Call** entry field.

2) Click on to the right of the **New Call** field to initiate the call.

The connection to the first conversational partner is automatically being held and he/she hears music(-on-hold). You can now talk to the consultation-call subscriber.

## 6.6.9 Toggling

***Prerequisites***

- The program has been configured correctly and completely.
- You are logged on to the communications system.
- You are being connected to two conversational partners. One of these calls has been set to on-hold because you are conducting a consultation call.

How to toggle calls during a consultation:

***Step by Step***

› Click in the **Call Control** function window on **Toggle** in the area of the held call.

The held call becomes active again and you can talk to the original subscriber. The connection to the consultation-call subscriber is held.

## 6.6.10 How to Transfer a Call to a new Subscriber

***Prerequisites***

- You are conducting a consultation call.

How to connect the original caller to the consultation call subscriber during a consultation call:

***Step by Step***

› In the **Call Control** function window click on in the area of the held call.

Your connection is automatically closed. The other two subscribers can talk to each other.

## 6.6.11 How to Activate the Completion of Calls to Busy Subscriber (CCBS)

***Prerequisites***

- The *OpenScape Desktop Client Enterprise Web Embedded Edition* is connected to an *OpenScape Voice V5*.

This feature enables you to automate a connection setup to a previously busy subscriber in the PBX. When you initiate a call and receive a busy signal from the target subscriber, you can activate or use the callback feature as follows:

***Step by Step***

***1)*** In the **Call Control** function window click on •←.

A greeting informs you that the callback function is active. Thereafter, the connection is cleared. You are then available to other callers again and can make calls yourself.

If the previously busy target subscriber becomes available again, the program is informed by the PBX accordingly. The program then lets you know by a call in the **Call Control** function window that the target subscriber is no longer busy.

***2)*** Accept the call with a click on in the **Call Control** function window.

The PBX calls the target subscriber again.

---

***NOTICE:*** CCBS cannot be used if the callee rejects the call or the PBX of the callee does not support the feature.

---

## 6.6.12 How to Activate Completion of Calls on no Reply (CCNR)

***Prerequisites***

- The *OpenScape Desktop Client Enterprise Web Embedded Edition* is connected to an *OpenScape Voice V5*.

This feature enables you to automate a connection setup to a subscriber who does not answer the phone in the PBX. If the target subscriber is available but does not answer the phone, you can activate the callback feature as follows:

***Step by Step***

***1)*** In the **Call Control** function window click on •←.

A greeting informs you that the callback function is active.

When the target subscriber hangs up the next time, the PBX informs the program accordingly. The program then lets you know by a call in the **Call Control** function window that the target subscriber is available.

*2)* Accept this call with a click on in the **Call Control** function window.

You are connected to the desired subscriber.

---

***NOTICE:*** CCNR cannot be used if the callee rejects the call or the PBX of the callee does not support the feature.

---

## 6.6.13 How to End a Call

How to clear a connection listed in the **Call Control** function window:

***Step by Step***

› Click in the **Call Control** function window on in the area of the active call.

The connection is cleared and does no longer appear in the **Call Control** function window.

## 6.6.14 How to Display Missed Calls

How to display a list of all missed calls:

***Step by Step***

› Click on **Missed Calls** in the tab bar under the main menu.

The **Missed Calls** tab opens in the workspace. This tab lists all missed calls .

## 6.6.15 How to Sort Journal Entries by Call Type

How to display only specific call types in the journal:

***Step by Step***

› In the combo box at the top right margin of the **Journal** function window select the call type you wish to have displayed in the **Journal**:

- **All Calls** (default)
- **Missed Calls**
- **incoming calls**
- **outgoing calls**

The **Journal** function window lists only the calls of the selected call type.

## 6.6.16 How to Start a Chat (Instant Messaging)

How to start a chat with another *OpenScape UC Application* user:

***Step by Step***

*1)* Open the **Contacts** function window.

*2)* Click on , or in the row of the desired contact.

The **Instant Messaging** window opens.

*3)* Enter the instant message your wish to send to the chat partner in the bottom entry area of the chat window.

*4)* Click on the **Send** button.

The message appears in the top text area, which also shows the further communication.

Depending on the chat partner's IM mode (online, offline or unknown) the message may be delivered instantly or delayed.

## 6.6.17 How to Send an E-Mail to a Contact

***Prerequisites***

- An e-mail address has been configured for the contact under the contact information.

How to send an e-mail to a contact:

***Step by Step***

***1)*** Click on in the **Contacts** function window in the row of the desired contact.

Your pre-configured default e-mail application starts.

***2)*** Write and send the e-mail message as usual.

The window of the e-mail application closes. The e-mail was sent.

## 6.6.18 How to Start Video Streaming

***Prerequisites***

- The *OpenScape Desktop Client Enterprise Web Embedded Edition* is connected to an *OpenScape Voice V5* or later.
- You have an installed and operable video camera.
- In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.

How to switch a video connection to an active call:

***Step by Step***

***1)*** Click on in the SoftPhone menu.

The **Video** window opens, showing your own image.

***2)*** Click on in the **Video** window.

Your own image appears in a red frame. It is transmitted to the connection partner.

> ***NOTICE:*** If your connection partner also has a video camera and switched his/her image to the conference in the same way, it appears automatically in your **Video** window. You cannot control or activate/deactivate receiving video images.

## 6.6.19 How to End Video Streaming

How to terminate transmitting your own video image:

***Step by Step***

› Click on in the **Video** window.

Your own image does no longer appear in a red frame.

> ***NOTICE:*** The video image of your connection partner remains visible until he/she terminates the transmission or the connection is cleared.

Your video image is no longer being transmitted. However, it remains visible in the **Video** window until you switch off the video camera via the icon in the Softphone menu or enable the icon in the **Video** window.

## 6.6.20 How to Play Voicemails via Telephone

Execute the following steps to play your voicemails via telephone:

***Step by Step***

***1)*** Open the **Voicemail Box** function window.

You find a list of all played voicemails and of those that have not been played yet .

***2)*** Activate the check box preceding the entry of the voicemail you would like to play.

***3)*** Click on the icon.

The **Voicemail-Player** window with the set **Telephone** option opens.

***4)*** Pick up the receiver.

The voicemail playback starts immediately.

## 6.6.21 How to Play Voicemails via the Windows Media Player

Execute the following steps to play your voicemails via the *Windows Media Player*:

***Step by Step***

***1)*** Open the **Voicemail Box** function window.

You find a list of all played voicemails and of those that have not been played yet .

***2)*** Activate the check box preceding the entry of the voicemail you would like to play.

***3)*** Click on the icon.

The **Voicemail-Player** window with the set **Telephone** option opens.

***4)*** Select the **Browser** option.

The view of the **Voicemail-Player** window changes as follows:

After a short initialization period (connection is being set up), "Ready" is displayed under the controls.

***5)*** Click on .

The voicemail playback starts.

## 6.6.22 How to Activate Tell-Me-When

How to configure and activate the *Tell-Me-When* feature for one of your *OpenScape UC Application* contacts:

***Step by Step***

***1)*** Open the **Contacts** function window with a click on the corresponding tab in the tab bar under the main menu.

***2)*** Select the contact entry for which you wish to activate the *Tell-Me-When* feature.

***3)*** Click in the **Contacts** function window in the toolbar on and select **Set Tell-Me-When ...** .

The following dialog opens.

*4)* Set the desired option in the **When ... Changes to** combo box.

*5)* Select the desired option in the **Action** combo box.

*6)* Determine the desired timeout for the *Tell-Me-When* feature in the **Expires** combo box.

*7)* Click on **OK**.

The **Tell-Me-When** dialog closes.

The *Tell-Me-When* feature is no longer active for the selected contact. A special icon to the left of the contact name in the contact list indicates this.

## 6.6.23 How to Deactivate Tell-Me-When

How to deactivate the Tell-Me-When feature for a selected contact:

***Step by Step***

*1)* Click in the toolbar of the **Contacts** function window on ▸▸ **More functions**.

*2)* Select **Delete Tell-Me-When**.

The Tell-Me-When feature is no longer active for the selected contact.

# 6.7 How to Collaborate with Contacts

This software solution offers the following features for collaborating with other participants.

## 6.7.1 How to Start an Ad-hoc Conference

How to start an Ad-hoc conference with selected participants:

***Step by Step***

*1)* Select the contacts to hold a conference with in the **Contacts** window.

*2)* Then click on .

A settings dialog opens.

*3)* Assign a **Name** to the conference and change the defined participant entries if desired ( ).

*4)* Click on the **Start** button.

The **Call Control** function window opens. All participants are connected after they have lifted the receiver. The spontaneously started conference is also listed in the **Conferences** window and indicated by  or  .

## 6.7.2 How Add a Participant to an Active Conference

If you would like to add another participant to the conference, proceed as follows:

***Step by Step***

*1)* Click in the **Call Control** window on  to search the configured directories for the desired contact.

The **Directory Search (advanced**) window opens.

*2)* Enter the name to be searched for.

*3)* Click on the **Search** button.

*4)* Select the desired entry among the hits and confirm your selection with **OK**.

*5)* Click on  in the **Call Control** function window.

The new participant is called by the system. He/she is connected to the conference after he/she has picked up the receiver.

## 6.7.3 How to Initiate a Merge Calls Conference

Expanding a consultation call to a server-based conference with three participants to which further conference participants can be added.

Execute the following steps to initiate a Merge Calls conference:

***Step by Step***

***1)*** Call the first conversational partner.

***2)*** Make a consultation call to the second conversational partner.

The first connection is being held.

***3)*** Click on in the area of the waiting call.

Both active calls are transferred to the conference server of the *OpenScape UC Application*. A conference between the subscribers is being initiated. The three conversational partners are interconnected.

---

***NOTICE:*** The conference ends as soon as the conference initiator hangs up.

---

## 6.7.4 How to Configure a Meet Me Conference

How to configure a new Meet Me conference:

***Step by Step***

***1)*** Open the **Contacts** function window.

***2)*** Select the conference participants from your contact list. You can select several contacts at a time by clicking on the desired contact list entries with the **[Ctrl]** key kept pressed.

***3)*** Then click on .

The setting dialog in which you can configure the new conference with the selected participants opens.

***4)*** Enter the desired conference name in the **Name** input field.

***5)*** Determine the **Join Option**s for the conference.

***6)*** If desired, add further participants via the or icon.

***7)*** Click on the **Apply** button to save your settings without closing the setting dialog.

The **Bridge number** field is filled in automatically and the conference **PIN** is generated. Subsequently, you can perform further configuration changes. The conference name appears as entry in the **Conferences** window.

*8)* Click on **OK** to save modifications and to close the dialog.

The new conference is listed in the **Conferences** window and can be started from there.

## 6.7.5 Configuring a Scheduled Meet Me Conference

How to configure a scheduled Meet Me conference:

***Step by Step***

*1)* Open the **Contacts** function window.

*2)* Select the conference participants from your contact list. You can select several contacts at a time by clicking on the desired contact list entries with the **[Ctrl]** key kept pressed.

*3)* Then click on .

The setting dialog in which you can configure the new conference with the selected participants opens.

*4)* Enter the desired conference name in the **Name** input field.

*5)* Activate the **Start time** checkbox.

The input field for setting date and time as well as for determining the conference duration is displayed.

*6)* Click on .

The calendar dialog opens.

*7)* Set the desired date and time at which the conference shall start automatically.

*8)* Confirm your selection with **OK**.

The calendar dialog closes.

*9)* Define the conference **Duration**.

*10)* If desired, add further participants via the  or  icon.

*11)* Determine the **Join Option**s for the conference.

*12)* Click on the **Apply** button to save your settings without closing the setting dialog.

The **Bridge number** field is filled in automatically and the conference **PIN** is generated. Subsequently, you can perform further configuration changes. The conference name appears as entry in the **Conferences** window.

*13)* Click on **OK** to save modifications and to close the dialog.

The scheduled conference appears in the **Conferences** window. The time at which the system starts the conference automatically appears under **Start time**.

## 6.7.6 How to Join an Active Meet Me Conference

You must be a conference participant before you can join a conference already in progress.

***Step by Step***

1) In the **Conferences** window click on to the left of the name of the active conference you wish to join.

   A selection list appears.

2) Select the **Join Conference** option in the open selection list.

You are connected to the conference.

## 6.7.7 How to Display Conference Data

How to display the conference data of a conference itemized in the conference list:

***Step by Step***

1) Select the desired conference in the **Conferences** window.

2) The click on to the left of the conference name.

The conference data is displayed under the selected list entry.

## 6.7.8 How to Edit Conference Settings

How to change an already defined conference, e.g. to add a participant:

***Step by Step***

1) Select the relevant conference in the conference list in the **Conferences** window.

