A MITEL
PRODUCT
GUIDE

Unify OpenScape UC Application V10

Fusion for Office

Extended Guide

08/2024

A31003-S50A0-U109-10-7619

Contents

1 Working with this Manual

Here you find information about the structure and use of this manual.

1.1 Target Group of this Manual

This manual addresses:

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

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

1.2 Representation Conventions

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

1.2.1 Formats and Display Forms

In the manual on hand the following conventions apply:

Purpose	Appearance	Example
Special emphasis	**Bold**	**Name** must not be deleted.
User interface elements	**Bold**	Click on **OK**.
Menu sequence	>	**File** > **Exit**
Textual cross reference	*Italic*	You find further information in the *Configuration and Administration* manual.
Path and file names	Font with fix character spacing, for example `Courier`	`c:\Program Files\...` or `Example.txt`
Specifications that may have individual content, such as variables.	*Italic* in angle brackets	Enter your *<user name>* and the *<password>* to log on to the system.

Purpose	Appearance	Example
System entry and output	Font with fix character spacing, for example `Courier`	`Command not found.`
Key combination	**Bold**	**[Ctrl]+[Alt]+[Esc]**

1.2.2 Notes

Types of notes

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

NOTICE: Denotes information worth knowing or useful tips.

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

1.3 Continuative Documentation

You find continuative information about OpenScape Fusion for Office in the following documentation:

- *OpenScape UCApplicationV10System Description*
- *OpenScape UCApplicationV10 Fusion for Office Installation Guide*
- *OpenScape UCApplicationV10Planning Guide*
- *OpenScape UCApplicationV10Installation and Upgrade*
- *OpenScape UCApplicationV10Configuration and Administration*
- OpenScape UCApplicationV10Fusion for Citrix V1

1.4 Acronyms

Table 1: Acronyms used

Abbreviation	Meaning
CTI	Computer Telephony Integration
DTMF	Dual -Tone Multi-Frequency
FQDN	Fully Qualified Domain Name
GUI	Graphical User Interface
IM	Instant Messaging
LDAP	Lightweight Directory Access Protocol

Abbreviation	Meaning
ONS	One-Number Service
SIP	Session Initiation Protocol
SMS	Short Messaging Service
SSO	Single Sign-On
UC	Unified Communications
UM	Unified Messaging
VDI	Virtual Desktop Infrastructure
VPN	Virtual Private Network

2 OpenScape Fusion for Office Overview

The OpenScape Fusion for Office solution provides the large number of OpenScape UCApplication features on the graphic user interface (GUI) of MicrosoftOutlook. OpenScape Fusion for Office uses the OpenScape Fusion that, in turn, is based on the OpenScape Web Client as part of the OpenScape UCApplication client portfolio. Also there is an integration with Skype for Business. OpenScape Fusion for Office combines the functionality of several old clients (Fusion for Outlook, Fusion for Lync, OpenScape Desktop Client Web embedded Edition and Outlook Extensions) to one client.

You can use OpenScape Fusion for Office as CTI client and SIP softphone at an SIP communications system (for example OpenScape Voice) or as CTI client at an OpenScape UCApplication system with connection to a OpenScape 4000. It provides the following functions:

- Single Sign-On (SSO) - Automatic logon to the OpenScape UCApplication system using the Windows logon data of the OpenScape UCApplication user
- Initiating and taking calls
- Initiating Ad-hoc conferences
- Configuring and initiating conferences
- Participating in spontaneous and scheduled audio, web and video conferences (SIP)
- Managing personal contacts in the contact list
- Server-based access to directories (LDAP)
- Logging of completed and unsuccessful calls in the history
- Managing your own presence status
- Managing the preferred devices for incoming and outgoing calls
- One-number service for incoming and outgoing calls
- Call Screening
- Sending and receiving instant messages (Instant Messaging)
- Accessing the voicemail box (in case of an OpenScape Xpressions integration)
- Notification about a contact's changed availability (Tell-Me-When), based on his/her presence information and call availability.
- Call routing rules
- Working in the team - Several OpenScape UCApplication users can be grouped in teams, thus using functions for telephoning in the team.

OpenScape Fusion for Office expands the MicrosoftOutlookGUI with the following controls:

- **OpenScape Fusion** function group on the **Outlook Home** tab

  It enables fast access to the controls for setting the individual presence status and the preferred device.
- **Calender extension** for Outlook Extensions.
- **Embedded functions for e-mails with "right click"**
  - Chat
  - Call
  - Set Tell Me When
  - Conference

- **Outlook Contact Card**

  providing functions when an e-mail is opened like chat, call, video call, e-mail, activate Tell Me When.

Furthermore Virtual Desktop Infrastructure (VDI) is supported via Citrix.

3 Configuration and Settings

Operating the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes smoothly requires various individual user settings in the OpenScape Fusion. 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 invoke this dialog from the **Logon** dialog of the user login with a click on the **Manage** button and a subsequent click on **Settings**. You can also open the configuration dialog during operation after logging in. To do this, open the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes context menu in the notification area of the Windows task bar and select **OpenScape Settings** and **Advanced Client Settings**.

NOTICE:

In live operation, you cannot adjust the basic connection parameters. They are displayed only and cannot be edited. If, however, it is still necessary to change connection parameters at this stage, you must first shut OpenScape Fusion for Office down via the context menu in the notification area of the Windows task bar. When you launch the program anew (with the **[shift key] kept pressed**), the connection parameters are released for editing.

The configuration options are for:

- General
- OpenScape UC Provider
- SIP Service Provider
- Desktop Notifications
- Keyboard Manager
- Plugin Integration Controller
- Modules

3.1 Settings for V10

On the Settings you can perform the main settings for the application. The single main settings are subdivided in sub-settings.

Depending on the setup mode - **OpenScape Provider** or **OpenScape & SIP Provider** - you can perform the following main settings listed in the left-hand section:

- **General** (both setup modes)
- **OpenScape UC Provider** (both setup modes)
- **SIP Service Provider** (OpenScape & SIP Provider).
- **Desktop Notifications** (both setup modes).
- **Keyboard Manager** (both setup modes)
- **Plugin Integration Controller**

- **Modules**

3.1.1 General Settings

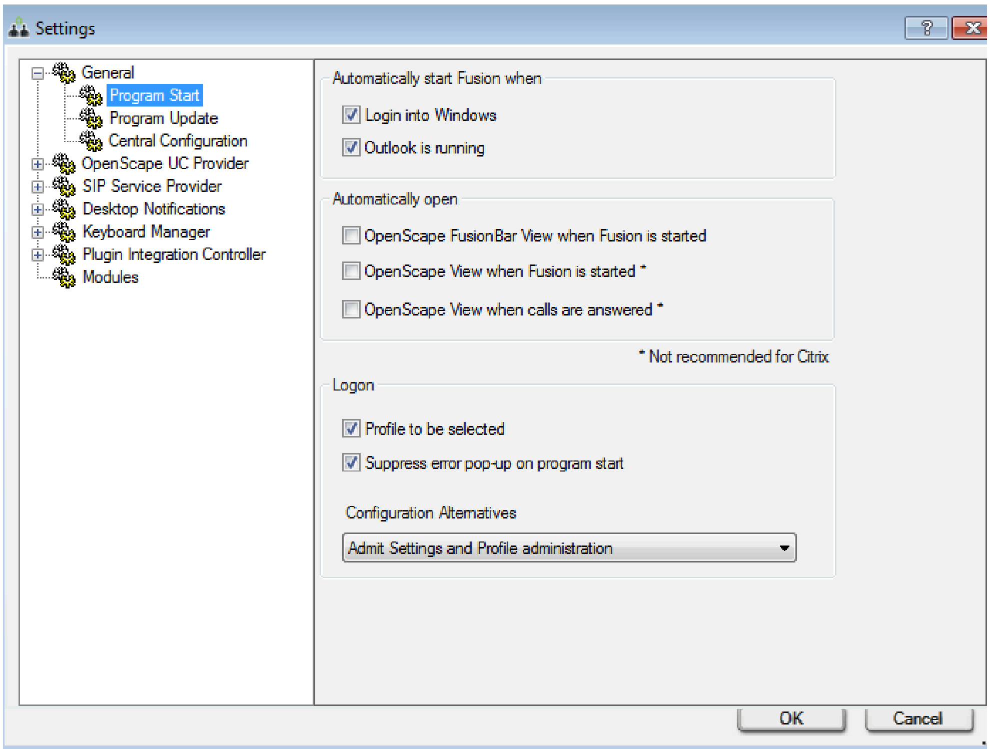
The **General** settings include the following sub-settings.

3.1.1.1 Starting the Program

NOTICE:

The settings for the program start are only available during operation.

Open **Settings** > **Advanced Client Settings** > **General** > **Program Start** in order to edit the options for starting the OpenScape Fusion.



You can define the following settings for the program start:

Automatically start Fusion when

You can activate / deactivate the following check boxes.

- Activating the **login into Windows** option starts the OpenScape Fusion automatically when you perform your Windows logon to the system.
- Activating the **Outlook is running** option starts the OpenScape Fusion automatically when Outlook is opened.

Automatically open

You can activate / deactivate the following check boxes.

- Activating the **OpenScape FusionBar view when Fusion is started** option will open the Fusion bar as soon as Fusion is started.
- Activating the **OpenScape View when Fusion is started** option will open the OpenScape view when Fusion is started.

NOTICE:

This option is not recommended when Citrix (VDI) is used.

- Activating the **OpenScape View when calls are answered** option will open the OpenScape view when calls are answered.

NOTICE:

This option is not recommended when Citrix (VDI) is used.

Logon

You can activate / deactivate the following check boxes

- **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 login dialog if only one profile is used. This profile must be created at the first program start after the installation.

- **Suppress error pop-up on program start**

  When activated errors will not be shown on program start.

Configuration Alternatives

You can use this setting to specify whether – and if so which – configuration options shall be available to a user when logging on. The following options are available:

- **Admit Settings and Profile administration**

  The complete list of management features as well as the **Settings** option are 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**

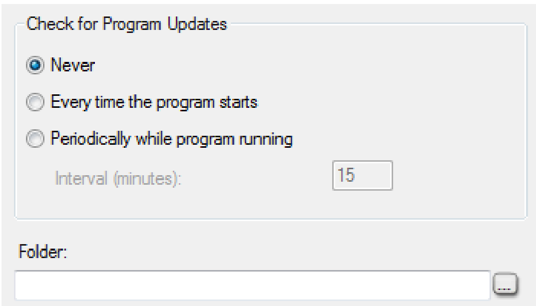
  The **Settings** entry is displayed in the menu of the **Manage** button after you have clicked on the button. The other management functions are not available. The **Add Profile ...** button is hidden from the login dialog.

3.1.1.2 Program Update

NOTICE:

Options for editing program update settings are only available when activated during logon, not when activated during live operation.

On the **Advanced Client Settings** > **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 Fusion for OfficeOpenScape Fusion for IBM Notes, a more recent version is searched for in the memory location specified under **Folder**.
- **Periodically while program running**

  While the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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.

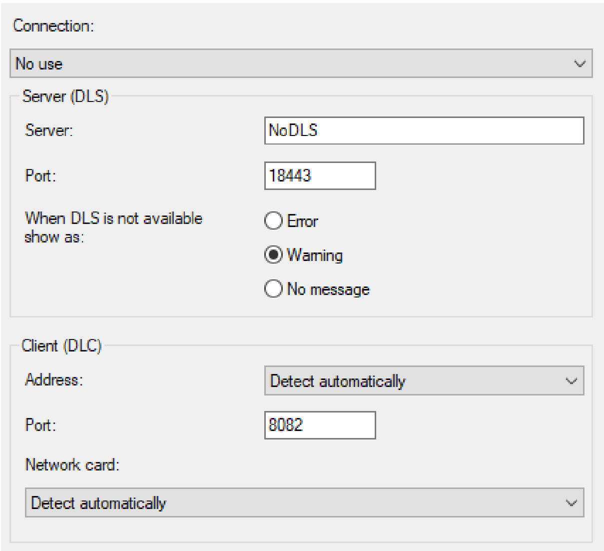
> **NOTICE:**
>
> If the update folder of the program is stored on another computer in the network, specify the path to the setup folder in the UNC (Uniform Naming Convention) format, for example `\\server name\path`. Before you do that, verify that you have the privileges required for accessing this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

3.1.1.3 Central Configuration

> **NOTICE:**
>
> Options for editing the central configuration settings are only available when activated during logon, not when activated during live operation.

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

To edit the settings for the central configuration, select on the tab **Advanced Client Settings** > **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

  – Enter the port number of the DLS server in the **Port** field. The DLS port is the port number used for accessing the central server.

  – In the **When DLS is not available show as** radio button field, select **Warning**.

- **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 computer configuration. Furthermore, you can enter an IP address manually.

    NOTICE:

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

  – In the **Port** field , enter the number of the local port under which the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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 computer.

NOTICE:

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

NOTICE:

These settings are entered by default if the central configuration is used during the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes setup.

NOTICE:

The fusion client OpenScape Provider data i.e. "Connection" and "Web Access" settings are configured in DLS at (IP Devices >> IP Client Configuration >> OpenScape) "Connection" tab and "WEB Access" tab, respectively.

For more information about DLS please refer to DLS documentation Open Scape Deployment Service.

3.1.2 OpenScape UC Provider Settings

The **OpenScape UC Provider** module is in charge of connecting the OpenScape UCApplication system. This module must be configured correctly to grant access to the entire functionality of the OpenScape UCApplication.

The following settings are available for configuring the **OpenScape UC Provider** module:

- **Connection**
- **My presence status**

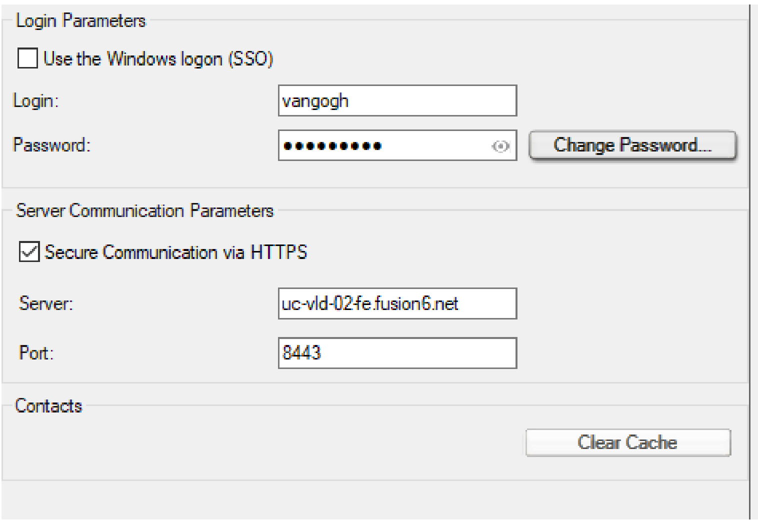
3.1.2.1 Connection

You must configure the login and communication parameters in the **OpenScape UC Provider** for connecting the OpenScape UCApplication system.

NOTICE:

You can perform the login and communication parameter settings of the **OpenScape UC Provider** only during logon.

Select on **OpenScape UC Provider** the **Connection** option.



You can perform the following **Login Parameters** settings in this dialog:

- **Use the Windows logon (SSO)**

  Activating this option determines that Single Sign-On shall be used for your logging on to the OpenScape UCApplication system. This requires the Single Sign-On feature to be active in your system. Logging on then occurs automatically with the Windows logon data if you are already logged in at your workstation. In this case, leave the input fields **Login** and **Password** for logging on to the OpenScape UCApplication system empty and ensure that the FQDN of the OpenScape UCApplication computer is entered in the **Server** input field.
- **Login**

  Enter the ID your system administrator has provided for logging on at the OpenScape UCApplication system. For example john.doe@system.

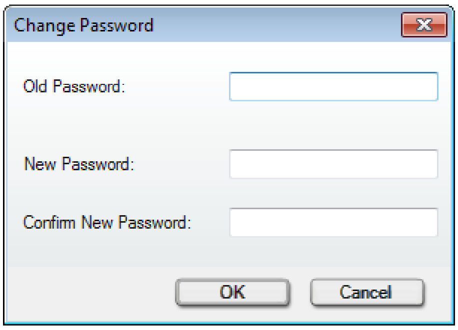
  If Windows Authentication is active at your system, your windows logon data should be used for logging on the OpenScape UCApplication system. For example jane.doe@domain.net or domain\jane.doe.
- **Password**

  Enter the password your system administrator has provided for logging on at the OpenScape UCApplication system.

  Just as in the Login input field, if Windows Authentication is active at your system, please use your Windows password.

- **Change Password**

  Via this button you can define your own password for logging on at the OpenScape UCApplication system in the following dialog:

  – **Old Password**

    Enter your current password.

  – **New Password**

    Enter your new password.

  – **Confirm New Password**

    Enter your new password once again to avoid typing errors.

  – **OK**

    A click on this button applies the password settings you have performed.

  – **Cancel**

    A click on this button discards the password settings you have performed.

You can perform the following **Server Communication Parameters** settings in this dialog:

- **Secure Communication via HTTPS.**

  This option is active by default. Your system administrator will tell you whether or not to change this setting.

- **Server**

  Enter here the FQDN of the OpenScape UCApplication computer.

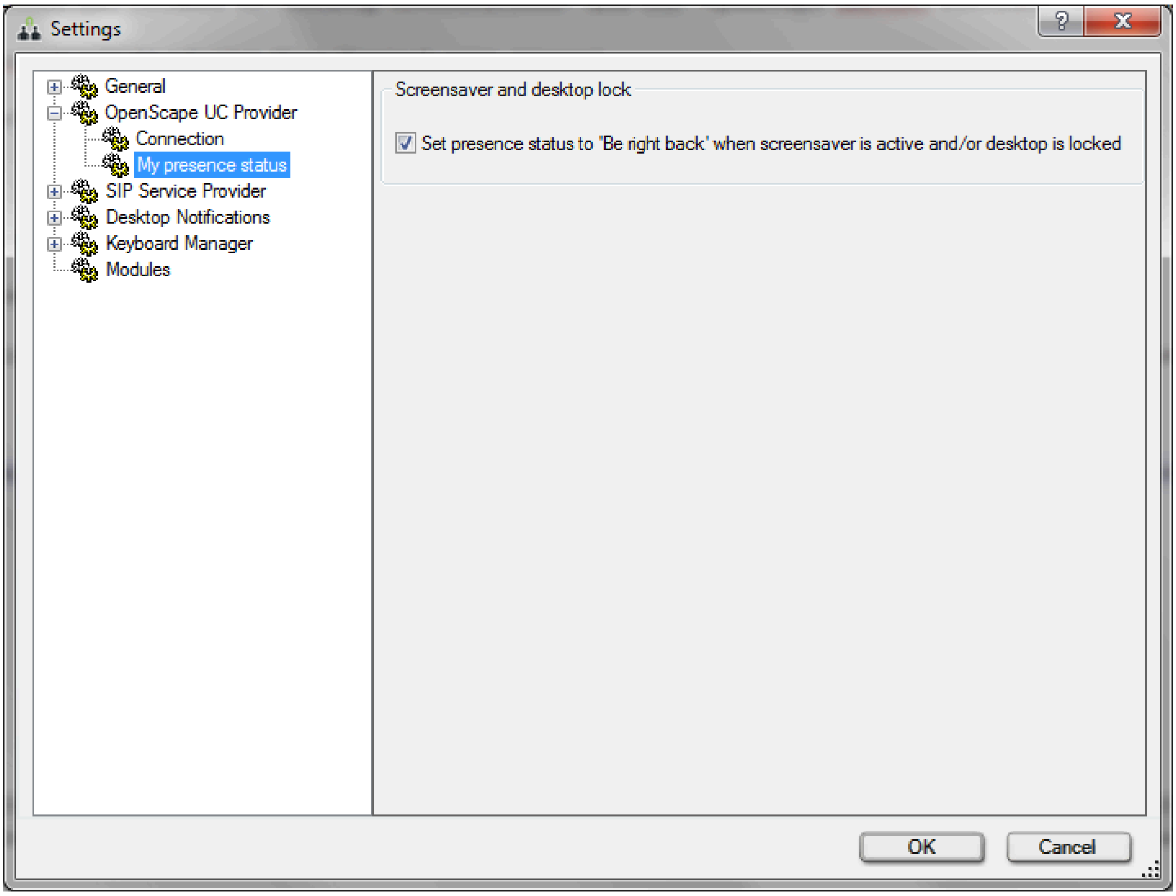
- **Port**

  This field defines the port number for communicating with the OpenScape UCApplication system. When you enable the **Secure Communication via HTTPS** check box, port number 4709 is automatically entered in this field. If the **Secure Communication via HTTPS** option is disabled, the port number field is automatically allocated with port number 4708. Your system administrator will inform you about whether or not these settings should be changed.

NOTICE:

For nd R3 / V1.6.xxx the ports are 7789 (HTTP) or 8443 (HTTPS).

3.1.2.2 My Presence Status



Screensaver and desktop lock

NOTICE:

You can perform this setting while logging in and during operation.

When the **Set presence status to "Be right back" when screensaver is active and/or desktop is locked** check box is enabled, the OpenScape Fusion checks whether your presence status is **Available** when the screensaver or energy-saving mode is active or the desktop is locked. If so, your status is then automatically set to **Be right back**. When the desktop is unlocked or the screensaver or energy-saving mode is disabled, your presence status is automatically reset to **Available**.

NOTICE:

If your presence status differs from **Available** when the desktop is locked or the screensaver or energy-saving mode is active, the presence status you have set is kept.

NOTICE:

If this check box is not ticked, your presence status remains unchanged when the desktop is locked or the screensaver or energy-saving mode is active.

3.1.3 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 **Logon** dialog for this purpose.

By setting the SIP Service Provider you configure the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes for being used as softphone at an SIP communications system.

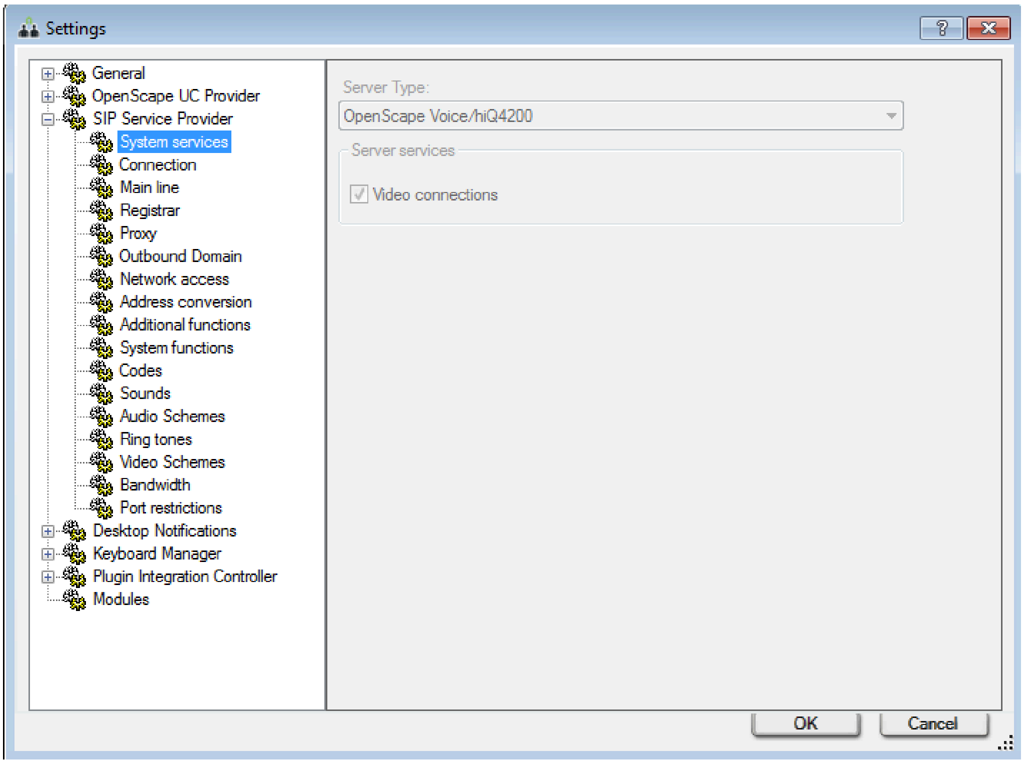
To edit the SIP Service Provider settings, select under **Settings** > **Advanced Client Settings** > **SIP Service Provider**. Then click on one of the following settings.

3.1.3.1 System Services

NOTICE:

You can perform these settings during login only.

Select under **Advanced Client Settings** > **SIP Service Provider** > **System services** the server type with which the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes is connected.



Server Type

- **OpenScape Voice/hiQ4200**

  Select this server type if the OpenScape Fusion is connected to an OpenScape Voice or a hiQ4200.
- **OpenScape Voice/hiQ4200 without video**

  Select this server type if the OpenScape Fusion is connected to an OpenScape Voice or a hiQ4200 without video support.
- **OpenScape 4000 <=V7**

  Select this server type if the OpenScape Fusion is connected to an OpenScape 4000 V6 or V7.
- **OpenScape 4000 >= V8**

  Select this server type if the OpenScape Fusion is connected to an OpenScape 4000 V8 or later.
- **Default without Video/Instant Messaging**

  Select this server type if the OpenScape Fusion 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.

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.

NOTICE:

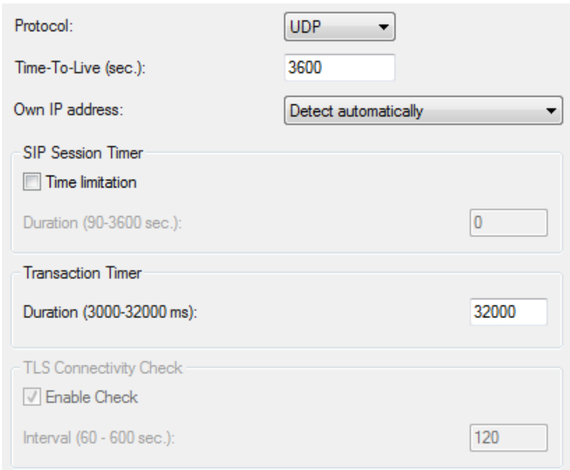
If a listed server service is active, the associated features and elements such as buttons, menu options, module windows, etc. are also active in the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes. These controls are unavailable or inactive if the associated server service is not active.

3.1.3.2 Connection

NOTICE:

You can perform such settings during logon only.

Select the entry **Advanced Client Settings** > **SIP Service Provider** > **Connection**. Enter the different connection settings for the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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 Fusion for OfficeOpenScape Fusion for IBM Notes 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**.

- **Time-To-Live (sec.)**

  OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes refreshes the registration with the SIP server in intervals specified in this 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 Fusion for OfficeOpenScape Fusion for IBM Notes. If the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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 sec.)**

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

Transaction Timer

- **Duration (3000-32000 ms)**

  OpenScape Fusion expects a response from the SIP server to its SIP request (for example when setting up an SIP connection) within this period. The default value set for this parameter is `32000` ms. When this period has expired and OpenScape Fusion 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 cannot be reached temporarily or permanently.

NOTICE:

The required details are provided by your administrator or PBX administrator.

TLS Connectivity Check

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

NOTICE:

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

- **Enable Check**

  If a tick is placed in the **Enable Check** checkbox (default settings), monitoring the TLS connection is active.
- **Interval (60 - 600 sec.)**

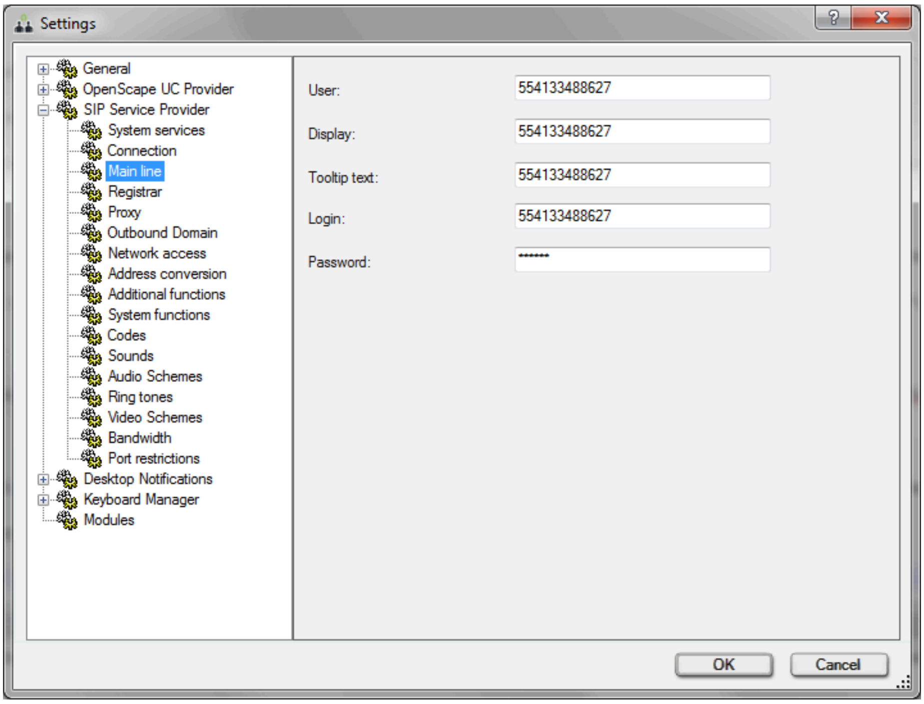
  With this parameter you can define an interval of 60 sec. to 600 sec. in which the existance of the TLS connection to the OpenScape Voice is checked. The default value is 120 sec.

3.1.3.3 Main Line

NOTICE:

You can perform these settings during login only.

Select **Advanced Client Settings** > **SIP Service Provider** > **Main line** to define the parameters for the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes main line.



NOTICE:

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

- **User**

  For logging on to the SIP communications system you need to enter a unique OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes phone number/user address.

  If you leave this field emtpy, logging on to the SIP communications system (for example OpenScape Voice) will fail. In this case it is not possible using the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes as SIP softphone.
- **View**

  Enter the complete name. The text is transmitted as subscriber name to your connection partners. This text is also used as a description of the primary line in the **Lines** window.
- **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 the SIP ID that has been configured for authentication at the SIP communications system.
- **Password**

  Enter here the SIP password that has been configured for the SIP ID specified under **Login**.

  NOTICE:

  The administrator of your SIP communications system provides you with the required details.
- **Address**

  Enter here the phone number or SIP address to be automatically called after activating the line (for example after picking up the receiver or pushing the corresponding key (*picking up*/*putting down the receiver*) of your headset).

  IMPORTANT:

  You can use the **Immediate connection** feature only with headsets that have a function key *picking up*/*putting down the receiver* , such as the headset USB adapter GN 8120 USB and other products by manufacturers GN Netcom and Plantronics.
- **Delay (sec.)**

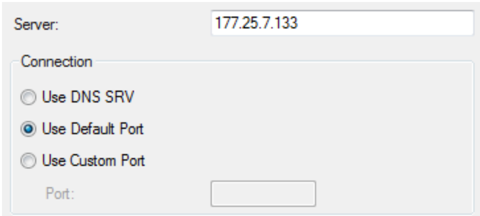
  This entry specifies the delay after which the above address is to be dialed. If the delay is set to `0`, the immediate connection is set up without delay.

3.1.3.4 Registrar

NOTICE:

You can perform these settings during login only.

Select under **Advanced Client Settings** > **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:

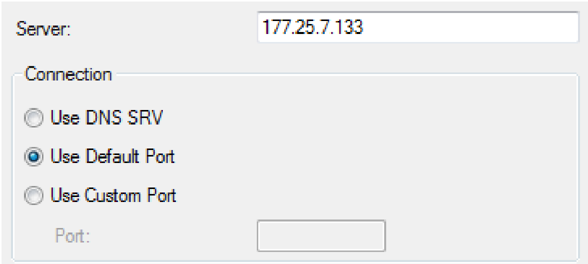
  The necessary details can be obtained from the system administrator.

3.1.3.5 Proxy

NOTICE:

You can perform these settings during login only.

Select under **Advanced Client Settings** > **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.

3.1.3.6 Outbound Domain

> **NOTICE:**
>
> You can perform these settings during login only.

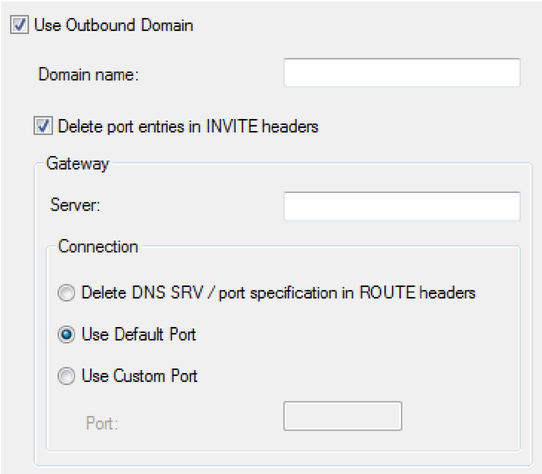
An outbound domain (outbound proxy server) is used e. g. for a (*Survivable Branch Office Solution*) with an OpenScape Voice. In this case the survivability is provided by an extra proxy component of the SIP server (survivable SIP proxy, for example *Comdasys Convergence*). A survivable SIP proxy (gateway)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

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 Client Settings** > **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 Fusion for OfficeOpenScape Fusion for IBM Notes 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 Fusion for OfficeOpenScape Fusion for IBM Notes to an OpenScape Voice with an OpenScapeBranch 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 Fusion for OfficeOpenScape Fusion for IBM Notes is used with an OpenScape Voice in a survivable branch solution (for example OpenScapeBranch), 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 Fusion for OfficeOpenScape Fusion for IBM Notes to an OpenScape Voice with an OpenScapeBranch solution in the central office.

NOTICE:

The necessary details can be obtained from the system administrator.

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

- **Delete DNS SRV / port specification in ROUTE headers**

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

  IMPORTANT:

  You must set this option for connecting an OpenScape Voice in survivable branch solutions (for example OpenScapeBranch).
- **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**.

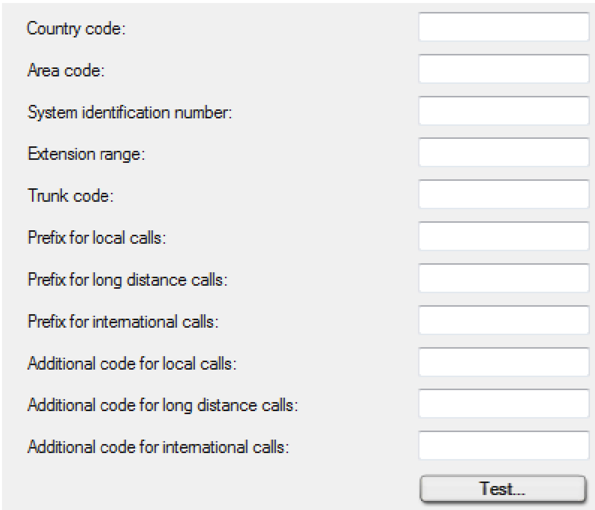
3.1.3.7 Network Access

NOTICE:

You can perform the network access settings during login only.

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 Fusion for OfficeOpenScape Fusion for IBM Notes directories or call lists. These settings are also used for converting call numbers into the internationally dialable format. If these settings are not configured properly, you may encounter problems when setting up connections. Network access settings are not needed if call number normalization is not active.

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



- **Country code**

  Enter here the international prefix for your location, for example `49` for Germany.
- **Area code**

  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.
- **System identification number**

  Enter the system identification number. This system ID number identifies internal call numbers in the directories that only set up internal connections when selected.
- **Extension range**

  Specify the extension range of your network in the form of a *regular expression.*

  Example:

  You have been assigned the system identification number with the numbers 0049 35 12345-2000 to 0049 35 12345-4999. In this case the extension range reads 2000 to 4999. Enter the following in the **Extension range** field for these phone numbers: `\b[2-4][0-9]{3}\b`.

– \b - the number must begin with a blank
– [2-4] - the first digit may be a character between 2 and 4 inclusive, thus 2, 3, 4
– [0-9]{3} - for the next three digits, numbers 0 to 9 are allowed
– \b - the number must end with a blank

- **Trunk code**

  Enter here the code that has been configured on your system or on your PBX to allocate trunks for outgoing connections.
- **Prefix for local calls/long distance calls/international calls**

  Enter the network operator ID for the respective call type in the corresponding fields. For example, in Germany no **Prefix for local calls** is used, while for other countries in Europe, South Africa and members of the NANP (North American Numbering Plan) the zero is used to mark local calls. In contrast, 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**

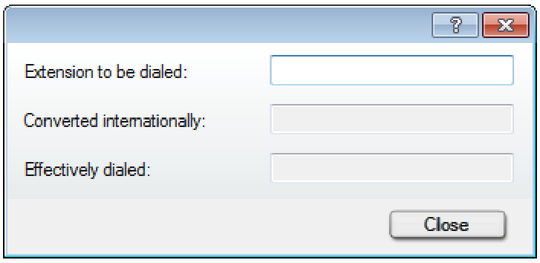
  Enter here any additional digits to be used as call-by-call prefixes. This data is independent from the configuration of the connected communications system.

  The sequence of the various codes is as follows:

  <trunk 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 Fusion for OfficeOpenScape Fusion for IBM Notes determines the phone number in international format.
- **Converted internationally**

  The phone number entered in the above field is automatically displayed in this field.
- **Effectively dialed**

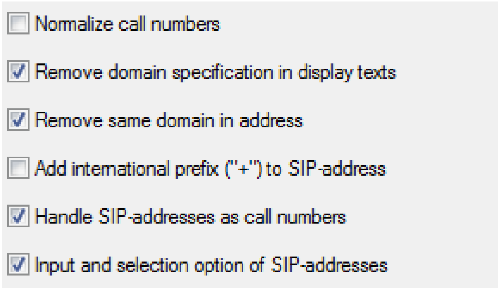
  This field displays automatically the actually dialed number. Depending on the set network access parameters the number may be shorter, for example if an internal phone number has been recognized.

3.1.3.8 Address Conversion

NOTICE:

You can perform the **Address Conversion** settings only during logon.

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



- **Normalize call numbers**

  Normalizing a phone number means that the number is converted into 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 (for example display the calling station) on the display.
- **Remove same domain in address**

  Activate this option to suppress the domain port in the case of SIP-URIs from the same/own registrar in addresses, for example call lists.
- **Add international prefix (“+“) to SIP address**

  Activate this option if the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes is to indicate the SIP address as international.

  Example:

  The SIP Service Provider delivers the address *sip:4924049087666@enterprise.com* and the OpenScape Fusion converts it into *sip:+4924049087666@enterprise.com*.

- **Handle SIP-addresses as call numbers**

  If this option is active, the domain portion is ignored and the text that precedes the domain considered a phone number.

  Example:

  sip:+4924049087666@enterprise.com is considered *+4924049087666*.
- **Input and selection option of SIP-addresses**

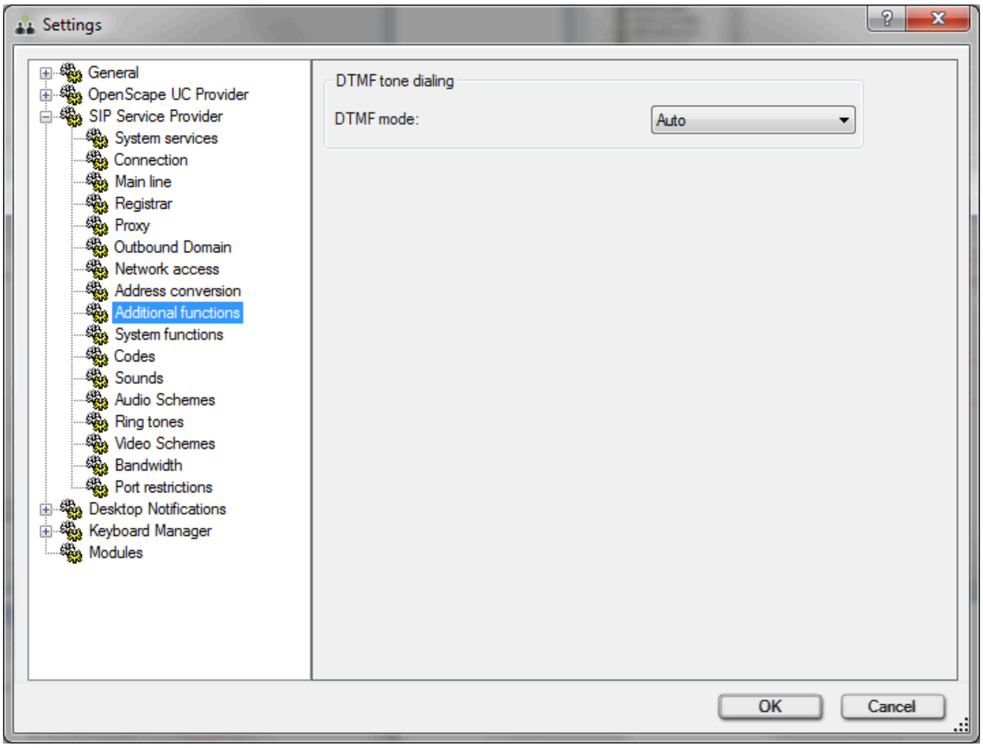
  Activate this check box to allow the input and selection option of SIP-addresses.

3.1.3.9 Additional Functions

NOTICE:

You can perform these settings during logon only.

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



DTMF tone dialing

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

- **DTMF mode**

  The available options in this combo box read **Auto** and **Inband**. You can obtain further details from your PBX administrator.

3.1.3.10 System Functions

NOTICE:

You can perform these settings during login only.

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

NOTICE:

The functions provided in this dialog are possibly not supported by every SIP communications system.

Voice recording

- **Disable Voice Recording**

  NOTICE:

  This option is not activated by default.

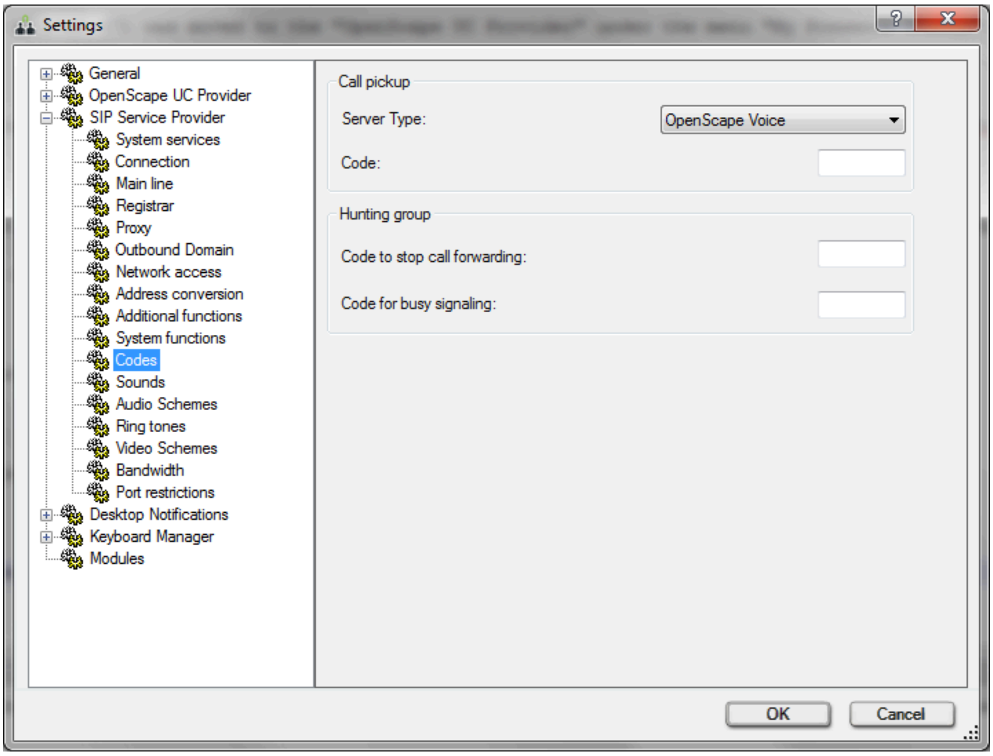
  This is under Call Control.

3.1.3.11 Codes

NOTICE:

You can perform these settings during logon only.

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



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:

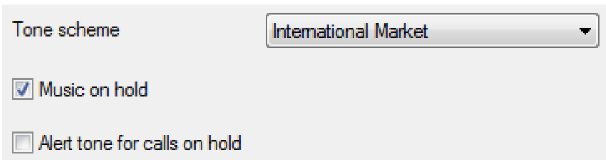
  The necessary details can be obtained from the system administrator.

3.1.3.12 Sounds

NOTICE:

You can perform these settings during login only.

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 Fusion for OfficeOpenScape Fusion for IBM Notes. You do this is on the tab **Advanced Client Settings** > **SIP Service Provider** > **Sounds**.



- **Tone scheme**

  Select from this combo box the country for which the default tones in the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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.

3.1.3.13 “Audio Schemes”

The **Audio Schemes** contains a list of configured audio schemes that enable conducting phone calls. An audio scheme combines different audio hardware components, for example speakers and microphone in the form of a headset.

NOTICE:

This menu can be reached also from the Fusion Tray via **Settings** > **Audio Schemes** > **Audio Scheme Settings**.

NOTICE:

You can select the headset from submenu from the systray in the taskbar.

settings > **Audio Devices** and select from there the device.

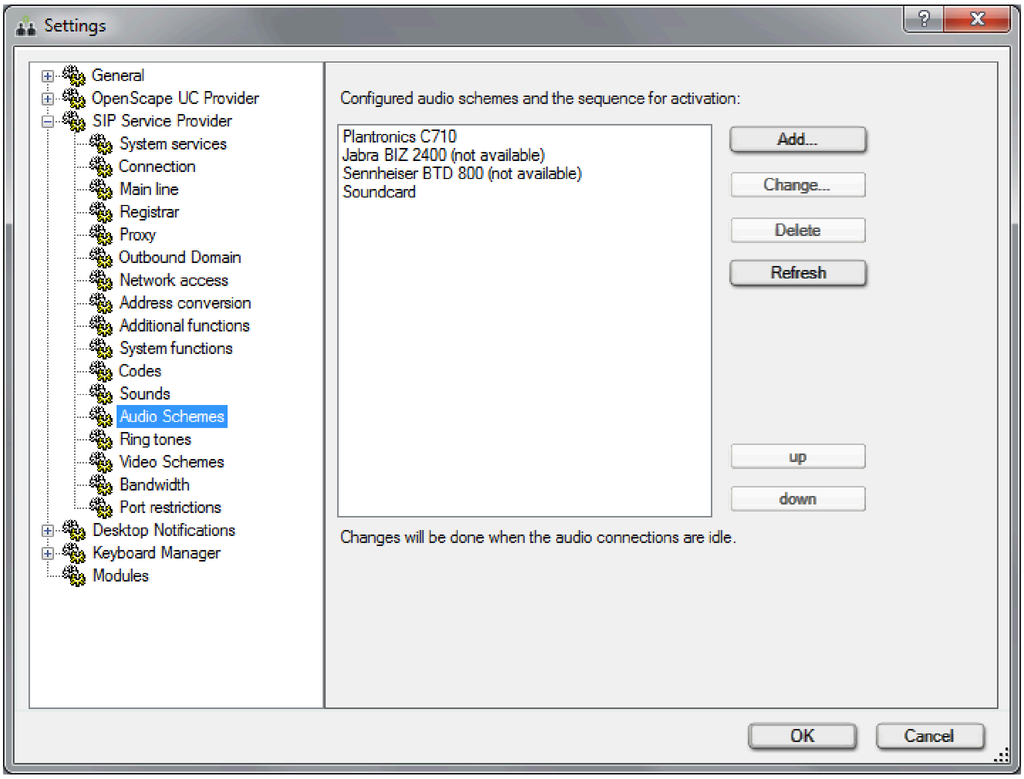
NOTICE:

You can see this tab only if you have selected the **OpenScape & SIP Provider** as default provider when installing the OpenScape Fusion for Office.

To set the audio schemes, select in the **Settings** dialog the **Audio Schemes** tab.

NOTICE:

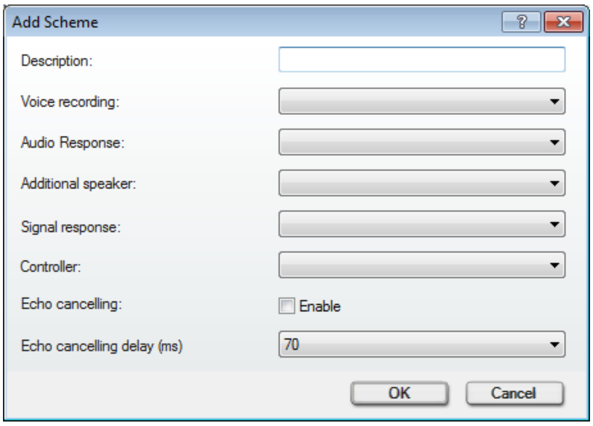
You can perform the audio device settings while logging in and also during operation.



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. 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**.
- Under **Additional speaker**, you optionally select the audio hardware for the loudspeaker to enable the *open listening* feature. If an additional speaker has been selected here and this audio scheme is active, the Softphone menu of the **Call Control** of the **Video** window display the icon for the *open listening* feature.

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

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

> **NOTICE:**
>
> Components of an audio scheme currently locally unavailable are represented in brackets. The entire audio scheme is then considered unavailable. The next available audio scheme may then be used.

- **Echo cancelling Enable/Disable**

  Selecting the **Enable** option activates the echo cancelling.

  This will remove unwanted echo signals during voice transmission. Echo cancelling is disabled by default.

> **NOTICE:**
>
> "**Echo cancelling**" feature is not intended to be used with regular handsets and headsets. The "Echo cancelling"

should be used only for "speakerphone" devices and for built-in microphones used without earphones, (in a laptop for example) and **only if the device does not have its own echo cancelling mechanism**.

- **Echo cancelling delay (ms)**

  During an active call (for example in an audio conference), feedbacks may occur between speaker and microphone. The signal that the speaker sends is picked up by the microphone and transmitted in addition to the actual voice signal as so-called echo signal with a slight delay. The **Echo cancelling delay (ms)** specifies the possible delay time between sending the loudspeaker signal and its being picked up by the microphone. The delay influences the echo cancelling efficiency. A delay of 70 ms is assumed by default but depending on the system used this value may deviate and needs to be adjusted accordingly. The values you can select for this setting are **0 ms**, **70 ms** or **140 ms**.

NOTICE:

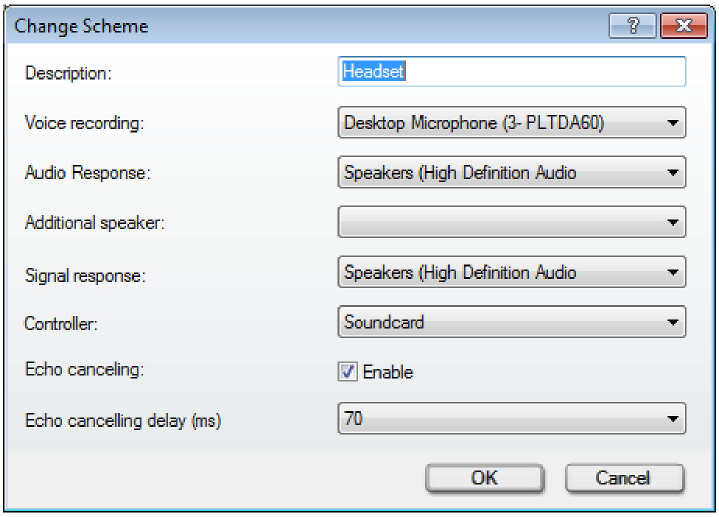
Before you change the **Echo cancelling delay (ms)** please consult your system administrator.

Selecting/activating audio schemes

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

Changing an audio scheme

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



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

Deleting an audio scheme

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

Audio scheme sequence

You can use the audio scheme sequence to influence selecting the required hardware. After the user has logged in, the OpenScape Fusion 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 Fusion.

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.

> **NOTICE:**
>
> Always change the current audio device via the audio schemes, not via the Windows control panel. Because you cannot synchronize the respective settings, the audio device set in the Windows control panel would be used but the client would display the audio device set last via the audio schemes.

3.1.3.14 Ring Tones

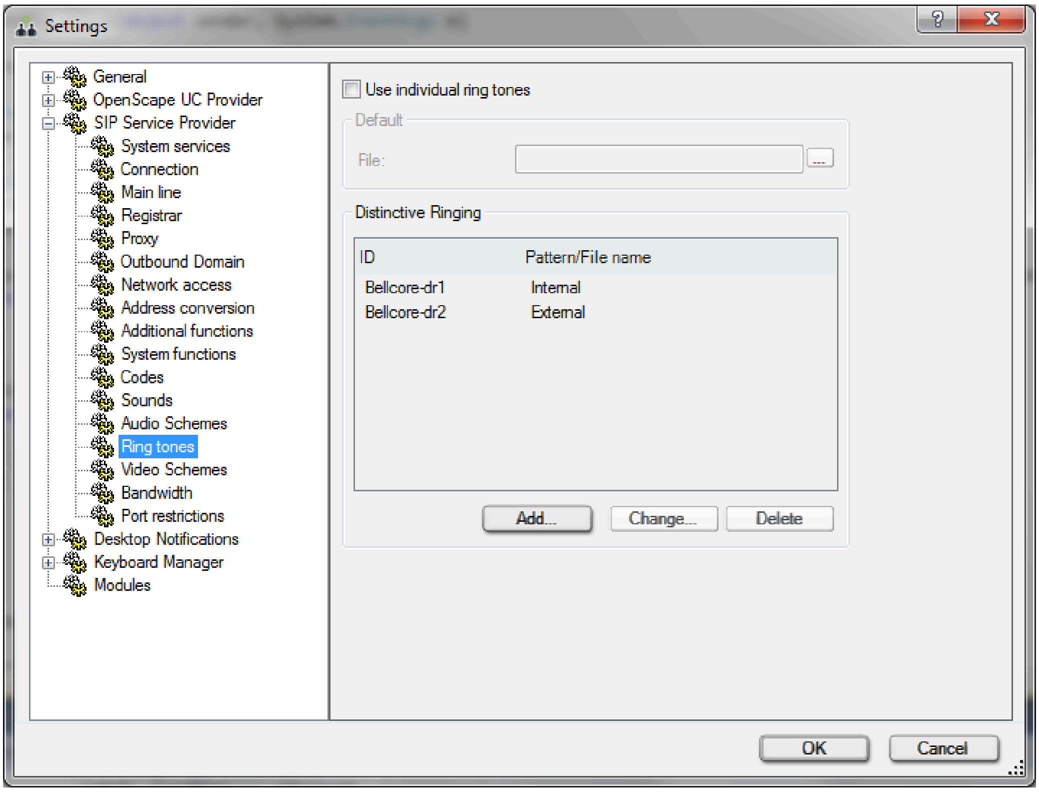
Alternatively to the default ring tones determined by the ring tone color set in the PBX, you can select an individual ring tone for signaling incoming calls. Compatible ring tone files must comply with the following requirements:

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

> **NOTICE:**
>
> If required, Microsoft Windows or the monitor itself disable speakers (particularly those integrated in the monitor) in the scope of power management or with activation of a screensaver. An incoming call can then not be signalled.

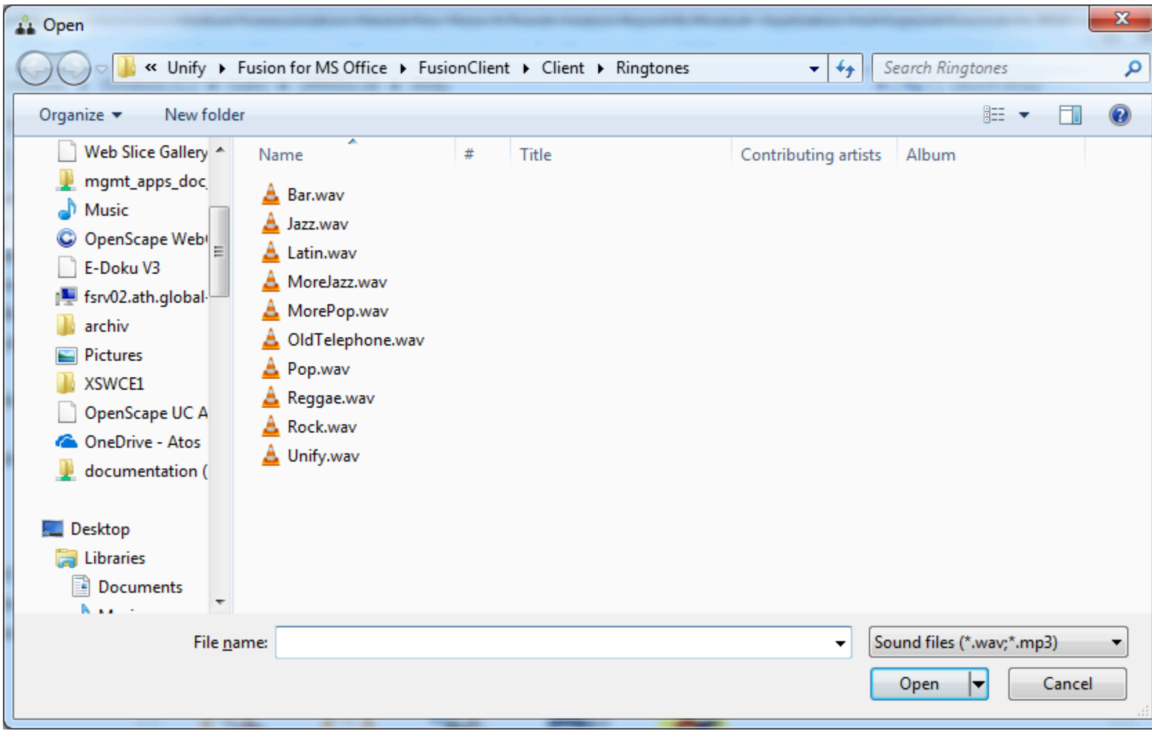
To configure an individual ring tone, select on the tab **Advanced** > **SIP Service Provider** > **Ring tones**.

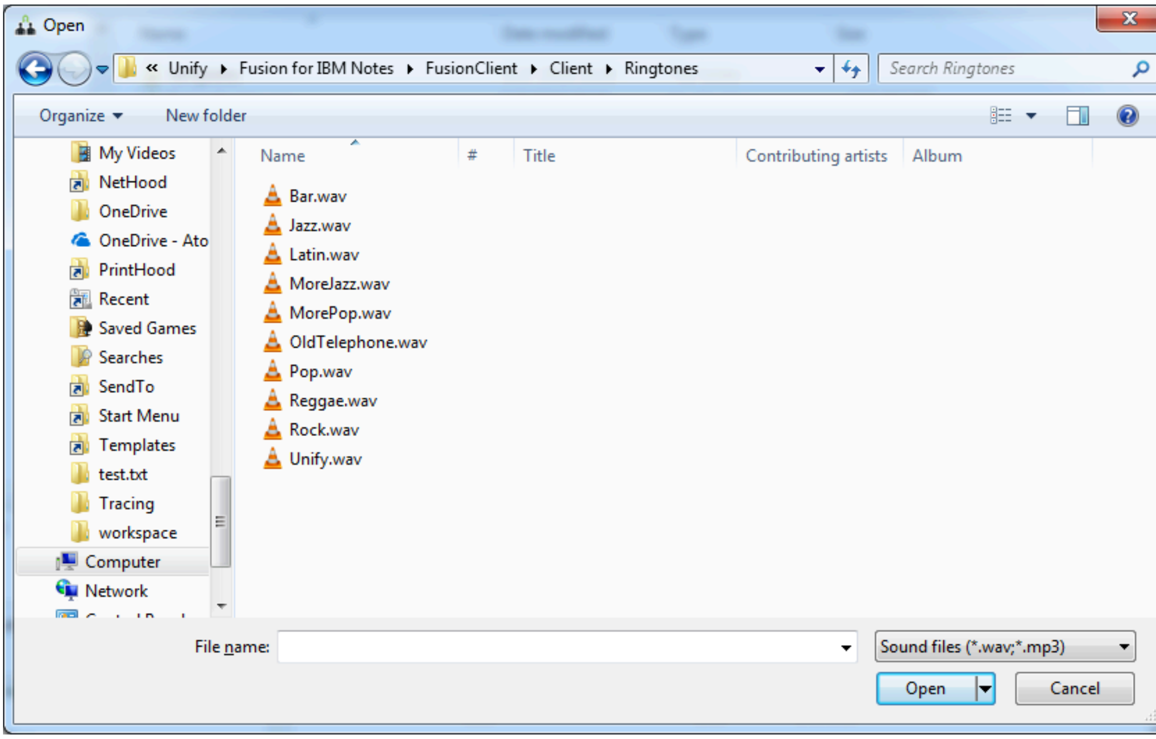
> **NOTICE:**
>
> You can edit the settings for the individual ring tone via the **Settings** dialog during login or operation. To do this, click on the **Manage** button in the **Logon** dialog or access the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes context menu to select the **Personal Settings** > **Ring tones**.



- Via the **Use individual ring tones** option you activate an individual ring tone. After you have activated this option, the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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.

For V1.6.46.26 and higher when you click on the browse button (...) on top right the following opens:





Files under `C:\Program Files (x86)\Unify\Fusion for MS Office \FusionClient\Client\Ringtones` will be opened. The files are seen in the screenshot above.

Files under `C:\Program Files (x86)\Unify\Fusion for IBM Notes \FusionClient\Client\Ringtones` will be opened. The files are seen in the screenshot above.

NOTICE:

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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.

Restrictions

There is a **restriction** due to **Windows** definitions:

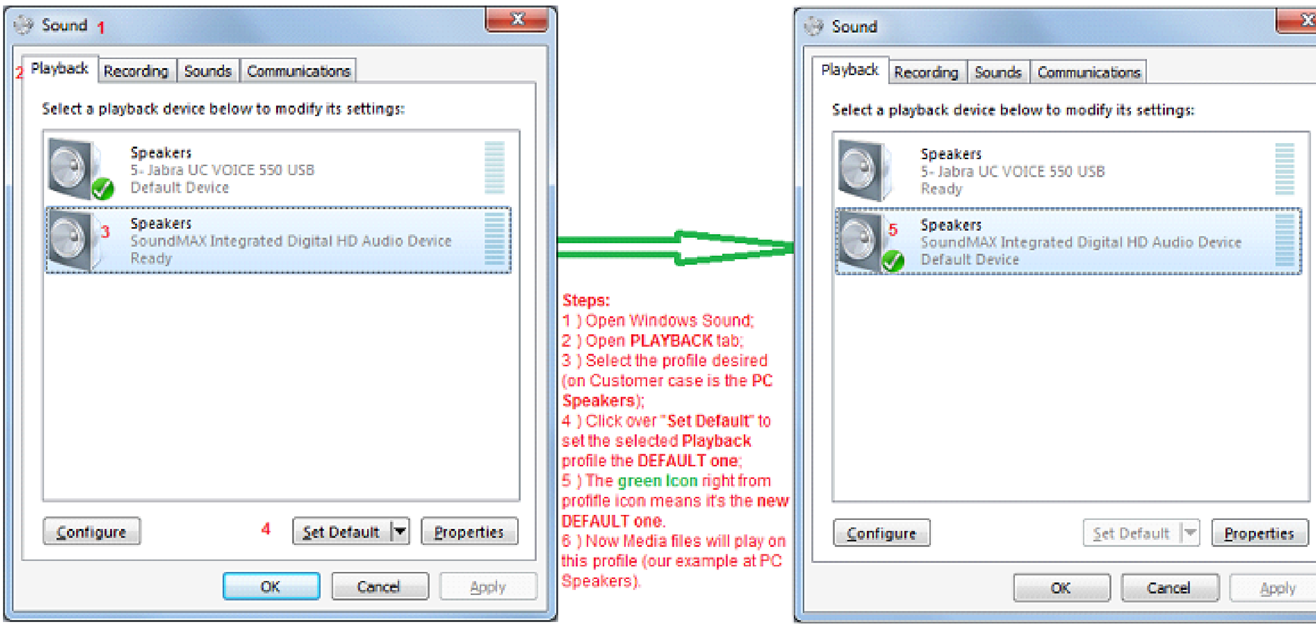
Once you select a **MP3 file**, it **won’t play** at the Audio device defined via Sound Schemes. Reasons are:

- Once User selects the **PLAY** a **MP3 file**, the **Windows Media Player** is the one to be used **automatically** by **Windows**.
- Due to this Windows Media Player will play on the **SELECTED Audio Device** as **DEFAULT** on **WINDOWS Sound SETTINGS**.
- The reason why the **regular Ring tone** plays as expected (using the Audio device defined via **Sound Schemes**, e.g. PC Speaker) is because it is **not** a **media** file.

Workaround

If the User insists to use a **specific Audio Device** (**Example PC Speaker** for **Ring MP3 file**) then the User needs to select the **desired** Audio Device as **DEFAULT** via **Windows Sound Playback**.

Example to define a new Audio Device as the new **Windows DEFAULT** Playback device:

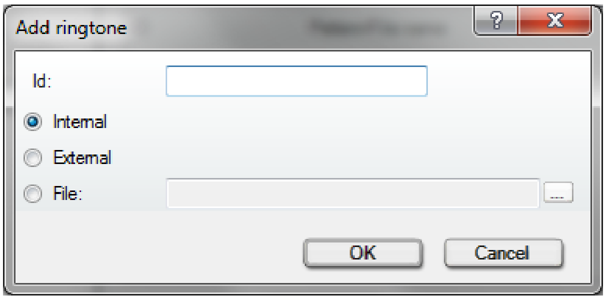


Defining a new Audio Device as Windows DEFAULT

Distinctive Ringing

Distinctive Ringing has been added.

By clicking on **Add...** you can add a new distinctive ringtone.

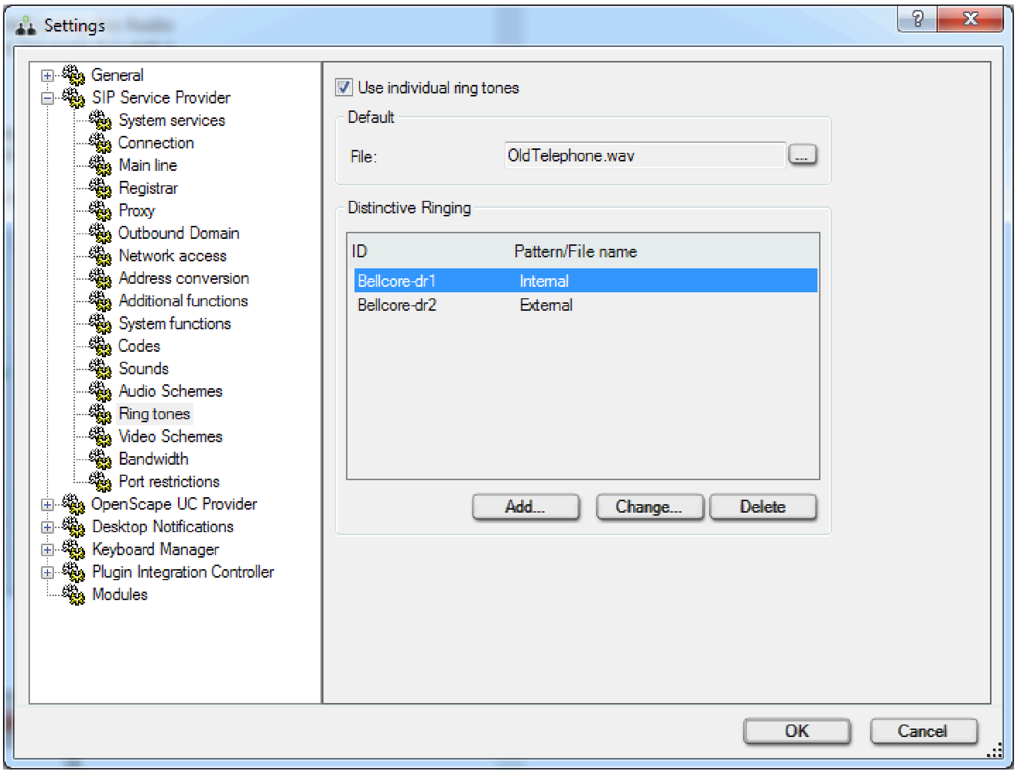


Hereby you can define the file and the id for he ringtone, and also for which type the distinctive ringtone will be used. You can click on one of the checkboxes:

- Internal: Uses the Fusion default ringing tone for internal calls (calls from inside the company).
- External: Uses the Fusion default ringing tone for external calls (calls from outside the company).
- File: It can be either a MP3 or WAV file defined by the user.

NOTICE:

The Id is an info that comes from the PBX. In case it is an OpenScape Voice, it defines by default the internal calls as **Bellcore-dr1** and external calls as **Bellcore-dr2**. This is what should be used in the Id field. The screenshot below shows how it looks like clicking OK in the **Add ringtone** window, choosing the default ringtones. If it does not work, please check with your IT department



If the incoming call id does not match with any ID of the Distinctive Ringing table, the ring tone defined in **Use individual ring tones** will be used.

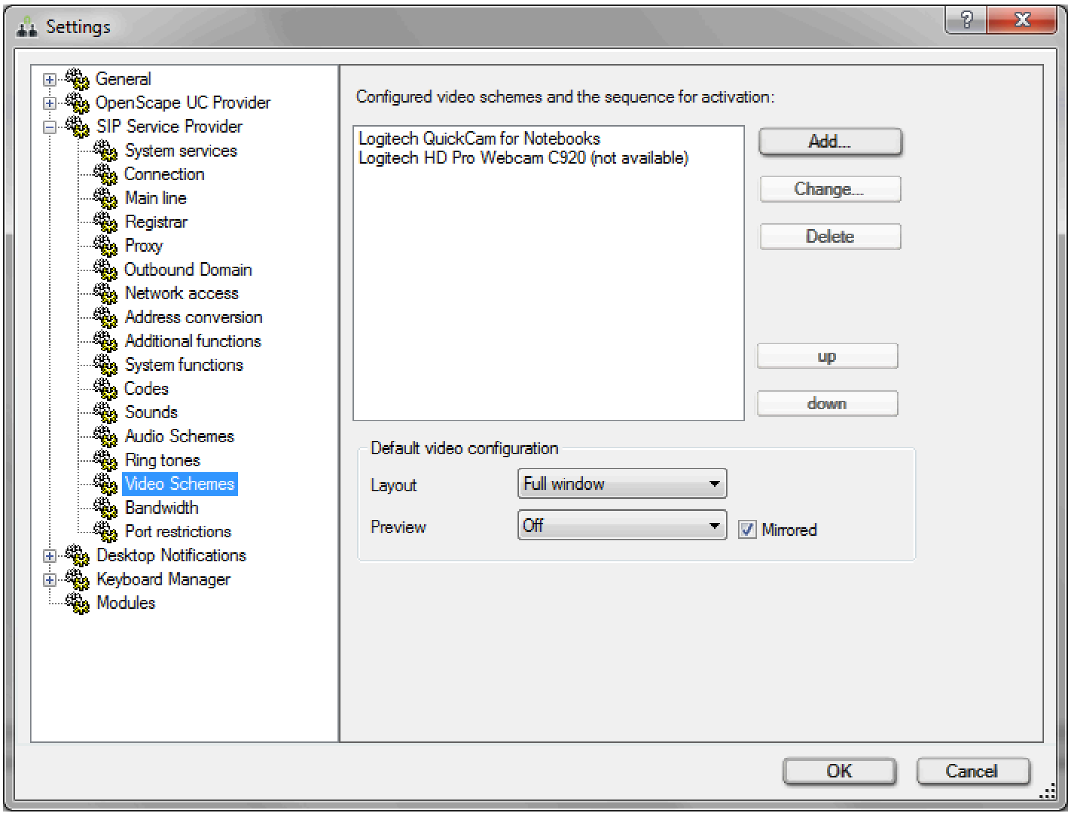
In our example above, if a call arrives with an Id different than **Bellcore-dr1** or Bellcore-dr2, the **OldTelephone.wav** will be played.

3.1.3.15 Video Schemes

NOTICE:

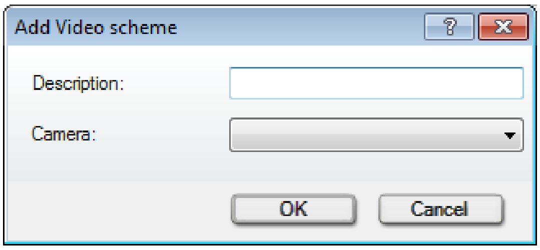
You can perform the **Video Schemes** settings during login only.

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 Client Settings** > **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 Fusion for OfficeOpenScape Fusion for IBM Notes.

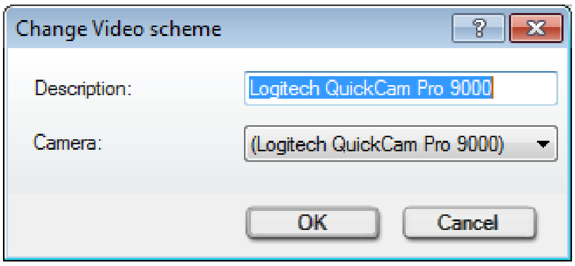
Selecting/activating a video scheme

To select/activate a video scheme, click the one you want in the list of configured video schemes.

> **NOTICE:**
>
> If a video scheme is temporarily locally unavailable, the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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 Fusion checks the video hardware specified in the video schemes. The list entries are processed from top to bottom. You can set the video scheme sequence using the **up** and **down** buttons.