2) Click on .

   The settings dialog opens with the data of the already defined conference.

3) Modify the data as desired.

4) Click on **OK**.

Your modifications are saved. The settings dialog closes.

## 6.7.9 Initiating a MeetNow! Conference

***Prerequisites***

- All conference participants have been informed by e-mail or via phone about the service access number, the conference start time and the defaulted conference PIN.

How to perform a MeetNow! conference:

***Step by Step***

***1)*** Dial into the conference via the service access number for MeetNow! conferences at the agreed time.

***2)*** Enter the agreed PIN via phone keypad or PC keyboard.

> ***NOTICE:*** In case of a MeetNow! conference you can enter the PIN by PC keyboard or phone keypad even if the video window is in focus.

***3)*** Conclude the PIN entry with the # key.

You are directly connected to the MeetNow! conference. If you have an operable video camera as well as a configured video scheme in the **SIP Service Provider** settings, the video window opens automatically.

## 6.7.10 How to Start an Ad-hoc Web Conference

If you would like to start spontaneously a web conference with other contacts, proceed as follows:

***Step by Step***

***1)*** Select the contacts to hold a conference with in the **Contacts** window.

***2)*** Then click on .

A settings dialog opens.

***3)*** Assign a **Name** to the conference and change the defined participant entries if desired ( ).

This setting dialog lets you add further members to the Ad-hoc conference. Enter a participant name or a phone number in the **Add participant** combo box for this purpose. Then click on to search the configured directories for the contact or on to complete the required contact information via the **Add participant** dialog.

***4)*** Click on the **Start** button to initiate the Ad-hoc conference.

The **Call Control** window opens. All participants are connected after they have lifted the receiver. The spontaneously started conference is also listed in the **Conferences** window and indicated by or .

*5)* Click on in the **Call Control** function window.

A file-download dialog opens via which you need to download the program required for the web conference.

*6)* Click on the **Apply** button in this dialog.

After successful download a security warning is displayed.

*7)* Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

## 6.7.11 How to Start a Meet Me Web Conference

How to start a web conference selected in the **Conferences** window:

***Step by Step***

*1)* Click on in the row of the selected conference in the **Conferences** window and select **Join Conference** from the opening list.

The voice conference connection is being established. The corresponding entry in the conference list is indicated by and the **Call Control** dialog opens.

*2)* Click on in the **Call Control** function window.

A file-download dialog opens via which you need to download the program required for the web conference.

*3)* Click on the **Apply** button in this dialog.

After successful download a security warning is displayed.

*4)* Confirm this security prompt with a click on the **Apply** button.

The connection to the web conference server is set up.

## 6.7.12 How to Initiate a Handover via DTMF Key

How to change a device you use in a conference:

***Step by Step***

*1)* Push the jkl 5 key.

*2)* Enter the phone number of the device you want to switch to.

*3)* Complete entering the phone number with the # key.

The entered phone number is announced for you to check.

***4)*** You are then prompted to continue with one of the following options:

- Push the 1 key to perform the handover,
- push the abc 2 key to abandon the process.

# 7 Rule interpreter - Routing Calls with Rules

The Rule interpreter of the *OpenScape UC Application* is a tool which analyzes the incoming calls automatically using customized rules and routes these calls to a determined contact or terminal.

> ***IMPORTANT:*** Members of a Multi-Line Hunt Group (MLHG) are not permitted to use the Rule interpreter or the *Rules* feature.

If you are out on business frequently and not able to accept your incoming calls personally, the Rule interpreter is a useful help for you. For example, you can specify that calls arriving during a meeting that takes place regularly once a week at a specific day and time are automatically routed to your secretary.

> ***NOTICE:*** Forwarding settings have priority over Rule interpreter settings. Conflicts between these settings may also occur. If you want to ensure that your rules are processed, you should deactivate call forwarding.

You can use the rule profile to control the routing of your incoming calls to other devices. Incoming-call routing may occur according to the following criteria:

- Depending on the caller's phone number
- Depending on the date or time at which the call comes in
- Depending on the setting of your presence status

You can activate a rule profile you have created by one of the following actions:

- Via the rule profile display combo box of the main menu by selecting the desired rule profile there
- Via the **Forwarding** function window
- Via the **main menu > menu > General ... > Common tab > Forwarding tab**

## 7.1 The Terminology of the Rule interpreter

This section mentions and describes the functional units which provide the functionality of the Rule interpreter and the understanding of which is important for the correct use of the Rule interpreter.

**Rule**

A rule defines how to handle incoming calls, e.g. if they are to be redirected or put through to your.

Redirecting the calls from preferred customers to the individual cell phone in case of absence.

The Rule interpreter executes only the rules assigned to an activated profile.

### Prioritization of Rules

Within a profile, rules can generally belong to one of three priority groups: **High** , **Normal** and **Low** . They are itemized in a list in the associated profile. The list of rules within a profile is processed from top to bottom. The higher the position of a rule in the list, the higher its priority in the executing order. If a profile contains several rules with the same priority, the rule with the highest position in the rule list is processed first. The following figure illustrates the processing of rules of different priority within an active profile.

Four rules of different priority have been assigned to profile 1. Rule 11 has the highest priority. Rule 12 and rule 13 have medium priority, with the priority of rule 12 within this profile being higher than the one of rule 13, as rule 12 is on a higher position in the list of rules than rule 13. Rule 14 has the lowest priority within this profile. If profile 1 is active and a call comes in, rule 11 is processed first. If it applies, the call is put through to your cell phone. In this case, the other rules are not checked. If rule 11 does not apply, rule 12 is processed as the next rule in the rule list. If it applies, the call is redirected to your secretary.

### Profile (Rule Profile)

The profile serves as rule container. It may contain one or several rules that can be prioritized against each other.

Only profiles may be activated, not individual rules. Consequently, a rule can only be executed if it was assigned to a profile.

**List of Persons**

There are many persons you might call. Assigning each single person to one or several rules can be tedious. Therefore it is useful to group these persons, e. g. *Family*, *Preferred Customers*, *Unwanted Callers*. The Rule interpreter offers lists of persons for this purpose. It is thus possible to integrate all members of your family in the *Family* list of persons. Several lists are possible.

Another advantage is that you can add further persons to each list and these persons are then automatically linked to the rule. The rule itself need not be modified.

You can use a date list to determine that a rule is only to apply on specific days. For example, a rule may only apply during your short breaks and your annual holiday. In this case you can define single days and also periods in this rule. So that you need not alter the rule when your holidays are rescheduled, you can also specify a date list and link it to the rule. You only need to modify the list then, but the rule itself remains unchanged.

## 7.2 Applying the Rule interpreter - Examples

The Rule interpreter supports you in the most different situations. The following three scenarios are examples and are intended to help your to better understand the functionality of Rule interpreter.

**Scenario 1: "In the office" - Redirecting calls depending on phone numbers**

In this scenario, all calls should basically go through to you. If, however, persons call that are itemized in your unwanted-callers list, these calls are to be routed to your secretary.

**Scenario 2: "In meeting" - Redirecting calls depending on presence status and phone numbers**

In this scenario, you take part in a company meeting. During the meeting, all calls are to be redirected automatically to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to you.

**Scenario 3: "On business trip" - Redirecting calls depending on date and time**

In this scenario, you are on a business trip and all calls during your absence are to be redirected to your secretary. If, however, preferred customers or a member of your family call, the call is to be routed to your cell phone. Your preferred customers may only call you from Monday to Friday 8:00 a.m. to 4:00 p.m.. You family may reach you any time.

**Realization**

You enable the mentioned sample scenarios in the Rule interpreter by specifying profiles, rules, list of persons and date lists. You can adapt these scenarios to suit your requirements or create new scenarios, thereby building your own body of rules.

## 7.2.1 Scenario 1: "In the Office"

In this example scenario, calls from determined phone numbers defined in the list of unwanted callers are to be redirected to your secretary.

To set up the scenario, you need:

- a new profile "Redirect unwanted calls"
- a new list of persons "Unwanted callers"
- a new rule "Redirect unwanted calls"

**Function**

When a new call arrives, the Rule interpreter checks automatically if the caller is on the list of persons "Unwanted callers". If so, the call is redirected to the secretary. If not, the call is put through.

### 7.2.1.1 Scenario 1: How to Create the "In the Office" Rule Profile

This section contains the step-by-step guide to creating the example rule profile "In the Office".

***Step by Step***

***1)*** Click **menu** in the main menu and select the **Rules...** menu option.

The **Rules** dialog opens.

***2)*** Create a new profile called ”In the Office”.

***a)*** Switch to the **Activate profile** tab.

***b)*** Click the **New** button.

A new list entry **New profile** is added to the **Profiles** list.

***c)*** Click on the **New profile** label.

The profile name is represented as entry field.

***d)*** Name the new profile "`In the office`" and push the **return key**.

The new profile is displayed with the new name "In the office" in the **Profiles** list.

---

***NOTICE:*** The "In the office" profile has been created. However, it does not contain any rules yet.

---

***3)*** Create the "Unwanted callers" list of persons.

***a)*** Switch to the **Lists of persons** tab.

The following window (example) is displayed.

***b)*** Click the **New** button under the **List of persons** section.

The entry **New list of persons** appears in the upper section of the **Lists of persons** tab.

***c)*** Click the **New list of persons** label.

The list of persons name is represented as entry field.

***d)*** Enter the name `"Unwanted callers"` for the list of persons and push the **return key** on your keyboard.

The list of persons "Unwanted callers" is displayed in the **List of persons** section. The list does not contain any person entries yet.

***4)*** Add persons to the list of persons "Unwanted callers".

Execute the following steps for all persons you wish to add to the list:

***a)*** Click the **New** button in the bottom section.

The following input dialog opens.

*b)* Specify the name of the desired person in the **Display name** input field.

*c)* In the **Phone/e-mail** input field, enter the phone number of the person.

*d)* Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons "Unwanted callers".

*5)* Create a new rule named "Redirect calls".

*a)* Switch to the **New/edit** tab.

*b)* Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

*c)* Click the **New rule** label.

The rule name is represented as entry field.

*d)* Enter the name `"Redirect calls"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect calls" appears in the **Rule** list.

*6)* Subsequently, perform the following settings for the rule "Redirect calls".

*a)* Set the priority of the rule "Redirect calls". To do so, activate the corresponding radio button, e. g. **Low**.

*b)* In the lower section, click **If call from**.

The following dialog opens.

*c)* Click on .

The following selection dialog opens.

*d)* Select the list of persons "Unwanted callers" and click the **Add** button.

The list of persons you selected has been added to the rule. The selection dialog closes.

*e)* Click on **OK**.

Your rule settings in the **If call from** section have been applied.

*f)* In the lower section, click **Action**.

The following window opens:

*g)* Click + for the **Redirect to** function.

The following input dialog opens:

*h)* Enter the secretary's name and phone number.

*i)* Click on **OK**.

The input dialog closes. The **Redirect to** function is active (■).

*j)* Click on **OK**.

The **Action** you have defined appears in the rule settings.

*k)* Click **Assigned profiles**.

The following selection dialog opens:

*l)* Select the profile "In the Office" and click **OK**.

The selection dialog closes. The profile "In the office" is displayed under **Assigned profiles**. The rule "Redirect calls" has been completely configured for its use in the profile "In the Office".

*7)* Close the Rules configuration dialog by clicking the **Close** button.

*8)* Activate the "In the office" profile.

*a)* Click on the combo box in the main menu.

A selection menu opens.

*b)* In this menu, select the rule profile "In the Office" marked by the symbol .

The symbol changes to . The "In the Office" profile is active.

You have created, configured and activated the "In the office" rule profile. For the routing of your incoming calls, the rules of this profiles are used.

## 7.2.2 Scenario 2: "In Meeting"

Supposed, you take part in a company meeting and have set your *OpenScape UC Application* presence status to **In meeting**. All calls during this meeting are redirected to your secretary. Calls from members of your family or preferred customers are redirected to your cell phone.

To set up the scenario, you need:

- a new profile "In meeting"
- a new list of persons "Family"
- a new list of persons “Preferred customers“
- a new rule “Put Through“
- a new rule "Redirect all"

**Function**

First, the rule "Put through" checks whether your presence status is "In meeting" and whether the call comes from a member of your family or a preferred customer. If so, the call is put through. If the conditions are not fulfilled, the call is routed to your secretary by the "Reroute All" rule.

The "Put through" rule must have a higher priority (e.g. Normal) as the "Redirect all" rule (e.g. Low). If not, the members of your family as well as the preferred customers would always reach your secretary as the "Put through" rule would never be applied.

### 7.2.2.1 Scenario 2: How to Create the "In meeting" Rule Profile

This section contains the step-by-step guide to creating the example rule profile "In meeting".

***Step by Step***

***1)*** Click **menu** in the main menu and select the **Rules...** menu option.

The **Rules** dialog opens.

***2)*** Create a new profile called "In meeting".

***a)*** Switch to the **Activate profile** tab.

***b)*** Click the **New** button.

A new list entry **New profile** is added to the **Profiles** list.

*c)* Click on the **New profile** label.

The profile name is represented as entry field.

*d)* Enter the name `"In meeting"` for the new profile and push the **return key**.

The new profile is displayed with the name "In meeting" in the **Profiles** list.

---

***NOTICE:*** The "In meeting" profile has been created. However, it does not contain any rules yet.

---

*3)* Create the list of persons "Family".

*a)* Switch to the **Lists of persons** tab.

The following window (example) is displayed.

*b)* Click the **New** button under the **List of persons** section.

The **New list of persons** entry appears in the **List of persons** list.

*c)* Click the **New list of persons** label.

The list of persons name is represented as entry field.

*d)* Enter the name `"Family"` for the list of persons and push the **return key** on your keyboard.

The list of persons "Family" is displayed in the **List of persons** section. The list does not contain any entries yet.

***4)*** Add a person to the list of persons "Family".

Execute the following steps for all persons you wish to add to the list:

***a)*** Click the **New** button in the bottom section.

The following input dialog opens.

***b)*** Specify the name of the desired person in the **Display name** input field.

***c)*** In the **Phone/e-mail** input field, enter the phone number or the e-mail address of that person.

***d)*** Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons "Family".

***5)*** Create the list of persons "Preferred customers".

***a)*** Click the **New** button under the **List of persons** section.

The entry **New list of persons** appears in the **List of persons** in the upper section of the **Lists of persons** tab.

***b)*** Click the **New list of persons** label.

The list of persons name is represented as entry field.

***c)*** Enter the name `"Preferred customers"` for the list of persons and push the **return key** on your keyboard.

The list of persons "Preferred customers" is displayed in the **List of persons** section. The list does not contain any entries yet.

***d)*** Add persons to the list of persons "Preferred customers".

***6)*** Create a new rule named "Put through".

***a)*** Switch to the **New/edit** tab.

***b)*** Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

***c)*** Click the **New rule** label.

The rule name is represented as entry field.

***d)*** Enter the name `"Put through"` for the new rule and push the **return key** on your keyboard.

The rule "Put through" appears in the **Rule** list.

*7)* Perform the following settings for the rule "Put through".

*a)* Set the priority of the rule "Put through". To do so, activate the corresponding radio button, e. g. **Normal**.

*b)* In the lower section, click **If call from**.

The following dialog opens.

*c)* Click on .

A selection dialog opens which features the existing lists of persons.

*d)* Select the lists of persons "Family" and "Preferred customers".

*e)* Click on the **Add** button.

The selected lists of persons have been added to the rule. The selection dialog closes.

*f)* Click on **OK**.

Your rule settings in the **If call from** section have been applied.

*g)* In the lower section, click **If my status is**.

A selection dialog opens which allows you to set the desired presence status.

*h)* Activate the **"In meeting"** checkbox and click **OK**.

The selection dialog closes.

*i)* Keep the default setting **Put straight through** under **Action**.

*j)* Click **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

*k)* Select the profile "In meeting" and click **OK**.

The selection dialog closes. The profile "In meeting" is displayed under **Assigned profiles**. The rule "Put through" has been completely configured for its use in the profile "In meeting".

*8)* Create another new rule named `"Redirect all"`.

*a)* Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

*b)* Click the **New rule** label.

The rule name is represented as entry field.

*c)* Enter the name `"Redirect all"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect all" appears in the **Rule** list.

*9)* Perform the following settings for the rule "Redirect all".

*a)* Set the priority of the rule "Redirect all". To do so, activate the corresponding radio button, e. g. **Low**.

*b)* Under **If call from**, keep the default setting **All**.

*c)* In the lower section, click **If my status is**.

A selection dialog opens which allows you to set the desired presence status.

*d)* Activate the **In meeting** checkbox and click **OK**.

The selection dialog closes.

*e)* In the lower section, click **Action**.

The following window opens:

*f)* Click + for the **Redirect to** function.

The following input dialog opens:

*g)* Enter the secretary's name and phone number.

*h)* Click on **OK**.

The input dialog closes. The **Redirect to** function is active ( ).

*i)* Click on **OK**.

The **Action** you have defined appears in the rule settings.

*j)* Click **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

*k)* Select the profile "In meeting" and click **OK**.

The selection dialog closes. The profile "In meeting" is displayed under **Assigned profiles**. The rule "Redirect all" has been completely configured for its use in the profile "In meeting".

*10)* Close the **Rules** dialog by clicking the **Close** button.

*11)* Activate the "In meeting" profile.

*a)* Click on the combo box in the main menu.

A selection menu opens.

*b)* In this menu, select the rule profile "In meeting" marked by the symbol .

The symbol changes to . The "In meeting" profile is active.

You have created, configured and activated the "In meeting" rule profile. For the routing of your incoming calls, the rules of this profiles are used.

## 7.2.3 Scenario 3: "On Business Trip"

You are on a business trip for a week. During this time, all calls from members of your family and preferred customers are to be redirected to your cell phone and the rest of calls to your secretary. Your family should always be able to reach you, the preferred customers, however, only during the business hours from 08:00 a.m. to 4:30 p.m.

To set up the scenario, you need:

- a new profile "On Business trip"
- a new list of persons "Family"
- a new list of persons “Preferred customers“
- a date list "Business trip"
- a new rule "Redirect family"
- a new rule “Redirect preferred customers“
- a new rule "Redirect all"

**Function**

First, the "Redirect family" rule checks whether the call comes from a member of your family. If so, the call is redirected to your cell phone. If not, the "Reroute preferred customers" rule will check whether the call comes from a preferred customer and whether he/she calls between 08:00 a.m. and 4:30 p.m. If both conditions are met, the caller is routed to your cell phone. However, if a preferred customer dials your number outside business hours (8:00 a.m. to 4:30 p.m.), the call is redirected to the secretary by the "Redirect all" rule.

The order of rules is important: The "Redirect family" rule has the highest priority, the "Redirect preferred customers" rule has medium priority and the "Redirect all" rule has the lowest priority. If, for example, the "Reroute all" rule came in second position, you could be reached by your family but the preferred customers would always talk to your secretary as the "Reroute preferred customers" rule would never be applied.

### 7.2.3.1 Scenario 3: How to Create the "On Business Trip" Rule Profile

This section contains the step-by-step guide to creating the example rule profile "On Business Trip".

***Step by Step***

***1)*** Click **menu** in the main menu and select the **Rules...** menu option.

The **Rules** dialog opens.

***2)*** Create a new profile called ”On Business Trip”.

***a)*** Switch to the **Activate profile** tab.

***b)*** Click the **New** button.

A new list entry **New profile** is added to the **Profiles** list.

***c)*** Click on the **New profile** label.

The profile name is represented as entry field.

***d)*** Enter the name `"On Business Trip"` for the new profile and push the **return key**.

The new profile is displayed with the new name "On Business Trip" in the **Profiles** list.

---

***NOTICE:*** The "On Business Trip" profile has been created. However, it does not contain any rules yet.

---

***3)*** Create the list of persons "Family".

***a)*** Switch to the **Lists of persons** tab.

The following window (example) is displayed.

***b)*** Click the **New** button under the **List of persons** section.

The **New list of persons** entry appears in the **List of persons** list.

***c)*** Click the **New list of persons** label.

The list of persons name is represented as entry field.

***d)*** Enter the name "Family" for the list of persons and push the **return key** on your keyboard.

The list of persons "Family" is displayed in the **List of persons** section. The list does not contain any person entries yet.

***4)*** Add persons to the list of persons "Family".

Execute the following steps for all persons you wish to add to the list:

***a)*** Click the **New** button in the bottom section.

The following input dialog opens.

*b)* Specify the name of the desired person in the **Display name** input field.

*c)* In the **Phone/e-mail** input field, enter the phone number of that person.

*d)* Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons.

*5)* Create the list of persons "Preferred customers".

*a)* Click the **New** button under the **List of persons** section.

The **New list of persons** entry appears in the **List of persons** list.

*b)* Click the **New list of persons** label.

The list of persons name is represented as entry field.

*c)* Enter the name `"Preferred customers"` for the list of persons and push the **return key** on your keyboard.

The list of persons "Preferred customers" is displayed in the **List of persons** section. The list does not contain any entries yet.

*d)* Add persons to the list of persons "Preferred customers".

*6)* Create the date list "Business trip".

*a)* Switch to the **Date lists** tab.

The following window (example) is displayed.

*b)* Click on the **New** button under the **Date list** section.

The entry **New date list** appears in the **Date list** section of the **Date lists** tab.

*c)* Click the **New date list** label.

The data list name is represented as entry field.

*d)* Enter the name "Business trip" for the date list and push the **return key** on your keyboard.

The date list "Business trip" is displayed in the **Date list** section. The list does not contain any date entries yet.

*7)* Add a date information to the "Business trip" date list.

*a)* Click the **New** button in the bottom section.

The following input dialog opens.

*b)* In the **Display name** input field, enter an expressive name for the date information.

*c)* Select the start date (**from**) in the left calendar section.

*d)* Select the end date (**to**) in the right calendar section.

*e)* Click on **OK**.

The input dialog closes. The new date entry has been integrated in the date list "Business trip".

*8)* Create a new rule named "Redirect family".

*a)* Switch to the **New/edit** tab.

*b)* Click the **New** button in the upper section.

In the **Rule** section, a new rule named **New rule** is displayed.

*c)* Click the **New rule** label.

The rule name is represented as entry field.

*d)* Enter the name `"Redirect family"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect family" appears in the **Rule** list.

*9)* Perform the following settings for the rule "Redirect family".

*a)* Set the priority of the rule "Redirect family". To do so, activate the corresponding radio button, e. g. **High**.

*b)* In the lower section, click **If call from**.

The following dialog opens.

***c)*** Click on .

A selection dialog opens which features the existing lists of persons.

***d)*** Select the list of persons "Family".

***e)*** Click on the **Add** button.

The selected list of persons has been added to the rule. The selection dialog closes.

***f)*** Click on **OK**.

Your rule settings in the **If call from** section have been applied.

***g)*** Click **If date/time**.

The following configuration dialog opens:

***h)*** Click  in the **Date** section.

A selection dialog opens which features the existing date lists.

*i)* Select the date list "Business trip".

*j)* Click on the **Add** button.

The selection dialog closes. The date list "Business trip" is displayed in the **Date** section.

*k)* Click the **OK** button in the configuration dialog.

The configuration dialog closes.

*l)* In the lower section of the **New/edit** tab, click **Action**.

The following window opens:

*m)* Click + for the **Redirect to** function.

The following input dialog opens:

*n)* Under **Display name**, enter, for example, Cell phone, and under Phone, the phone number of your cell phone.

*o)* Click on **OK**.

The input dialog closes. The **Redirect to** function is active (■).

*p)* Click on **OK**.

The **Action** you have defined appears in the rule settings.

*q)* Click **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

*r)* Select the profile "On Business Trip" and click **OK**.

The selection dialog closes. The profile "On Business Trip" is displayed under **Assigned profiles**. The rule "Redirect family" has been completely configured for its use in the profile "On Business Trip".

***10)*** Create another new rule named “Reroute preferred customers“.

***a)*** In the upper section of the **New/edit** tab, click the **New** button.

In the **Rule** section, a new rule named **New rule** is displayed.

***b)*** Click the **New rule** label.

The rule name is represented as entry field.

***c)*** Enter the name `"Redirect preferred customers"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect preferred customers" appears in the **Rule** list.

***11)*** Perform the following settings for the rule "Redirect preferred customers".

***a)*** Set the priority of the rule "Redirect preferred customers" by activating the corresponding radio button, e.g. **Normal**.

***b)*** In the lower section, click **If call from**.

***c)*** In the dialog that opens, click .

A selection dialog opens which features the existing lists of persons.

***d)*** Select the list of persons "Preferred customers".

***e)*** Click on the **Add** button.

The selected list of persons has been added to the rule. The selection dialog closes.

***f)*** Click on **OK**.

Your rule settings in the **If call from** section have been applied.

***g)*** Click **If date/time**.

The following configuration dialog opens:

***h)*** Click  in the **Date** section.

A selection dialog opens which features the existing date lists.

*i)* Select the date list "Business trip".