Default video configuration

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

- **Layout**

  This option lets you specify the default view for your video window. You can select one of the following views:

  – **In call** (default)

    This view displays images of the connection partners in a frame and slightly turned. Your own image appears bottom left. When it is being transmitted, it is shown in a red frame.

  – **Full window**

    In this view the image of the connection partner occupies the entire video window. Your own image (if configured) appears bottom left. When it is being transmitted, it is shown in a red frame.

  – **Full screen**

    In this view the image of the connection partner occupies the entire screen. Your own image (if configured) appears bottom left. When it is being transmitted, it is shown in a red frame.

  – **Keep previous**

    With this setting you determine that the view used last is saved when you shut the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes down and used again when you restart the program.

- **Preview**

  – **Off**

    Your own image is not displayed or the video camera is switched off.

  – **On** (default)

    Your own image is displayed or the video camera is switched on.

  – **Keep previous**

    With this setting you determine that the setting for your own image used last is saved when you shut the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes down and used again when you restart the program.

- **Mirrored**

  – When this option is active, your own image is displayed mirrored in the **Video** window but transmitted unmirrored to the connection partner.

  – When this option is inactive, your own image is displayed unmirrored in the **Video** window and also transmitted unmirrored to the connection partner.

3.1.3.16 Bandwidth

Audio and video communication between the OpenScape Fusion and the communications system is based on fixed compression algorithms (codecs). To achieve high transmission quality of audio and video signals via network as far as possible, you need to perform appropriate bandwidth and codec settings in the OpenScape Fusion.

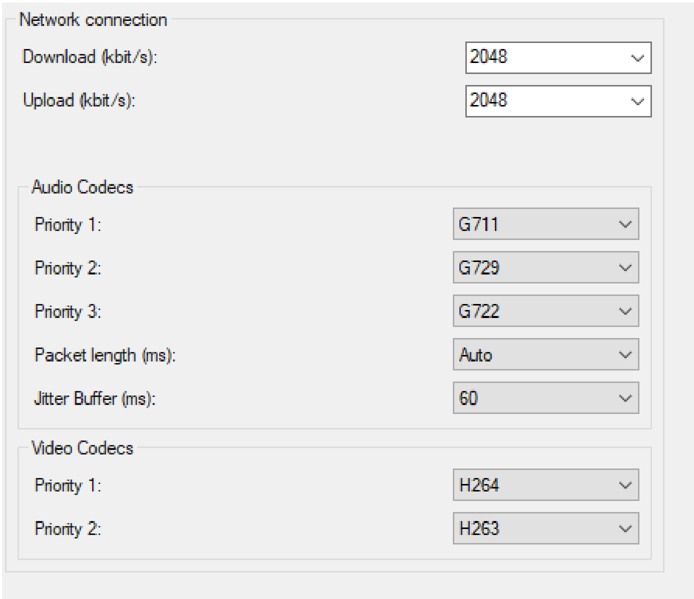
NOTICE:

You can perform such settings during logon only.

NOTICE:

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

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



Network connection

- **Download (kbit/s)**

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

  NOTICE:

  For Video HD resolution, it is recommended to use 1024 Kbit/s(640 x 480) or 2048 Kbit/s (1280 x 720).

  To define the rate for Download and Upload, open the Video resolution settings from **SIP Service Provider > Bandwidth > Network Connection settings**
- **Upload (kbit/s)**

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

NOTICE:

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

- **Load Default Profile**

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

Audio Codecs

Determine in this section the codec sequence required for voice communication. The three audio codecs that OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes 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 set period and 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 Fusion for OfficeOpenScape Fusion for IBM Notes 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.

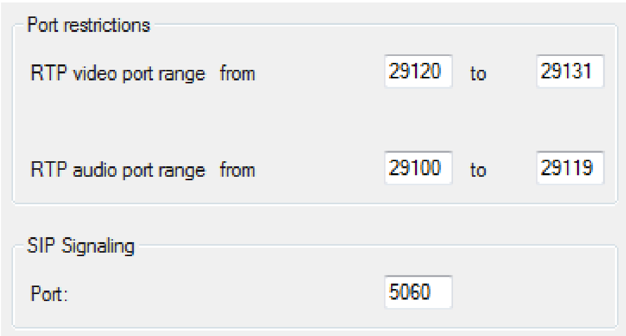
- **Priority 2**

  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.

3.1.3.17 Port Restrictions

> **NOTICE:**
>
> You can perform these settings during login only.

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



Port restrictions

- **RTP video port range from/to**

  Enter the RTP ports used for the video connections in these fields.

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

- **RTP audio port range from/to**

  Enter the RTP ports used for the voice connections in these fields.

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

SIP signaling

- **Port**

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

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

3.1.4 Desktop Notifications Settings

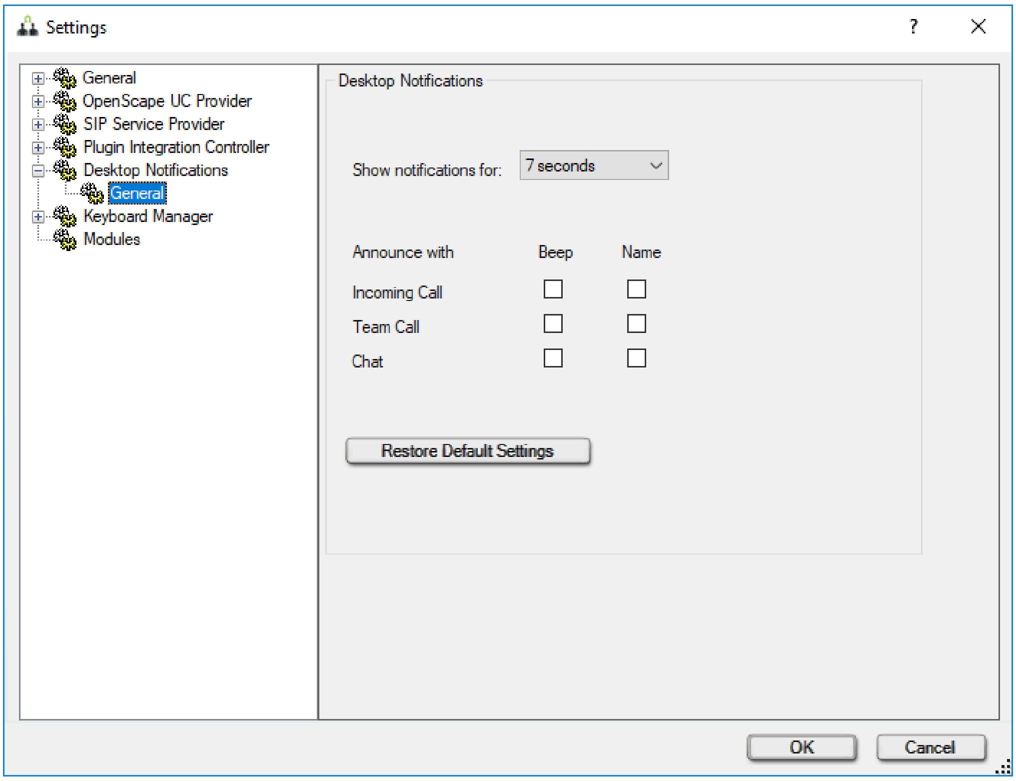
The **Notifier Toast (Desktop Alerts)** module enables indicating status changes in the form of desktop notifications. Independent from the selected default provider it is part of the installation by default.

> **NOTICE:**
>
> You can edit the **Notifier Toast (Desktop Alerts)** settings via right click on the Systray -> **Open Scape Client Options** -> Settings

You reach the dialog for performing the settings of the **Desktop Notification Settings** module on the tab **Settings** > **Desktop Notifications** > **General**.

The **Enable the Group pickup call toaster** option lets you activate (default) or disable the display of desktop notifications that indicate calls coming in for the members of a call pickup group. When this option is active, incoming group pickup calls are indicated in a desktop notification and can be accepted from there.

You can define how long the toasters should be displayed. You can select the time from the Combo box.



You can enable / disable all notifications separately via **Settings** > **OpenScape UC Settings** > **Notifications**. Refer to How to enable / disable desktop notifications

You can select whether to hear a beep sound or hear the caller's name when receiving a call. Same applies for Team Calls and for a Chat messages (i.e. you can choose between hearing a beep sound or the name of the contact sending you a chat message).

3.1.5 Keyboard Manager

Here Hotkeys can be defined.

Under **Key Assignments** the Hotkeys under **System-wide keyboard tokens (Hotkeys)** for

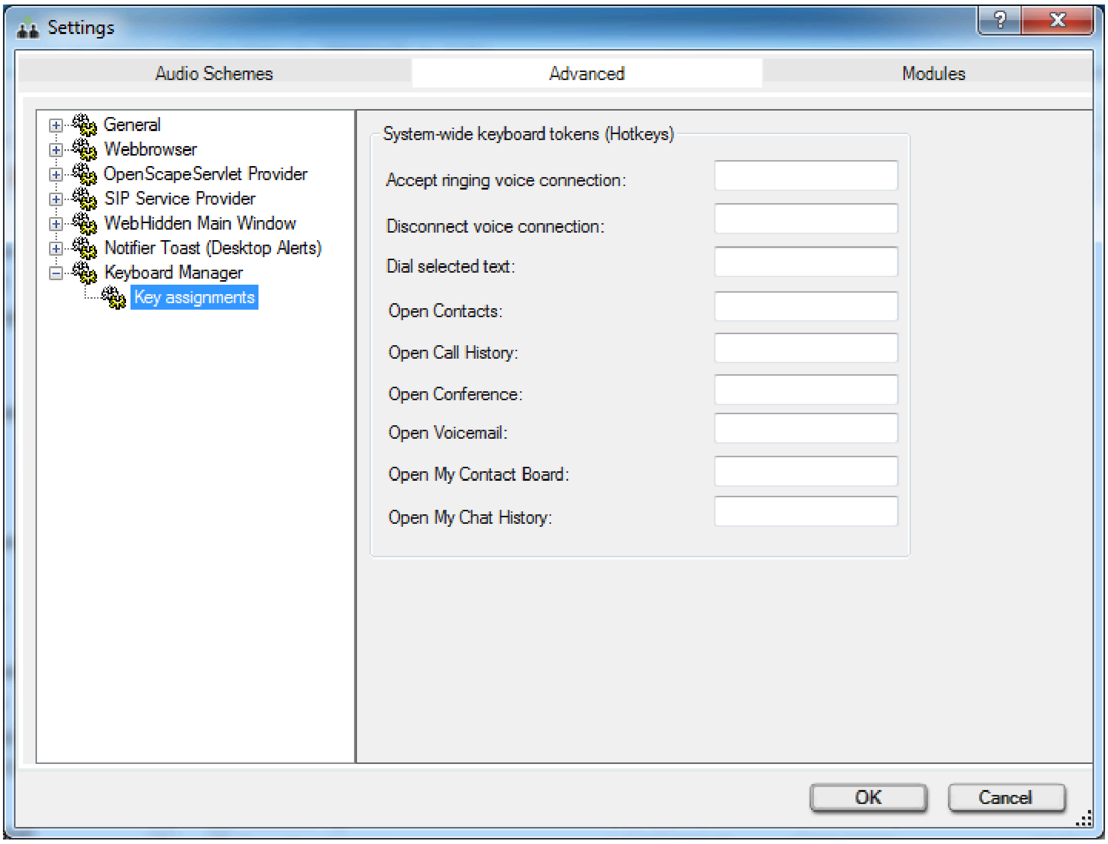
- Accept ringing voice connetion
- Disconnect voice connection
- Dial selected text

- Open Contacts
- Open Call History
- Open Conference
- Open Voicemail
- Open My Contact Board
- Open My Chat History

can be changed.

NOTICE:

Specify the keys with an F, e.g. F5. Do not use F1.

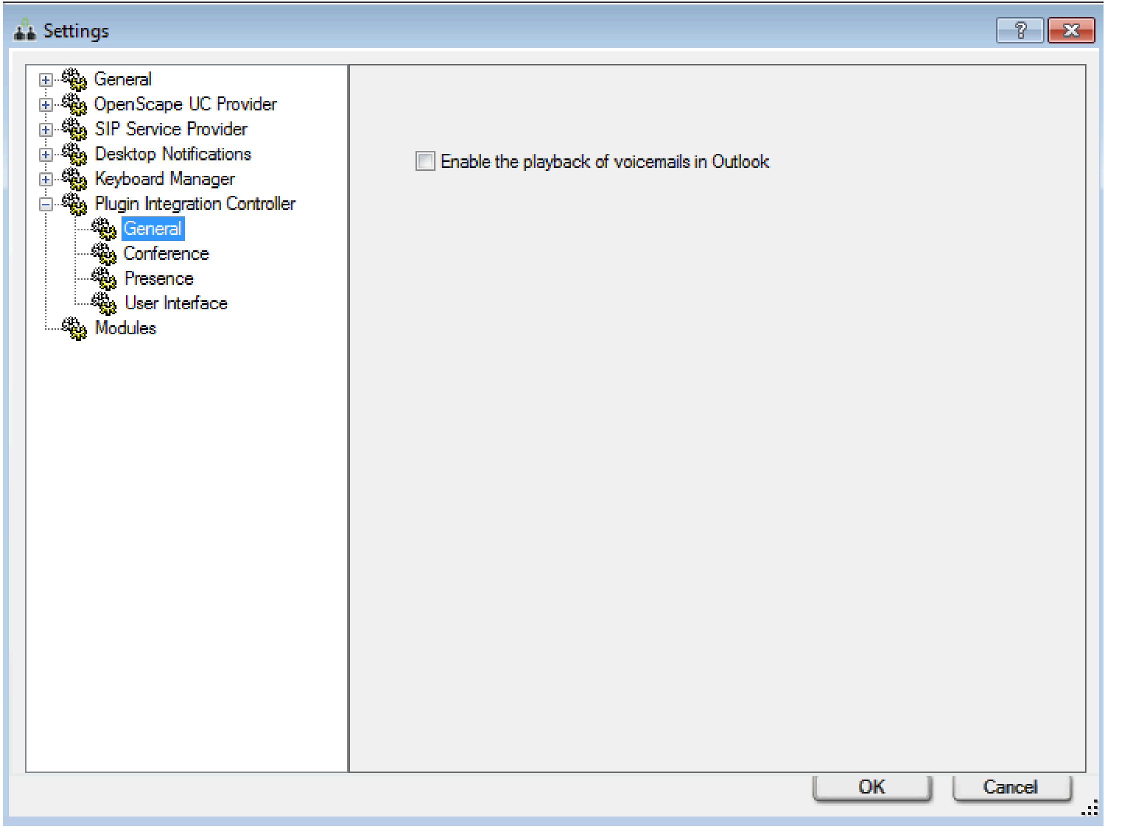


3.1.6 Plugin Integration Controller

You can set parameters for Conferences, voicemail in Outlook and presence configuration

You reach this menu via **Settings** > **Advanced Client Settings** > **Plugin Integration Controller**

3.1.6.1 General



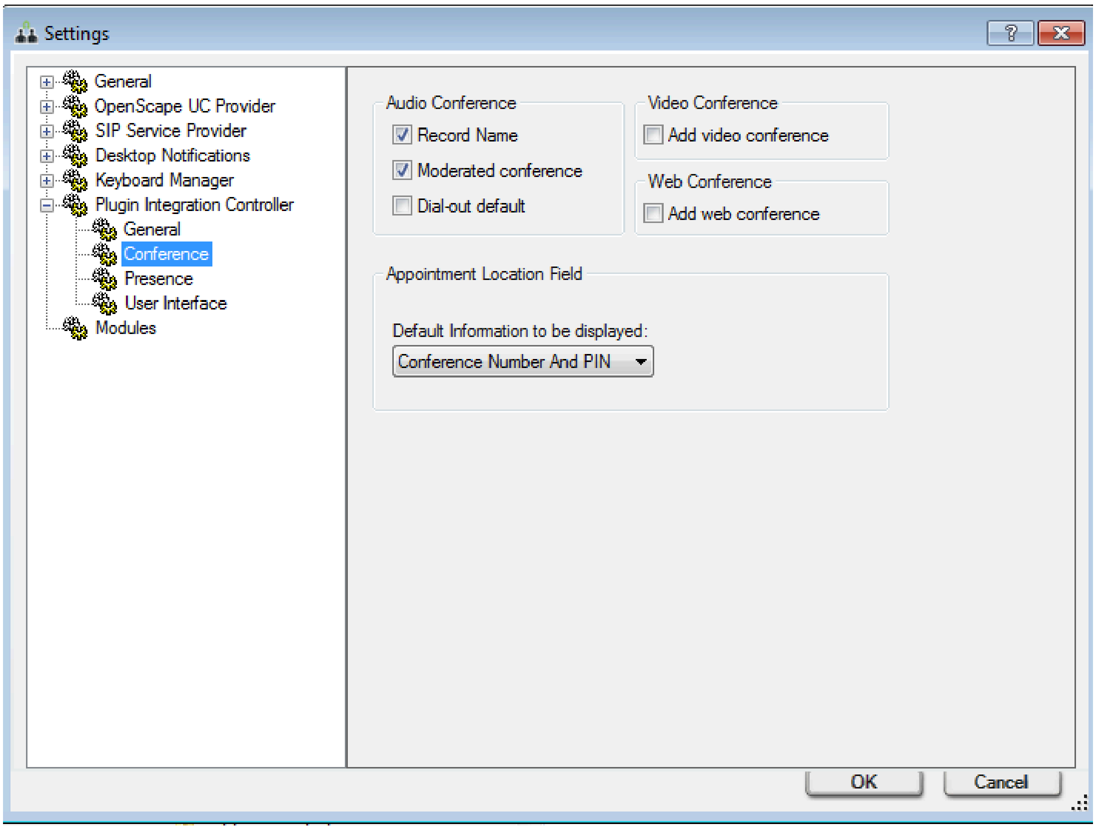
When you activate the check box **Enable the playback of voicemails in Outlook** it is possible to play also the voicemail in Outlook.

3.1.6.2 Conference

You can define the settings for conferences

- Audio conference
- Video conference
- Web conference

and also which information will be shown



Audio Conference

- **Record name** check box

  When activating this check box the participant must record his / her name before entering the conference.
- **Moderated conference** check box

  When activating this check box the conference will be moderated.
- **Dial-out default** check box

  When activating this check box the conference setting will be dial-out setting is predefined when you create a conference. Dial-out means that the participants will be called when the conference is started.

Video Conference

- **Add video conference** check box

  When activating this check box the conference will be a video conference

Web Conference

- **Add web conference** check box

  When activating this check box the conference will be a web conference

Appointment location field

Here you can select which information the participant will receive

- **Conference Number And PIN**

  The participant gets the information about Conference Number and PIN

- **Conference PIN**

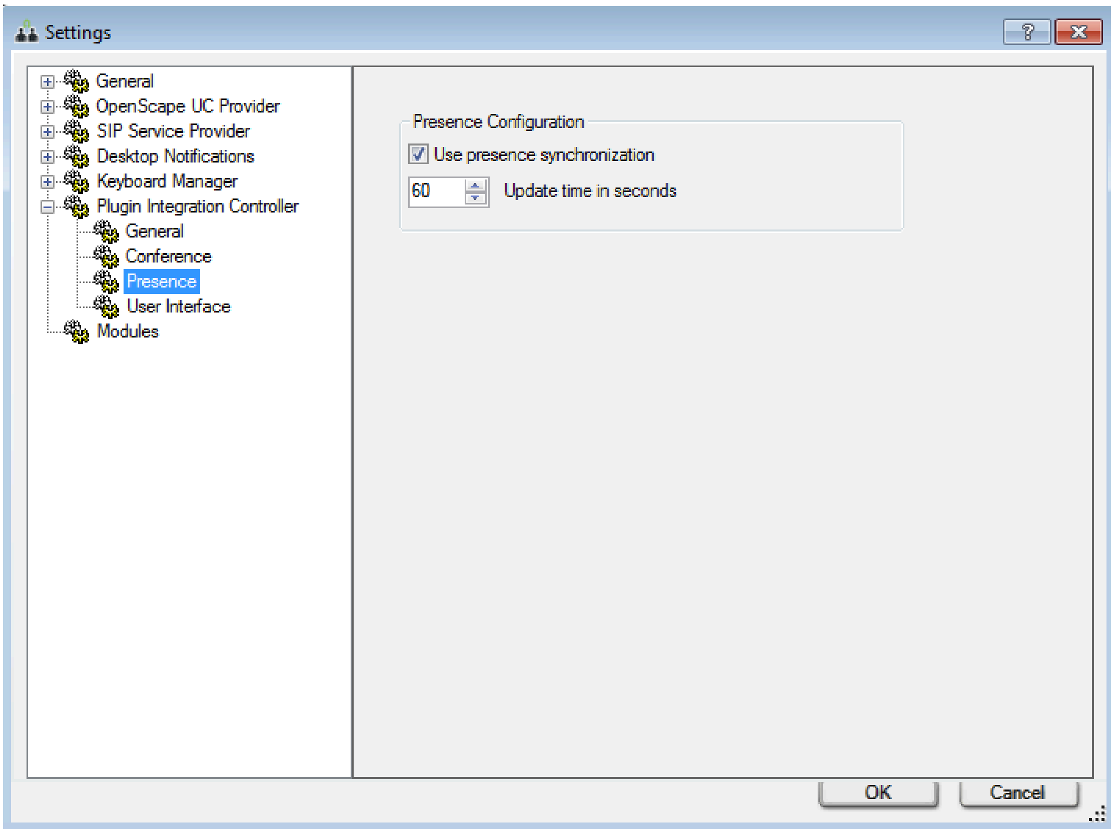
  The participant gets the information about Conference PIN
- **Blank**

  No information will be given to the participant.

3.1.6.3 Presence

You can define if the presence states will be synchronized with Extensions for Outlook.

You can define if the presence states will be synchronized with Extensions for Notes.



Presence Configuration

- **Use presence synchronization** check box

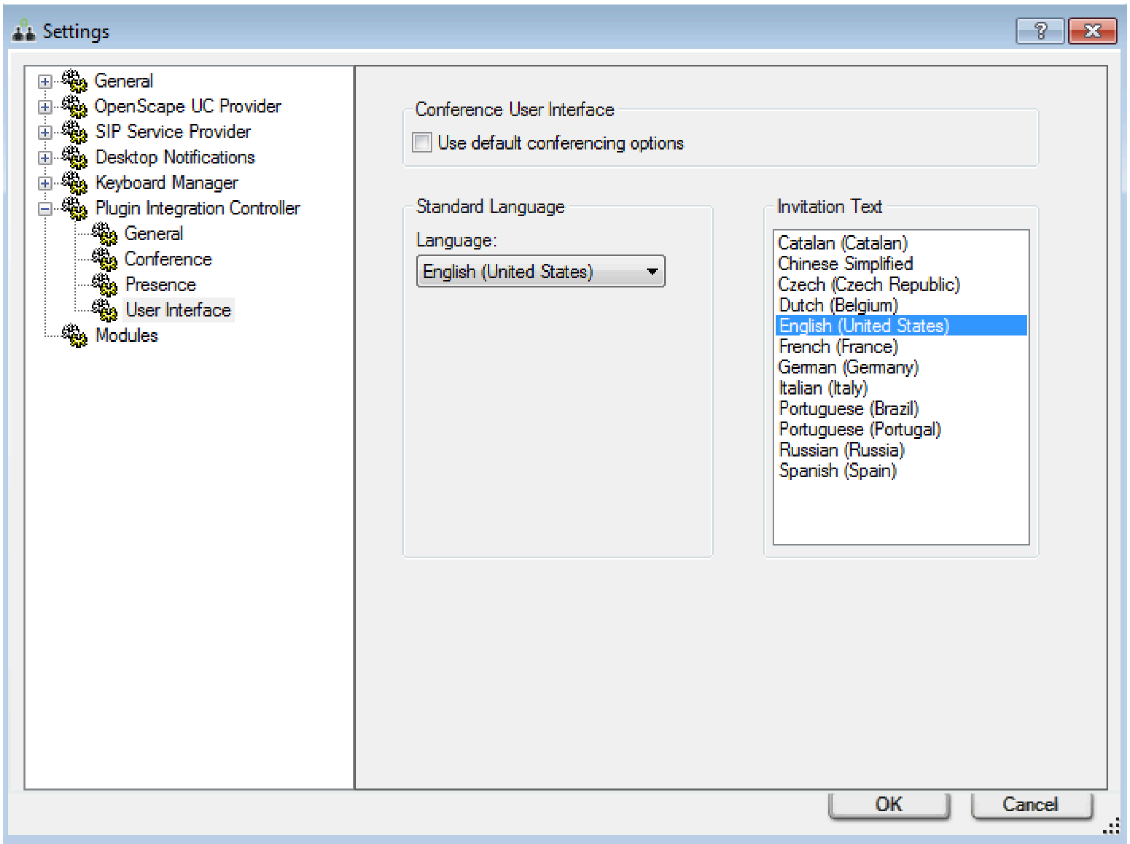
  When this check box is activated the presence state between Fusion for Office and Extensions for Outlook is synchronized.

  When this check box is activated the presence state between Fusion for Notes and Extensions for Notes is synchronized.

  In case the check box is activated you have to specify the update time in seconds, it is the time interval in which the presence will be checked.

3.1.6.4 User Interface

Here custom specific setting can be done.



Confererence user interface

- **Use default conferencing options** check box

  When this check box is activated the default settings for a conference will be applied.

Standard language

Under **Language** select the standard language for your conference..

Invitation text

Here you can define in which language(s) the invitation text will be sent. You can select more than one language. By clicking on the language you can select it when not highlighted or deselect when highlighted.

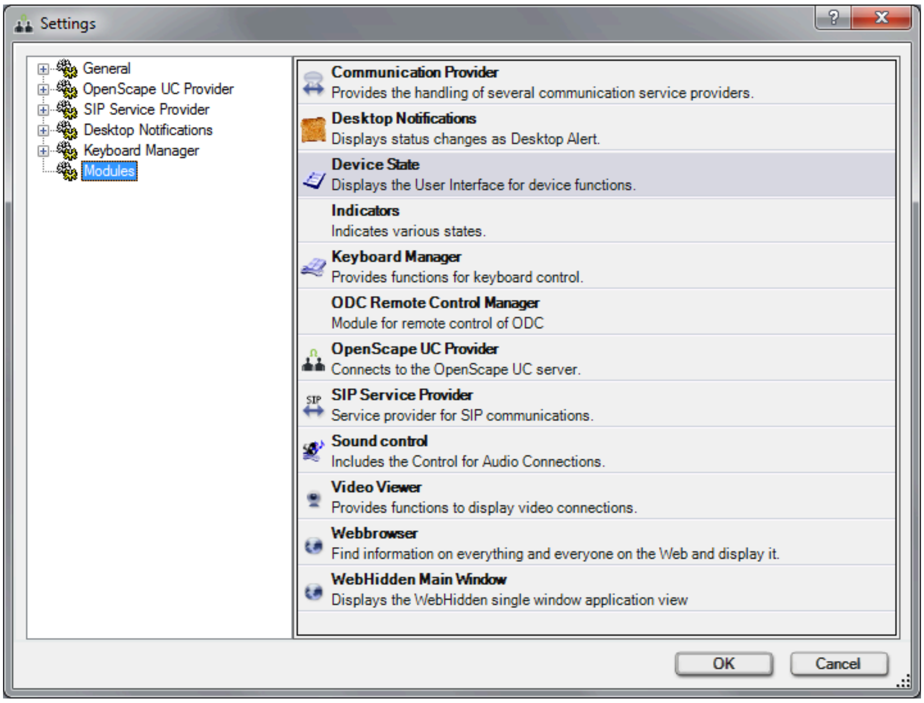
3.1.7 “Modules”

The OpenScape Fusion structure consists of different modules. Each module provides an individual feature. During the installation, only modules set for the selected default provider - **OpenScape Provider** or **OpenScape & SIP Provider** - on the basis of their functionality or features are automatically added to the configuration. Such modules are listed on the **Modules** tab. *You find further information in the Fusion for Office Installation Guide.*

NOTICE:

The modules are no longer editable.

The following figure exemplifies the **Modules** tab with **OpenScape & SIP Provider** in use as default provider.



The following table lists the available modules and summarizes their functions. The modules automatically loaded with any setup method are indicated with (✓).

IMPORTANT:

Modules not listed in the following table must not be installed or activated! If you add modules not described here, considerable problems may occur while you operate OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes!

Module	Description	Setup type
Communication Provider[1]	Enables SIP Service Provider operation.	All (✓)
Device State	This module provides the user interface for changing the device functions, thus controls the **Settings** menu.	OpenScape & SIP Provider (✓)
Desktop Notifications[1]	This module controls the display of a notification window that appears dynamically at the bottom right screen margin.	All (✓)

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

Module	Description	Setup type
ODC Remote Control Manager[1]	This module enables the communication between OpenScape Fusion and OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes as well as accessing the OpenScape UCApplication features via the MicrosoftOutlookIBM Notes user interface.	All (✓)
OpenScape UC Provider	This module is in charge of connecting an OpenScape UCApplication system.	All (✓)
SIP Service Provider	This module enables the OpenScape FusionOpenScape Fusion for IBM Notes to perform SIP telephony services.	OpenScape & SIP Provider (✓)
Sound control[1]	This module is in charge of the audio command (audio buttons, menu volume, volume control, button additional speakers).	OpenScape & SIP Provider (✓)
Video viewer	This module is in charge of displaying the **Video** window.	OpenScape & SIP Provider (✓)
Webbrowser	This module enables opening frequently accessed internet pages directly in the web browser of the *OpenScape Fusion*.	All (✓)
WebHidden Main Window[1]	This module controls opening single windows via the **OpenScape Fusion** tab and the **OpenScape Fusion** function group of the **Start** tab on the user interface of the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes client.	OpenScape & SIP Provider (✓)

4 Getting Started

4.1 Starting OpenScape Fusion for Office

When you start MicrosoftOutlook, OpenScape Fusion for Office is launched automatically. You can disable the automatic start in the OpenScape Fusion for Office configuration dialog.

NOTICE:

You find detailed information about possible settings in the OpenScape Fusion for Office configuration dialog and the functions they serve in the *OpenScape UC ApplicationV10OpenScape Fusion for Office Installation Guide*.

NOTICE: The program always starts under the user profile used last.

The **Logon** dialog opens immediately after the first program start after the installation. In this dialog you can select or configure your user profile for logging on to the OpenScape UC Application system. The **OPENSCAPE** profile exists for each user by default. You can use this profile or create and configure a new one. If you wish to use the **OPENSCAPE** default profile, you need to configure it appropriately before the first logon to the OpenScape UC Application system.

IMPORTANT:

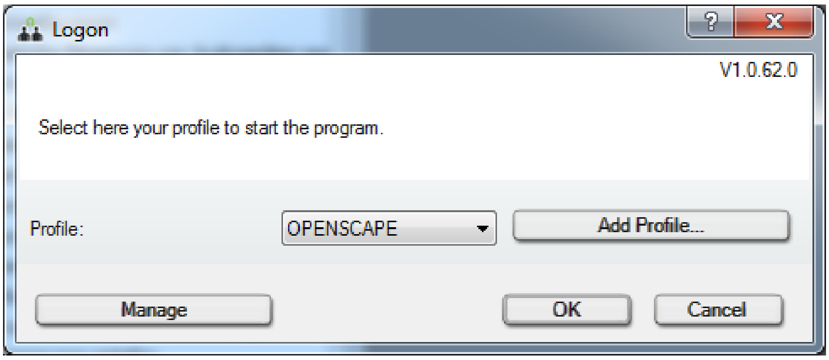
You can invoke the Logon dialog if you want to modify the profile or revise the profile settings. To do this close Outlook and Fusion for Office, keep the **shift key** pressed when starting Fusion for Office.

4.2 User Login

Before you can use OpenScape Fusion for Office, you need to log on to the OpenScape UC Application system with your user profile.

Default login

After you have started your MicrosoftOutlook client for the first time, the following logon dialog opens:



In this dialog you can select a user profile or create a new one and open the **Settings** dialog for configuring the various OpenScape Fusion modules.

The logon dialog provides the following functions:

- **Profile**

  Several profiles can be configured for every 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 individual program environment when working with OpenScape Fusion for Office in different locations or on different PCs. Select the profile that allows you to operate as a user in the **Profile** field.
- **Add Profile...**

  This button lets you configure a new profile.
- **Manage**

  A click on this button invokes the menu for managing the configuration settings. It gives you access to the following configuration options:

  – **Settings**

    Opens the **Settings** dialog for performing the OpenScape Fusion settings.

  – **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

OpenScape UC ApplicationV10OpenScape Fusion for Office Installation Guide manual.

– **Backup Configuration...**

  Outsources all parameter settings for the current login user, the current login computers and login profiles. You can create a destination folder to which this full configuration is then exported in a defined structure. You find further information about backing up the configuration in the *OpenScape UC ApplicationV10OpenScape Fusion for Office Installation Guide* manual.

– **Restore Configuration...**

  Loads all parameter settings for a user/PC/profile combination. You can enter a source folder from which the defined structure for a full configuration is loaded. You find further information about restoring the configuration in the *OpenScape UC ApplicationV10OpenScape Fusion for Office Installation Guide* manual.

After you have selected a user profile and performed required settings in the **Settings** dialog, start the OpenScape Fusion via **OK**. An active OpenScape Fusion is indicated by the OpenScape Fusion icon in the notification area of the Windows task bar. The Outlook Plugin, the Calendar Plugin and the Skype for Business Plugin are also loaded, depending on the selection done for the installation.

Single Sign-On (SSO)

Single Sign-On (SSO) function enables you to use the features of the OpenScape UC Application via the OpenScape Fusion for Office after logging in at your workstation without having to additionally authenticate against the OpenScape UC Application system. If Single Sign-On has been configured for your Windows user account, the login dialog is not displayed.

NOTICE:

So that you can use this feature, the **Use the Windows logon (SSO)** option must be active in the **Settings** > **Advanced** > **OpenScape Servlet Provider** > **Connection** dialog and the corresponding **Server Communication Parameters** have to be properly configured. In addition, the data for the web access to the OpenScape UC Application system must be entered in the settings dialog on the tab **Advanced** > **OpenScape Servlet Provider** > **Web Access**.

NOTICE:

You can change profile settings or add a new profile afterwards.

When Fusion for Office is not running you can change the profile settings as follows:

Keep SHIFT key pressed and then Start -> Fusion for Office.

Emergency Disclaimer

An Emergency Calls Disclaimer might pop up, informing you that this client should not be used for Emergency calls. This message will keep appearing after each login, unless you click Accept to signify that you have read and understood this disclaimer.

4.3 Resetting your Password

In case you have forgotten your password or your account has been locked due to inactivity or to multiple failed login attempts, you can reset your password via the Fusion for Office Client.

Follow the steps below to reset your password:

Step by Step

1) On the login screen of your Fusion for Office client, click **Reset password**.

2) In the input field, enter the email address associated with your account and click **Reset my password**.
If the email address corresponds to an existing user, an email will be delivered to your inbox, containing a password reset link.

3) Click the password reset link delivered to your email address.
The password reset link is valid for 15 minutes. After expiration, you need to request a new password reset.

4) Enter a new password for your account in the **New password** field. Confirm your choice by re-entering your password in the **Confirm new password** field.

The new password must have a minimum length of 8 characters and must contain at least an upper-case letter, a number and a special character.

5) Click **Save new password**.
You can now use the new password to login to your account.

4.4 Password Expiration Notification

You will be notified that your password is about to expire via:

- An email sent to the email address associated with your account.
- A warning displayed in Extended View.

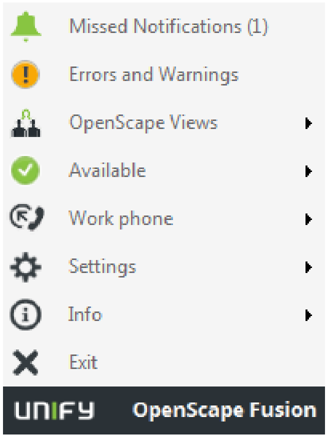
You will receive an email notification and a warning in Extended View when there is a certain number of days (10, 5 or 1) until password expiration.

An email notification will be also sent when the password has already expired. The user will continue to be notified via email until the password is reset.

4.5 OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes Context Menu

The OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes context menu allows you to access additional menu options.

You open the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes context menu with either a left or a right click (both have the same result) on the mouse button on the OpenScape Fusion icon in the notification area of the windows task bar.



4.5.1 Operating Options in the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes Context Menu

The OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes context menu provides additional menu options.

In opposite to previous versions there is no need to click on the arrow for the submenu, just hover over the arrow and the submenu opens.

Such options are in detail:

- OpenScape Views

  here are the submenus:

  – Contacts

    The contacts list is opened.

  – Call History

    The call history list is opened.