*j)* Click on the **Add** button.

The selection dialog closes. The date list "Business trip" is displayed in the **Date** section.

*k)* Activate the checkboxes **Mo**, **Tu**, **We**, **Th**, **Fr** to define on which days of the week to apply the rule "Redirect preferred customers".

*l)* Click + in the **Time** section.

The following input dialog opens.

*m)* For the **Time range**, enter, for example, under **from** 08:00 a.m. and under **to** 4:30 p.m.

*n)* Click on **OK**.

The input dialog closes. The configured time range is displayed in the **Time** section.

*o)* Click on **OK**.

The configuration dialog closes. Your settings are applied.

*p)* In the lower section, click **Action**.

The following window opens:

*q)* Click + for the **Redirect to** function.

The following input dialog opens:

*r)* Enter the secretary's name and phone number.

*s)* Click on **OK**.

The input dialog closes. The **Redirect to** function is active ( ).

*t)* Click on **OK**.

The **Action** you have defined appears in the rule settings.

*u)* Click **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

*v)* Select the profile "On Business Trip" and click **OK**.

The selection dialog closes. The profile "On Business Trip" is displayed under **Assigned profiles**. The rule "Redirect preferred customers" has been completely configured for its use in the profile "On Business Trip".

*12)* Create another new rule named "Redirect all".

*a)* In the upper section of the **New/edit** tab, click the **New** button.

In the **Rule** section, a new rule named **New rule** is displayed.

*b)* Click the **New rule** label.

The rule name is represented as entry field.

*c)* Enter the name `"Redirect all"` for the new rule and push the **return key** on your keyboard.

The rule "Redirect all" appears in the **Rule** list.

*13)* Perform the following settings for the rule "Redirect all".

*a)* Set the priority of the rule "Redirect all" by activating the corresponding radio button, e.g. **Lowl**.

*b)* Under **If call from**, keep the default setting **All**.

*c)* In the lower section, click **Action**.

The following window opens:

*d)* Click + for the **Redirect to** function.

The following input dialog opens:

*e)* Enter the secretary's name and phone number.

*f)* Click on **OK**.

The input dialog closes. The **Redirect to** function is active (■).

*g)* Click on **OK**.

The **Action** you have defined appears in the rule settings.

*h)* Click **Assigned profiles**.

A selection dialog opens which allows you to set the desired rule profile already defined.

*i)* Select the profile "On Business Trip" and click **OK**.

The selection dialog closes. The profile "On Business Trip" is displayed under **Assigned profiles**. The rule "Redirect all" has been completely configured for its use in the profile "On Business Trip".

*14)* Close the Rules dialog by clicking the **Close** button.

*15)* Activate the “On Business Trip” profile.

*a)* Click on the combobox in the main menu.

A selection menu opens.

*b)* In this menu, select the rule profile "On Business Trip" marked by the symbol .

The symbol changes to . The "On Business Trip" profile is active.

You have created, configured and activated the "On Business Trip" rule profile. For the routing of your incoming calls, the rules of this profiles are used.

## 7.3 Functions and Interface of the Rule interpreter

This section contains reference information for the Rule interpreter tool. It is intended to serve as reference for the functions and the user interface of the Rule interpreter. The settings you see in the figures are examples and need to be replaced with the scenario settings or your own ones.

All dialogs in which you define profiles, rules, lists of persons and date lists can be invoked via the main menu under **menu > Rules ...**.

### 7.3.1 How to Creating a New Profile

This section describes how to create a new profile. The rules already created or to be created are grouped under a profile.

***Step by Step***

*1)* Open the **Rules** dialog via the **main menu > menu > Rules ...**.

*2)* Switch to the **Activate profile** tab.

*3)* Click the **New** button.

In the **Profiles** section, a profile named **New profile** is created.

*4)* Click the name **New profile** to change it.

The profile name is represented as entry field.

*5)* Enter the new name and push the **return key**.

The profile name should now reflect your change. The new profile has been created. However, it has not been assigned any rules yet.

The new profile has been created. However, it has not been assigned any rules yet.

## 7.3.2 How to Create a New Rule

This section describes the steps for creating a new call rule and for specifying your settings. The entries you see in the figures are examples. The settings can be performed as described in the example scenarios. But you can also customize the settings.

How to create a new rule:

***Step by Step***

*1)* Open the **Rules** dialog via the **main menu > menu > Rules ...**.

*2)* Switch to the **New/edit** tab.

*3)* Click the **New** button.

In the **Rule** section, a new rule named **New rule** is displayed.

*4)* Click the **New rule** label.

The rule name is represented as entry field.

*5)* Enter the desired name for the new rule and push the **return key** on your keyboard.

The rule name should now reflect your change.

*6)* Configure the newly created rule.

*a)* Activate one of the radio buttons **High**, **Normal** or **Low** to define the priority group for the rule.

Your setting will be applied and saved automatically. The priority group of the new rule is also adapted automatically in the **Rule** section.

*b)* Click **If call from** to define one or more phone numbers for incoming calls.

*c)* Click **If date/time** to define the date and the time for which the rule is to apply.

*d)* Click **If my status is** to set the dependency of the rule on your presence status.

*e)* Click on **Action** to define whether the incoming call from the phone number set under **If call from** is to be put through or forwarded.

*f)* Click on **Assigned profiles** to assign the rule to one or more already defined profiles.

The new rule has been created and configured.

## 7.3.3 How to Specify Rule Priorities

This section describes the steps to define the priority of a new call rule within a profile. Each rule is assigned to a priority group. The priority groups are **High**, **Normal** and **Low**. The rules of the **High** priority group are always processed first. Within a profile the rules of a priority group are also prioritized against each other and are processed from top to bottom. The priority groups are specified on the **New/edit** tab and the priorities within a profile are defined on the **Activate profile** tab.

***Prerequisites***

- You have created at least one profile.
- Your have assigned at least two rules of the same priority group (**High**, **Normal** or **Low**) to this rule profile.

***Step by Step***

*1)* Open the Rules dialog via the **main menu > menu > Rules ...**.

*2)* Switch to the **Activate profile** tab.

*3)* Select the profile that you would like to define rule priorities for.

All rules linked to this profile are displayed in the Rules of profile field.

*4)* If several rules of the same priority group are assigned to the rule profile your selected, select one of the rules the priority of which you would like to change in the priority group.

*5)* Click on ▽ or △ to move the rule up or down in the list.

By moving the rule up, its priority increases within the group and it will be processed earlier.

## 7.3.4 How to Create a New List of Persons

This section explains how to create a new list of persons. By using lists of persons, callers are divided in groups and linked to a rule. If you wish to link a caller to a rule, the caller must simply be added to a list of persons. The rule itself need not be modified.

How to create a new list of persons:

***Step by Step***

*1)* Click **menu** in the main menu and select the **Rules...** option.

The **Rules** dialog opens.

*2)* Switch to the **Lists of persons** tab.

The following window (example) is displayed.

*3)* Click the **New** button under the **List of persons** section.

A new list of persons named **New list of persons** is displayed.

*4)* Click the name **New list of persons** to modify the name of the list of persons.

The list of persons name is represented as entry field.

*5)* Enter the new name for the list of persons and press **Enter** on your keyboard.

The name of the list of persons should now reflect your change: It does not contain any person entries yet.

*6)* Add an entry to the list of persons.

Execute the following steps for all persons you wish to add to the list:

*a)* Click the **New** button in the bottom section.

The following input dialog opens.

*b)* Specify the name of the desired person in the **Display name** input field.

*c)* In the **Phone/e-mail** input field, enter the phone number or the e-mail address of that person.

*d)* Click on **OK**.

The input dialog closes. The new person entry has been integrated in the list of persons.

The new list of persons has been created and contains the desired person entries. However, it cannot be used by the Rule interpreter as it has not been assigned to a rule yet.

## 7.3.5 Creating a Date List

This section explains how to create a new date list. By using date lists, date information is divided in groups and linked to a rule. If you wish to link a date to a rule, the date must simply be added to a date list. The rule itself need not be modified.

How to create a new data list:

***Step by Step***

*1)* Click **menu** in the main menu and select the **Rules...** option.

The **Rules** dialog opens.

*2)* Switch to the **Date lists** tab.

The following window (example) is displayed.

*3)* Click on the **New** button under the **Date list** section.

A new date list named **New date list** is displayed.

*4)* Click the name **New date list** to modify the data list name.

The data list name is represented as entry field.

*5)* Enter a new name for the date list and push the **return key** on your keyboard.

The date list name should now reflect your change. It does not contain any date information yet.

*6)* Add an entry to the date list.

*a)* Click the **New** button in the bottom section.

The following input dialog opens.

*b)* In the **Display name** input field, enter an expressive name for the date information.

*c)* Select the start date (**from**) in the left month display.

The start date you have defined (**from**) appears above the left calendar.

*d)* If you would like to define an end date, activate the **to** checkbox.

The right calendar is displayed.

*e)* Select the end date (**to**) in the right month display.

The end date you have defined (**to**) appears above the right month display.

*f)* Click on **OK**.

The input dialog closes. The new date information has been integrated in the date list.

The date list has been created. However, it has not been assigned to a rule yet.

## 7.3.6 How to Define the Time for a Rule

Rules may apply for determined days (defined e.g. in date lists) and/or for determined days of the week and/or for determined times. This section describes how to set for a rule the day of the week and the time the rule is to apply for.

***Prerequisites***

- You have already created at least one rule.

***Step by Step***

*1)* Click **menu** in the main menu and select the **Rules...** option.

The **Rules** dialog opens.

*2)* Switch to the **New/edit** tab.

*3)* Select the rule for which you would like to define a day of the week and a time.

In the bottom area of the tab, the rule settings are displayed.

***4)*** Click **If date/time**.

The following dialog opens:

***5)*** Activate the checkbox(es) of the desired day(s) of the week.

***6)*** Click + in the **Time** section.

The following input dialog opens.

***7)*** In the **from** input field, enter the desired start time. The valid format for the time input is `hour:minutes` (e.g. `00:00`).

***8)*** In the **to** input field, enter the desired end time. The valid format for the time input is the same as for the **from** input field.

***9)*** Click on **OK**.

The input dialog closes. The configured time is displayed in the **Time** section of the dialog.

***10)*** Click on **OK**.

The dialog closes.

The performed settings have been applied and saved. Your time information for the selected rule appears on the **New/edit** tab under **If date/time**.

## 7.3.7 How to Activate a Rule Profile

So that a profile and the rules linked to it can take effect, it must be activated.

***Step by Step***

*1)* Click on the combo box in the main menu.

A selection menu opens.

*2)* In this menu, select the desired rule profile marked by the symbol .

The symbol changes to .

The selected profile is active.

## 7.3.8 How to Deactivate a Rule Profile

Deactivate an active rule profile to accept your calls as usual in your workplace.

***Step by Step***

*1)* Click on the combo box in the main menu.

A selection menu opens.

*2)* Select **Deactivate rule profile**.

The selected profile is inactive.

## 7.3.9 "Activate profile" Tab

You can use this tab to manage profiles. Forexample, you can create a new profile, delete a profile or change the priority of individual, assigned rules.

**Invoking the dialog**

Click on menu in the main menu and select the **Rules...** option. The **Rules** settings dialog opens. Switch to the **Activate profile** tab. The dialog may look like this, for example:

The **Activate profile** tab is divided into two sections:

- **Profiles** - All configured rule profiles are listed here.
- **Rules of profile:** - The rules assigned to a profile selected in the **Profiles** section are listed here.

### Operating elements in the "Profiles" section

This section may look like this, for example:

This section offers access to the following functions:

- - You activate/deactivate the profile by clicking this button that precedes the profile name. An active profile is indicated by .
- - Click this button to modify the name of a profile.

  ***NOTICE:*** You can also directly click the name of the profile to rename it.

- - Click this button to view information about the profile: the rules to which the profile is linked and the functions of these rules.
- - Click this button to delete a profile.
- **New** button - Click this button to create a new profile.

- **Duplicate** button - With a click on the **Duplicate** button, you can create a new profile by duplicating an already existing profile.

### Operating elements in the "Rules of profile" section

This section may look like this, for example:

This area shows the rules, with priority groups marked as follows: - **High**, - **Normal**, - **Low**. This area offers access to the following functions:

- - Click this button to move the selected rule up.
- - Click this button to move the selected rule down.

> ***NOTICE:*** A rule can only be moved up and down within the same priority group (high, normal or low).

- - Click this button to assign new rules to the profile. The following dialog opens:

In this dialog box, all available rules are listed. Activate the corresponding check box and click **OK** to assign the desired rule(s) to the currently selected profile.

- - Click this button to edit the rule settings. The dialog box changes to the **New/edit** tab.
- - Click this button to remove the selected rule from the profile. The rule still exists, but is no longer linked to this profile.
- **New rule** button - Click the **New rule** button to create a new rule for the current profile. The dialog box changes automatically to the **New/edit** tab.

- **Undo** button - Click this button to undo the changes made to the rules of the corresponding profile.

## 7.3.10 "New/edit" Tab

You can use this tab to manage and configure rules. You may, for example, create and configure a new rule, delete an existing rule or change your settings.

---

***NOTICE:*** Note that a rule can only be executed if it is assigned to a rule profile.

---

### Invoking the dialog

Click on menu in the main menu and select the Rules... option. The configuration dialog box Rules with the **New/edit** tab opens. By default, this tab looks as follows:

The **New/edit** tab is divided into two sections:

- **Rule** - This section lists all the rules you have configured for call forwardings.
- Rule settings - The settings of a rule selected in the **Rule** section are displayed here.

### Operating elements in the "Rule" section

This section may look like this, for example:

This section offers access to the following functions:

- - Click this button to modify the name of a rule.

  ***NOTICE:*** You can also directly click the name of the rule list to rename it.

- - Click this button to delete a profile.
- **New** button - Click this button to create a new rule.
- **Duplicate** button - With a click on the **Duplicate** button, you can create a new rule by duplicating an already existing rule.

### Operating elements in the rule settings section

This section may look like this, for example:

This section offers access to the following functions:

- Define the priority group - For each rule, you can define the following priority groups by activating the corresponding radio button: - High, - Normal, - Low.
- With a click on this icon the rule settings are summarized in a separate dialog box.
- - By clicking this icon, the selected rule is set to the highest priority and added to all profiles.

You expect a phone call from your garage and you want this call be routed to your cell phone at any rate and any time, no matter which profile is currently active. You thus need not modify each single profile.

> ***NOTICE:*** To undo this function, you can either delete the affected rule ( ✕ ) or deactivate the checkboxes for each profile via the rule setting **Assigned profiles**.

- - Click this button to open the editing dialog box of the corresponding rule setting.
- - After clicking this icon the respective rule setting is reset to its default value.
- **Undo** button - Click this button to undo the changes made to a rule.

**Rule settings**

For each rule you can specify the following settings:

- **If call from**
- **If date/time**
- **If my status is**
- **Action**
- **Assigned profiles**

Click or simply the corresponding line to open a dialog for each of these settings where you can perform the corresponding rule setting.

### 7.3.10.1 If Call from

Use this setting to determine for which callers the rule is to apply. This setting allows you to link a list of persons or individual person entries to a rule.

In the lower section of the **New/edit** tab, click on the icon of the **If call from** entry or on the entry itself to open the following dialog box:

This dialog box displays a list of all callers for which the respective rule is to apply.

The dialog allows you to access the following features:

- - Click this button to add one or more persons from an existing list of persons to the rule. The following dialog opens:

  The following operating elements are available in this dialog:
  - Add from list - This combo box provides a list of all available lists of persons.
  - Combo box - To select the person entries
  - Add - Click this button to add the selected persons to the rule and close the dialog box.
  - Cancel - Click this button to close the dialog and dismiss the settings made.
- - Click this button to assign an already defined list of persons to the rule. The following dialog opens:

  The following operating elements are available in this dialog:
  - Checkboxes - To select the person entries
  - Add - Click this button to add the selected persons to the rule and close the dialog box.
  - Cancel - Click this button to close the dialog and dismiss the settings made.
- - Click this button to search the configured directories for a determined person and add him/her subsequently to the rule. The following dialog opens:

In the following input fields, enter the desired search criteria:

- Name - Search for a person via his/her last name
- First name - Search for a person via his/her first name
- Phone - Search for a person via his/her phone number
- Address group - If you have grouped your contacts in address groups, you can enter here the address group the person you are looking for belongs to.
- Address book - Specify here the address book in which you want to search.
- Max. matches - Specify here how many hits are to be displayed at the most in the search hit list.

The following icons show whether a contact has been found in an external directory, a global or a private contact list:

| | |
|---|---|
| | The contact information was found in an external directory. |
| | The contact information originates from the global contact directory of the *OpenScape UC Application*. |
| Empty | The contact information originates from your private *OpenScape UC Application* address book. |

The following operating elements are available in this dialog:

- - Click this icon to integrate a selected user from the search hits list in your *OpenScape UC Application* contact directory. The Add entry to contact list dialog opens; it contains the existing contact data. You can complete the data or simply add the contact to your contact list by clicking the **OK** button.

---

***NOTICE:*** This function is not permitted for selected search hits from your private *OpenScape UC Application* address book.

---

- - Click this button to delete a found contact coming from your private *OpenScape UC Application* contact list.

  ***NOTICE:*** This function is not permitted for selected search hits from a directory.

- - Click this button to edit a found contact coming from your private *OpenScape UC Application* contact list. The **Change entry in the contact list** dialog opens with the already existing user data. You can make the desired changes.

  ***NOTICE:*** This function is not permitted for selected search hits from a directory.

- - Click this button to view the existing information for a user you have been looking for. It is displayed in the **Lookup person** dialog that opens.
- - Click this button to save the contact entries found locally on your computer.
- - Click this button to print the contact entries found in table form.
- - Click this button to reset or delete all search criteria entered.

- - Click this button to define person entries and add them directly to the rule. Use the following dialog that opens to define for a new person a **Display name**, a **Phone** number and an **E-mail** address.

After having assigned to the rule a person and a list of persons, the dialog box may look like this:

You can apply the following actions to a person entry:

- - Click this button to change the date for the existing person entry.
- - Click this button to remove the corresponding person entry from the list of callers for this rule. The person entry will be deleted from the list for the rule setting **If call from**, but will stay in the list of persons **Recently used** defined by default, so that it can be reused, if required.
- - Click this button to remove a list of persons assigned to the rule from the list.

### 7.3.10.2 If Date/Time

Use this setting to specify for which period, on which weekdays and at which time the rule is to apply. This setting allows you to link a date list or individual date information to a rule.

In the lower section of the **New/edit** tab, click on the icon of the **If date/time** entry or on the entry itself to open the following dialog box:

The dialog box is divided into the following sections:

- **Date -** In this section, define in which period the rule is to apply, e.g. 26 June to 12 August.
- **Weekday -** In this section, define the weekdays on which the rule is to apply within the time range specified, e.g. only from Monday to Friday.
- **Time -** In this section, configure at which time the rule is to apply, e.g. from 3:00 p.m. to 4:00 p.m.

The settings shown in the following dialog as an example mean that the current forwarding rule is to apply from 26 June to 12 August, but only from Monday to Friday between 3:00 p.m. and 4:00 p.m.

The following operating elements are available in this dialog:

- **Use mobile time -** Activate this check box to determine that Rule interpreter may have to consider time zone differences when applying this rule. This is for example useful when you are in another time zone and would like to work with the *OpenScape UC Application* client from there.

  ***NOTICE:*** Make sure that you have set the correct time zone in the main menu **menu > General ... > Common tab > Appearance tab** under **Mobile time zone**.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

### Operating elements in the "Date" section

The following operating elements are available in this section:

- - Click this button to add an already defined date list to the rule. The following dialog opens:

  

  Activate the desired combo boxes and click the **Add** button to apply your settings directly.

- - Click this button to enter date information and add it directly to the rule. The following dialog opens:

  

  To set the date, the following operating elements are available:

  – **Display name - In this input field, enter an expressive name for the date entry.**

- **from** - In this calendar, the current date is marked by default by a light blue rectangle. Click on the desired date in this calendar to define the start date for the date list or rule. It is marked by a dark blue rectangle and appears next to the **from** label.
- **to -** By default, this combo box is not activated and the calendar data in this section are hidden. Activate this combo box to show this calendar. Select the desired date in this calendar to define the end date for the date list or rule. It is marked by a dark blue rectangle in the calendar and appears next to the **to** label.

Operating elements in the **from**/**to** calendar sections:

- - Click this button to move one month back.
- - Click this button to move one month forward.
- - Click this button to return to the current month.
- - Click this button to move one year back.
- - Click this button to move one year forward.

- - Click this button to modify an already defined date entry.
- × - Click this button to remove a date entry from the rule.

**Operating elements in the "Time" section**

The following operating elements are available in this section:

- + - Click this button to enter the desired time in the format `hour:minutes` (e.g. 15:40) directly in the following dialog box.

- - Click this button to modify an already defined time.
- × - Click this button to remove an already defined time.

## 7.3.10.3 If my Status is

Use this setting to specify for which of your personal presence statuses a rule should apply.

In the lower section of the **New/edit** tab, click on the icon of the **If my status is** entry or on the entry itself to open the following dialog:

The following operating elements are available in this dialog:

- **If my status is** - This checkbox is automatically activated if at least one presence status is set.
- Combo box to select the presence status as a criterion for a rule. The following table provides an overview of the available presence statuses and their meanings:

| Status | Description |
|---|---|
| | Signal for the other *OpenScape UC Application* users that you can be reached at your workstation. |
| | Signal for the other *OpenScape UC Application* users that you cannot be reached at your workstation. |
| | Signal for the other *OpenScape UC Application* users that you are at your workstation but do not want to be disturbed. |
| | Signal for the other *OpenScape UC Application* users that you have left your workstation for a short period. |
| | Signal for the other *OpenScape UC Application* users that you can be reached at your workstation but only want to be disturbed in urgent cases. |
| | Signal for the other *OpenScape UC Application* users that you are currently in a meeting and cannot be reached. |

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog and dismiss the settings made.

### 7.3.10.4 Action

Use this setting to determine the person to receive forwarded calls when the rule is applied.

In the lower section of the **New/edit** tab, click on the icon of the **Action** entry or on the entry itself to open the following dialog box:

The dialog allows you to access the following features:

- **Put straight through** - With this option being active (■), all incoming calls are put through to the currently set device from your device list.
- **Redirect to** - Activate this combo box (■) to configure the device or person to direct your incoming calls to. The calling subscriber sees the phone number of the device to which the call has been routed.
  You can perform this setting by one of the following actions:
  - ▼ - Click the small triangle of this combo box to open the selection menu that contains the forwarding destinations used last. Select your forwarding destination in there.
  - ✎ - Click this button to modify the name and the phone number for an already defined forwarding destination in the following dialog box.

  - 📄 - Click this button to add one or more persons from an existing list of persons to the rule as forwarding destination. The following dialog opens:

  Activate the corresponding check box and click the **Add** button to add the selected person to the rule as forwarding destination.

– - Click this button to search the configured directories for a determined person and add him/her subsequently to the rule as forwarding destination as well as to the **Forwarding destinations** list. The following dialog opens:

The search hit is then copied and becomes directly the forwarding destination for the rule and is added automatically to the list of forwarding destinations.

– - A click on this button lets you define directly a new forwarding destination. The following dialog box opens which allows you to define for the forwarding destination a display name and a phone number.

- **Use preferred device** - Activate this check box ( ) to set the forwarding destination for incoming calls in a way that the calling subscriber sees your *one-number service* number and not the phone number to which the call has been routed.

  ***NOTICE:*** You can perform this setting by using one of the actions described for the **Redirect to** option.

- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

### 7.3.10.5 Assigned Profiles

Use this setting to assign the rule you are currently editing to the desired profile. This makes the rule executable at all. The profile must have been already defined. A profile entered in boldface is currently active. Multiple profiles can be assigned to a rule.

In the lower section of the **New/edit** tab, click on the icon of the **Assigned profiles** entry or on the entry itself to open the following dialog box:

The following operating elements are available in this dialog:

- By activating the check box that precedes the desired profile, a profile is assigned to the rule.
- **OK -** Click this button to save all settings made and close the dialog.
- **Cancel -** Click this button to close the dialog without saving the settings made.

## 7.3.11 "Lists of persons" Tab

You can use this tab to manage lists of persons. Via the **If call from** and **Action** options on the **New/edit** tab, you can link a list of persons to a rule. Only then, it is considered by theRule interpreter. In this way you create rules that route calls from specific subscribers to the device you defined for this purpose.

#### Invoking the dialog

In the main menu, select **menu > Rules ...**. The configuration dialog **Rules** opens. Switch to the **Lists of persons** tab. As long as you do not change anything, this tab looks as follows by default:

The **List of persons** tab is divided into two sections:

- **List of persons** - All configured lists of persons are listed here.
- **Persons from list:** - All person entries assigned to a list of persons selected in the **List of persons** section are displayed here.