  – Conference

    The conference list is opened

  – Voice Mail

    The Voice Mail list is opened

  – Fusion bar

    Opens the Fusion bar

    From this bar you can access most of the features.

    It is an alternative to the Settings menu

  – Favorites

    Opens the Favorites Contacts

  – Chat Board

    Opens the chat window in combined view

- Presence Status

  Your presence state is shown.

  By using the small arrow you can change also the presence state.

- Preferred Device

  Here you see your preferred device.

  By using the arrow you can select the preferred device.

  The devices which you can select are ordered into groups and inside there in alphabetical order. The groups are:

  – 1. Auto Pilot (if OSMO is configured as well)
  – 2. Office Phone (main ONS device)
  – 3. System generated devices (e.g. associated)
  – 4. user generated devices
  – 5. device list

  For the devices there is no icon visible.

  You have the list for incoming and for outgoing devices, so they can be different for incoming and outgoing

- Settings

  Here are the submenus:

  The submenu has two sections:

  - SoftPhone

  - OpenScape UC

  Section **SoftPhone**:

  – Stop hunting group

    NOTICE:

    This is only visible if you are member of a Multi Line Hunting Group (MLHG).

  – Unavailable for hunting group

    NOTICE:

    This is only visible if you are member of a Multi Line Hunting Group (MLHG).

  – Camera preview on (or off when it was set to on)

    opens or closes the camera preview

  – Call Waiting

    You can set there the Call Waiting attributes

    - Disable

    - Enable

    - Enable without tone

  – Audio Schemes

    Opens the Audio Schemes menu, from there you can select the audio device, if configurable and available.

  – Advanced Client Settings

    Opens the Fusion Client Settings, like connectivity settings to OpenScape UC and Softphone, audio devices, etc.

  Section **OpenScape UC**:

  – Forwarding and Rules

    Here you can define Call Forwarding and / or rules.

  – OpenScape UC Settings

    Here you open the UC Settings menu, from there you can edit voice mail settings, add new devices, presence settings, notification etc.

  – Profile

    Here you can change you profile picture and view your contact information

- Info

  Here are the submenus:

  – Help

    Opens the help, in this case this document is opened.

  – Version

    Displays the version and also the copyright information.

  – Update

    You can update to a higher version if the update files are available.

- **Errors and Warnings**

  As long as OpenScape Fusion is not fully connected to all required services (for example at the start) or if there is a communication problem with the OpenScape UC Application system, a red cross or a yellow exclamation mark appears within the icon: e.g. . Then appears the **Errors and Warnings** item in the list of context menu options. Selecting this option displays the **Current Error Report** window. This report contains further information about these errors.

  If OpenScape Fusion is fully connected to all required services (icon does not feature a red cross), the user's presence status is displayed in the icon, for example .

- **Missed Notifications**

  This appears only when there are missed notifications, e.g. a missed call. In this case the Fusion icon has on the top left side.

  When you click on the Notifications you see the toasters you have missed and can take actions from there.

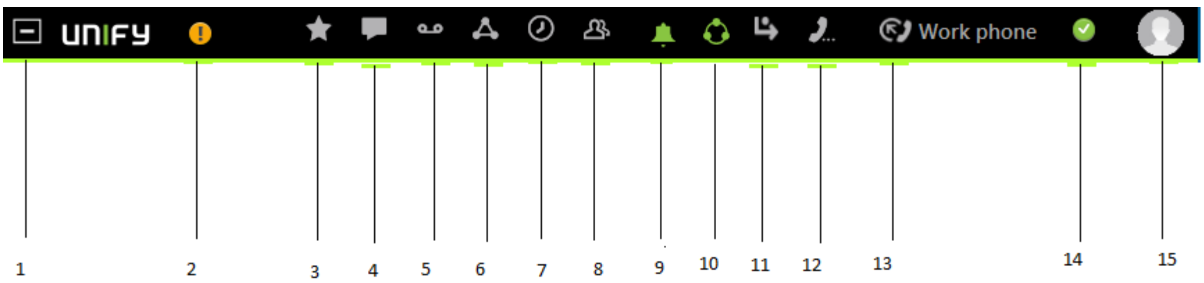
- Exit

  Terminates OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes.

4.6 Fusion bar

You can activate the Fusion bar via **Settings** > **OpenScape Views** > **Fusion bar**

From the Fusion bar you have short cuts for nearly all Fusion features. It is an alternative to the **Systray** menu.



1) You can set where you want to display the Fusion bar:

- **Top bar** - to display the Fusion bar at the top of your screen
- **Left bar** - to display the Fusion bar at the left side
- **Right bar** - to display the Fusion bar at the right side
- **Bottom bar** - to display the Fusion bar at the bottom of your screen

Also you can select two additional options from this list:

- **Auto hide** - to auto-hide the Fusion bar
- **Close** - to close the Fusion bar

2) You can check the Errors and Warnings.

This is helpful if something does not work as expected or an info that something needs your attention

NOTICE:

This icon is only displayed if there are Errors or Warnings. If everything is fine, you do not see this icon on the Fusion bar.

3) opens the Favorites
4) opens the chat board
5) opens voice mail
6) opens the conferences
7) opens the call history
8) opens the Contacts
9) Shows the notification(s) (e.g. missed call)

NOTICE:

This icon is only displayed if there are any notifications. In any other case it is not displayed.

10) Huntgroup

You can login / logout from the hunt group.

NOTICE:

This icon is only shown if you are a member of a hunt group and it has been configured accordingly. For further information please contact your administrator.

11) Forwarding and Rules

You can activate or deactivate Call Forwarding and / or create / edit / delete rules and profiles or just activate / deactivate profiles.

12) Search or dial

you can search for a contact to be dialed or enter a phone number and dial it. This button changes to green in case of an active call:

13) You can select your device
14) You can see or modify your presence state

15) You can open a further menu

From there you can

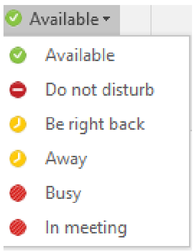
- open OpenScape UC Settings
- open the Profile (e.g. change avatar)
- activate / deactivate Call Waiting
- set Audio Schemes
- open Audio Scheme settings menu
- open Volume settings
  - Microphone
  - Ring tone
  - Speaker
- open Advanced client setting

4.7 Presence Setting

The user can set his/her personal presence status via OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes.

You reach the list for selecting your presence status in the Fusion Notes Plugin or in the OpenScape Views (Contacts, Call History, Conference, Favorites, Chat board). Via this button you can see your currently set presence status. The icon and text change depending on the respective status. The presence status icon is also displayed in the OpenScape Fusion icon in the notification area of the Windows task bar.

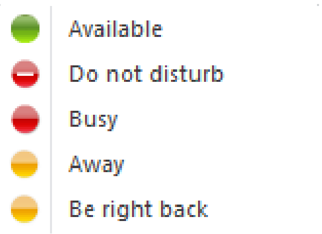
You set the personal presence status in the presence status menu.



UC Presence states:

State	symbol
Available	
Do not disturb	
Be right back	
Away	
Busy	
in a meeting	

The UCMA presence states:



NOTICE:

When the user changes presence the presence change isn't auto-refreshed on Outlook's ribbon.

Outlook must be in focus to refresh the presence change.

Do Not Disturb functionality

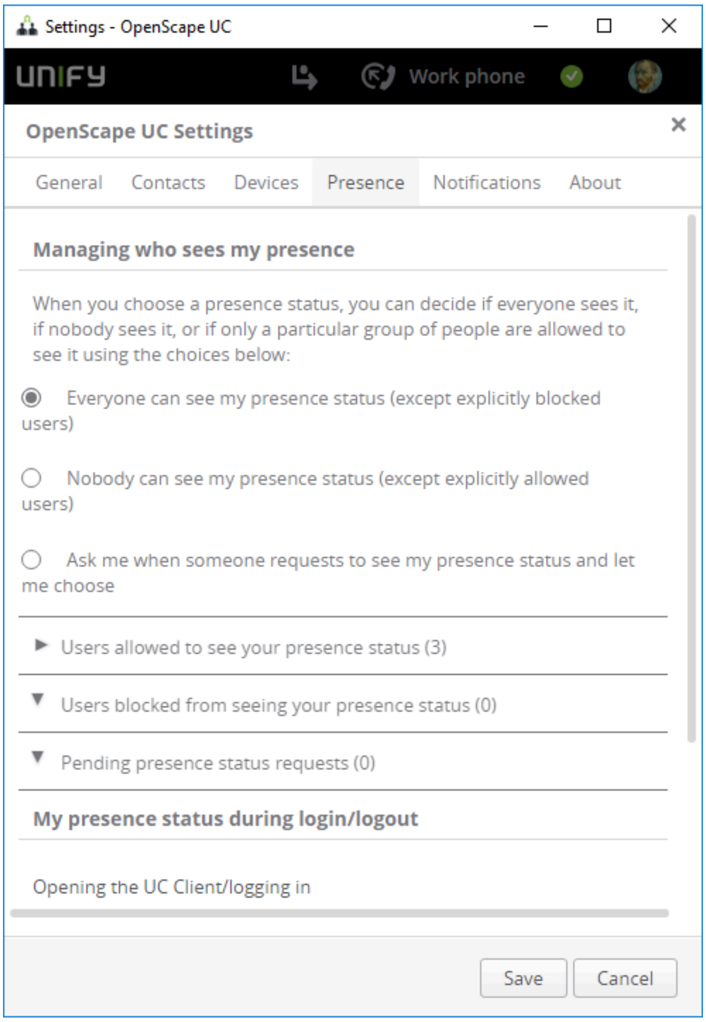
You can set your presence status to **Do Not Disturb** and it will make it visible to the rest of the users that you do not want to be interrupted. Additionally, you will not receive toasters of new incoming calls, chat, and other notifications if someone tries to reach you. The **Do Not Disturb** feature supports a mechanism that blocks any call from reaching you.

NOTICE:

This mechanism is only available when you have set as your **Preferred Device** the Fusion softphone.

Managing who sees my presence

The item **Managing who sees my presence** (via Openscape View menu or via Fusion Tray -> Settings -> OpenScape UC Settings -> Presence) enables managing the behavior in case of a presence request by OpenScape UCApplication users who wish to see / are allowed to see your presence status.



The following settings are available on the Access Control List:

- Everyone can see my presence status (except explicitly blocked users)
- Nobody can see my presence status (except explicitly allowed users)
- Ask me when someone requests to see my presence status and let me choose

My presence status during login / logout

With the item **My presence status during login / logout** (Settings -> OpenScape UC Settings -> presence) you can specify which presence status is shown when you

- login to the client
- logout from the client

Presence status setting from OpenScape UC Provider

Here you can enable on under My presence status the check box, so that the presence status "Be right back" is displayed when the Fusion machine is locked or the screensaver is active.

4.8 One-Number Service

The One-Number Service (ONS) feature enables the user to combine mobility, optimal availability and transparency towards third parties. Hereby the user has the control of the device independent on which device is set as preferred device.

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.

4.8.1 Preferred Device

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes users can control the default processing of incoming and outgoing calls with the help of a so-called preferred device. The preferred device can be a single device or a device list.

When the user receives a call, the default routing is determined by the preferred device. If the device is a single device, the call is forwarded to this device. If the device is a list, the call is forwarded to every device on the list in succession until the call is accepted. In both cases the call is forwarded to the voicemail system if it was not accepted on any of the devices. This requires the relevant user to have been assigned a voicebox.

The preferred device also determines from which device OpenScape UC Application places the user's calls. If the preferred device is a single phone, it is used. If the device is a device list, the first phone on the list is used. The user may select an alternative device to change the default setting for single calls.

> **NOTICE:**
>
> It is possible to select a device for incoming calls and a device for outgoing calls. The default for outgoing device is : the same as incoming device.

Examples

In the ensuing scenarios the user has set the following:

Devices: private phone, mobile phone, office phone

Device lists: device list `Out_of_office` contains private phone and mobile phone; device list `Do_not_disturb` contains voicemail.

- Scenario A: The user sets the preferred device to office phone.
  - Incoming calls are routed to the office phone and, by call forwarding, to the voicemail system, if the user has been assigned a voicebox.
  - Outgoing calls are initiated from the office phone.

- Scenario B: The user sets the preferred device to `Out_of_office`.
  - Incoming calls are routed to the private phone, then to the mobile phone and eventually to the voicemail system, if the user has been assigned a voicebox.
  - Outgoing calls are initiated from the private phone.
- Scenario C: The user sets the preferred device to `Do_not_disturb`.
  - Incoming calls are directly routed to the voicemail system, if the user has been assigned a voicebox.

    In this case the device for outgoing calls has to be different.

You reach the list for selecting your preferred device with a click on the Office Phone button in the **OpenScape Fusion** plugin or in one of the Contact, Call History, Conference, Favorites, Voice Mail, Chat board view. This button indicates the currently set preferred device. Furthermore you can change it also from the Sys-tray.

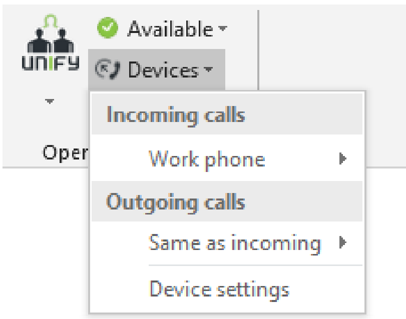
4.8.2 Preferred Device - Controls

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes enables adding, changing and deleting preferred devices.

It is possible to change the preferred device also from the call control.

The following figure exemplifies the list in which you can select a phone or named device list as preferred device and add as well as configure named device lists. From the Fusion Plug-in for Outlook.

The following figure exemplifies the list in which you can select a phone or named device list as preferred device and add as well as configure named device lists. From the Fusion Plug-in for Notes in the Main bar.



You can select also the device from the systray.

- The user can select his/her preferred device or named device list.

When a device is selected as the preferred one, it is used for incoming and outgoing calls by default. By default the Outgoing call is marked same as incoming. When a device list is selected as the preferred one, the first device on this list is used for outgoing calls. Incoming calls are signaled of the first device, if the Ring-No-Answer (RNA) timeout of this device has not been reached yet. If the call remains unanswered within the RNA time of this device, the call is signaled on the device that is next on the list.

4.8.3 Managing Devices and Named Device Lists

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes allows the user to manage his/her devices and named device lists used for initiating and accepting calls.

Device management

Under Settings (from Contacts, Call History, Conferences, Voice mail, Favorites, Chat Board) click in the tab **Devices**.On the **Devices** tab you can add further devices to be used, modify device settings and remove devices no longer required from the device list.

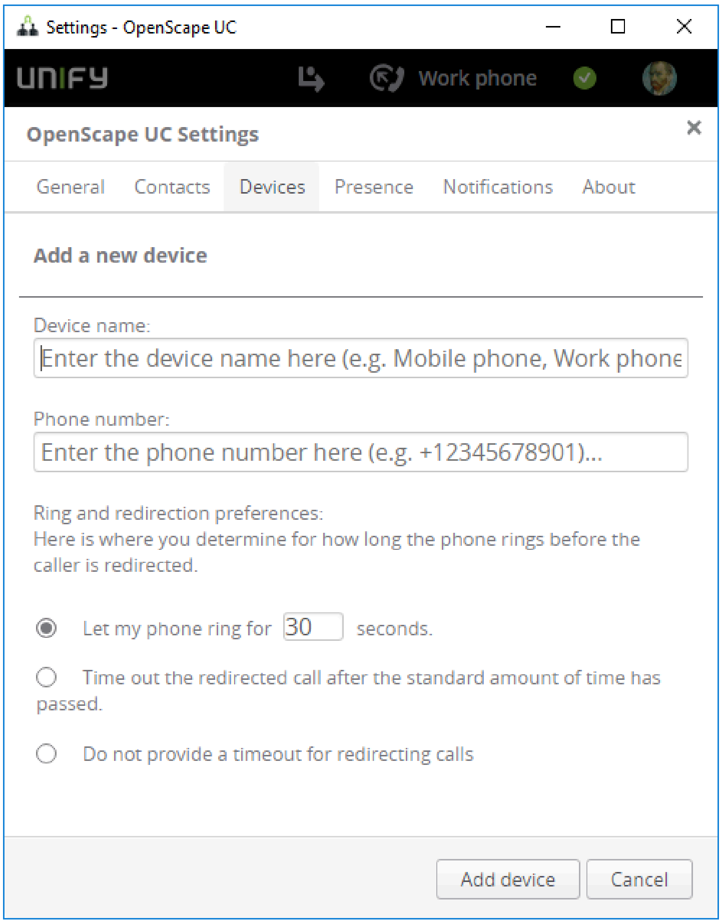
You can execute the following actions on this tab:

- **Configuring a new device**

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

  NOTICE:

  Depending on your profile settings as OpenScape UC Application user in the CMP, the + and **New** buttons for configuring a new, preferred device may be hidden. In this case there is no way to add any number of your own devices to the OpenScape UC Application device list. You can still use your ONS number and the already configured devices.



In this dialog you can perform the following settings:

– **Device Name**

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

– **Phone number**

  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`.

– **Let my phone ring for <number> seconds**

This is the ring time in seconds you can configure individually. After the ring time has expired, 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 OpenScape 4000 PBX the ring tone is redirected to the voicemail box after the ring time specified in this field has expired.

– **Time out the redirected call after the standard amount of time has passed**

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.

– **Do not provide a timeout for redirecting calls**

The ring tone is not switched over to another configured device.

A click on the **Add Devcice** 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**

  After 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.

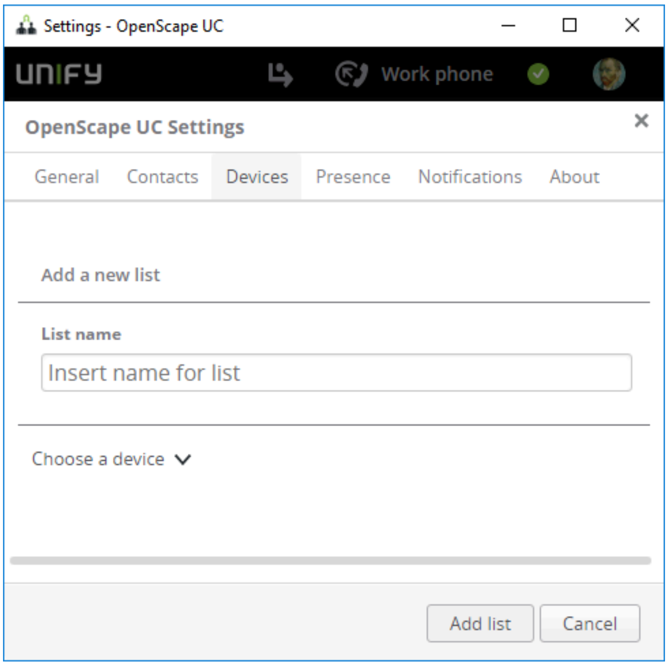
NOTICE:

Depending on your profile settings as OpenScape UC Application user in the CMP, the × icon may be hidden. In this case there is no way to remove the corresponding device from your OpenScape UC Application device list.

With a click on the **Save** button your settings become valid.

Device list

Via Extended View -> Devices you are at devices menu. Scroll down until you see **Add a new list**. In case you do not see "Add a new list" click on the arrow at "View your custom lists".



Enter a name for the device list. With "choose a device" you can add a device. Repeat "Choose a device" for all your required devices. Then click on **Add list**.

When you hover over the device you see on the left side a red small "x". With this you can remove the device. On the right side you see arrows for up and down, so you can change the order.

4.9 Chat

The **Chat** window enables you to send text messages to OpenScape UC Application users who are currently online. You can send and receive Offline messages. You can also receive such messages from other OpenScape UC Application users. If your chat partner is logged in at the system and at the instant-messaging (IM) service, messages are instantly delivered as you send them, so that your colleague may react and answer immediately.

You reach the **Chat** window in one of the following ways:

- via Outlook Contact Card

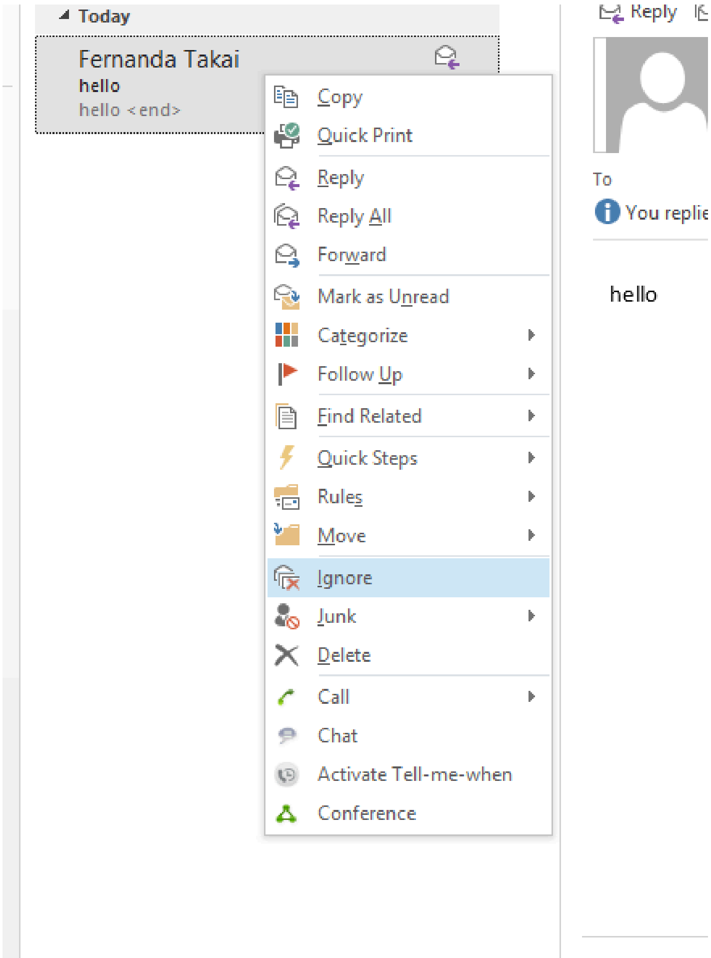
  NOTICE:

  To avoid a conflict between Fusion and Microsoft Teams regarding the use of the Outlook Contact card, please make sure that you have configured only one of them to access the contact card.

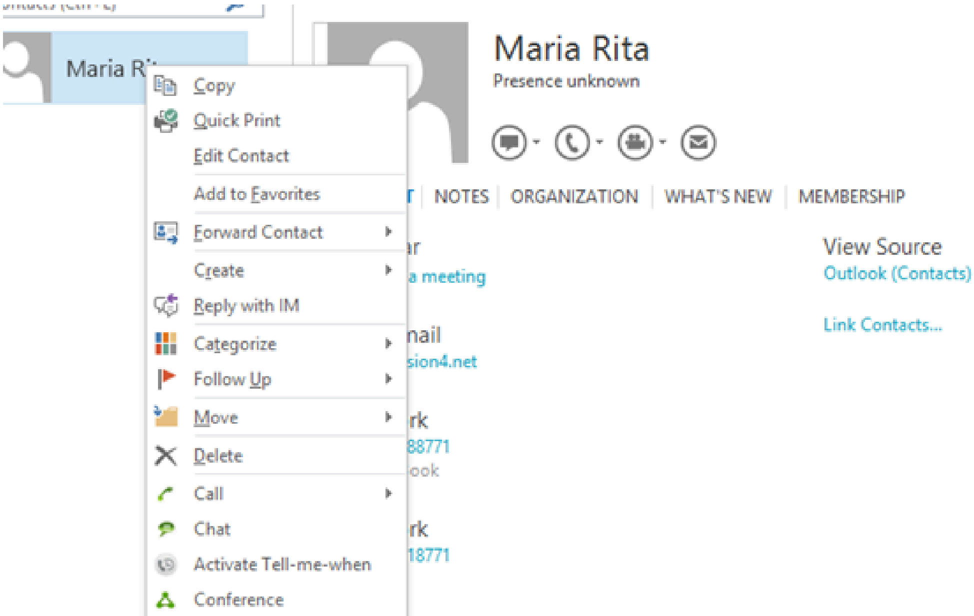
  This means that when the parameter `ODC_ContactCard_Enabled` is set to `true` (configured via `deployment.xml`) for Fusion to use the contact card, then the parameter `Register Teams as the chat app for Office` should be set to `false` for Microsoft Teams, or vice versa.

- via Reading Pane

- via "connect to"
- Via the context menu of an e-mail in your MicrosoftOutlook inbox

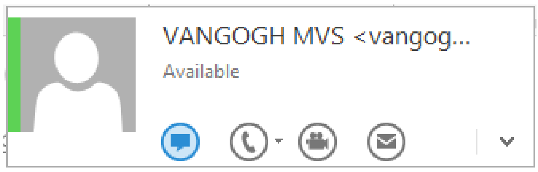


- Via the context menu of a contact in your MicrosoftOutlook contact list

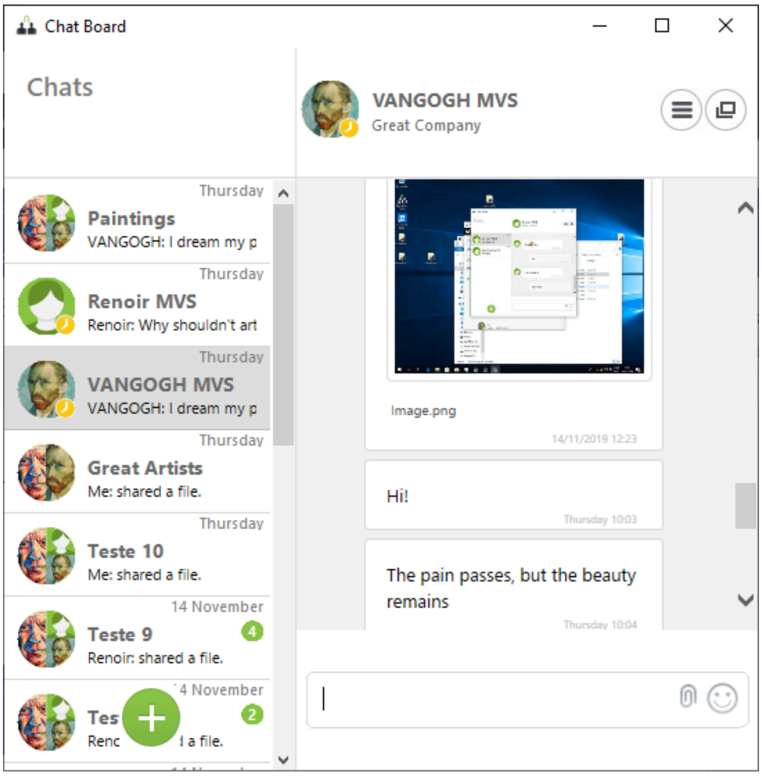


To reach the context menu, click with the right mouse button on the contact in your MicrosoftOutlook contact list with whom you wish to start a chat. Selecting the **Chat** option opens the **Instant Messaging** dialog.

- Via the **Business Card IM** button



When you double click an e-mail in your MicrosoftOutlook inbox to open it in a separate window and position the mouse pointer on the recipient or originator name, the contact's business card is displayed. Click on the **chat** icon .



When you select a chat (either 1-to-1 or group chat) the messages are displayed on the right side..

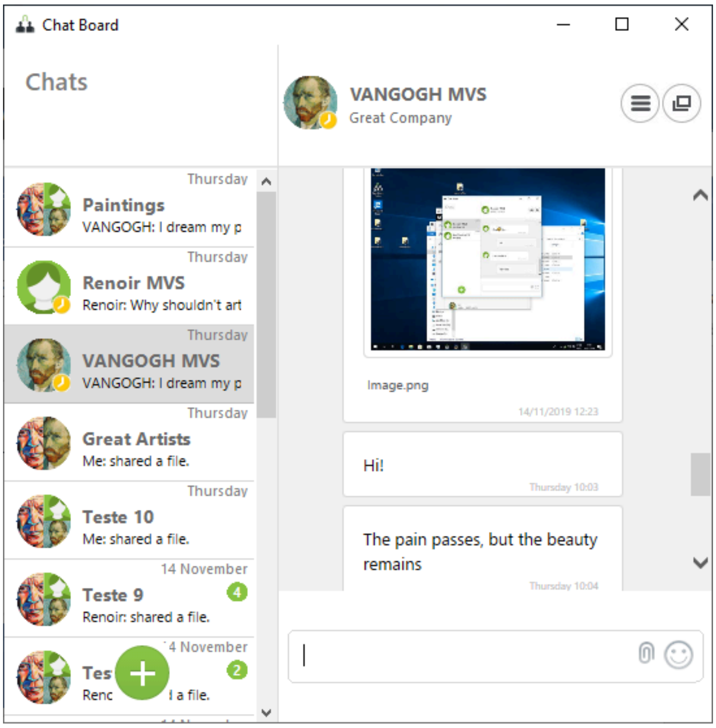
NOTICE:

The list may be empty when you have neither initiated nor received a chat.

4.9.1 Chat - Operating Options

Controls on the tab of an active chat connection

The following operating options are available in the **Chat** dialog during a chat (normally it opens in the combined window):



- The presence status is shown in the avatar.
-  show the communication options (e.g. add participant, Call Work Phone, Create a Conference or Start Web Collaboration)

  In case of group chat you have also the option **Leave chat**. In this case you leave the chat and the chat disappears from the chat and also from the history.
- With the "Smiley" (right bottom) you can add emoticons

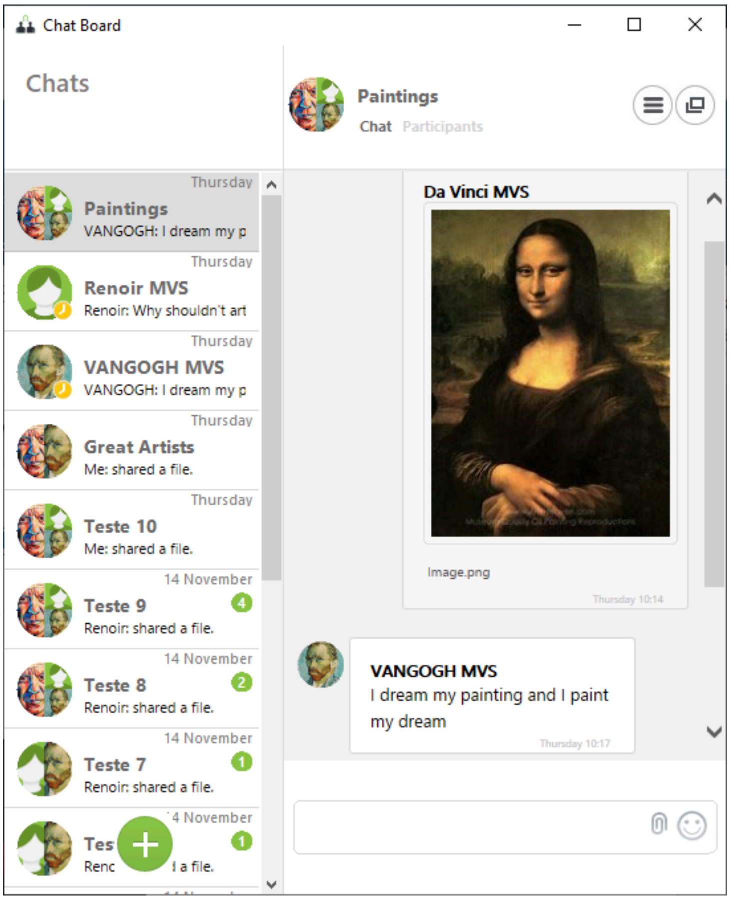
NOTICE:

With Windows 7 the emoticons are black and white, while with Windows 10 the emoticons are colored.

With the new OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes you can chat, either you start a chat or you receive a chat.

Furthermore it is possible to handle more than one chat.

- **1-to-1 Chat or group chat**

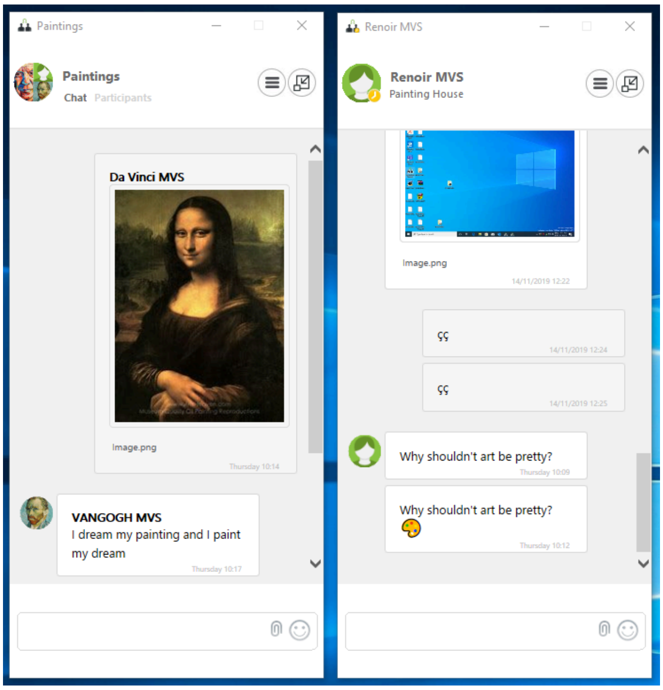


- **multiple chats** (several 1-to-1 chats or group chats)

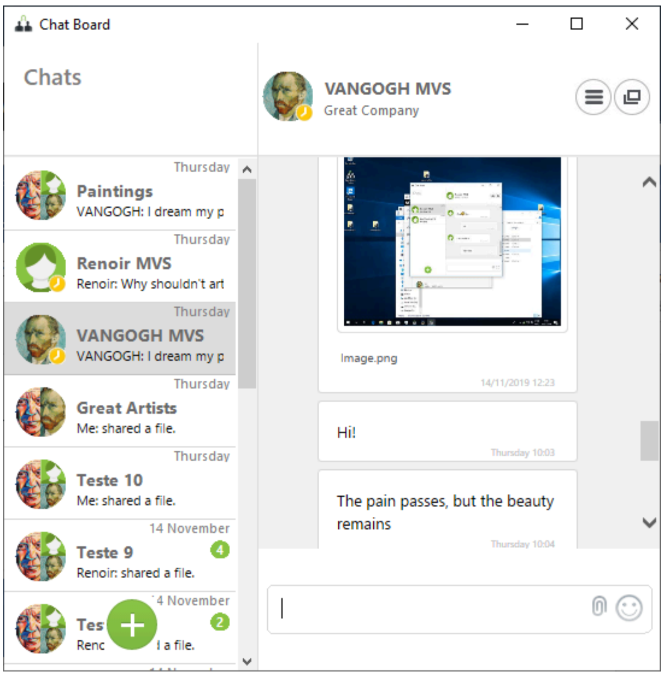
  Here either you have for every chat one separate window or you have one window from where you select the related chat.

  You can switch from one window to more windows.

  chat with multiple windows:



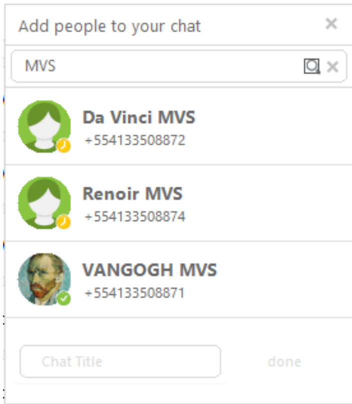
  multiple chat with one window:



  You can switch between the displays via the small icon on the top right.

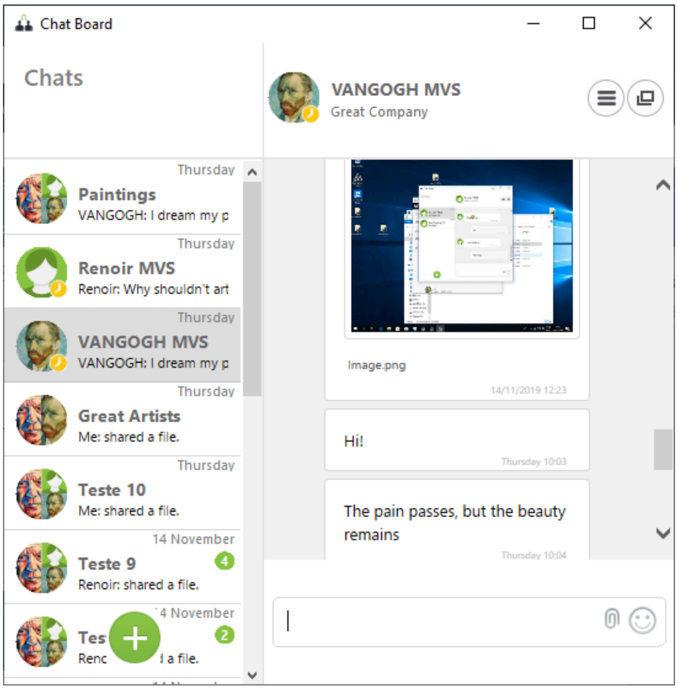
Click either on or on depending on in which view you are.