### Operating elements in the "List of persons" section

This section may look like this, for example:

By default, this section features the following two lists of persons:

- **Recently used** - The following devices or persons are automatically integrated in this list of persons:
  - All devices or persons that you have newly integrated in one of your lists of persons.
  - The phone numbers you have defined for the **If call from** rule setting on the **New/edit** tab.

- **Forwarding destinations** - In this list of persons, all devices or persons are integrated automatically that you have defined as forwarding destinations for the **Action** rule setting on the **New/edit** tab.

> ***NOTICE:*** You can only edit the predefined lists of persons **Recently used** and **Forwarding destinations**, i. e. add new persons to the lists, delete persons from the lists and modify existing person's data (e. g. phone number). You cannot delete the two lists of persons.

The following operating elements are available in the **List of persons** section:

- - Click this button to modify the name of a list of persons.

> ***NOTICE:*** You can also directly click the name of the list of persons list to rename it.

- - Click this button to remove a list of persons from the list.
- **New** button - Click this button to create a new list of persons.
- **Duplicate** button - With a click on the **Duplicate** button, you can create a new list of persons by duplicating an already existing list of persons.

**Operating elements in the "Persons from list" section**

This section may look like this, for example:

The following operating elements are available in the **Persons from list** section:

- - Click this button to integrate determined persons from already created or existing lists of persons in the current list of persons. The following dialog opens:

The following operating elements are available in this dialog:

- **Add from list** - This combo box provides a list of all available lists of persons.
- Checkbox to select the person entries
- **Add** - Click this button to add the selected persons to the list of persons and close the dialog.
- **Cancel** - Click this button to close the dialog and dismiss the settings made.

- - Click this button to search the configured directories for a determined person and add him/her subsequently to the current list of persons. The following dialog opens:

In the following input fields, enter the desired search criteria:

| | |
|---|---|
| **Name** | Search for a person via his/her last name |
| **First name** | Search for a person via his/her first name |
| **Telephone** | Search for a person via his/her phone number |
| **Address group** | If you have grouped your contacts in address groups, you can enter here the address group the person you are looking for belongs to. |
| **Address book** | Specify here the address book in which you want to search. |
| **Max. matches** | Specify here the maximum number of hits to be displayed in the search hit list. |

The following icons show whether a contact has been found in an external directory, a global or a private contact list:

| | |
|---|---|
| | The contact information was found in an external directory. |
| | The contact information originates from the global contact directory of the *OpenScape UC Application*. |
| Empty | The contact information originates from your contact list. |

The following operating elements are available in this dialog:

– - Click this button to integrate a selected user from the search hits list in your contact directory. The Add entry to contact list dialog opens; it contains the existing contact data. You can complete the data or simply add the contact to your contact list by clicking the **OK** button.

---

***NOTICE:*** This function is not permitted for selected search hits from your private address book.

---

– - Click this button to delete a found contact coming from your private contact list.

---

***NOTICE:*** This function is not permitted for selected search hits from a directory.

---

– - Click this button to edit a found contact coming from your private contact list. The Change entry in the contact list dialog opens with the already existing user data. You can now perform the desired changes.

---

***NOTICE:*** This function is not permitted for selected search hits from a directory.

---

– - Click this button to view the existing information for a user you have been looking for. It is displayed in the Lookup person dialog that opens.

– - Click this button to save the contact entries found locally on your computer.

  - - Click this button to print the contact entries found in table form.
  - - Click this button to reset or delete all search criteria entered.
  - - Click this button at the bottom margin of the dialog to display the top of the search hits list.
  - - Click this button at the bottom margin of the dialog to display the bottom of the search hits list.
  - - Click this button to display the previous search hits in the list.
  - - Click this button to display the next search hits in the list.
- - Click this button to define person entries and add them directly to the list of persons. Use the following dialog that opens to define for a new person entry a display name, a phone number and an e-mail address.

- - Click this button to modify an existing person entry.
- - Click this button to remove a person entry from the list of persons.
- **New** - Click this button to create a new person entry.
- **Undo** - Click this button to undo the changes made to a person entry.

## 7.3.12 "Date lists" Tab

You can use this tab to manage date lists. In a date list you can specify days and time periods during which a rule should apply, for example, 04/01 to 10/01, 31/08 or 01/09 to 15/09. You can link a date list to a rule via the **If date/time** option on the **New/edit** tab. Only then, it is considered by theRule interpreter.

### Invoking the dialog

In the main menu, select **menu > Rules ...**. The configuration dialog **Rules** opens. Switch to the **Date lists** tab. As long as you do not change anything, this tab looks as follows by default.

The **Date lists** tab is divided into two sections:

- **Date list** - All configured date lists are listed here.
- **Date information from list:** - All date information assigned to a date list selected in the **Date list** section is displayed here.

### Operating elements in the "Date list" section

This section may look like this, for example:

The following operating elements are available in the **Date list** section:

- Ai - Click this button to modify the name of a date list.

  ***NOTICE:*** You can also directly click the name of the date list to rename it.

- ✕ - Click this button to remove a date list from the list.
- **New** - Click this button to create a new date list.

- **Duplicate** - With a click on the **Duplicate** button, you can create a new date list by duplicating an already existing date list.

### Operating elements in the "Date information from list" section

This section may look like this, for example:

The following operating elements are available in the **Date information from list** section:

- ✚ - Click this button to enter date information and add it directly to the list. The following dialog opens:

To set the date, the following operating elements are available:

- Display name - In this input field, enter an expressive name for the date entry.
- from - In this calendar, the current date is marked by default by a light blue rectangle. Click on the desired date in this calendar to define the start date for the date list or rule. It is marked by a dark blue rectangle and appears next to the **from** label.
- to - By default, this checkbox is not activated and the calendar data in this section are hidden. Activate this checkbox to show this calendar. Select the desired date in this calendar to define the end date for the date list or rule. It is marked by a dark blue rectangle in the calendar and appears next to the **to** label.
- ← - Move one month back
- → - Move one month forward
- ✥ - Return to the current month
- « - Move one year back
- » - Move one year forward

- - Click this button to edit the configured date.
- - Click this button to edit the defined time range.
- - Click this button to modify an existing date entry.
- × - Click this button to remove a date entry from the date list.
- **New** - Click this button to create a new date entry.
- **Undo** - Click this button to undo the changes made to a date entry.

> ***NOTICE:*** The **Undo** button is inactive until you define a date entry for the selected date list.

## 7.3.13 "Info" Tab

This tab provides information on general procedures for creating and activating rules and profiles.

You reach the **Info** tab via the **main menu > menu > Rules ...**.

# 8 Voicemail Settings

After you have invoked the **Voicemail...** option from the **menu**, you can perform settings for the voicemail system.

The dialog for configuring the voicemail settings opens.

Via the navigation bar at the left hand side you can open the configuration pages for the voicemail system. The following configuration pages are available:

- **User data**
- **Voice mail system**
- **Forward access**
- **Groups**
- **Time profiles**
- **Recordings**

## 8.1 User Data

On the **User data** page you can see information about your user account.

You open this setting page via **menu > Voicemail ... > User data**.

You can select the language for the user interface and for the default greetings of your voicemail box in the **Language selection (for voice mail system)** combo box.

You can modify some of the settings, depending on the system configuration.

- **Deputy**
  Entry or selection of the mailbox deputy.
  If you are absent for a longer period (vacation, business trip, illness, etc.), you can redirect your mailbox to another user (deputy feature).

  ***NOTICE:*** Messages that have been delivered to your deputy do not appear in you mailbox.

- **Your address data**
  You can complete the data mask with your personal address data if you would like to do so. Therefore the following data fields are provided: **Company**, **Department**, **Address 1**, **Address 2**, **Zip Code**, **Location**, **Federal State**, **Country**, **Home Number**, **Home Fax** and **Mobile Phone**.

  ***NOTICE:*** Enter the complete phone number in the fields where you enter phone numbers yourself (e.g. private number). Example: `+49892221111` (international prefix, area code without leading zero, extension number).

- **Save**
  A click on **Save** backs up all the selections and entries you have made respectively updates the **User data** page.

## 8.1.1 How to Configure a Mailbox Deputy

To configure a mailbox deputy proceed as follows:

***Step by Step***

***1)*** Open the settings page for the user data via **menu > Voicemail > User data**.

***2)*** Click on the button next to the **deputy** field.

Another window with a list of all users opens.

***3)*** Select a user in this window. Click on the corresponding user ID.

The window closes and the selected name will be entered in the **Deputy** field.

***NOTICE:*** If you know the deputy's user ID, you can enter him/her directly in the **Deputy** field.

***4)*** Click the **Save** button.

***NOTICE:*** Remove the name from the **Deputy** field to deactivate the mailbox routing.

## 8.1.2 How to Select a Language (for the Voicemail System)

If you wish to configure a language for the default greetings of your voicemail system that differs from the one of your operating system, proceed as follows:

***Step by Step***

***1)*** Open the setting page for the user data via **menu > Voicemail > User data**.

***2)*** Click on the **Language selection (for voice mail system)** combo box.

The list of available languages is displayed.

***3)*** Select the desired language.

***4)*** Click on the **Save** button.

The page is updated and displayed in the set language.

## 8.2 Voice Mail System

On this page you can make different settings for your personal voice mailbox.

---

***NOTICE:*** Please note that modifications will not become active until you click the **Save** button at the end of the page.

---

You open this setting page via **menu > Voicemail... > Voice mail system**.

You can perform the following settings on this page:

- **Change PIN**
  You can change your PIN for voicemail box access. All digits from 0 to 9 can be used. The PIN itself must have at least four digits and must not exceed 23 characters, unless your configuration differs from the standard one.
  It is checked for:
  - Length (too short or too long)
  - Invalid characters (letters or special characters),
  - String of a constant number, such as 444444
  - Ascending or descending number string, such as 12345 or 654321
  - Includes the individual telephone or voicemail box number
  - Contains a vanity number
  - PIN was already used at an earlier time

  - PIN is the same as the default PIN
- **Voice mail system**
  Since only the voicemail system *OpenScape Xpressions PhoneMail*is available, selecting another voicemail system is not possible.
- **Referral extension**
  You can enter a direct dialing number to which your calls will be deflected if necessary. The number entered here is used when activating the call forwarding to the referral extension.
  Your deputy may be an *OpenScape UC Application* user, a user on your PBX, or an external user (you need exchange access to enter an external number for a deputy). If the deputy in an internal subscriber, you can enter the number in short form (that is, as extension number) or in long form (for example 32323 or +49 89 722 32323). Otherwise, enter the number in international format. The phone number may not contain more than twenty-two digits.
  Enter the number of the desired extension without the CO exit code and prefix 0, but include the country code.

  ***NOTICE:*** Use a personal greeting to notify any callers that they can use the key combination 0 > 7 to connect to the configured referral extension.

- **Mailbox options**
  You can define a detailed or short version of the user prompts of your voicemail box and the relative playback volume.
  - Example of a standard greeting: “Select the star button to correct your entry”.
  - Example of a short greeting: “Correct entry with star”.
- **Caller options**
  It is possible to enable callers to mark the message they leave as urgent. If you activate this option, the caller receives another menu after recording his/her message, in which he/she may select the respective option via the telephone.
- **Simplified greeting configuration**
  Two time profiles are available for the voicemail system:
  - The time profile for the simplified greeting configuration that is the default when you log on to the system. The simplified greeting configuration allows only using one greeting per greeting type and working day.
  - The time profile for the enhanced greeting configuration. It enables configuring the greetings of the single greeting types for each working day separately.
- **Mobility number**
  This feature enables you to specify forwardings that the caller can trigger by telephone key entry. Forwarding can be used for both internal and external destinations or to trigger an action, such as switching to another voice mailbox or granting callers callback access (access to their voice mailbox).
  Forwarding can be set up with different variants (actions) with each call forwarded being assigned its own phone key ranging from 0 to 9 as well as * and #. Your voicemail should inform the caller of the appropriate phone key.

This must be recorded as a special greeting. If the caller presses the predefined phone key after listening to your greeting, the call is forwarded using the specified action. You can also define various actions for multiple forwarding and make them available to the caller.
Configured forwarding options and their destination numbers are displayed in the **Phone Number** field. The corresponding phone key is displayed under **Reachable with key(s):**. You can quickly enable or disable existing forwardings via the options **Enabled** or **disabled**.
The **Forward Mode** page provides a definition of forwarding.

- **Edit messages via telephone**
  **Set filter for messages**
  You can set a message playback filter on the telephone so that only specific messages are played upon their retrieval. Messages contained in the server inbox folder are accessed by default.

  ***NOTICE:*** These filters are not applied to read notifications. Read notifications are still issued since they have been explicitly demanded.