With the communication options on the top right you can add chat-partners to the chat (select Add chat partners to the conversation). A new window opens and you can type a name or part of a name. Click then on icon .



You can send offline messages, this means that the partner(s) do not need to be in presence state available.

Also you can receive a chat when you have a presence state different as available. The number of unread messages is indicated with a small green circle.



When unread messages are read the counter (green circle) is adapted accordingly. When all chats are read, then the green circle disappears.

Also when you receive a chat, you are informed with the notifications in the Fusion icon from the systray.

4.9.2 Chat History

IMPORTANT:

Chat history in a networking/federated scenario is not supported.

You can open the menu directly under OpenScape Views Chat board.

Chat history from Fusion is integrated in the combined view (my Chat board).

When you perform a chat with more people, you can give a name to the group. (Chat title). With this title you can continue the chat.

4.9.3 Chat attachments

You can share and exchange files (e.g photos, docs, video) with the Chat attachments feature.

The following limitations apply:

- The file size a user is able to share is configured by the administrator and is by default limited to 100 MB.
- Sharing is enabled by default for the most file types. For example:
  - – PDF (.pdf)
    - PNG (.png)
    - JPEG (.jpeg)
    - GIF (.gif)
    - BMP (.bmp)
    - Text (.txt)
    - CSV (.csv)
    - ZIP (.zip, .7zip)
    - Video (.mp4)
    - Microsoft Office (.word, .xls, ppt)

NOTICE:

You can find the complete list in the *OpenScape UC Installation and Configuration Guide*.

NOTICE:

Your system administrator can configure your system to support additional file types by using a white list. Contact your administrator for more details.

4.9.4 Deleting a Chat Message

To delete a chat message you have sent, hover your mouse over the message and click the  icon to delete it.

The message will be removed for you and for all other chat participants.

NOTICE: The messages can be deleted only one by one.

4.9.5 Starting and using the chat in a one-on-one call

During a call with another UC user, you can use the chat panel to exchange messages, links or attachments with the other call participant.

Step by Step

1) To start the chat in a one-on-one call, click on the call control bar.

The **Communication Options** available are displayed.

Previous messages exchanged by the call participants, if any, are displayed in the chat panel.

2) Click **Chat**.
The chat panel is displayed and the call participants can start exchanging message of view older messages.

3) During the call, you can do the following actions using the chat:

a) Type a new message in the message box and send it by click the icon or pressing the `Enter` key.

b) Send an emoji, by clicking the icon displayed on the right side of the message box.

c) Add attachments, by clicking the icon, displayed on the right side of the message box.

d) Delete chat messages, by clicking **Delete** at the bottom of the message.

e) Call another UC user, by clicking .

f) Display the **Communication Options** available, by clicking :

- Add more participants to the chat.
- Send an email to the call participant/s.

g) Pin the chat, by clicking .

The following tabs are displayed in the chat panel:

- **Messages**: contains all messages exchanged by the call participants alongside their name and time of sending.
- **Files**: contains all attachments shared by the call participants.

4) After the call ends, you can view the messages and attachments shared during the call and exchange further messages.

a) Click to open the **Chat** tab.

b) Select the chat you want to view.

NOTICE:

The **Chat** tab contains a recording of all messages exchanged between the call participants, before the call and during the call. After the call ends, it is possible to send further messages or files in the chat.

5) To hide the chat panel during a call, click on the call control bar.

The chat panel will not be displayed to you anymore. The other call participant will still be able to see it.

4.9.6 Starting and using the chat in a conference call

During a conference call, participants can exchange messages, links or attachments with each other.

Prerequisites

- You are a UC user (not a guest participant).
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

Step by Step

1) To start the chat in a conference call, click on the call control bar.

The chat panel is displayed.

You can disable some active call panels to make the chat panel appear larger on your call screen.

2) During the conference, you can do the following actions using the chat:

a) Type a new message in the message box and send it by click the icon or pressing the `Enter` key.

b) Send an emoji, by clicking the icon displayed on the right side of the message box.

c) Add attachments, by clicking the icon, displayed on the right side of the message box.

d) Delete chat messages, by clicking **Delete** at the bottom of the message.

The following tabs are displayed in the chat panel:

- **Messages**: contains all messages exchanged by non-guest participants alongside their name and time of sending.
- **Files**: contains all attachments shared by non-guest participants.

3) After the conference ends, you can view the chat messages and attachments shared during the conference call.

a) Click to open the **Conferences** tab.

b) Next, click **Conference Chats**.

c) Select the conference for which you want to view the chat messages and attachments shared.

The following tabs are displayed:

- **Messages**: contains all messages exchanged during the conference, alongside their name and time of sending.
- **Files**: contains all attachments shared during the conference.

NOTICE:

The **Conference Chats** tab contains only a recording of the chat messages and files exchanged during the conference. After the conference ends, it is not possible to send further messages or files.

4) To hide the chat panel in a conference call, click on the call control bar.

The chat panel will not be displayed to you anymore. Other participants will still be able to see it.

4.10 Whiteboard

Whiteboard allows you to work together with other call participants by typing notes, drawing or importing images on a blank page during a conference call.

NOTICE: Only UC users are allowed to start the whiteboard during a conference call. Guest participants can use the whiteboard functionality, but they are not allowed to start it.

The following UC clients support the whiteboard functionality: WebClient, UC Desktop App and Fusion for Office.

4.10.1 Adding, editing or hiding the whiteboard in a conference call

During a conference call, non-guest participants can start the whiteboard at any time.

Prerequisites

- You are a UC user (not a guest participant).
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

Step by Step

1) To add the whiteboard to the active conference call, click on the call control bar.

The whiteboard is added to the active conference call.

You can disable some active call panels to make the whiteboard appear larger on your call screen.

2) To start editing, select a tool from the left side of the whiteboard.

The whiteboard tools available are described in the following table:

Table 2: Whiteboard tools

Whiteboard tool	Description	How to use it
	Download	Download the whiteboard image as PNG file and save a copy for yourself. **NOTICE:** At the end of the conference, the whiteboard image will not be saved automatically.
	Select	Select objects, resize and move them around.
	Pencil	Draw free form shapes
	Arrow	Draw arrows.
	Lines	Draw lines.
	Rectangle	Draw rectangle shapes.
	Ellipse	Draw ellipse shapes.
	Text	Insert text.
	Image	Insert images.
	Undo	Undo the most recent change.

Whiteboard tool	Description	How to use it
	**Other options**	Display additional options: • Set or change the background of the whiteboard. • Clear all elements in the whiteboard

When you select the **Pencil**, **Arrow**, **Lines**, **Rectangle** or **Ellipse** icons, you can choose a color and weight for the object you are about to add.

When you select the **Text** icon, you can choose the color, size and style of the text you are about to add.

In case the window of your UC client is too small to show all possible options for the whiteboard, additional options will be displayed in the **Other options** area.

All changes you make on the whiteboard are shown to all call participants alongside your name.

3) To hide the whiteboard during the active conference call, click  on the call control bar.

The whiteboard will not be displayed to you anymore. Other participants will still be able to see it.

4.11 Surveys

This feature allows you to invite users to answer a set of questions and get their opinion on a specific topic.

Surveys can be distributed in one of the following ways:

- Start a survey during a conference call.

  The survey is displayed to all conference participants.
- Send a survey invitation to specific users.

  The invitation contains a link to the survey. Only the users with the link can respond to the survey.

You can do the following actions on surveys:

- Create, edit or delete a survey
- Start or stop surveys during a conference call
- Send survey invitations to specific users
- Show, print or clear survey responses

Each survey can have one of the following statuses:

- **Ready**: the survey is ready to be distributed to conference participants or to specific users via invitations.
- **In progress**: the survey has been started in a conference call or has been distributed via survey invitations.

  Responses are being collected for running surveys.

- **Paused**: the survey has been stopped and responses are no longer collected.

During conference calls, guest users are not allowed to start surveys but they can respond to surveys initiated by other UC participants.

4.11.1 Creating a survey

You can create a new survey via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

   The surveys created previously (if any) are displayed in this area.

2) Click **+ Create survey** in the top right of the screen.

   The survey creation page opens with the following two tabs:

   - The **Designer** tab that allows you to add questions to the survey using the elements available.
   - The **Preview** tab that allows you to view the survey questions and test the functionality.

3) In the **Designer** tab, start creating the survey in one of the following ways:

   - Drag and drop an survey element from the toolbox displayed on the left side of the screen.
   - Click **Add Question** to start creating the survey using the default survey element (**Single-Line Input**).
   - Click **...** inside the **Add Question** button and select a survey element from the list.

   The following survey elements are available:

   - **Radio Button Group**, for questions with multiple choices, that allow a single selection.
   - **Rating Scale**, for questions that allow rating according to a specified rating scale.
   - **Checkboxes**, for questions with multiple choices, that allow to select one or more options.
   - **Dropdown**, for questions that allow a single selection from a series of options.
   - **Yes/No (Boolean)**, for questions where the only possible values are **Yes** and **No**.
   - **Single-Line Input**, for questions that allow answers in plain text, on a single line.
   - **Long Text**, for questions that allow answers in plain text, on one or more lines.

4) Configure the survey:

- Enter a custom title for the survey in the **Survey Title** field.
- Enter a short description of the survey's purpose in the **Description** field.
- Click to browse for and upload a survey logo.
- Configure the questions and pages of the survey.

  Each survey can include multiple pages, with one or more questions on each page. To reorder or move questions to a different page, drag and drop the questions in the desired location.

  You can mark survey questions as mandatory by switching the **Required** slider to ON (orange).

  You can use questions previously created as template for new ones by clicking the **Duplicate** button.

  If you want to change the type of a survey question, select another element from the drop-down list displayed in the bottom-left corner of the question.

  For extended survey features, click to open the survey settings tab on the right side of the screen. Depending on the element type, different sections are displayed in this area, allowing you to edit the survey's general settings, configure the logic, layout, data and validators for the survey's questions.

5) Optionally, you can navigate to the **Preview** tab to view the questions and test the functionality.

In this area, you have the following options:

- Click to preview the survey on different screen types and sizes.
- Click to preview the survey elements in portrait or landscape orientation.
- Click to show or hide invisible survey elements.
- Click to preview the survey elements in the default or modern theme.

6) Once you finish configuring the survey, click **Save** in the top right of the screen.

The newly created survey is displayed in the **Surveys** tab and it is in the **Ready** status.

4.11.2 Editing a surveys

You can edit an existing survey via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The surveys created previously are displayed in this area.

2) Locate the survey you want to edit and click the button displayed on the right side.

3) Select **Edit** from the drop-down list.

The survey questions and settings are displayed.

4) Edit the survey questions and settings according to your needs.

5) Once you finish editing the survey, click **Save** in the top right of the screen.

The changes you made are saved and the survey is in the **Ready** status.

4.11.3 Starting a survey during a conference call

During a conference call, you can distribute one or more surveys to the participants to get their opinion on a specific topic.

When a survey is started, a pop-up window is displayed to all participants and they can answer the questions.

It is possible to start a survey multiple times during a conference call. The survey is displayed to all participants every time the survey initiator starts it.

When you select to start again a survey for which responses have already been collected, you must confirm that you want to redistribute it. You have the following options:

- **Yes, collect more responses**: the survey is displayed again to all participants and the new responses are recorded along with the previous ones.
- **Yes, clear all responses and continue**: the survey is displayed again to all participants. The responses collected previously are cleared and new responses are collected.
- **No**: the survey redistribution action is canceled.

When a survey is started during a conference, it will be displayed to participants who are in the call at the time of the distribution and to participants who join the conference at a later point.

It is only possible to run one survey at a time during a conference call.

Follow the steps below to start a survey during a conference call:

Step by Step

1) Click on the call control bar.

2) Select the survey you want to start from the list of surveys.

A message is displayed asking you to confirm you want to start the survey selected.

3) Click **Yes**.

The survey is displayed to all conference participants and they can start answering the questions.

NOTICE: Participants who do not want to take the survey can click the **Close** button at the bottom-right of the survey window. A pop-up message is displayed asking for exit confirmation, then the survey is no longer shown.

When a survey is running, the survey icon on the call control bar turns green.

The survey initiator can stop a survey at any time, by click the survey button again and selecting **Stop survey**.

4.11.4 Sending survey invitations

You can invite users to participate in a survey by sending an email invitation, containing a link to the survey. The users who receive the invitation can use the link until the expiration date set by the survey initiator.

Step by Step

1) To send a survey invitation, navigate to the **Surveys** tab.

The list of available surveys is displayed.

2) Locate the survey for which you want to sent an invitation.

3) Click and select **Invitation**.

A pop-up window is displayed with a pre-defined survey invitation.

From here, you can do one of the following:

- Set the survey expiration date.
- Click **Copy** to copy the survey invitation text to the clipboard and send it manually to specific users.
- Click **Send mail to participants** to open the default email client with a pre-populated message containing the survey invitation.

The users who receive the invitation need to open the link with a browser of their choice to start the survey.

It is not possible to use the link after the expiration date or if the survey has been stopped by the survey initiator.

4.11.5 Survey responses

While a survey is running, its status changes to **In progress**. In this status, responses from users are collected and you can view them in one of the following ways:

- In the **Surveys** tab, via the **Show Responses** option.
- During a conference call via the **Show results** option.

4.11.5.1 Showing survey results during a conference call

When a survey is distributed to conference participants, the initiator can view the survey results during the conference call.

The results are only available to the conference participant who has created and started the survey.

Step by Step

1) Click on the call control bar.

A new window is displayed informing that the survey is running.

2) Click **Show results**.

The survey responses window opens and you can view the survey title, expiration date, number of responses and a graphical representation of them, in a histogram or average graph.

When responses are displayed in a histogram, you can choose the graph representation (scatter, vertical or horizontal bars) and the order of the survey results (ascending or descending).

When responses are displayed in an average graph, you can choose the graph representation (bullet or gauge) of the survey results.

You can save the survey results in one of the following formats:

- As a PNG file, by clicking in the upper right part of the graph.

  This option only saves the graph representation. Any other data displayed in the survey results window is not displayed in the PNG file.

- As a PDF file, by clicking the in the upper right part of the survey results window.

  This option saves all the information displayed in the PNG file

Once the survey is stopped, it is no longer possible to view the survey results while in the conference call. You can only view the results in the **Surveys** tab.

4.11.5.2 Showing survey responses

You can view survey responses in the **Surveys** tab for:

- A survey that has been distributed to specific users via invitations.
- A surveys that has been started during a conference call, but it is not running anymore.

The results are only available to the UC user who has created and started the survey.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The list of surveys is displayed in this area.

2) Locate the survey for which you want to view responses and click the button displayed on the right side.

3) Select **Show Responses** from the drop-down list.

The survey responses window opens and you can view the survey title, expiration date, number of responses and a graphical representation of them, in a histogram or average graph.

When responses are displayed in a histogram, you can choose the graph representation (scatter, vertical or horizontal bars) and the order of the survey results (ascending or descending).

When responses are displayed in an average graph, you can choose the graph representation (bullet or gauge) of the survey results.

You can save the survey results as a PNG file, by clicking in the upper right part of the graph. This option only saves the graph representation. Any other data displayed in the survey results window is not available in the PNG file.

4.11.5.3 Clearing survey responses

You can clear the responses collected for a survey via the **Surveys** tab.

The results are only available to the UC user who has created and started the survey.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The list of surveys is displayed in this area.

2) Locate the survey for which you want to clear responses and click the button displayed on the right side.

3) Select **Clear Responses** from the drop-down list.

A pop-up window is displayed asking you to confirm the action.

4) Click **Yes**.

All responses collected previously for the selected survey are cleared and you can not view them anymore. To collect new responses, you must redistribute the survey.

4.11.5.4 Printing survey responses

You can print the responses collected for a survey via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

The list of surveys is displayed in this area.

2) Locate the survey for which you want to print responses and click the button displayed on the right side.
3) Select **Print Responses** from the drop-down list.

   The survey responses are displayed in a new browser tab.
4) Click in the upper right part of the screen to print the survey results.

4.11.6 Deleting a survey

You can delete a survey that is no longer needed via the **Surveys** tab.

Step by Step

1) Click in the left navigation bar to open the **Surveys** tab.

   The surveys created previously are displayed in this area.
2) Locate the survey you want to delete and click the **X** button displayed on the left side of the survey’s title.

   A pop-up message is displayed asking you to confirm the delete action.
3) Click **Delete**.

The survey is removed from the list of surveys.

It is no longer possible to view the results collected previously for deleted surveys.

4.12 Call Control

The **Call Control** window provides features for controlling your phone during an active call (phone call, consultation or conference) and enables dialing any phone number.

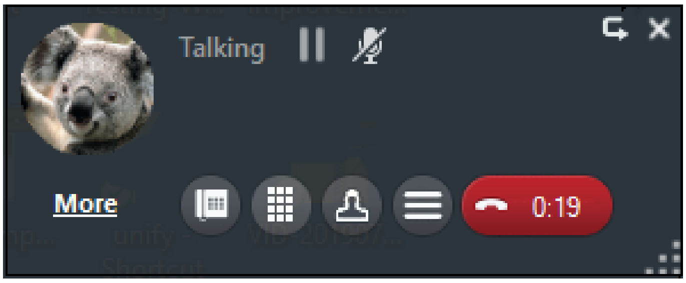
The window always opens automatically when you set up a call connection or another subscriber tries to reach your extension.

NOTICE:

The headset button to answer / hang up calls does not open the Call Control window.

4.12.1 Call Control mode

The Call Control appears in the bottom right side of the screen when a call is established and does not overrun your current work screen.



You can also access the call control view via the **Search or dial** button  on the Fusion bar. Green color indicates that you are on an active call, whereas this button will appear as grey on the Fusion bar.

Only Call Control mode functions:

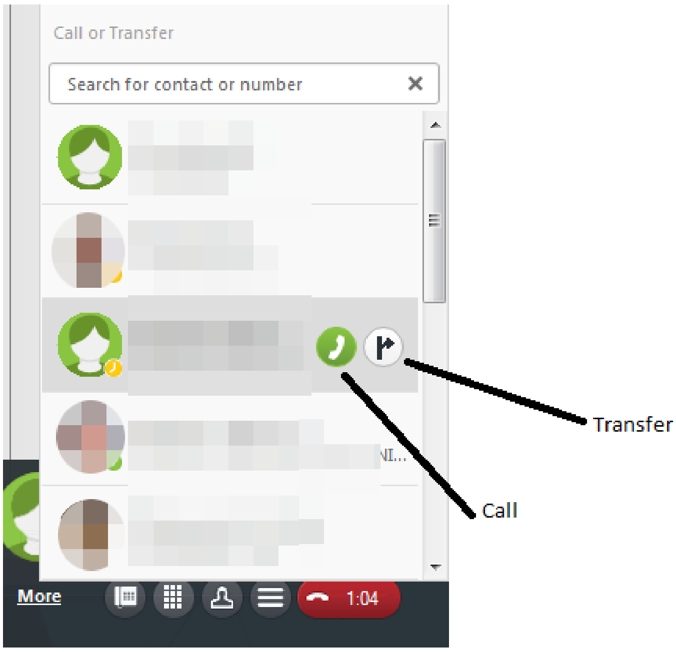
- **More**: **Switch to OpenScape View**
-  :**Handover to other device**
-  :**DTMF Dialing**

 :**Consultation/Transference**

This button opens your contact list. Next to each contact you can perform the two following actions:

–  Call that specific contact

–  Transfer the call to that specific contact



- **: Menu of options**
  - Chat
  - E-mail
  - Additional Speaker On/Off
  - Start Web Collaboration
  - Start Voice Recording
  - Start Video Streaming
  - Volume Settings
- : **Return call control to the default position**

  This back button returns your call control window view to its orginal position, i.e right bottom corner.

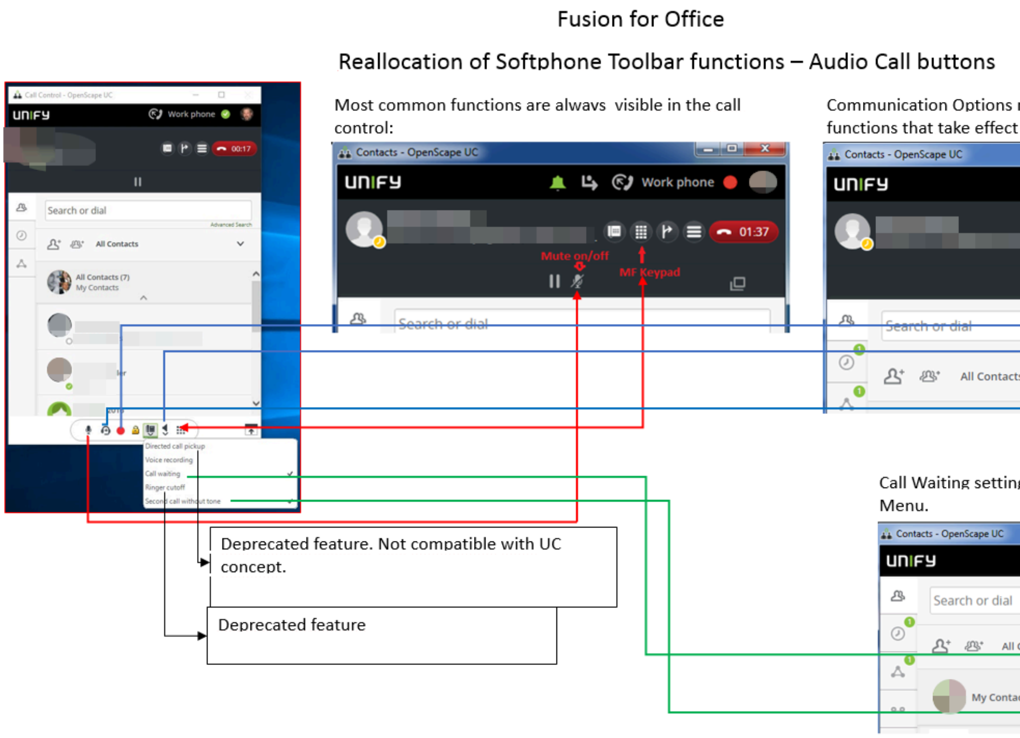
Calls on hold

When you have a call on hold, then you have the following options:

- **More**: Switch to OpenScape View
- **: Transfer call**
- **: Menu of options** with the same options as above
- : **Resume call**

Reallocation of Softphone Toolbar options

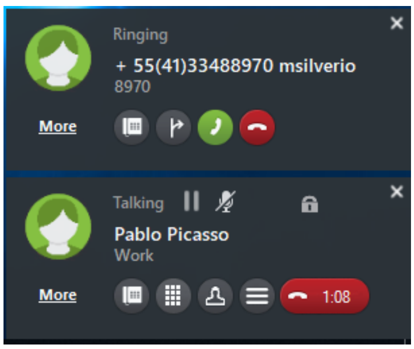
In the figure below, you can see the reallocation of the toolbar options in the Softphone interface and their placement compared to the only Call mode and OpenScape View.



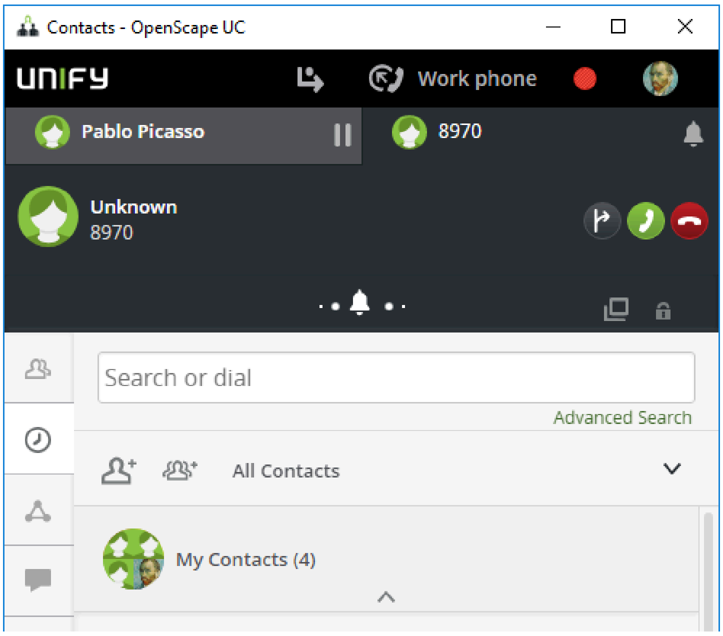
4.12.1.1 Inbound Call

An incoming call is indicated via notification toaster in the **Call Control** window.

- If you have already a running call, the only CallControl display is like the following:



- The more detailed OpenScape View is displayed as the following:



The following features are available:

- **Change Device**

  This feature lets you forward the call to another device and you resume the call from there. The following dialog opens:

  You see already your devices listed (here Work phone and Andy Mobile) so you can click on one of your devices and pickup the call from there.

- **forward incoming call**

  This feature lets you forward the active call to another subscriber. The following dialog opens:

  In the field "Search" you can enter a name and then press enter so that the call is transferred to this person.

- **Accept call**

  The connection is being established.

  NOTICE:

  This icon is only displayed if you have configured the device your ONS number is assigned to as preferred device when the call comes in. If another device has been chosen from the device list as preferred device, the icon for accepting a call is not available in the **Call Control**. You can accept the call only via the currently configured preferred device.

- **Reject incoming call**

  The call is rejected and the connection setup aborted.

4.12.1.2 Incoming Team Call

Calls destined for other members of your team are signalled to you too in the **Call Control**.

The phone number of the team member that is being called is shown inside the Call Control window. You can pick up such a call with a click on .

4.12.1.3 Active Call

During an active call you can use the following features to control the call:

- **Change Device**

  This feature lets you forward the call to another device and you resume the call from there. The following dialog opens:

  You see already your devices listed (here Work phone and Andy Mobile) so you can click on one of your devices and pickup the call from there.

- **Search for contact to call or transfer**

  This feature lets you to make a consultation or transfer the call to another contact.

  The search or dial field is displayed to look for a contact or type the number you want to call.

  If the name or number you have typed is in your private contact list, the contact immediately appears in the list.

  You can click on to look for more contacts in the OpenScape UC or other integrated directories.

  A consultation call is done by pressing the button that appears when you select the contact. The call is transferred by pressing the button on the contact.

  In case you typed a phone number that is not associated to any contact, click on the button to make the consultation call.

- **communication options**

  with communication options you may chat, send an email or start a Web Collaboration. There may be more options depending on which state of the call you are.

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

  Via this option you hold the active call.

  NOTICE:

  If you operate the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes with a connection to a OpenScape 4000 , this function is unavailable.

- **Resume held call**

  NOTICE:

  If you operate the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes with a connection to a OpenScape 4000 , this function is unavailable.

  NOTICE:

  You see the "Resume held call" icon only, if you have put the call on hold.

  You are automatically reconnected to the original caller.

- 00:12 **Close connection**

  Closes the connection.

4.12.1.4 Consultation Call

When you are in an active call, click on the button in the call control bar to select a contact for a consultation call. Click on button that appears when you select the contact to make the call.

During a consultation call the following call control functions are available to you in the area of the held call:

- **Change Device**

  This feature lets you forward the call to another device and you resume the call from there. The following dialog opens:

  You see already your devices listed (here Work phone and Andy Mobile) so you can click on one of your devices and pickup the call from there.

- **Merge Calls Together**

  This feature starts a PBX conference call with you, the consultation party and the one on hold.

- **Search for contact to call or transfer**

  This feature lets you transfer the consultation call. Two menu options will appear to you:

  a) Transfer to waiting call:

  When you select this option, you will be disconnected and the contact you are in consultation will be connected in a call to the contact on hold.

  b) Transfer to another person:

  When you select this option, you will be prompted with a search or dial field to select other contact you want to transfer the call. You will be disconnected from the consultation call and can retrieve the call on hold.

- **communication options**

  With communication options you can select actions like starting a chat or the video camera preview.

  NOTICE:

  You may have different or more functions depending on OpenScape UC system is deployed.

- **Close connection**

  Closes the connection.

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

  NOTICE:

  If you operate OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes with a connection to a OpenScape 4000 , this function is unavailable.

  Via this option you hold the active call. You can then call another subscriber to consult him/her.

- **Resume held call**

  NOTICE:

  If you operate OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes with a connection to a OpenScape 4000 , this function is unavailable.

  The connection to the consultation-call subscriber is closed. You are automatically reconnected to the original caller.

4.12.1.5 Conference Connection

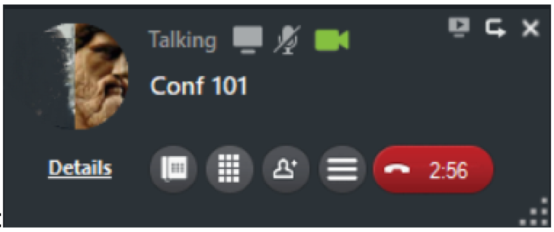
Depending on the system environment and your participant privileges (creator/moderator, invited participant), the Call Control window of an active conference offers different controls.

Depending on the OpenScape UC Application system environment, the **Call Control** of an active conference opens automatically after the conference start or can be opened manually via a URL in the conference notification e-mail.

NOTICE:

External users invited for a conference cannot open the Call Control window.

Standalone Call Control view:

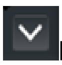
An example of the Standalone Call Control view is shown in the following figure: 

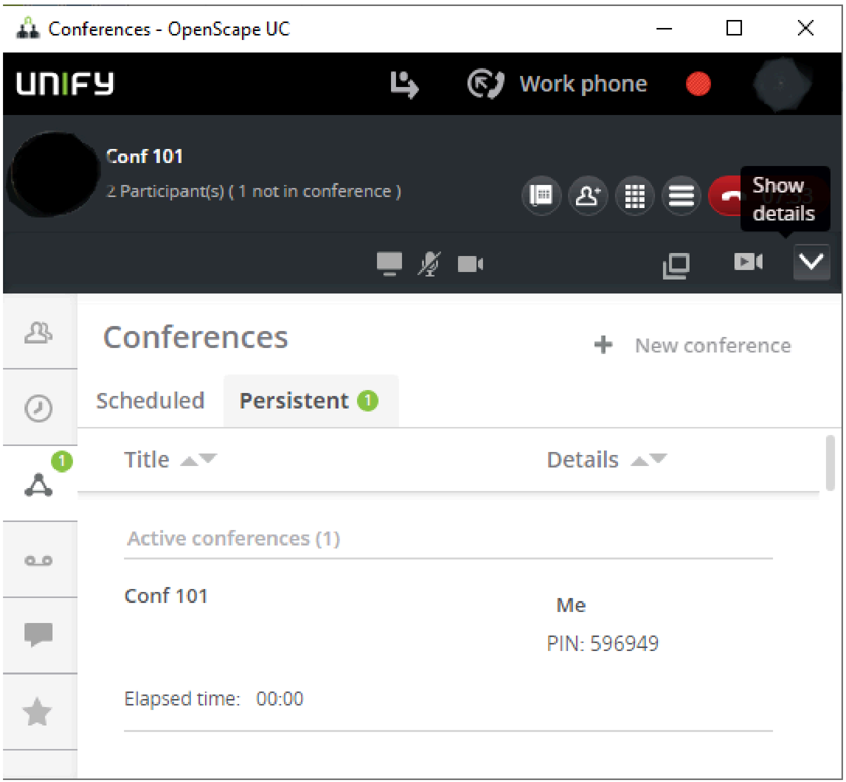
Video and Screen Sharing controls:

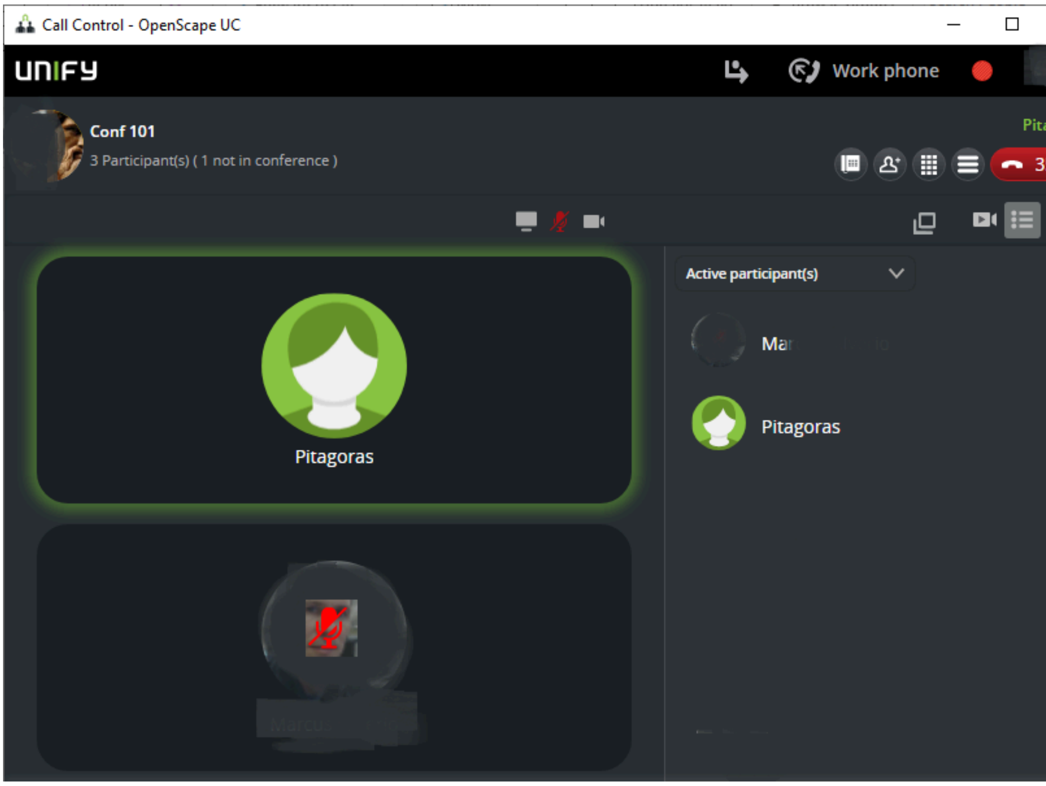
-  - Button to start screen sharing. The button is green for the user that is sharing the screen.
-  - Button to start video streaming. The button is green for the user that is streaming his video.
-  - When a user is sharing a screen with you, use this button to get the screen sharing window to foreground.

OpenScape view

Click on **Details** to switch to OpenScape View.

Click the **Show Details**  button in the call control bar of the conference connection. The call control bar extends downwards and shows the conference participants' details. The currently active speaker is highlighted.





The Conference Call control buttons are the following:

-  - Display/Hide the List of Participants

-  - Display/Hide video view of active speakers
-  - Display the Only Call Control view
-  - Start video streaming
-  - Mute/Unmute your audio
-  - Start/Stop Screen Sharing
-  - When a user is sharing a screen with you, use this button to get the screen sharing window to foreground.

The **Call Control** window of an active conference displays the following controls, conference and status information:

- Conference name
- Conference PIN
- Features for participants with moderator/creator privileges
- List of participants connected to the conference

  In case of a moderated conference with many participants, the number of conference participants displayed in the **Call Control** is restricted for clarity. If the number of participants exceeds a value specified by the system administrator in the CMP (default 15), each participant only sees his/her own entry and a specific number of moderators. The number of visible moderators is also defined by the system administrator (default 15).

  In case of an open conference with many participants, the list of participants who are connected to the conference contains only one entry - each participant only sees himself/herself.
- List of participants who have not joined the conference yet
- Name of the currently active speaker is highlighted

NOTICE:

Depending on your OpenScape UC Application system environment (at least two media servers are available), the **Call Control** window may display another active call in addition to the ongoing conference. This is a connection to the conference system via which the existing conference is transferred to another media server to avoid a system overload.

NOTICE:

Conference participants who can open the Call Control window via a link are not displayed in the **Call Control** when they click on this URL. They appear as conference participants in the **Call Control** of the conference as soon as they dial in.

NOTICE:

Depending on the system environment, invited participants may open the **Call Control** via the URL contained in the conference notification e-mail but see nothing but an empty **Call Control** window. The conference is displayed in the **Call Control** as soon as it has been started by the conference creator or moderator.

Moderators and creators can use the following features in the **Call Control** to control an active conference:

- Mute Connection
- Unmute Connection
- Mute Conference
- Unmute Conference
- Start WebCollaboration

Invited participants can use the following features in the **Call Control** to control an active conference:

- Mute Connection
- Unmute Connection
- Start WebCollaboration

The **Call Control** window opened via the URL in the conference notification e-mail can provide the following information and functions depending on the system environment:

- Highlighted representation of the active speaker
- Conference PIN
- List of current conference participants
- List of participants who have not joined the conference yet.

NOTICE:

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

You can use the **Call Control** window to add further OpenScape UC Application or external participants to the conference.