  Fax or voicemails delivery reports are stored in your voicemail box as e-mail by default. These reports will always be announced, irrespective of the settings for e-mail announcements. This behavior can be changed in the voicemail system, so that the settings made there for e-mails also apply for delivery reports. If you are unsure about this matter, please consult your system administrator.
- **Automatic speech recognition**
  On this page you can set the voice recognition sensitivity of the *EVO* voicemail system. Normally, the default values are sufficient.
  Using cell phones the sensitivity may have to be upgraded since cell phone connections are sometimes not free from volume fluctuations.

  ***NOTICE:*** Further information about the *EVO* voicemail system is provided in the product's user manual.

## 8.2.1 How to Change the PIN

How to change the PIN for accessing your own *OpenScape UC Application* voicemail box:

***Step by Step***

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2) Click the **Change** button next to **Change PIN**.

   The following window opens.

*3)* Enter a new PIN in the **New PIN** field and repeat the entry in the **Confirm new PIN** field.

*4)* In the **User password** field enter your current password that you also use for logging on to the *OpenScape UC Application*.

*5)* Click the **Save** button.

After your new PIN has passed the system's security check, you receive a modification confirmation.

---

***NOTICE:*** If your new PIN does not comply with the security policy or contains invalid characters, you are prompted to repeat the entry. You can do this via the **Next** button.

---

*6)* Click on the **Next** button.

The window closes and the new PIN is immediately valid.

## 8.2.2 How to Select User Prompts

How to select the user prompt type for your voicemail box and define the relative playback volume:

***Step by Step***

*1)* Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

*2)* Click in the **User prompts** combo box and select whether to use standard or abbreviated user prompts.

*3)* Set the **playback volume**. The default setting is level 5.

*4)* Click on the **Save** button.

Your modifications are saved.

## 8.2.3 How to Define Caller Options

How to offer callers the option to label the left message as urgent:

***Step by Step***

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2) In the **Caller options** section select the **Callers can leave urgent messages** option.
3) Click on the **Save** button.

   Your modifications are saved.

## 8.2.4 Advanced Greeting Configuration

To activate the advanced greeting configuration, proceed as follows:

***Step by Step***

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2) Untick the **Use the simplified greeting configuration** checkbox.
3) Click on the **Save** button.

   Your modifications are saved.

## 8.2.5 How to Define Call-Forwarding Keys

How to define a key the caller may use for triggering a forwarding:

***Step by Step***

1) Open the setting page for the voicemail system via **menu > Voicemail... > Voice mail system**:
2) Click the **Change key(s)...** link.

   The **Forward Access** setting page opens.

*3)* In the **Access menu for** combo box, select the cases for which forwarding should apply.

*4)* Select the respective **action** in the combo boxes.

At the same time the respective key number (**tel. key**) is set.

*5)* If necessary, enter the desired phone number in the field **Number to dial**.

---

***NOTICE:*** The phone numbers are generally copied from the database. Only for the cases where you have configured a forwarding to a phone number that you have defined freely you need to enter it in the **Number to dial** field.

---

*6)* Click the **Save** button.

Your settings are saved.

---

***NOTICE:*** Be sure to inform callers of these individual phone key(s) with appropriate greetings.

---

***NOTICE:*** The **Default menu** button resets the menu to its original appearance. Modifications performed are deleted then.

---

After the forward mode has been defined, the page **Voice mail system** shows under **Mobility number** the key number for the forwarding to the **mobility number** and the destination number.

## 8.2.6 How to Set a Personal Message Filter

How to set your personal message filter:

***Step by Step***

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click on the **Edit personal filter** button to specify details for the playback filter.

   The following page opens:

3) Select an **inbox folder** if necessary.

4) Select a filter option under **Message type**. The **No messages** option locks this message type so that it is not considered for playback.

   ***NOTICE:*** Only message types that exist in the system can be selected. The message type **Voicemail** is always available.

5) Click on the **Save** button at the bottom margin of the page.

   Your settings are saved.

## 8.2.7 How to Set the Speech Recognition Volume

To set the speech recognition volume proceed as follows:

***Step by Step***

1) Open the settings page for the voicemail system via **menu > Voicemail... > Voice mail system**:

2) Click the **Edit** button next to the entry **Automatic speech recognition**.

The following page opens:

*3)* Set the volume here via the two combo boxes, separately for **If call from normal phone** and **If call from mobile phone**.

*4)* Click on the **Save** button.

Your settings are saved.

## 8.3 Forward Access

Specify the different variants (actions) and phone keys for forwarding on the **Forward Access** page. First of all, you can decide which call type you wish to forward, for example, **Internal calls**, **External calls** or **After-hours greeting**. If you select **Alternate greeting**, all incoming calls will be forwarded. Now determine the forwarding action and the phone key to be pushed by the caller.

---

***NOTICE:*** You can always reach this menu via the *Telephone User Interface (TUI)*, but no options are named by the system. In order to inform the caller about the possible options you need to configure a personal announcement.

---

You open this setting page via **menu > Voicemail > Forward Access**.

The table below describes the available actions:

| Action | Description |
|---|---|
| **Not assigned** | This selection disables the corresponding key number. |
| **Hang up** | Disconnects the call if the caller presses the relevant phone key. |
| **Callback access (callback mode)** | Allows the caller to access your mailbox quickly (without having to enter the voicemail box number). |
| **Direct access (control mode**) | Allows the caller to access your mailbox normally. |
| **Guest access (answering machine mode)** | Allows leaving a message. The caller has to enter the required mailbox number. |
| **Mobile phone number** | Forwards to a preset mobile phone number |
| **Operator** | The operator's phone number is configured in the user group, but it may also be configured in the voicemail profile. |
| **Page the user** | The caller pages you by pressing the relevant phone key. |
| **Referral extension** | Performs a forwarding to the referral extension you have defined. |

| Action | Description |
|---|---|
| **Skip greeting** | Allows the caller to skip the welcome greeting. |
| **Dial the number** | Allows the forwarding of calls to any telephone number. If the caller pushes the corresponding phone key, the call is immediately connected to the telephone number you have specified here. |
| **Enter the number, beginning with key** | Enables the caller to call any extension. Please note that the digit you dial to invoke a specific feature is already the first digit of the dialable extension. Finish entering the digits with the [#] key. |

## 8.3.1 Configuring a Forwarding

To configure a forwarding proceed as follows:

***Step by Step***

***1)*** Open the forward access page via **menu > Voicemail > Forward Access**.

***2)*** In the **Access menu for** combo box select the case for which the forwarding is to apply: in case of an external/internal call, when your are conducting a call (your normal line is busy), when your are outside your office or when the caller has dialed your phone number outside business hours.

***3)*** Select the respective action in the combo boxes.

At the same time the respective key number is set.

***4)*** If necessary, enter the desired phone number in the field **Number to dial**.

***NOTICE:*** The phone numbers are generally copied from the database. Only for the cases where you have configured a forwarding to a phone number that you have defined freely you need to enter it in the **Number to dial** field.

***5)*** Click **Save** to save your settings.

***NOTICE:*** Be sure to inform callers of these individual phone key(s) with appropriate greetings.

***NOTICE:*** The **Default menu** button resets the menu to its original appearance. Modifications performed are deleted then.

## 8.4 Groups

The voicemail system of the *OpenScape UC Application* enables you to quickly and easily create groups and manage them. In these groups you combine specific contacts. You can then send messages to all group members by using the group name for addressing.

You open this setting page via **menu > Voicemail > Groups**.

By default, this setting page displays the groups of type **Broadcast** your system administrator has pre-configured. Only users with administrator privileges can create and edit this type of group.

---

***NOTICE:*** These groups, if created by the system administrator, are automatically available to *OpenScape UC Application* or *OpenScape Xpressions PhoneMail* users with normal user privileges.

---

As *OpenScape UC Application* or *OpenScape Xpressions PhoneMail* user you can define up to ten private groups on this page. A private group contains contacts and/or other private groups that you can compile according to individual criteria.

With a click on the **Create private group** button can display the name specified in the **Create new group** field in the **Overview of groups**.

The new group is thus created. However, it does not contain any members yet. A click on the group name displayed as link opens a dialog that lists the single group members or in which these members can be assigned to the group.

> ***NOTICE:*** Members of a group can be single users as well as groups already defined.

With a click on the **Delete group** button you can remove a group from the list the radio button of which you have previously activated.

> ***NOTICE:*** You can see the button for deleting a group only after creating a private group. As soon as all private groups have been deleted, the **Delete group** button is hidden again.

## 8.4.1 How to Create a new Private Group

How to create a new private group:

***Step by Step***

1) Open the groups-setting page via **menu > Voicemail > Groups**.
2) Enter the desired group name in the **Create new group** field.
3) Click the **Create private group** button.

The new group will be created and displayed. However, it has not been assigned any members yet.

## 8.4.2 How to Edit a Private Group

How to assign members to a private group or edit other settings:

***Step by Step***

1) Open the groups-setting page via **menu > Voicemail > Groups**.
2) Click on the **Display name** of the group you wish to edit.

> ***NOTICE:*** If you select a group for which have no privilege, only the current settings are displayed, however, you may not carry out modifications. The **Save**... buttons and the group of the available users and groups are hidden.

The following page opens where you can execute the desired editing steps.

### 8.4.2.1 How to Admit Users to a Private Group

***Prerequisites***

- You are configured on the voicemail system as user.
- You have already created the desired private group.

How to integrate contacts as members in a previously defined private group:

***Step by Step***

1) Open the groups-setting page via **menu > Voicemail > Groups**.

2) Click on the **Display name** of the group in which you wish to integrate the new member.

> ***NOTICE:*** If you have selected a group that you are not allowed to edit for lack of privileges, e.g. a broadcast group, only the current settings are displayed, however, you may not carry out modifications. The **Save**... buttons and the group of the available users and groups are hidden.

The following page opens, on which you can assign the desired users to the selected group.

The **Available users** list shows all users registered in the system. The **Available groups** list shows all groups already created.

3) Select your preferred criterion for sorting the lists of available users and groups in the **Sort by** combo box.

*4)* Click the **Sort** button to update the sorting.

*5)* If the desired contact is currently not visible in the list of available users, click on the **Next** button for displaying the next 50 user list entries.

*6)* Click the **First** button to reload the first 50 entries.

> ***NOTICE:*** If you are looking for a particular name, enter the name in the **Search user** field and click **Search**.

*7)* To mark a user desired for the group, simply click this user in the **Available users** list.

*8)* Click the **<<** button to insert the marked user in the group.

*9)* Proceed similarly for **Available groups** to add groups to the group if desired.

*10)* Apply the same procedure for inserting more users or groups.

*11)* If required, select other external addresses for the group (e.g. e-mail addresses) under **Alternate addresses** and click the **<<** button to add these to the group.

*12)* Click on the **Back** button.

Your settings are saved. The **Groups** setting page is displayed.

### 8.4.2.2 How to Remove Users from a Group

To remove a user from a group proceed as follows:

***Step by Step***

*1)* Click on the entry in the **members** list that you want to remove.

> ***NOTICE:*** Keep the **[Ctrl]** key pressed to select several entries at a time if required.

*2)* Click on the **>>** button.

The user has now been removed from the group. He/she is no longer itemized in the **Members** list.

### 8.4.2.3 How to Record a Group Name

***Prerequisites***

- You are configured on the voicemail system as user.
- You have already created a private group.

How to record a group name as greeting:

***Step by Step***

1) Open the groups-setting page via **menu > Voicemail > Groups**.
2) Click on the group's **Display name**.

   The configuration page with available group settings opens.
3) Click the **Recording** link next to **Record group name**.

   The **Recordings** dialog opens.
4) Enter the number of the telephone from which you want to record the group name.
5) Afterwards, click on **OK**.

   The **Recordings** dialog closes. Your phone rings and you can start your recording.
6) Click on **Record** and record the desired name.
7) Click on **Exit**.

   You have now finished recording.
8) Click on **Save**.

   The name you have recorded has been backed up.

The **Recording** link next to **Record group name** is no longer displayed. The **Name recorded** column on the **Groups** page now features the corresponding checkbox ticked off.

---

***NOTICE:*** The group name recording procedure is identical with the recording procedure.

---

## 8.4.3 How to Delete a Group

How to remove a private group from the list of groups:

***Step by Step***

1) Open the groups-setting page via **menu > Voicemail > Groups**.
2) Click the option field that precedes the desired group to select it.
3) Click the **Delete group** button. A security check will appear.
4) Confirm the security check.

The selected group has been deleted.

## 8.5 Time Profiles

With the help of a time profile you can define when and with which greetings your mailbox should react to incoming calls.

> ***NOTICE:*** The greetings that can be integrated in the time profile of this dialog must first be created via the **Recordings** feature.

Two time profiles are available:

- The time profile for the **simplified greeting configuration** that is the default when the program starts. The simplified greeting configuration allows only using one greeting per greeting type and working day.
- The time profile for the **advanced greeting configuration**. Via this it is possible to configure the greetings of the greeting types for each working day separately.

### 8.5.1 Time Profile for the simplified Greeting Configuration

In the simplified greeting configuration you can globally specify the greetings to be used only once. These settings then apply for all weekdays for which you have released the greetings.

You can configure the following settings for the simplified greeting configuration:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played for the caller. He/she cannot leave a message in your mailbox.

- **Greeting cannot be interrupted**
  If this option is activated, it is not possible to interrupt a greeting by clicking a telephone key. You cannot use the telephone keys until the system has played the entire greeting.
  The only exception is the configured confirmation key (for instance ***** or **#**) that can be used at all times. If the configured confirmation key was ignored, it would not be possible to connect to your own voice mailbox.
- **Greetings**
  You can choose from the following options for every call type, for an alternate greeting, for after-hours greetings and for each day of the week:
  - **none**
    If you select **none** for the greetings, a standard system greeting will be used.
  - **Personal greetings**
    Personal greetings are only marked with a number in the list. You can only select the personal greetings that you have previously recorded on the configuration page **Personal settings > Recordings**.
  - **Standard user greetings**
    Default user greetings are marked with a number and a star in the list. Only those default user greetings are available that a user with administrator privileges has previously recorded on the **Recordings** configuration page as default user greeting.
- **Business days**
  By activating the appropriate Business days checkbox you determine for which weekdays the selected greetings are to be played.
- **Business hours**
  You can enter a time range for business hours in the **from** and **to** input fields. Enter the times in hours and minutes (syntax: HH:MM). Outside the period specified here the greeting you have set under **After-hours** or a default greeting of the system is used.

In the **Greetings** section you can assign personal greeting texts to different call types:

- **Alternate greeting**
  An alternative greeting is played independently from the call type (internal, external, busy). As soon as you record and activate this greeting, all incoming calls will be answered with it. This setting disables any other greetings you may have set for internal calls, external calls, calls with engaged line or outside business hours.
- **Internal**
  Select here the greeting to be played if the received call is an internal one (e.g. within your company).
- **External**
  Select here the greetings to be played if the received call is an external one (e.g. a call from the public telephone network).
- **Busy**
  Select here the greeting to be played if your telephone is busy when a call is received.

- **After-hours greeting**
  Select here the greeting to be played if a call is received outside the set business hours.

Click on **Save** to save your settings.

## 8.5.2 Time Profile for the Advanced Greeting Configuration

The advanced time-profile allows making individual settings for each weekday.

You can create an individual time profile for each weekday by assigning the settings to the corresponding greetings in a column each, respectively by selecting the corresponding greeting options.

You can use the following options and perform the following greeting settings:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played for the caller. He/she cannot leave a message in your mailbox.
- **Greeting cannot be interrupted**
  If this option is activated, it is not possible to interrupt a greeting by clicking a telephone key. You cannot use the telephone keys until the system has played the entire greeting.
  The only exception is the configured confirmation key (for instance ***** or **#**) that can be used at all times. If the configured confirmation key was ignored, it would not be possible to connect to your own voice mailbox.

- **Greetings**
  You can choose from the following options for every call type, for an alternate greeting, for after-hours greetings and for each day of the week:
  - **none**
    If you select **none** for the greetings, a standard system greeting will be used.
  - **Personal greetings**
    Personal greetings are only marked with a number in the list. You can only select the personal greetings that you have previously recorded on the configuration page **Personal settings > Recordings**.
  - **Standard user greetings**
    Default user greetings are marked with a number and a star in the list. Only those default user greetings are available that a user with administrator privileges has previously recorded on the **Recordings** configuration page as default user greeting.
- **Business days**
  By activating the appropriate Business days checkbox you determine for which weekdays the selected greetings are to be played.
- **Business hours**
  You can enter a time range for business hours in the **from** and **to** input fields. Enter the times in hours and minutes (syntax: HH:MM). Outside the period specified here the greeting you have set under **After-hours** or a default greeting of the system is used.
- **Further settings**
  Via the Use Monday settings for whole week option you can copy the settings made for Monday to all weekdays and thus simplify the configuration.
  Via the **Use default system settings** option you can copy the settings that the administrator has globally made for the system as standard user profile. When you select this option, all other selections and settings in the Time profiles dialog are disabled.

In the **Greetings** section you can assign personal greeting texts to different call types:

- **Alternate greeting**
  An alternative greeting is played independently from the call type (internal, external, busy). As soon as you record and activate this greeting, all incoming calls will be answered with it. This setting disables any other greetings you may have set for internal calls, external calls, calls with engaged line or outside business hours.
- **Internal**
  Select here the greeting to be played if the received call is an internal one (e.g. within your company).
- **External**
  Select here the greetings to be played if the received call is an external one (e.g. a call from the public telephone network).
- **Busy**
  Select here the greeting to be played if your telephone is busy when a call is received.

- **After-hours greeting**
  Select here the greeting to be played if a call is received outside the set business hours.

Click on **Save** your settings.

## 8.5.3 How to Select the Greeting Configuration

Proceed as follows to switch from a simplified greeting configuration to the enhanced greeting configuration.

***Step by Step***

*1)* Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

*2)* Untick in the checkbox **Use simplified greeting configuration**.

*3)* Click on the **Save** button at the bottom margin of the page.

Your modifications are saved.

## 8.5.4 How to Create a time Profile for the Simplified Greeting Configuration

How to create a time profile for the simplified greeting configuration:

***Step by Step***

*1)* Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

*2)* Tick the check box **Use simplified greeting configuration**.

*3)* Click on the **Save** button at the bottom margin of the **Voice mail system** page.

Your modifications are saved.

*4)* Click on **Time profiles** in the navigation section.

The **Time profiles** setting page opens on which you can perform settings for the new time profile.

*5)* Set whether a message recording should be allowed. Activate or deactivate the option **Message recording not allowed**.

*6)* Set whether the caller may interrupt the greeting. Activate or deactivate the option **Greeting cannot be interrupted**.

*7)* Set the greetings for the single call types. In the corresponding combo boxes select a greeting for each call type. If you do not select a greeting for a call type, the default system greeting is used for this call type.

*8)* Select the business days for which the greetings are to become effective.

*9)* Set the business hours.

*10)* Via the **Use default system settings** checkbox you can copy the system default settings.

> ***NOTICE:*** If you select this option, all other selection and setting options on this page become inactive.

*11)* Click on the **Save** button.

A confirmation message informs you that your settings have been backed up.

Creating a time profile for the simplified greeting configuration is now complete.

## 8.5.5 How to Create a Time Profile for the Advanced Greeting Configuration

How to create a time profile for the enhanced greeting configuration:

***Step by Step***

*1)* Open the settings page for the voicemail system via **menu > Voicemail > Voice mail system**:

*2)* Untick in the checkbox **Use simplified greeting configuration**.

*3)* Save your modifications via the **Save** button at the bottom margin of the **Voice mail system** page.

*4)* Then open the configuration page for the time profile by clicking on **Time profiles** in the navigation section.

*5)* Set here whether a message recording should be allowed. Activate or deactivate the option **Message recording not allowed**.

*6)* Set whether the caller may interrupt the greeting. Activate or deactivate the option **Greeting cannot be interrupted**.

*7)* Set the greetings for the single call types. In the corresponding combo boxes select a greeting for each call type. If you do not select a greeting for a call type, the default system greeting is used for this call type.

*8)* Set the business hours.

*9)* Via the **Use Monday settings for whole week** checkbox you can transfer the Monday settings to all other days. If you do not select this option, you need to perform the steps 5 to 8 for each weekday.

*10)* Via the **Use default system settings** checkbox you can copy the system default settings.

> ***NOTICE:*** If you select this option, all other selection and setting options on this page become inactive.

*11)* Click the **Save** button.

A confirmation message informs you that your settings have been backed up.

Creating a time profile for the advanced greeting configuration is now complete.

## 8.6 Recordings

On the configuration page **Recordings** the recordings that are available for the user are displayed. These recordings are assigned to the different call types via the time profiles.

You can back up nine personal greetings and one name greeting.

---

***NOTICE:*** The recording type **Personal group** is only visible if you have created a personal group on the **Groups** setting page.

---

You open this setting page via **menu > Voicemail > Recordings**.

Different user types are provided with different recording types:

- **Standard user**
  - **Welcome greeting**
    Recordings of this type are only displayed if they have been created by an administrator or company.
  - **Standard user greeting**
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - **Private group**
    Recordings of this type are only displayed if they have been created by the user. Greetings of this type can only be created if a private group has been previously generated.
  - **Personal name recording**
    Recordings of this type are only displayed if they have been created by the user.

  - **Personal greeting**
    Recordings of this type are only displayed if they have been created by the user.
- **Company**
  - **Welcome greeting**
    Recordings of this type are only displayed if they have been created by an administrator or company.
- **System**
  - **Standard user greeting**
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - No recording of type “Private group” is displayed, even if the user has made such a recording.
- **Administrator**
  - An administrator may use advanced recording options.

You can use any terminal device for your recording.

---

***NOTICE:*** If your administrator has created and configured global greetings (company greetings), they will be replaced by your personal greeting.

---

## 8.6.1 How to Record and Edit Greetings

How to record or modify a personal greeting:

***Step by Step***

***1)*** Open the **Recordings** setting page for the voicemail system via **menu > Voicemail > Recordings**:

The following page opens:

***2)*** Click on the **Create** button.

The following page opens:

---

***NOTICE:*** You can back up nine personal greetings and one name greeting. The recording type **Personal group** is only visible if you have created a personal group on the **Groups** page.

---

***3)*** Select the desired recording type in the column under **Type of recording** via the respective radio button in front of the entry. The following options are available:

- **Personal name recording**
- **Personal greeting**
- **Private group**

---

***NOTICE:*** This option is only displayed if you have configured a private group.

---

***4)*** In the **Recording** column select the details. In case of a personal greeting this is the call type. In case of a personal group this is the group name. Based on this call type respectively name a recording may be selected, for example, in a time profile.

***5)*** Determine the recording you wish to deploy under **Select a method** and by activating the corresponding radio button:

- **Record via telephone now**
  Option for recording the desired greeting via your telephone
- **Upload recording**
  Option for using a file that exists already in your file system

***6)*** Click on the **Create** button.

Depending on the selected method continue as described in the following.

### 8.6.1.1 How to Record Greetings via Telephone

If you have selected the **Record via telephone now** option under **Select a method**, proceed as follows to record a greeting via your telephone:

***Step by Step***

***1)*** Enter the number of the telephone with which you want to record the greeting in the following dialog.

***2)*** Then click on the **OK** button.

Your phone rings. As soon as you have picked up the receiver the following page is displayed:

***3)*** Click on the **Record** button.

Recording starts.

***4)*** Click on the **Pause** button to interrupt the recording.

The current length of the greeting is displayed on the positioning bar for your information.

***5)*** Click the **Play** button to play back the recording and listen to your recording via the telephone handset.

***6)*** If you are satisfied with your recording, click the **Exit** button.

The recording is saved and the **Recordings** page reappears.

***7)*** If you would like to repeat the recording, click the left end of the positioning bar to rewind to the start of the recording and then click the **Recordings** button to restart the recording.

*8)* Enter a number in the input field beneath the buttons and click the **Go to position:** button to move to a specific position in the recording.

> ***NOTICE:*** If you have selected the **Auto refresh** option, the cursor will always be set to the beginning of the input box by the repeated download of the page. This complicates the input. Deactivate this option before using the time input field.

The current position is displayed in seconds via the buttons and on the positioning bar.

### 8.6.1.2 How to Upload an Existing Greeting File

If you have selected the **Upload recording** option under **Select a method**, proceed as follows to use an existing greeting file from your file system:

***Step by Step***

*1)* Enter the path and file name of the prepared file in the text field or find the desired file in the file system via the **Browse...** button.

*2)* Click on the **Create** button.

The recording is saved and the **Recordings** page reappears.

## 8.6.2 How to Delete Greetings

> ***NOTICE:*** A greeting that is currently used in a time profile cannot be deleted. Before you delete a greeting, check whether this greeting is used in a time profile..

***Step by Step***

*1)* In the recording list select the greeting that you would like to delete by clicking the radio button in front of the entry.

*2)* Click on the **Delete recording** button.

You are prompted to confirm the deletion.

*3)* Click on **OK**.

The selected greeting is deleted and you see the **Recordings** page again.

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