- OpenScape UC Application users

  For example, you can enter the name of the desired OpenScape UC Application participant in the **New Call** combo box and subsequently click on to search all configured directories for the desired contact.
- External users

  You can add an external user to the conference by entering his/her phone number in the **New Call** combo box and enabling the green receiver. This participant will be directly called by the conference system. He/she will not receive a conference notification e-mail because the conference system does not know his/her e-mail address.

> **NOTICE:**
>
> For adding external participants we recommend using the **Add participant** dialog as it allows specifying an e-mail address for the desired participant. You reach this dialog with a click on in the **Modify conference** dialog.

4.12.1.6 Starting Conference WebCollaboration

Before participants can dial into a scheduled or persistent conference, it must be started. Moderated conferences can only be started by a moderator.

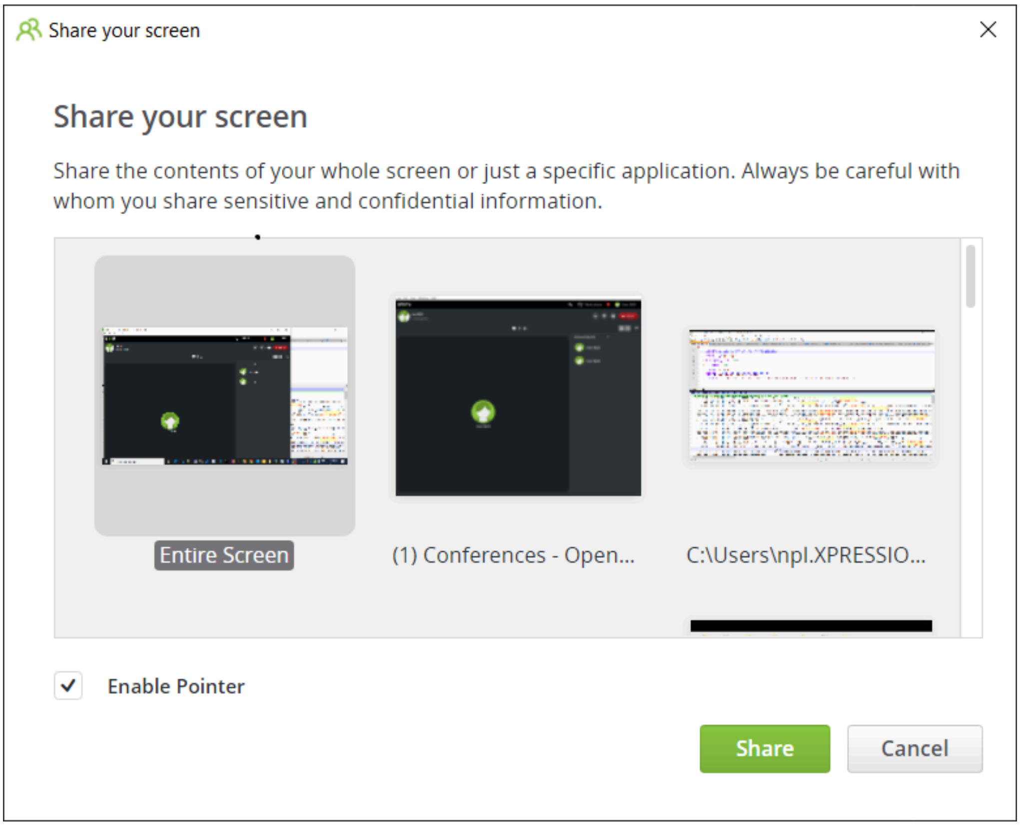
Click on in the signaling bar. Depending on how your system is deployed, the functionality can be one of the two modes below:

A. WebCollaboration using FastViewer

The file of the OpenScape Web Collaboration participant module will start downloading in your web browser. Open this file once finished downloading to start the web conference. This is the mode when OpenScape UC is deployed to use FastViewer as a WebCollaboration System.

B. WebCollaboration via WebRTC

The options to select the screen you want to share will be automatically displayed without the need to download any file. This is the mode when OpenScape UC is deployed to use WebCollaboration via WebRTC. If another conference participant starts screen sharing, a screen sharing window is automatically opened for you to see the contents.



The other call party will see your screen sharing in the designated Call Control section.

See more details about how to deploy your WebCollaboration system in the *OpenScape UC Installation guide*.

4.13 Directory Search

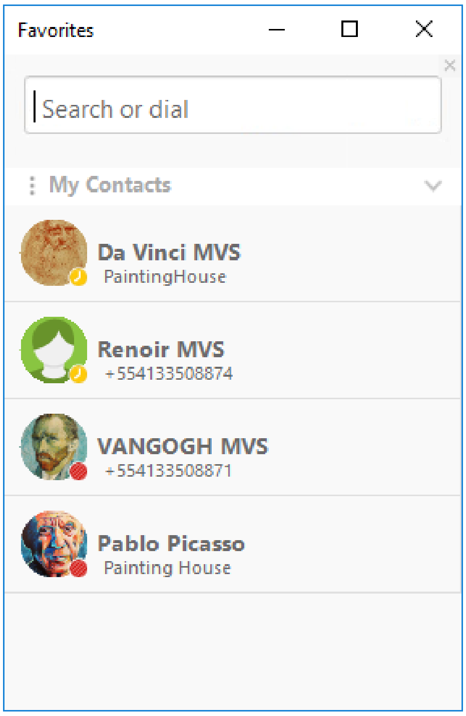
In the **Directory Search** window you can access your company directory, the OpenScape UC Application user directory and your private contacts to search for contact names.

You reach the **Directory Search** via the OpenScape Contacts View by clicking on the contact symbol  .

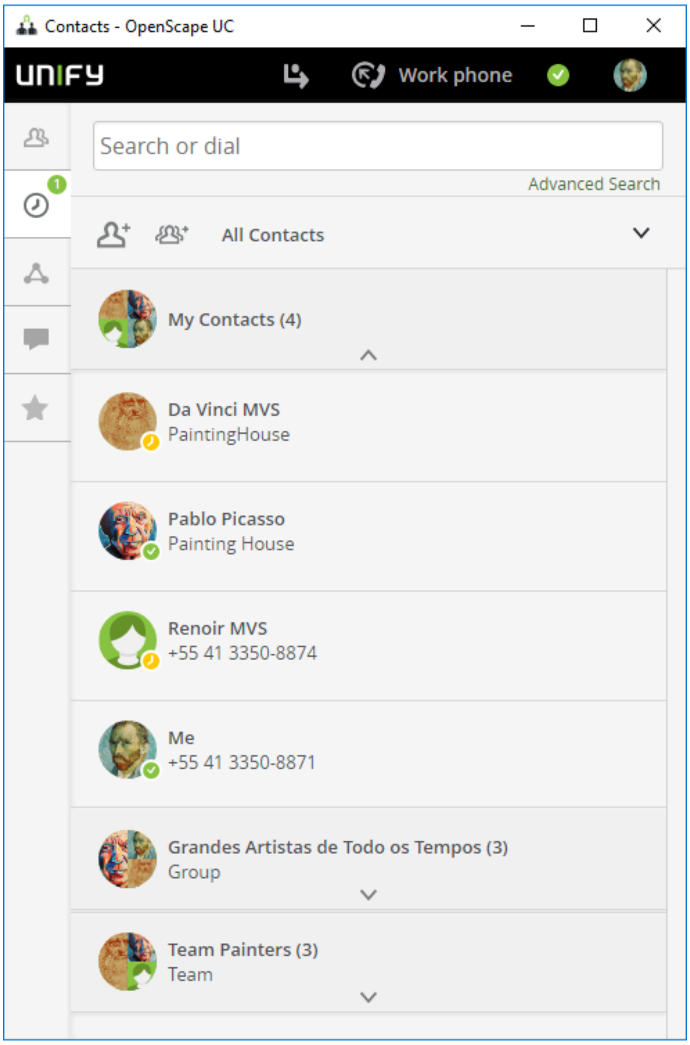
Alternatively you reach the directory search via **Favorites** panel.

This window enables you to quickly look for a contact in all configured address books. Start the quick search by entering a name, parts of a name into the **Search** field and then press enter.

Favorites:



OpenScape Contacts View:



Alternatively you can click also on the **Advanced Search** for performing a more specific search.

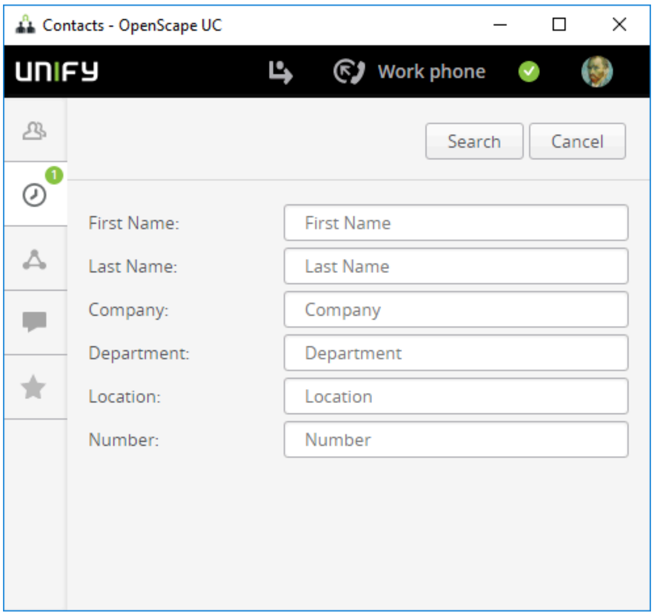
NOTICE:

The advanced search is only possible via extended view (In Fusion V1.6.xxx only via OpenScape Views Contacts or Outlook Plugin).

NOTICE:

The advanced search is only possible via extended view (In Fusion V1.6.xxx only via OpenScape Views Contacts or Notes Plugin).

It is possible to search with multiple criteria in parallel.



You can search with

- First Name
- Last Name
- Company
- Department
- Location
- Number

NOTICE:

All fields can be partly specified. There are restrictions that the first letters must match, you can not search from the middle or at the end, e.g. for Location Athens you can specify Ath.

NOTICE:

For similar contacts which seem to be for the same entry, one merged entry with all data is displayed e.g. similar name, but same phone number and e-mail address.

4.13.1 Information in the "Directory Search" Window

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

-  you can call the contact.
-  you can use the communication options.

  You can call, start a Web Collaboration, make a chat, send an email etc.
-  you can add the contact to the action bar.

4.14 Contacts

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes enables accessing the OpenScape UC Application contacts as well as other contacts. The latter ones are e. g. private contacts who can be freely entered in the contact list or users who were transferred from an LDAP directory to the personal contact list. The user and media presence (IM, language) is displayed for each OpenScape UC Application contact.

You reach the **Contacts** window via OpenScape Contacts View. Click then on the contact icon  .

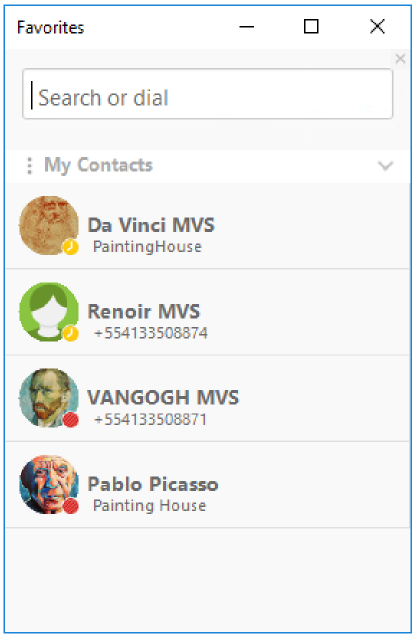
Alternatively you can use the **Favorites** panel for displaying the contacts.

Also from **Settings** > **OpenScape Views** > **Contacts** or from Outlook Plugin you can reach the menu.

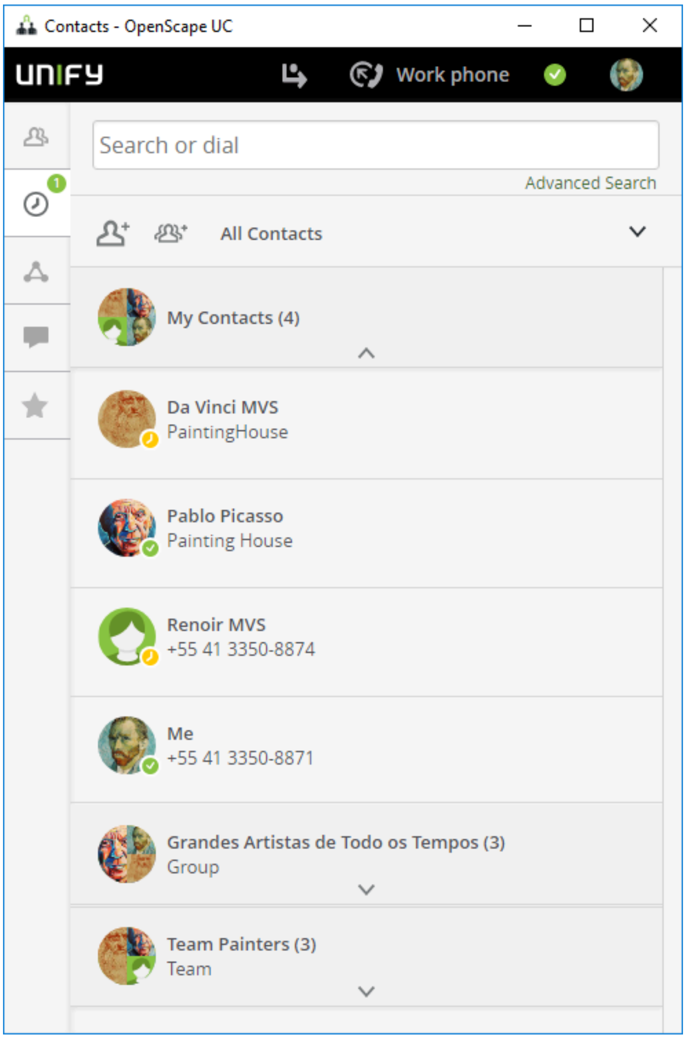
Also from **Settings** > **OpenScape Views** > **Contacts** or from Notes Plugin you can reach the menu.

Alternatively you can use for displaying the contacts **My Contact Board / Favorites**.

From the **Favorites** panel:



From OpenScape Contacts view:



4.14.1 Contacts - Operating Options

The **Contacts** window displays all of the contacts you entered into the contact list. It provides various controls the functions of which support you in managing your private contacts.

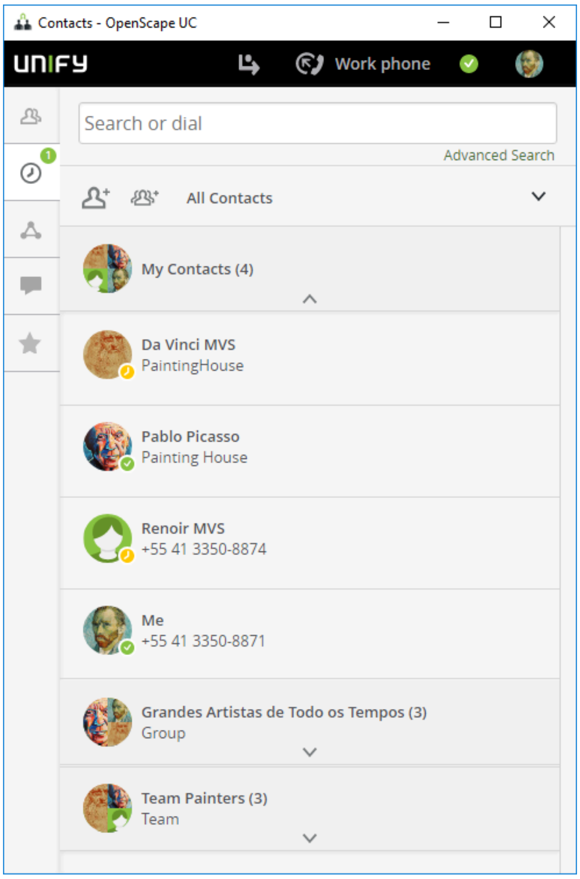
The contact list provides the following features:

NOTICE:

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

- Create new contact entry

Create a new entry by clicking on the add contact symbol. The following mask opens.



Fill out the mask and press on **Save**.

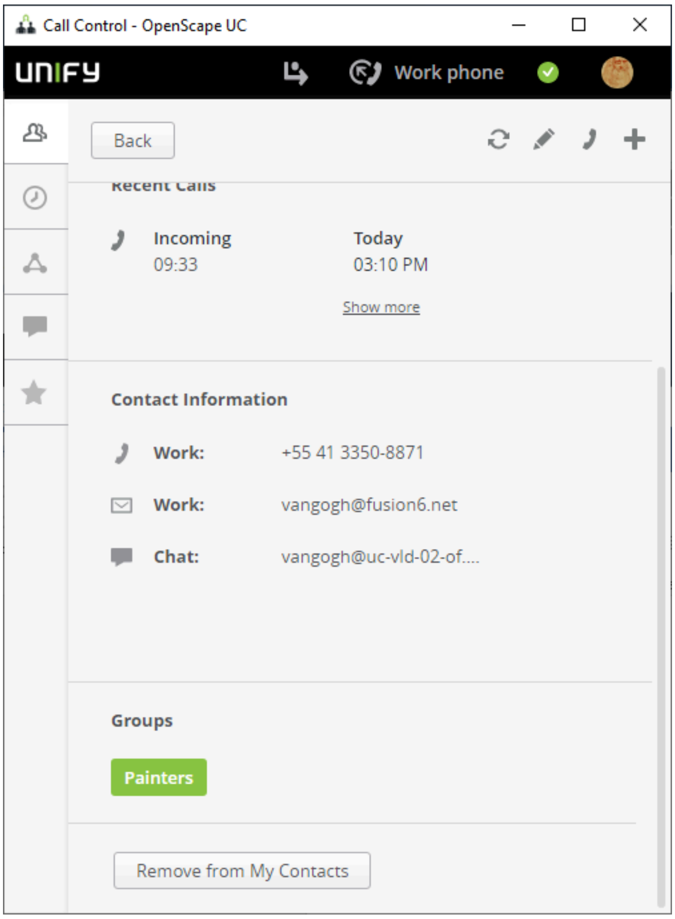
NOTICE:

The fields marked with an asteriks (*) are mandatory.

In case you have defined groups, on the bottom you see the groups (if any). By clicking on the groups you assign the contact to a group or groups. The selected groups are shown green

- **Delete contact entry**

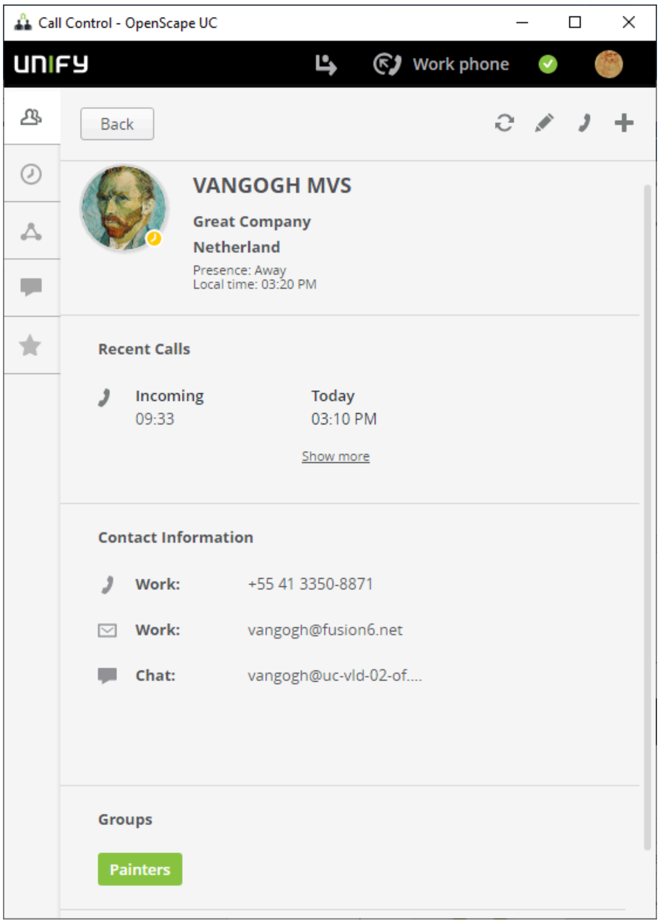
  select the contact you want to delete.



Click on **remove from my Contacts** (on the bottom left)

- **Edit contact entry**

  select the contact to be edited.



  Click on the pencil ( ) and then you see the contact input mask (similar to add a contact). Make the changes and click on **Save**.

  NOTICE:

  You can assign or remove the contact from associated groups. Activated groups are displayed in Green (here for example "Painters")

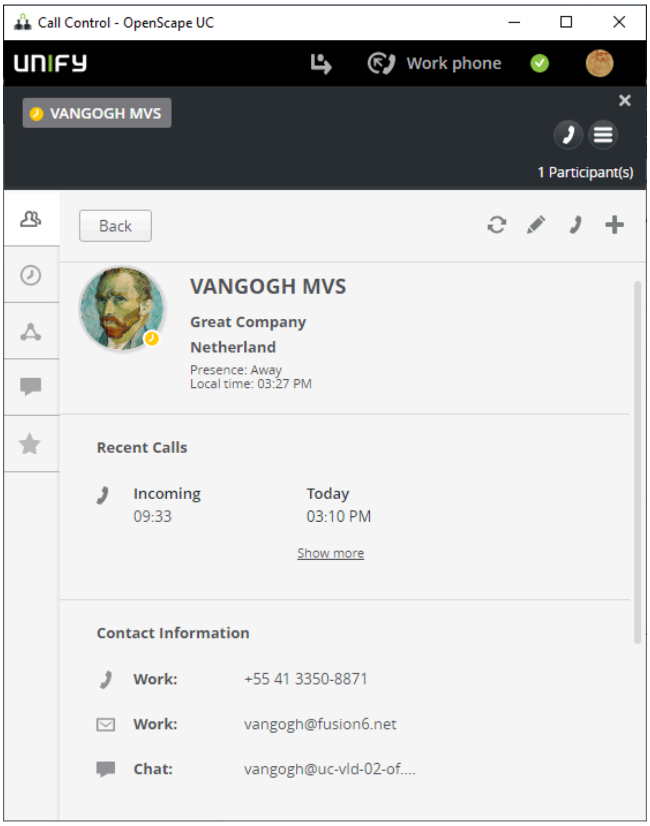
- **Call contact**

  Select the contact and click on (on the top right).

- **add contact to action bar**

  Select the contact and click on the (on the top right).

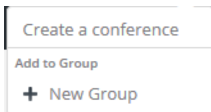
  the following screen opens.



On the top left you see again the telephone symbol with which you can call the contact.

You also see right next to the telephone symbol the symbol for communication options .

From there you can start e.g. a conference.



NOTICE:

There can be also other contacts already on the action bar. In this case you may have more options.

4.14.2 Outbound Connection

When you initiate a call, OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes behaves according to the preferred device used.

- The system administrator has assigned you the preferred device currently used in the CMP as ONS number (for example the number of your office phone or Softphone) and the *Auto Answer* feature for this number is enabled in the PBX (for example OpenScape Voice).

  In this case the connection to the desired conversational partner is directly set up and displayed in the **Call Control** window.
- The preferred device currently used is not configured as your ONS number (for example your mobile phone) in the CMP.

  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 return call**
  - 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. When the previously busy line becomes available again, OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes is notified about that by the PBX. OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes will then indicate by a call in the **Call Control** window that the subscriber is no longer busy. If you accept this return call with a click on , the target subscriber is called by the PBX again.
  - Call completion on no reply (CCNR) - When 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 before you hang up. Next time the subscriber hangs up, OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes is notified about that by the PBX. 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 will set up the connection to the desired subscriber once again.

NOTICE:

If the user initiates a callback from a preferred device different from the ONS device, the callback will in due course not be indicated at the preferred device but at the device with the associated ONS number.

NOTICE:

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

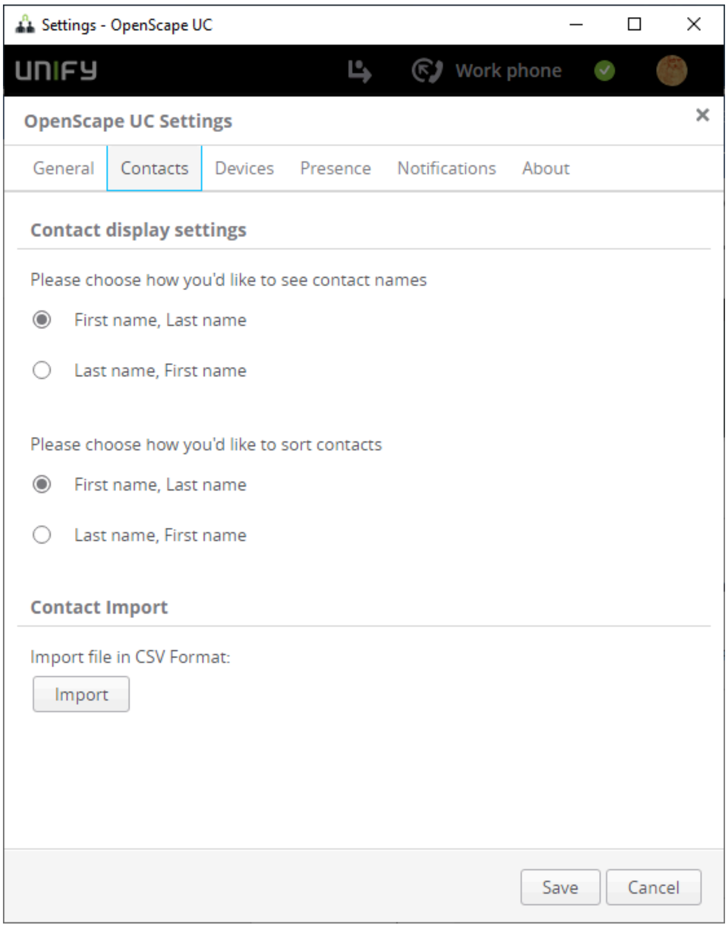
4.14.3 Configuration Options in the Contacts Window

In the **OpenScape View** > **Settings** > **Contacts** or **Systray** > **Settings** > **OpenScape UC Settings** > **Contacts** window you can configure various setting options for managing address data. Such options enable changing display options as well as importing contact data.

Overview

The following options are possible:

- Contact display settings
- Contact Import



Contact display settings

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

There are radio buttons where you select how contacts are displayed and sorted.

- how to see contact names

  First name, Last name

  Last name, First name

- how to sort contacts
  First name, Last name
  Last name, First name

Then click on **Save** or on **Cancel**.

Contact Import

On this section you perform settings for importing addresses.

Click on **Import** in order to import a csv-file.

> **NOTICE:**
>
> Normally the csv-file has been exported from Outlook, WebClient 1.0 or Comassist.

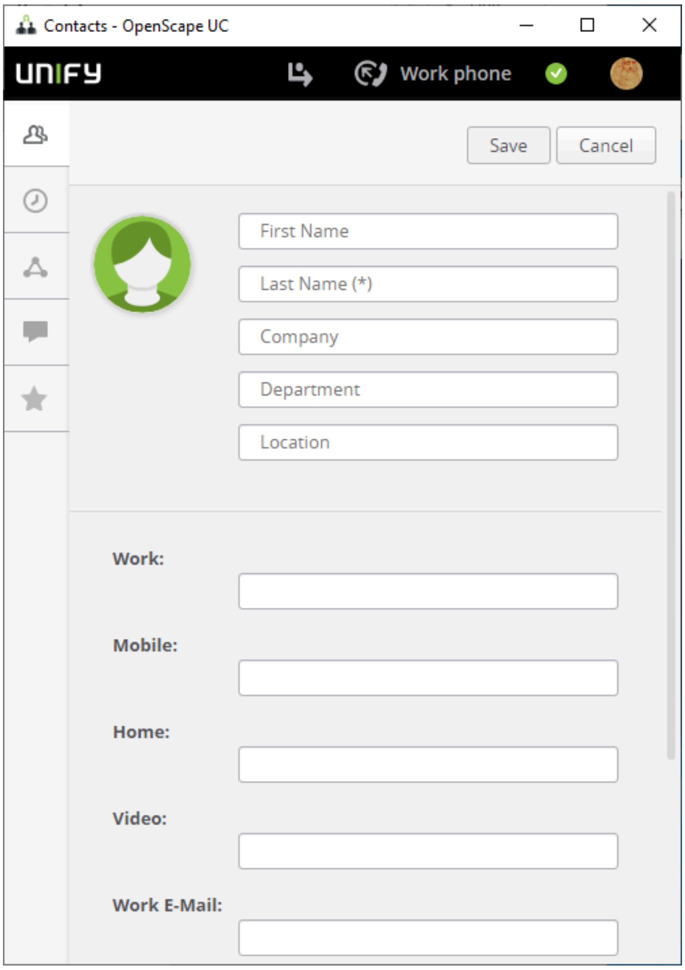
> **NOTICE:**
>
> Import mechanism only supports UTF-8 scheme encoding. Make sure that the CSV file is saved with UTF-8 encoding before importing.
>
> To save a CSV file by using the UTF-8 encoding format, follow these steps:
>
> 1. Open the CSV file by using Notepad.
>
> 2. In Notepad, click the File menu, and then click Save As.
>
> 3. In the Encoding list, select UTF-8, and then click Save.

> **IMPORTANT:**
>
> It is not recommended to create the csv-file manually, the import may fail. Also do not modify the csv-file manually.

You are informed about the result.

4.14.4 Input Mask of a Contact – Adding a Contact

In the **Contacts** window you find the icon that lets you add a new contact to your contact list. After the have clicked this icon, the following input mask opens: In this dialog you can perform the following settings:



- **First Name**

  Here you can enter the first name of the contact with a maximum of 64 characters.
- **Last name**

  Here you can enter the last name of the contact with a maximum of 64 characters.
- **Company**

  Here you can enter a company name with a maximum of 64 characters.
- **Department**

  Here you can enter a department name with a maximum of 64 characters.
- **Location**

  Here you can enter a location name with a maximum of 64 characters.
- **Work**

  Here you can enter a phone number with a maximum of 32 characters.
- **Mobile**

  Here you can enter the number of a mobile device with a maximum of 32 characters.
- **Home**

  Here you can enter a phone number with a maximum of 32 characters.

- **Video**

  Here you can enter the number of a video-compatible device with a maximum of 32 characters.
- **Work e-mail**

  Here you can enter an e-mail address with a maximum of 64 characters.
- **Chat**

  Here you can enter an instant-messaging address with a maximum of 64 characters.

A click on **Save** saves the performed settings and closes the input mask.

A click on **Cancel** closes the input mask without saving performed changes.

4.14.5 Input Mask of a Contact – Editing a Contact

In the **Contacts** window click on a contact you want to edit and with icon you can edit an existing contact of your contact list. After you have clicked on this icon, the input mask (similar to adding a contact) with the contact's data opens: In this dialog you can perform the following settings:

- **First Name**

  Here you can enter the first name of the contact with a maximum of 64 characters.
- **Last name**

  Here you can enter the last name of the contact with a maximum of 64 characters.
- **Company**

  Here you can enter a company name with a maximum of 64 characters.
- **Department**

  Here you can enter a department name with a maximum of 64 characters.
- **Location**

  Here you can enter a location name with a maximum of 64 characters.
- **Work**

  Here you can enter a phone number with a maximum of 32 characters.
- **Mobile**

  Here you can enter the number of a mobile device with a maximum of 32 characters.
- **Home**

  Here you can enter a phone number with a maximum of 32 characters.
- **Video**

  Here you can enter the number of a video-compatible device with a maximum of 32 characters.
- **Work e-mail**

  Here you can enter a private e-mail address with a maximum of 64 characters.

- **Chat**

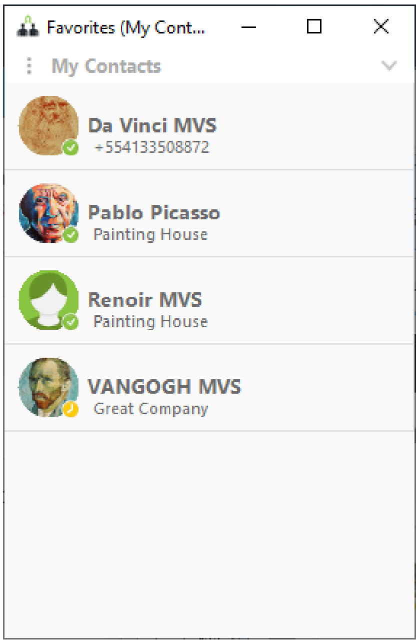
  Here you can enter an instant-messaging address with a maximum of 64 characters.

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

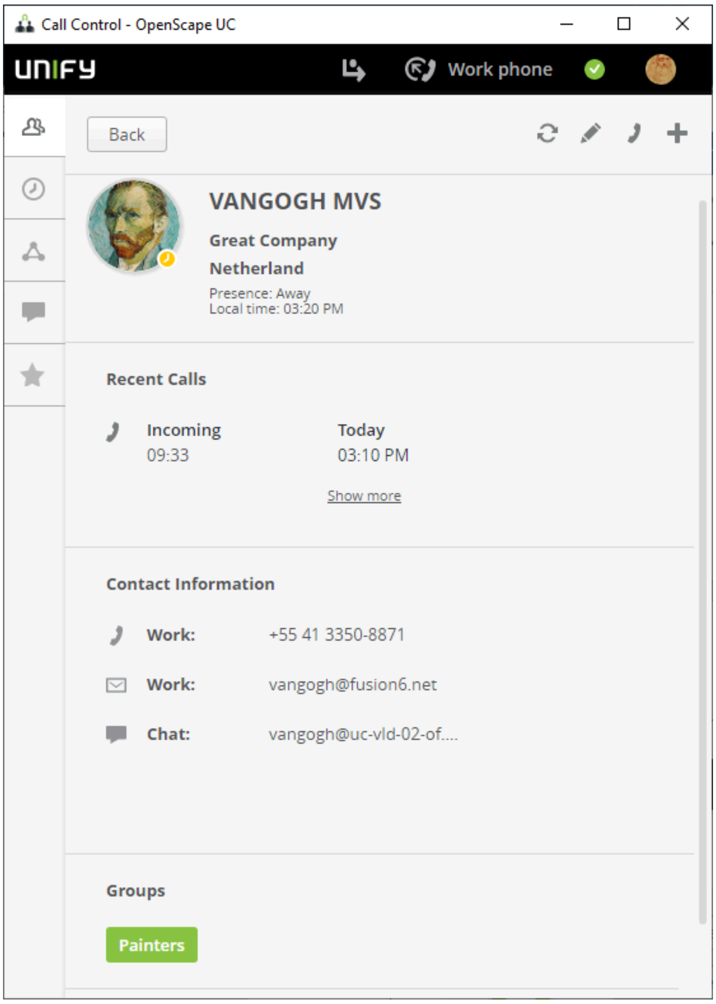
With a click on the **Cancel** button you can close the input mask without saving performed changes.

4.14.6 Display Contact Details via Favorites

Open the Favorites (You reach the Favorites e.g. via the **OpenScape Views** > **Favorites**)



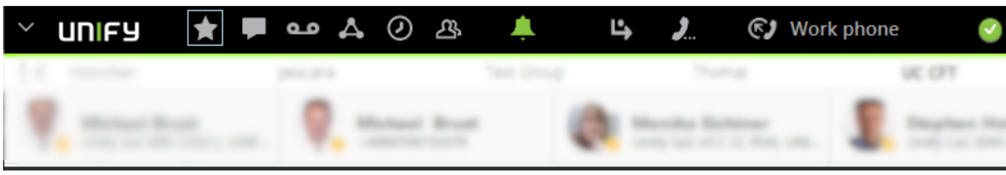
Left click on the contact (e.g. Da Vinci MVS) and the details open.



4.14.7 Working with Favorites

In the Favorites bar in UC V10, you can perform the following enhanced features:

- You can dock your **Favorites** on the Fusion tool bar.
- The Group of Contacts can now be selected by tabs, displayed either as a Standalone window or in docked horizontal view (on top or bottom Fusion bars). It is also possible to be docked to the right or left Fusion bar, and in this case the group selection is a drop down menu.



- You can switch between hiding or displaying the **Favorites** bar by pressing the  in the top left of the bar.
- It's also possible to Add a Group, Add a Contact or Search for Contacts through the Favorites menu.

- The Favorites bar can be displayed in three different modes:
  - Detail: Displaying names and basic info like work phone number, etc.
  - Compact: Displaying just the names of your Favorites contacts.
  - Pictures: Displaying the avatars and names of your Favorites contacts.
- When **Favorites** is docked to Fusion Bar (only top or bottom), it is possible to choose how many rows (2, 4 or 6) of group/team contacts are displayed.
- You can change the order that groups/teams appears in **Favorites** and to hide groups/teams from **Favorites** display.

4.15 Team Function - Overview

The OpenScape UC Application team function lets you group several OpenScape UC Application users into single teams, thus providing each member with useful telephony features.

The following features are available to team members:

- If privileged, each team member can see the telephone status of other team members.
- If privileged, a team member can also see the calls that come in for other team members.
- If privileged, a team member can accept calls on behalf of other team members.

NOTICE:

If a team member accepts a call on behalf of another team member whose name and number are not displayed (anonymous member), the call will not be specially indicated in the history of the accepting team member but displayed as a normal incoming call.

- Team members who have a team administrator profile can manage the member list of the respective team.
- Each team member can become team administrator of his/her own team, thus obtaining the privilege of managing this team.
- Only team administrators who have been assigned the default **Team Administrator** profile or another profile with the privilege of **managing groups** by the OpenScape UC Application system administrator in the CMP can create new teams and delete his/her own already existing teams.

The following persons are authorized to create and manage a team:

- The OpenScape UC Application system administrator via the CMP.

NOTICE:

You find detailed information about managing the team features via the CMP in the *OpenScape UC ApplicationV10Configuration and Administration* manual.

- A team administrator via the client GUI - This is an OpenScape UC Application user who has been assigned the default **Team Administrator** profile or another profile with the privilege of **managing groups** by the OpenScape UC Application system administrator in the CMP.

The team members can have one of the following roles:

- Team Administrator

  A team administrator is an OpenScape UC Application user who is privileged to manage the team. This includes adding new members to the team and removing members from the team. Every OpenScape UC Application user may adopt the Team Administrator role. A team can comprise several members with Team Administrator role at the same time. Each team administrator can define other team members as team administrators of the respective team also. The team administrator keeps his/her role until he/she removes himself/herself or is removed by another team administrator from the team or the team creator or another team administrator withdraws the privileges of managing a team from him/her.

  The creator of a team is automatically its team administrator also. He/she keeps the privileges of managing the team as long as the team exists and independently from modifications to the assigned profiles/privileges in the CMP. Other team administrators are not privileged to withdraw the Team Administrator privileges from the team creator.
- Team Member

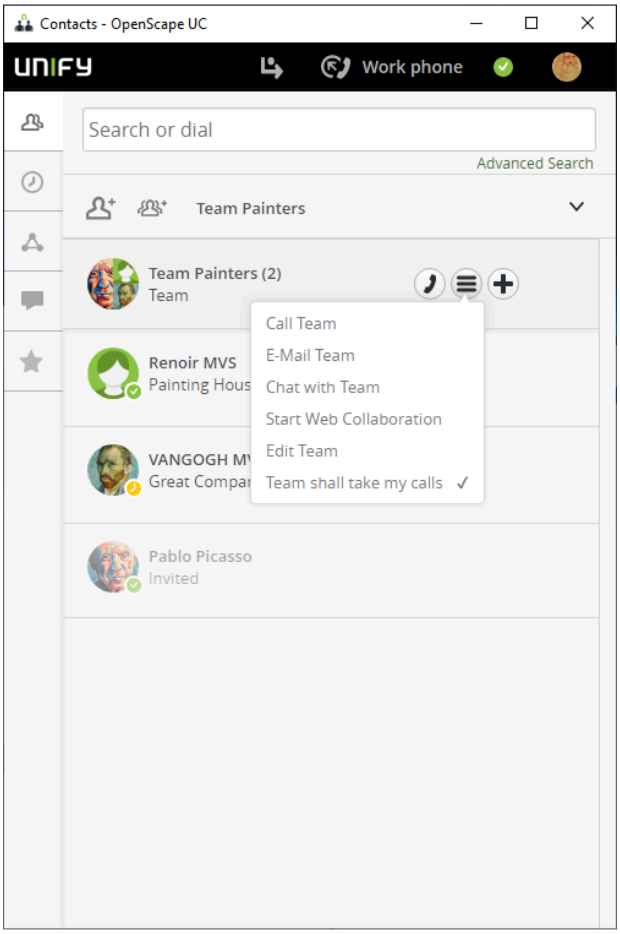
  A team member is an OpenScape UC Application user who is not allowed to manage the team. Each team member can be appointed team administrator by another team administrator via the client GUI or by the system administrator in the CMP.

For working in the team, OpenScape UC Application provides the **Team View** window. You reach the **Team View** window with a click on the **Team** button in the **OpenScape UC Application Features** function group of the **OpenScape Fusion** tab.

4.15.1 Team View - Controls and Features

The **Team / Group View** window shows the member list of the respectively selected team. The **Team / Group View** remains empty until you are added to a team or Group as member or have created a team.

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



- **Add group / team members**

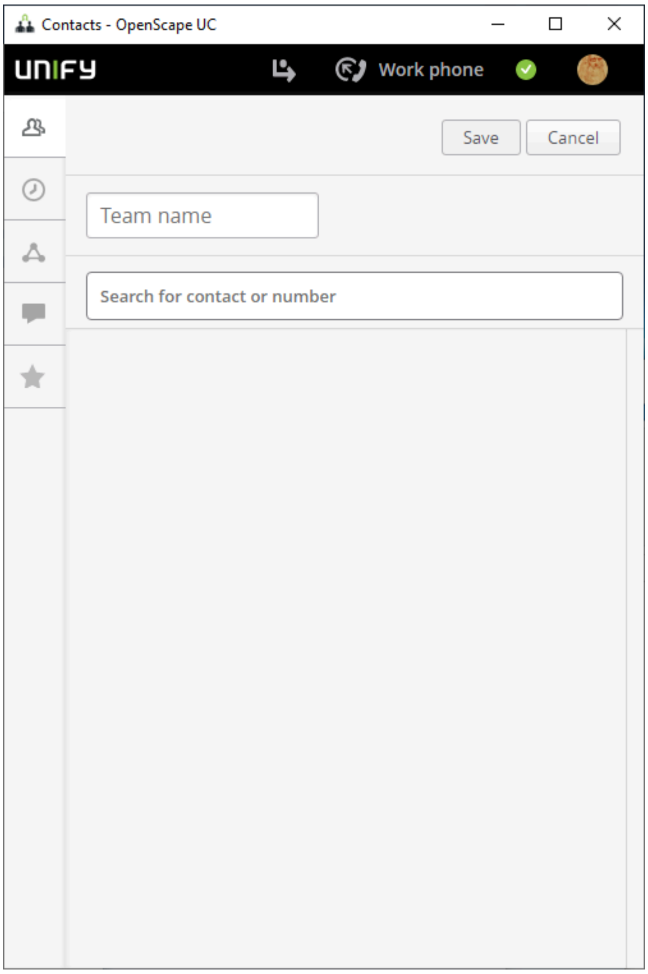
  Then you see a menu and select **Create new Team**

  The team administrator can use this feature to find contact information about OpenScape UC Application users in the **Directory Search** dialog for integrating these users in. In the **Search for contact or number** enter a name or number and press enter or if displayed, select the name.

NOTICE:

The option **Create new Team** is available only for team administrators.

Also the invited team member must accept the invitation. This can be done via the notification toaster.



- **Delete member**

  hover with the mouse over the member and click on the right side on the x.

  This option allows the team administrator to remove team members from his/her team after selecting them.

  In addition, every team member can use this option to quit the respective team by himself/herself if the following applies:

  – The relevant team member was not added to the team by a system administrator and is thus an enforced team member.
  – The relevant team member is not the last team administrator of the team.

- Presence status of a team member

  The **Team View** shows you the presence states of other team partners:

State	icon
Available	
Do not disturb	
Be right back	
Away	
Busy	
in a meeting	

4.16 Tell-Me-When

If you cannot reach a contact for once, you can use the Tell-Me-When feature of the OpenScape UC Application to perform actions or to notify you as soon as the respective person is available again.

NOTICE:

This function is available with OpenScape UC Application users only.

For example, if you want to call a contact but is displayed next to his/her name in the contact list or his/her presence status differs from status **Available**, you know that this contact is currently unavailable. In this case you can use the Tell-Me-When feature to be informed when the contact is available again.

- A **notification toaster** displayed, which informs you about the presence availability modifications of the contact.

You reach this feature in one of the following ways:

- Via the **Communication** options of every contact, either in **OpenScape View Contacts** or in **Favorites** panel, select the **Notify when available** in **Tell me when** options. The **Tell-Me-When** dialog opens.
- Via the context of the Contact Card.

  You reach the context menu when you open an email and you hover the mouse over for the originator or recipient of which you wish to configure and activate the Tell-Me-When feature. Selecting the from the Outlook Card the **Tell-Me-When** option opens the **Tell-Me-When** dialog.
- Via the Ribbon when you open an e-mail and click on the **Tell-Me-When** icon .
- Via the e-mail context menu (right click)

4.16.1 Tell-Me-When Feature Settings

The **Tell-Me-When** dialog enables configuring and thus adjusting the *Tell-Me-When* feature to your own demands.

The following settings are available in this dialog:

- Determine the desired timeout for the Tell-Me-When feature in the **Expires in** combo box.
- Click the **OK** button to save the performed settings made and to close the dialog. The Tell-Me-When feature is thus activated for the selected contact.

NOTICE:

You may see a small clock inside the avatar of the contact as indication that Tell Me When is active.

- Click the **Cancel** button to close the Tell-Me-When dialog without saving the settings made.

4.16.1.1 Features of the Tell-Me-When Notification Window

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

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

- Call displayed contact

  Click on this icon to initiate a call to the displayed contact.
- Communication options.

  Click on this icon to get the communication option (e.g. Mail, Chat, etc.)

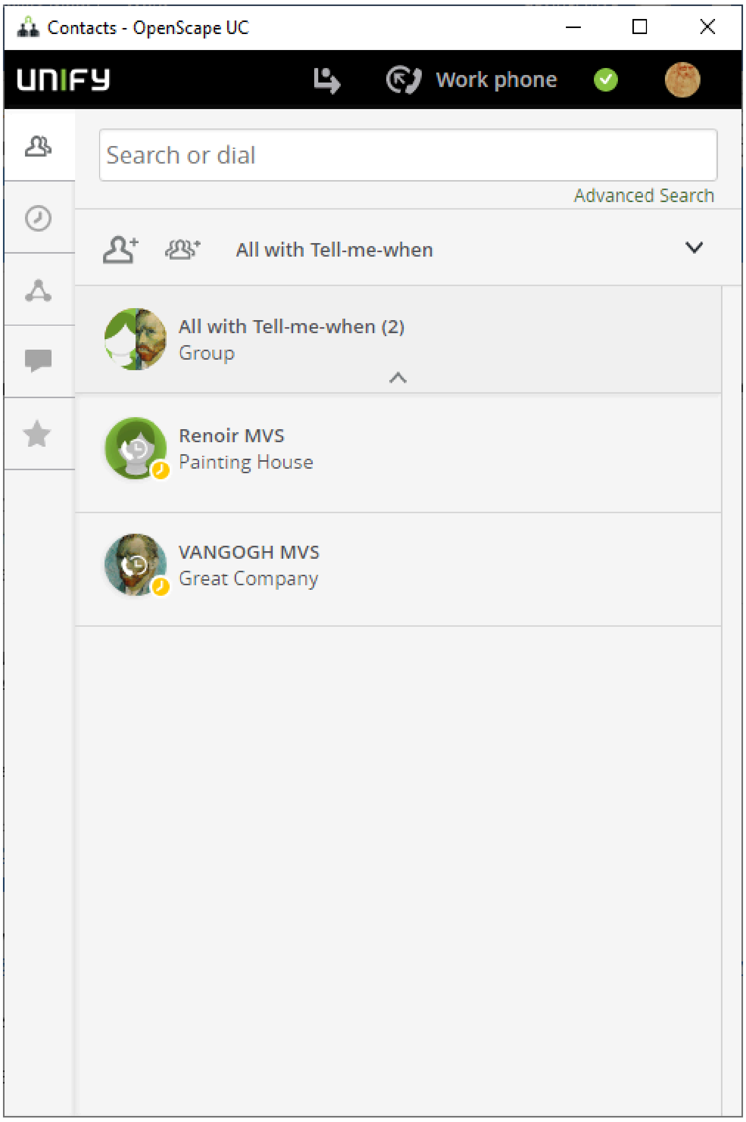
IMPORTANT:

MicrosoftOutlookIBM Notes should have been defined as the default "mail to" program in order to be able to use the mail option for OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes.

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

4.16.2 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 reach this dialog via the **All Contacts** window.



A list entry contains the following elements (from left to right):

- The Avatar
- 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.

4.16.3 Modifying Tell-Me-When Settings

You can modify the settings of an already activated Tell-Me-When feature during its runtime.

If you have activated the Tell-Me-When feature for an OpenScape UC Application contact and wish to change the performed settings, you can use the **Set Tell-Me-When...** option provided in the context menu of the selected contact. A click on this option opens the following dialog in which you can perform the desired changes.

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

NOTICE:

In the ribbon you can cancel the Tell Me when. You can click either with a left click or a right click on the Tell Me When icon (it is green in order to indicate that Tell Me When is active)

4.17 Conferences

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes provides an overview of all configured conferences in the conference list. Furthermore, you can use OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes to configure conferences. Such conferences are provided in the OpenScape UC Application conference portal.

OpenScape UC Application conference portal

The OpenScape UC Application conference portal provides virtual conference rooms in which users gather to conduct audio and video conferences. For this purpose, users may deploy any phone or softphone as audio device. You find details about supported video devices in the *OpenScape UC Application Planning Guide*. You can schedule and control conferences via telephone user interface (TUI) or OpenScape UC Application clients such as OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes.

Supported conference types

OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes supports the following conference types:

- Ad-hoc conference
- Scheduled conference
- Persistent conference

Each of these conference types comprises audio, video and web collaboration.

Ad-hoc conference

An Ad-hoc conference is a dynamically, spontaneously configured conference performed directly. If you want to stage a meeting with several persons and the contact list shows that they are all available, you can select them and start a one-time audio conference. You can also determine several originators of e-mails selected in the MicrosoftOutlookIBM Notes inbox as well as several contacts from the MicrosoftOutlookIBM Notes contact list as conference participants.

Ad-hoc conferences support audio connections only.

NOTICE:

The ad-hoc conference is moderated by the initiator.

Scheduled conference

This conference type is scheduled and configured in advance.

There are two types of scheduled conferences:

- Open conference

  An open conference is a scheduled conference in which all participants have equal control privileges. Such a conference is started either automatically at the scheduled time or manually by one of the conference participants or automatically by the first conference participant who dials in. The conference configuration allows two ways of joining in: Participants are either called automatically by the system after the conference start (dial-out), or they need to dial in by themselves (dial-in).
- Moderated conference

  A moderated conference is a scheduled conference that can only be controlled by participants who have moderator privileges or by the conference creator. The conference starts automatically at the scheduled time if such a point in time has been configured. If no start time has been defined, the moderator can start the conference manually or by dialing in. Depending on the configuration, the conference participants can dial into the conference (Dial-In) or are called by the system (Dial-Out). With the moderator leaving the conference, it comes automatically to an end for the other participants, too.

  NOTICE:

  If a moderator has routed his/her phone to another extension and a conference call occurs, this call is forwarded to the routing destination. Though the conference call can be accepted at this routing destination, it is not possible to join the conference from there.

  Please heed the following for moderated conferences:

  – If the moderator of a scheduled conference leaves the conference during the initially scheduled period, the conference persists until the initially scheduled end time. So, the other conference participants can resume the conference.
  – If the moderator of an unscheduled conference leaves the conference during the initially scheduled period, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.
  – If the moderator leaves the conference during a conference prolongation, the grace period starts when the moderator terminates the conference call. The grace period enables the other conference participants to end the conference also. When the grace period has expired, the conference ends.
  – The default system configuration plays a short signal tone audible to all conference participants when a conference participant joins or leaves the conference. In case of a larger number of conference participants joining or leaving, this signal tone may become annoying to the others. Therefore, it is not played anymore when the number of participants specified by the system administrator in the CMP (default 15) is reached.
  – In case of a moderated conference with many participants, the number of conference participants displayed in the **Call Control** is restricted for clarity. If the number of participants exceeds a value specified by the system administrator in the CMP (default 15), each participant only sees

his/her own entry and a specific number of moderators. The number of visible moderators is also defined by the system administrator (default 15).

Persistent conference

You can configure persistent conferences quickly via a special bridge number with all external and internal participants. The conference room is exclusively defined by entering an arbitrary PIN. In other words, all conference participants who dial the bridge number and enter the same PIN are in the same conference room and can communicate with each other directly.

NOTICE:

The special character of this conference type does not allow the conference portal to control the assignment of access PINs for conferences. This may lead to participants of different conferences using the same access PIN for their respective conference. In this case, users who take part in such conferences are inadvertently connected in the same conference room. To control the assignment of access PINs for conferences, each user may receive a personal access PIN. Users will then have to specify this access PIN when inviting other participants for a conference. Personal access PINs may be derived from the extensions within a company, for example.

4.17.1 Conferences - Operating Options

The **Conferences** window provides various controls for creating, starting, editing and deleting a conference.

The following functions are available in the toolbar of the **Conferences** window for scheduling conferences:

- **Create conference**

  Click on **+ Create conference** to configure a new conference. The **Conferences** dialog opens. You can use the input mask on the **Create Conference** tab to prepare the conference. Click on Create when you have filled all the data.

  NOTICE:

  When you don’t specify a time you create a persistent conference.

- **Edit selected conference**

  Click on the conference name in the **Scheduled** or**Persistent** tab so you can edit the conference. This option enables you to edit selected conferences you created yourself via your OpenScape UC Application conference or contact list as well as with the OpenScape Extensions for Microsoft Outlook application (OpenScape Extensions for Microsoft Outlook is already included in OpenScape Fusion for Office). The **Conferences** input mask with the data of the selected conference opens for editing.

You can perform the following conference settings:

– Adding or removing conference participants

NOTICE:

In case of conferences created via the OpenScape Extensions for Microsoft Outlook application you cannot perform any participant list alterations.

– Participant role: Moderator or participant (in case of moderated conferences only)

NOTICE:

Participants that join a UC conference only with audio, will listen to a "Your phone is now muted/unmuted" message, when they mute or unmute their device.

– Type of connection setup:(participant dials in) or(participant is called)

NOTICE:

In case of conferences created via the OpenScape Extensions for Microsoft OutlookOpenScape Extensions for Lotus Notes application the conference creator can change his/her connection setup type only once, namely from participant dials in by himself/herself to participant is called.

– Options (moderated/open conference, name recording, video/web conference (if configurable))

You can use this option to display settings of conferences you have been invited for. In this case you cannot perform any changes.

Every conference participant can remove himself/herself from the participant list of a conference, no matter whether he/she is the creator or has been invited as participant. This will delete the conference from your own conference list.

Changes are displayed to all conference participants via the OpenScape UC Application conference list as well as in the MicrosoftOutlook calendar next time they open the respective conference dialog.

Click on Save when you are done.

- **Delete selected conference**

To remove a configured conference from the list, hover the mouse over the conference and click on the x on the left side.

IMPORTANT:

Conferences you have configured via the MicrosoftOutlook calendar cannot be removed from the MicrosoftOutlook calendar with this function. You need to open such conferences in the MicrosoftOutlook calendar with a doubleclick and a subsequent click on the **Delete conference** icon to remove them from the MicrosoftOutlook calendar.

- **Combo box** for selecting the conference view

  The combo box in the toolbar allows filtering the conference list by the conferences you have created to display them exclusively. To do this, select the **I'm creator** option in the selection list. Via **All Conferences** you can display the complete conference list.

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

- **Start time**

  Indicates the time at which the system starts a scheduled conference.
- **Name**

  Conference name
- **Creator**

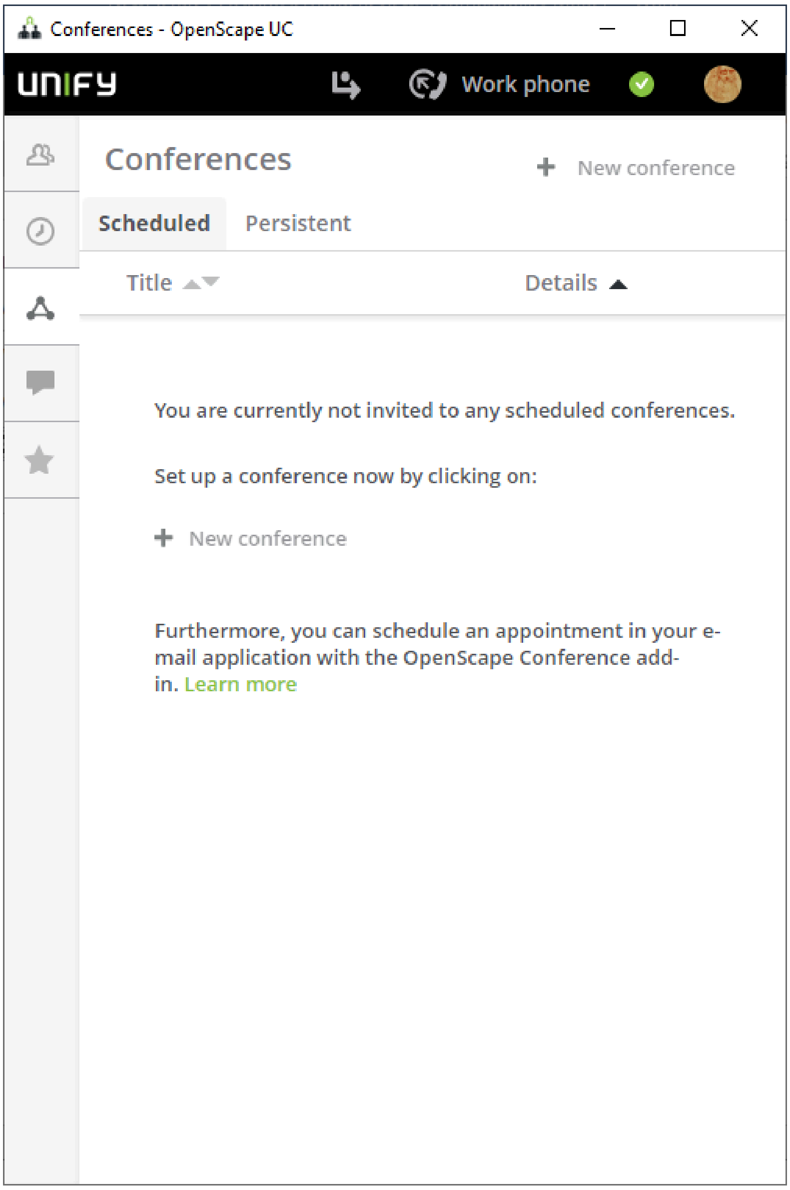
  Name of the inviting person

4.17.2 Configuration Options of a Scheduled Conference

The **Conferences** window provides various controls for creating, starting, editing and deleting a conference.

Configuration of a conference

Click on the icon in order to switch to conferences. There are scheduled and persistent conferences. For persistent conferences you do not specify a time.



Click on "+ New Conference" and fill out the fields.

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

- **Title**

  enter a title for the conference
- **Moderated**

  There is a check box where you can specify if the conference is moderated.
- **Record name**

  There is a check box where you can specify record name (optional). Activate this function 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.
- **Set time for conference**

  There is a check box where you can specify the time (optional). When you check this box, new boxes for start and end time are displayed. When you specify the time, it is a scheduled conference, else it is a persistent conference.

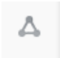
- **Participants**

  You can add participants to the conference.

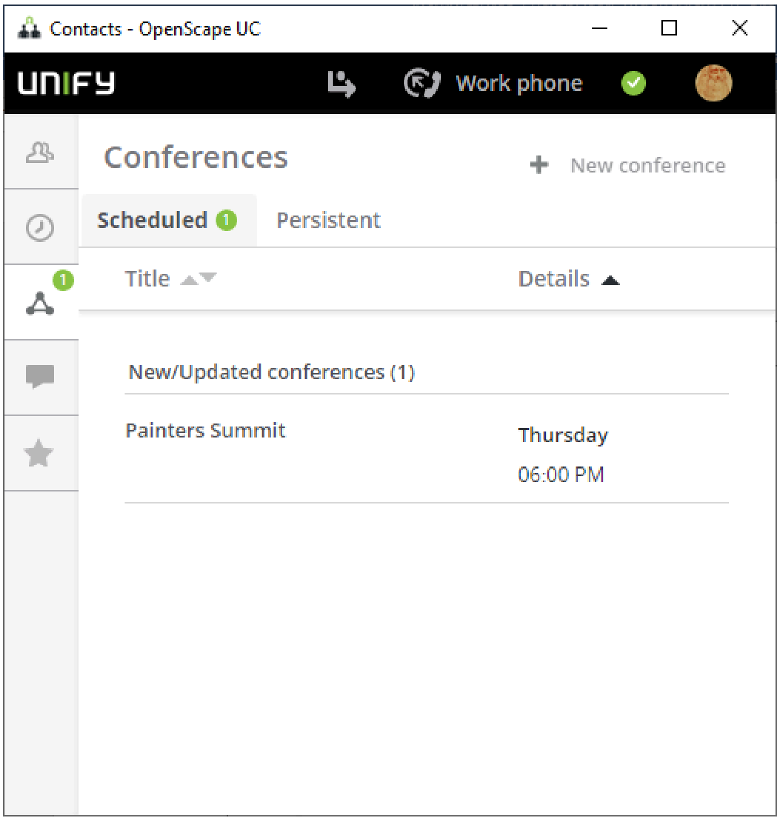
4.17.3 Conference List

The conference list is displayed in the **Conferences** window and provides an overview of all configured conferences.

The conference list 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.

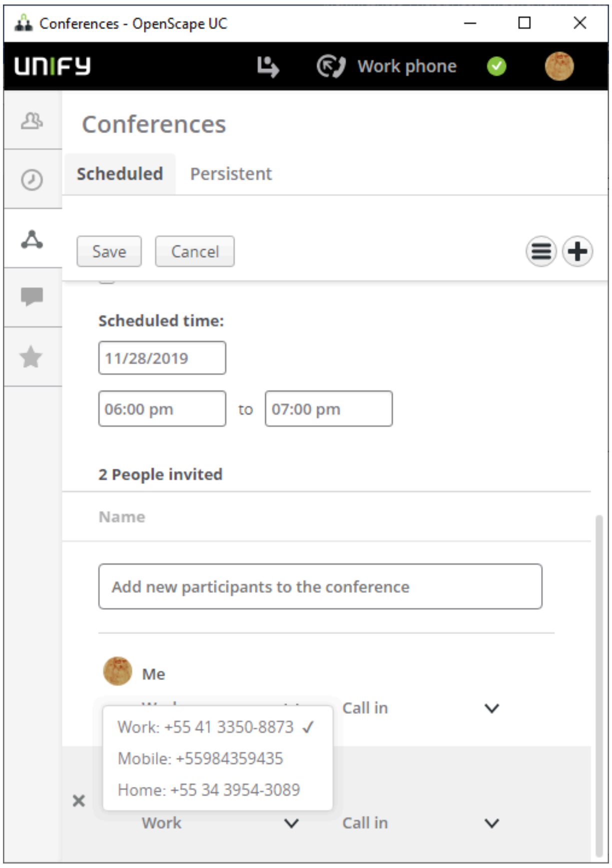
You reach this window via the extended view by clicking on the conference icon .

There are two lists, it depends on which tab you have selected. (Scheduled, Persistent)



4.17.4 Select number for conference partner

It is possible to select the number of the conference partner. This is useful when you know your partner is not in the office, but reachable via mobile.



Click on the arrow next to "work".

4.17.5 Ad Hoc Conferences

Ad Hoc Conferences can be created from the following:

- Outlook Mail E-Mail List
- Favorites
- OpenScape Contacts View
- Outlook Email Ribbon Pane (Conference Button)
- From the "Connect To"

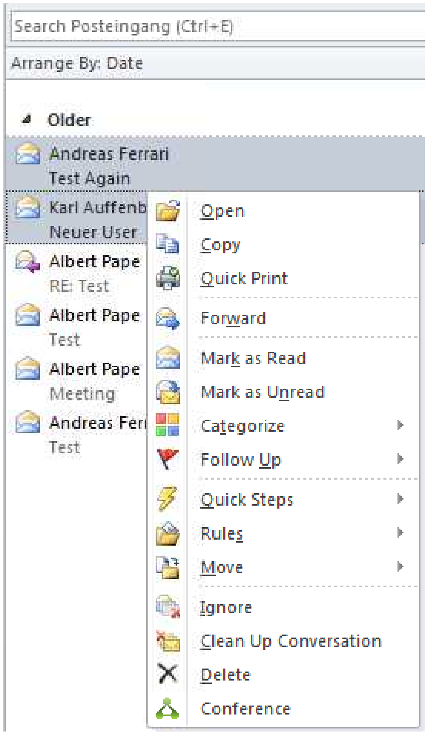
4.17.5.1 Ad-hoc Conferences from the MicrosoftOutlook E#Mail List

OpenScape Fusion for Office enables configuring an Ad-hoc conference with the originators of several selected e-mails in one of the MicrosoftOutlook e-mail lists.

You can quickly initiate a spontaneous conference with several e-mail originators via one of your MicrosoftOutlook e-mail lists. The e-mail addresses of the selected e-mail originators are resolved by the Microsoft Exchange server. If at least one phone number has been assigned to each of the e-mail originators you select in the e-mail list, a click with the right mouse button on such a list entry shows a context menu that provides the **Conference** menu option.

NOTICE:

The **Conference** menu option is unavailable, if the selected conference participants/e-mail originators have signed the e-mails digitally.



NOTICE:

If a phone number could be determined for only one e-mail originator, a click with the right mouse button opens a context menu that offers **Call (<name>)** with the assigned phone number(s) as additional item. The menu option **Call (<name>)** is only available to originators of e-mails not signed digitally.

Selecting this option opens a configuration dialog window.

The following settings and functions are possible via this dialog:

- **Name**

  Here you can enter an expressive name limited to 30 characters.
- **Participants**

  This section lists the following information and functions for the selected participant (from left to right):

  – Participant name

  – Phone number

    If several phone numbers have been configured for the conference participant, the one he/she currently uses is displayed shifted to the left. You can click on the phone number display to select another phone number from the displayed list.

– 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.

– ×

Via this icon you can remove the corresponding participant from the conference participant list.

NOTICE:

All conference participants are called by the conference system and have the same privileges for controlling the conference.

The initiator of the conference is automatically the moderator. In this case when the moderator leaves, the conference is cleared.

- **Add participant**

  Use one of the following options to select conference participants:

  – Enter the phone number or name of the desired contact in the **Add participant** combo box. Then click on . The **Add participant** dialog opens for completing the participant data. Specify the missing data (name, phone number and e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.

  NOTICE:

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

  – Click on the triangle icon on the right margin of the **Add participant** combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on . The **Add participant** dialog opens for completing the participant data. Specify in there the **Name** and **E-mail** address of the contact for display in the conference list. Finally click on **OK** in this dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.

  NOTICE:

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

- Click on to initiate a contact search in the available directories. The entry mask with the search criteria opens. Select the desired contact from the search hits and click on **OK** in the **Directory Search** dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.
- Click on . The **Add participant** dialog opens. Specify here the **Name**, the **Phone** number as well as the **E-mail** address of the conference participant. Finally click on **OK** in this dialog. The contact is added to the list of conference participants.

NOTICE:

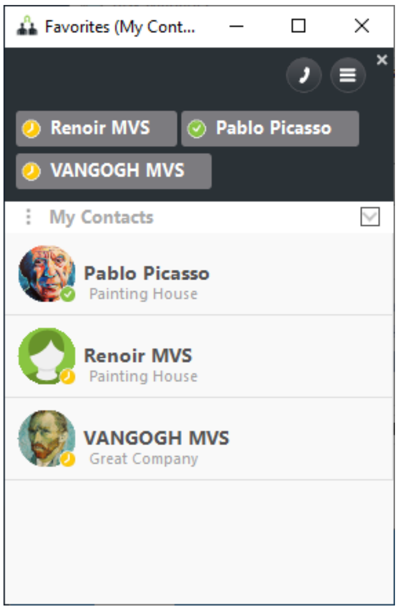
If you do not configure an e-mail address for the participant here, he/she will not receive a conference notification e#mail and thus no information about the conference access data.

- **Start**

  With a click on this button you can initiate the Ad-hoc conference after you have applied the settings determined in the template.

4.17.5.2 Ad-hoc Conferences from Favorites

1) Open the Favorites
2) On the contacts you wish to add click on the "Add to Actionboard Symbol" .
3) When all contacts are added to the action board, click on the communication options Symbol and select Conference.



The following settings and functions are possible via the new dialog window:

- **Name**

  Here you can enter an expressive name limited to 30 characters.
- **Participants**

  This section lists the following information and functions for the selected participant (from left to right):

  – Participant name

  – Phone number

    If several phone numbers have been configured for the conference participant, the one he/she currently uses is displayed shifted to the left. You can click on the phone number display to select another phone number from the displayed list.

  – 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.

  – ×

    Via this icon you can remove the corresponding participant from the conference participant list.

    NOTICE:

    All conference participants are called by the conference system and have the same privileges for controlling the conference.

    The initiator of the conference is automatically the moderator. In this case when the moderator leaves the conference is cleared.

- **Add participant**

  Use one of the following options to select conference participants:

  – Enter the phone number or name of the desired contact in the **Add participant** combo box. Then click on . The **Add participant** dialog opens for completing the participant data. Specify the missing data (name, phone number and e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.

    NOTICE:

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

  – Click on the triangle icon on the right margin of the **Add participant** combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on . The **Add participant** dialog opens for completing the participant data. Specify in there the **Name** and **E-mail** address of the contact for display in the conference list. Finally click on

OK in this dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.

NOTICE:

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

– Click on to initiate a contact search in the available directories. The entry mask with the search criteria opens. Select the desired contact from the search hits and click on **OK** in the **Directory Search** dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.
– Click on . The **Add participant** dialog opens. Specify here the **Name**, the **Phone** number as well as the **E-mail** address of the conference participant. Finally click on **OK** in this dialog. The contact is added to the list of conference participants.

NOTICE:

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

- **Start**

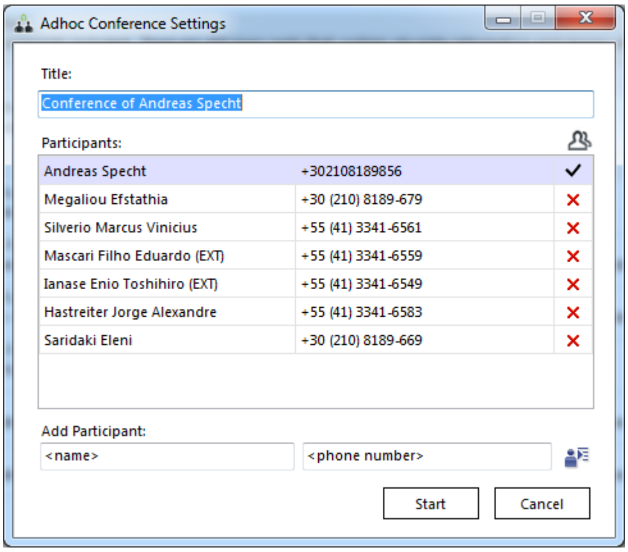
  With a click on this button you can initiate the Ad-hoc conference after you have applied the settings determined in the template.

4.17.5.3 Ad-hoc Conferences from E-Mail Ribbon

1) Open the E-Mail

2) On the Outlook Ribbon click on the conference symbol .

Selecting this option opens the following configuration dialog:



The following settings and functions are possible via this dialog:

- **Name**

  Here you can enter an expressive name limited to 30 characters.

- **Participants**

  This section lists the following information and functions for the selected participant (from left to right):

  – Participant name

  – Phone number

    If several phone numbers have been configured for the conference participant, the one he/she currently uses is displayed shifted to the left. You can click on the phone number display to select another phone number from the displayed list.

  – 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.

  – ×

    Via this icon you can remove the corresponding participant from the conference participant list.

    NOTICE:

    All conference participants are called by the conference system and have the same privileges for controlling the conference.

    The initiator of the conference is automatically the moderator. In this case when the moderator leaves the conference is cleared.

- **Add participant**

  Use one of the following options to select conference participants:

  – Enter the phone number or name of the desired contact in the **Add participant** combo box. Then click on . The **Add participant** dialog opens for completing the participant data. Specify the missing data (name, phone number and e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.

    NOTICE:

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

  – Click on the triangle icon on the right margin of the **Add participant** combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on . The **Add participant** dialog opens for completing the participant data. Specify in there the **Name** and **E-mail** address of the contact for display in the conference list. Finally click on

OK in this dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.

NOTICE:

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

– Click on to initiate a contact search in the available directories. The entry mask with the search criteria opens. Select the desired contact from the search hits and click on **OK** in the **Directory Search** dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.
– Click on . The **Add participant** dialog opens. Specify here the **Name**, the **Phone** number as well as the **E-mail** address of the conference participant. Finally click on **OK** in this dialog. The contact is added to the list of conference participants.

NOTICE:

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

- **Start**

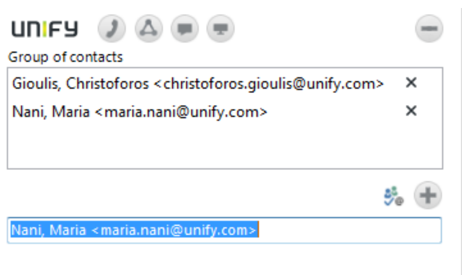
  With a click on this button you can initiate the Ad-hoc conference after you have applied the settings determined in the template.

4.17.5.4 Ad-hoc Conferences from Connect To

NOTICE:

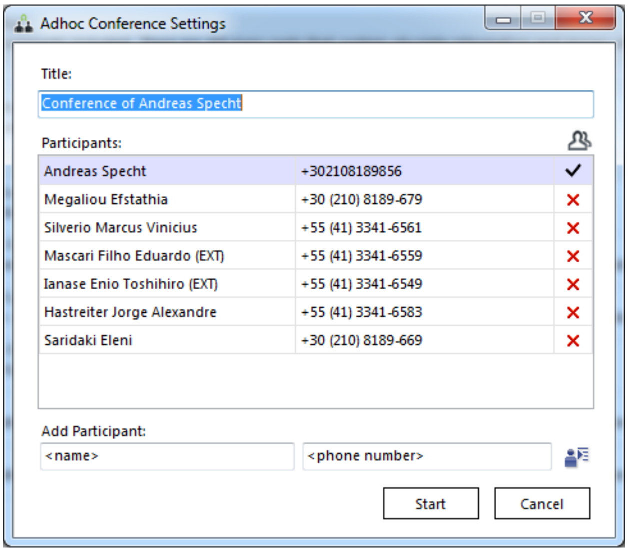
See also the chapter 4.28.1.3 Connect To by Search or Dial.

1) Click on the Outlook Plugin in the "Connect To"
2) Add all the necessary participants



3) Click on the conference symbol .

Selecting this option opens the following configuration dialog:



The following settings and functions are possible via this dialog:

- **Name**

  Here you can enter an expressive name limited to 30 characters.
- **Participants**

  This section lists the following information and functions for the selected participant (from left to right):

  – Participant name

  – Phone number

  If several phone numbers have been configured for the conference participant, the one he/she currently uses is displayed shifted to the left. You can click on the phone number display to select another phone number from the displayed list.

  – 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.

  – ×

  Via this icon you can remove the corresponding participant from the conference participant list.

NOTICE:

All conference participants are called by the conference system and have the same privileges for controlling the conference.

The conference is automatically the moderator. In this case when the moderator leaves the conference is cleared.

- **Add participant**

  Use one of the following options to select conference participants:

  – Enter the phone number or name of the desired contact in the **Add participant** combo box. Then click on . The **Add participant** dialog opens for completing the participant data. Specify the missing data (name, phone number and e-mail address) and click on **OK** in this dialog. The selected contact is added to the list of conference participants.

  NOTICE:

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

  – Click on the triangle icon on the right margin of the **Add participant** combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on . The **Add participant** dialog opens for completing the participant data. Specify in there the **Name** and **E-mail** address of the contact for display in the conference list. Finally click on **OK** in this dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.

  NOTICE:

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

  – Click on to initiate a contact search in the available directories. The entry mask with the search criteria opens. Select the desired contact from the search hits and click on **OK** in the **Directory Search** dialog. The selected contact is added to the participant list and notified about the conference access data by e-mail.

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

  NOTICE:

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

- **Start**

  With a click on this button you can initiate the Ad-hoc conference after you have applied the settings determined in the template.

4.17.6 Scheduled Conferences from the MicrosoftOutlook Calendar

OpenScape Fusion for Office includes OpenScape Extensions for Microsoft Outlook.

OpenScape Extensions for Microsoft Outlook provides features in *MicrosoftOutlook* that let you plan server-based Meet Me conferences via meeting request in the MicrosoftOutlook calendar. Such server-based conferences comprise:

- Audio conferences
- Web conferences
- Video conferences

When the conference extensions are installed, the button

Add OpenScape conference

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

The conference is performed via the OpenScape UC Application server.

NOTICE:

The default system configuration plays a short signal tone audible to all conference participants when a conference participant joins or leaves the conference. In case of a larger number of conference participants joining or leaving, this signal tone may become annoying to other participants.

Conferences created via OpenScape Extensions for Microsoft Outlook are also displayed in the conferences lists of OpenScape Web Client and OpenScape Desktop Client Enterprise Web Embedded Edition and can be edited via such clients.

NOTICE:

Deactivating the Exchange Cache Mode after installing the Extensions for Outlook is possible to cause performance degradation to the calendar function.

4.17.7 Move participants from Large to Rich Conference

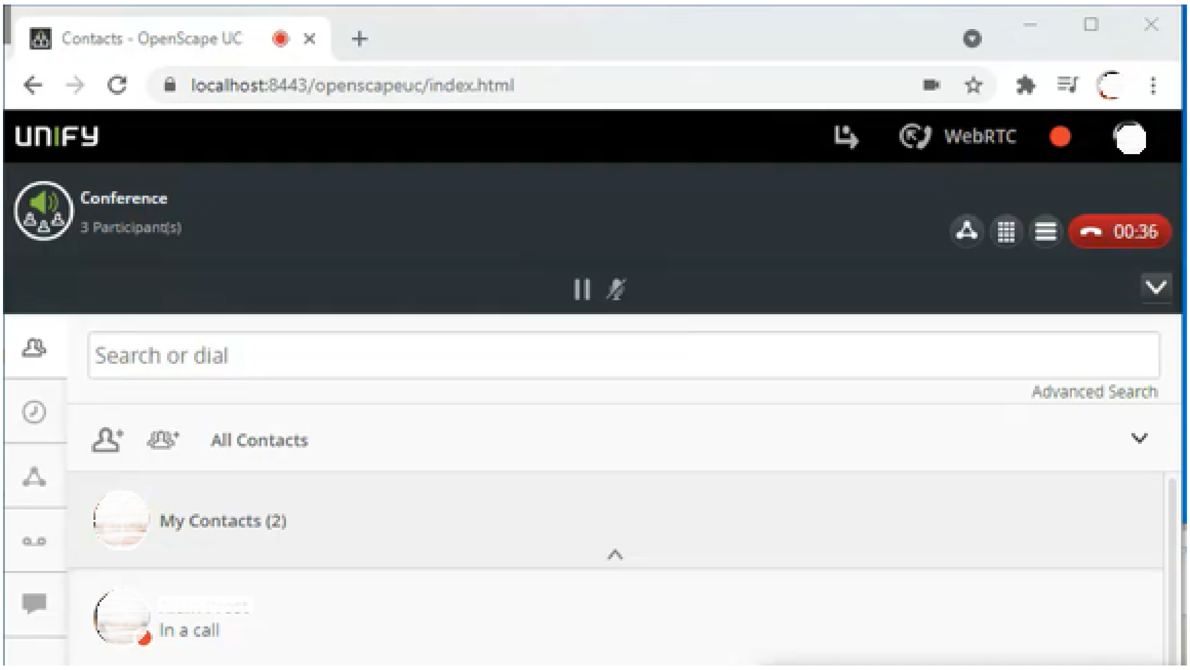
You can move all participants that are already talking in a voice conference (Large Conference) to a rich conference (MS Conference) in order to access more features, such as video and screen sharing, improving the collaborative work in a longer discussion.

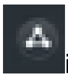
Prerequisites

You are connected to a Large conference.

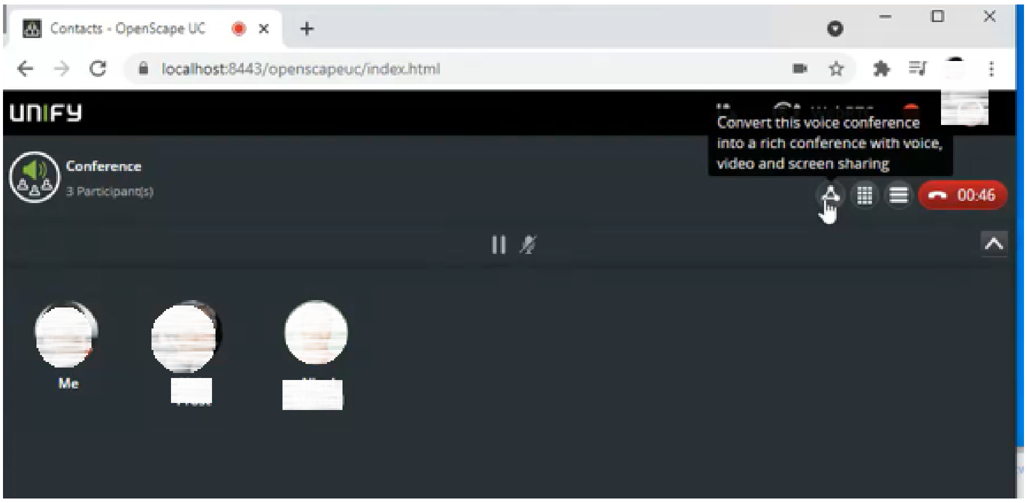
Step by Step

1) During a voice conference one or more participants want to access additional collaboration features, e.g. screen-sharing.

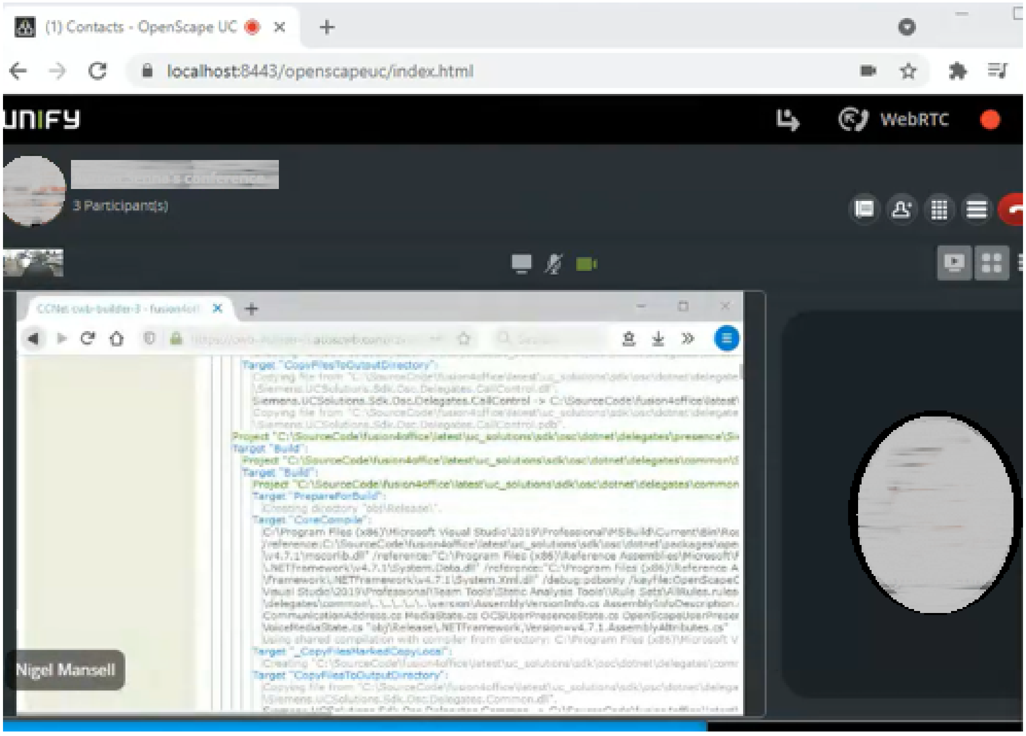


2) Click on  in the call control bar of the voice conference to convert it into a rich conference.

This action moves all the participants to a rich conference room where they can now use extra conferencing features, such as, video and screen sharing.



3) Now all conference participants are in the rich conference interface where they can share documents, video and use other collaborative tools as show in the figure below:



4.18 SIP URI Dialing

Fusion can support video calls and video conferences with other companies by using SIP URI dialing. The following options are available:

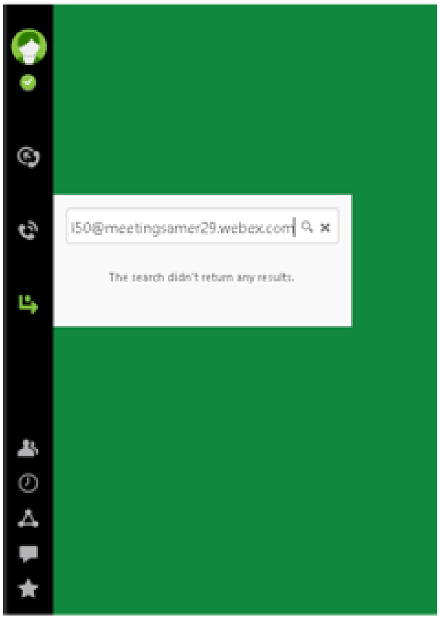
- **Dial out**: Join video conferences or video calls of other companies through your Fusion client.
- **Dial in**: Invite members of other companies to attend a UC Video Conference.

The supported syntax is: `sip:<user>@<domain>` with the most common used SIP URI formats for video communications, as the following:

- – 1234567891234@videosystems.com
  – John.Smith@videosystem.com
  – Alice@10.11.12.13

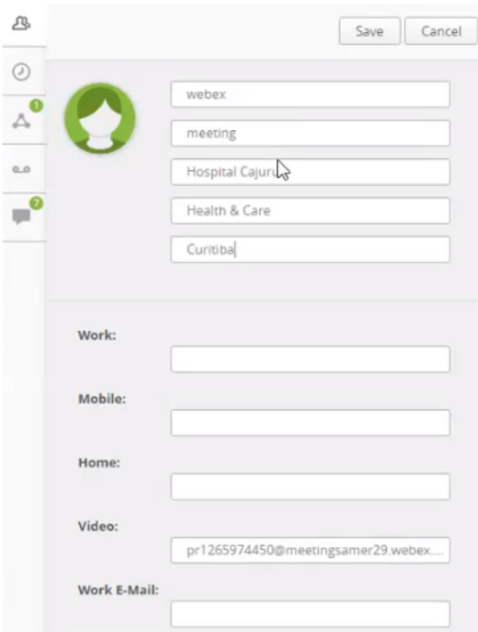
4.18.1 Using Search or Dial for dial out

You can dial out via the Fusion bar from the search or dial box like in the figure below by entering the external contact’s details in SIP URI format:



4.18.2 Creating an external SIP URI contact and Initiating a Call

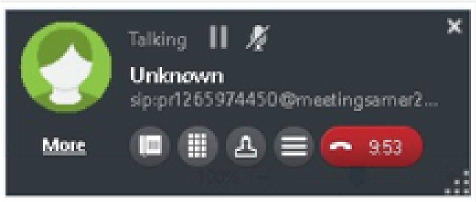
You can save external contacts using their SIP URI format address in the Video field of the new contact’s window, like shown in the figure below:



Once added as a private contact you can initiate a call by clicking on the .

4.18.3 Call Control in a SIP URI call

In a SIP URI call you have the basic call control options as shown in the figure below. In addition, SIP URI calls are sorted in the Call History tab.



4.19 Call History

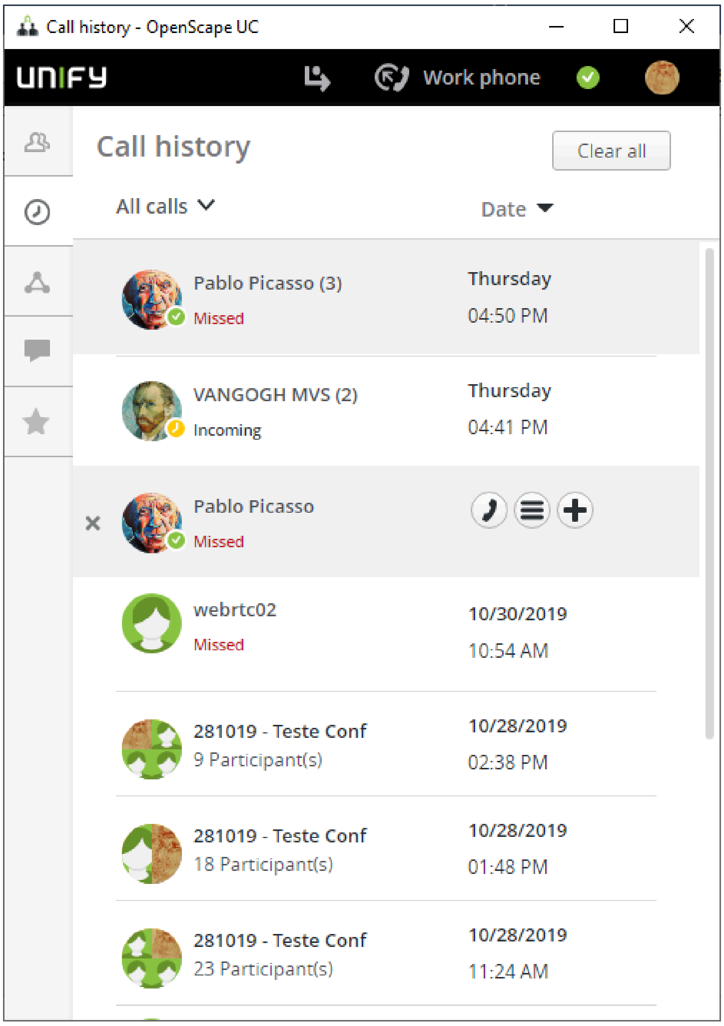
The **Call History** window logs all in and outbound calls as well as conferences, no matter whether or not they were successful.

You reach the **Call history** window via the extended view. (In Fusion V1.6.xxx also via Systray -> OpenScape Views -> Call History)

Alternatively also from the Outlook Plugin : Contacts

Alternatively also from the Notes Plugin : Contacts

Click on the  .



NOTICE:

The call history may show more details about the call e.g. forwarding steps.

4.19.1 Call History- Operating Options

Call History - Operating Options

When you hover over the contact you see three icons:

- Call the contact
- use communication options (e.g. e-mail, web collaboration, etc.)

IMPORTANT:

MicrosoftOutlookIBM Notes should have been defined as the default "mail to" program in order to be able to use the mail option for OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes.

- add contact to the action bar

4.19.2 Call History - Information

Call History Information

You are informed about

- Incoming Call
- Outgoing Call
- Missed Call
- Forwarded Call
- Conference Call

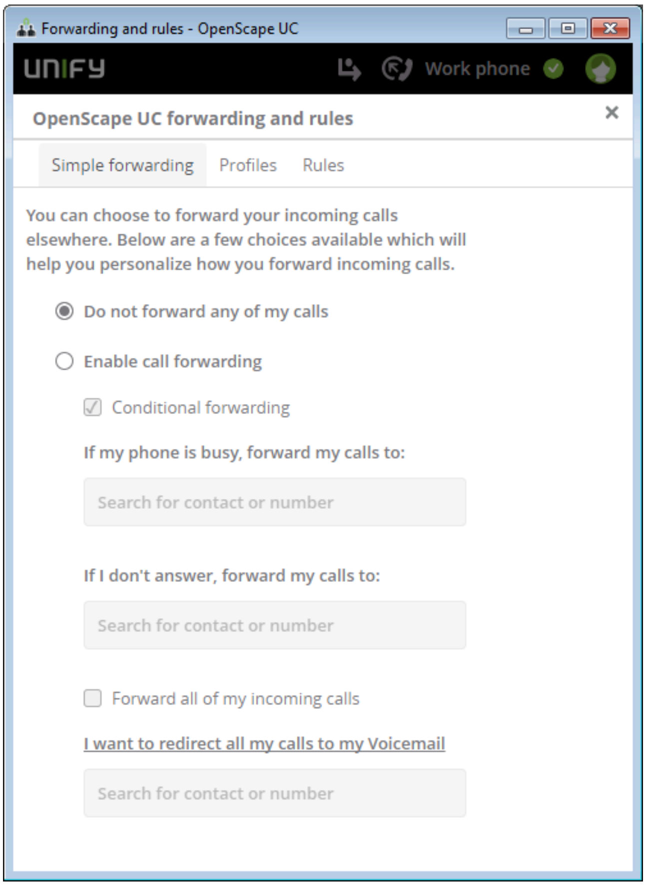
NOTICE:

Number in brackets (after the contact) indicate how many subsequent calls have been performed with this contact when no other call was inbetween.

4.20 Forward Call

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 dialog for configuring this by Fusion systray menu **Settings** > **Forwarding and Rules** or directly from the OpenScape View tool bar button



4.20.1 Call Forwarding - Configuration and Operating Options

In the dialog for a call forwarding under Systray > Settings > Forwarding and Rules you can select three options from combo boxes (you need to click also on Enable Call Forwarding):

You can define the type of incoming calls to be forwarded:

- **If my phone is busy, forward my calls to**

  This is also known as call forwarding on busy.

  Select the **contact or number** in the related combo box to whom the call should be forwarded in case your line is busy.
- **If I don’t answer, forward my calls to**

  This is also known as call forwarding on no answer.

  Select the **contact or number** in the related combo box to whom the call should be forwarded in case you don’t answer in a certain time.

- **Forward all my incoming calls**

  here all incoming calls are forwarded, this is also known as unconditional call forwarding.

  When you click on the check box then all the previous options are

  de-activated.

  Enable the check box before this option and select the **contact or number** in the related combo box to whom the call should be forwarded.
- **I want to redirect all my calls to my Voicemail**

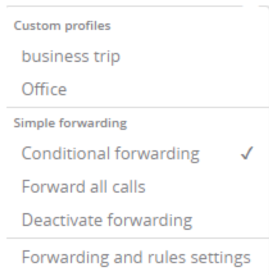
  When you click on this option the field **Search for contact or number** is automatically filled with your voicemail entry.

> **NOTICE:**
>
> Call forwarding on busy (option 1) and Call forwarding on no answer (option 2) can work in parallel.

> **NOTICE:**
>
> When you want to define more complex rules, then select **Rules** and / or **Profiles** tab.

Afterwards you have to activate the Call Forwarding so that it is getting effective.

1) Click on the menu bar or on the Fusion bar on .
2) Then in the drop down menu select the type of forwarding (**Conditional forwarding** or **Forward all calls**, in some cases only one option is displayed, it depends what you have specified in call forwarding menu)

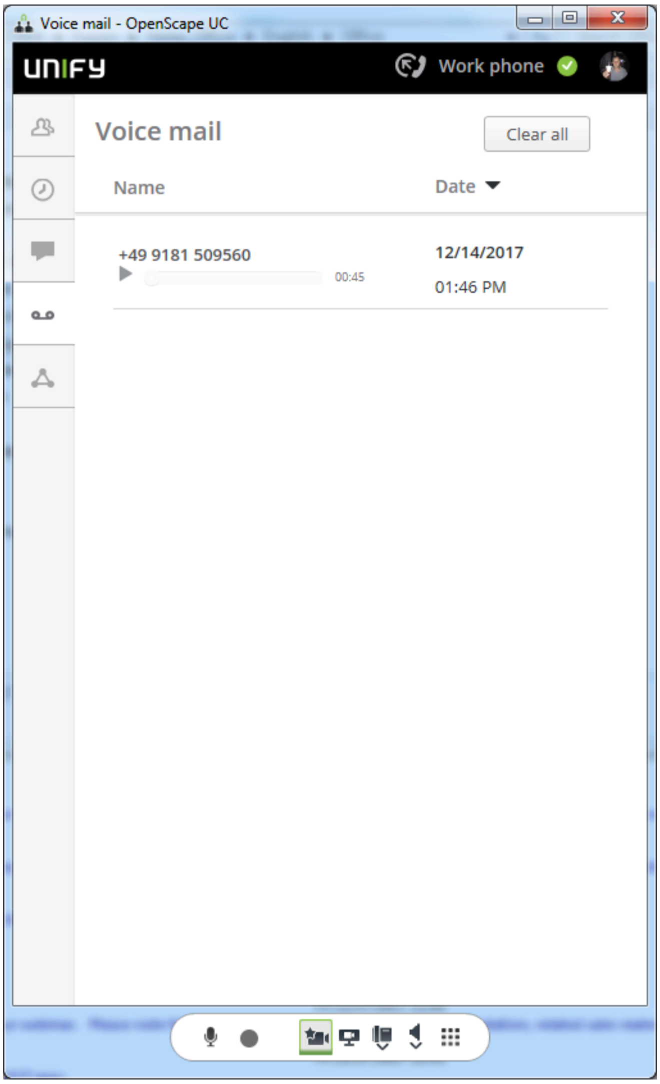


> **NOTICE:**
>
> There is also the option **Deactivate forwarding**.

4.21 Voicemail Box

If you use an OpenScape Xpressions system for voice messaging/unified messaging, you can send and receive voicemails. These voicemails are displayed in the **Voicemail Box** window.

You reach the **Voicemail Box** via the OpenScape View:



The voice mails can be played from there via the following features:

- Via the computer sound card by means of *Windows Media Player*.

4.21.1 Information in the "Voicemail Box" Window

Information in the window

You can see how many "not played" Voicemail you have. You see it on the Voicemail Icon . In this case one message has not been played.

You see the icon to play the message, the name of the sender and the presence status of the sender, the duration and date and time when the message has been received.

NOTICE:

When the name is neither in the global address list nor in the personal address book, then the name and the presence status cannot be displayed.

Actions you can do

When you hover the mouse over the contact you can call it (phone symbol) or you use communication options e.g. to e-mail, conference, etc. or add it to the action bar (the big plus sign).

4.21.2 Voicemail Box - Operating Options

Actions you can perform

- You can delete the Voicemail

  hover with the mouse on the message and on the left side click on the small x.
- You can call the sender

  hover with the mouse over the message can click on the phone icon on the right side.

  NOTICE:

  When you click on the phone icon it’s getting green.
- You can use communication options like e-mail, web-conference etc.

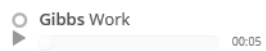
  Hover with the mouse over the message and click on the communication options icon on the right side.
- You can put the message to the action bar.

  Hover with the mouse over the message and click on the icon on the right side .

4.21.3 Controlling the Voicemail Playback (Voicemail Player)

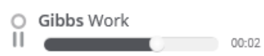
Playback the message

Click on the play-back icon in the display.



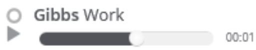
Pause the message

While the message is playing click on the pause icon .



Continue to play after message has been paused.

Click on the play-back icon in the display.



4.22 Rules

Based on user-defined rules, **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** enables automatically analyzing incoming calls of the user and forwarding them to a specific contact or device.

This is useful if the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes user if frequently underway and cannot accept his/her incoming calls personally. For example, he/she can specify that the calls received during a meeting that takes place regularly once a week on a specific day and at a specific time are automatically routed to his/her secretary.

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

The OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes user can control forwarding of his/her received calls to other devices via a rule profile. 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

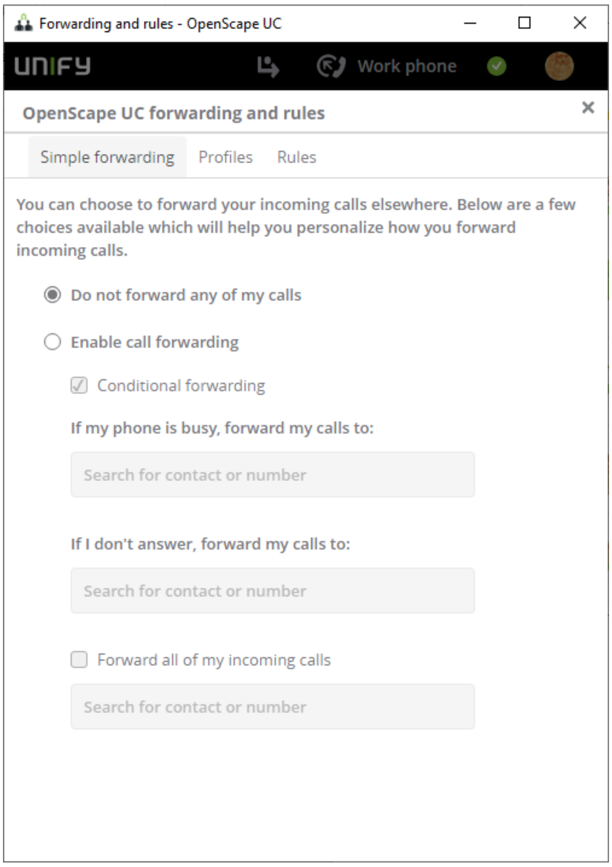
You find a comprehensive description of the rule functions in *chapter "Rule Interpreter - Routing Calls with Rules"*.

You reach the rules via Extended view.

4.22.1 Rules - Operating Options

The user can access his/her rule profiles via **Systray** > **Settings** > **Forwarding and Rules**.

Accessing rules



Click then on the **Rules** tab.

NOTICE:

You need also to add your rule(s) to a profile and activate the profile.

4.23 Video Telephony (SIP)

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, a sufficient number of free video licenses as well as the configuration of a video scheme in the **SIP Service Provider** settings.

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

- You can switch the video image to an existing audio connection.

  When your connection partner complies with the video transmission requirements, you receive the video image of your connection partner automatically, no matter whether a video camera is installed or switched on at your station. Your own video image or the one sent to your connection partner as well as the video image received from your connection partner appear in the **Video** window.

NOTICE:

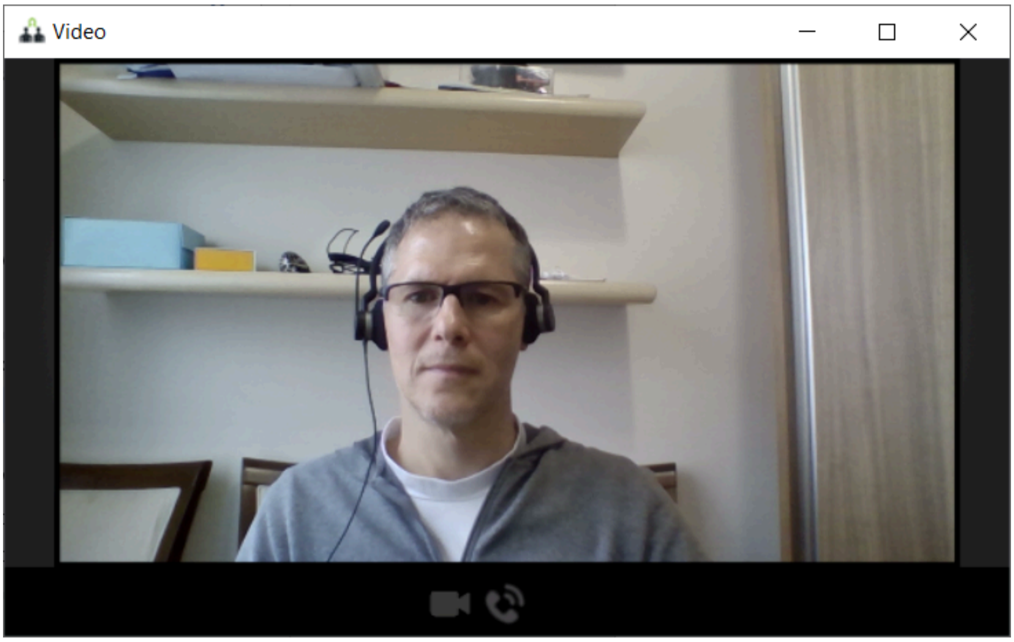
The video transmission or screen resolution quality may change during an active call. Such changes result from the bandwith for transmitting video data streams automatically adjusting to the available bandwidth resources of the communications system.

4.23.1 Video Features

The video telephony feature enables using the following functions:

Camera image

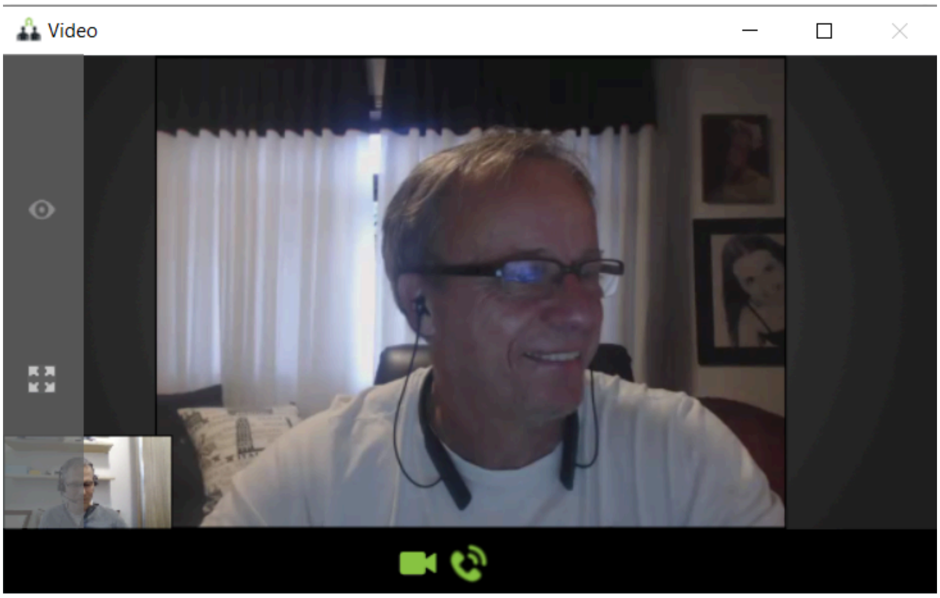
The camera image function opens your own video image in the **Video** window. You can perform camera image settings from Video Schemes option in SIP Service Provider group of settings from Advanced Client Settings. For example, you can configure whether the camera image or your own video image is automatically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



Receiving a video image

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

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



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

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

NOTICE:

While a video connection with mutual video streaming is up, you cannot close the Video window.

Operating via computer keyboard

[F11] key - Enabling the **[F11]** key you can maximize or restore the **Video** window. This feature is only supported for the camera image and the views **In call** and **Full 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.

4.23.2 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 stati 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.
- **Conferences with video**

  All conferences are video enabled. You can create conferences via the **Conferences** function window by yourself and also participate in conferences you have been invited for. In addition, you can take part in conferences that were configured with the **OpenScape Extensions for Microsoft Outlook** application.

  Fore more details refer to section Video Conference Window.

4.23.3 Controlling a Video Conference using DTMF keypad

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

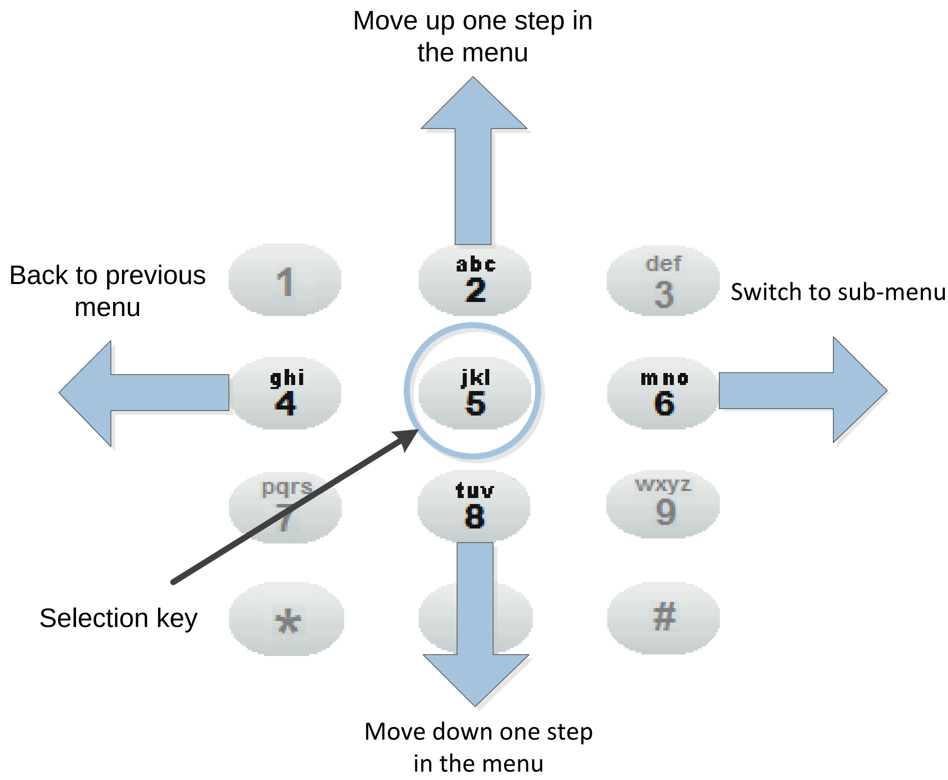
During a video conference you can use the default keypad of your phone or the DTMF dialing option in the Softphone menu to display a video menu on the video screen and to trigger conference control functions.

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

NOTICE:

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

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



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

The displayed video menu provides the following function menus:

- **Conference**

  This menu lets you apply the following functions to the conference:

  – **Participants**

    Select this function for displaying the participant list for a conference. Via the 0 0 command you can hide the participant list again.

    NOTICE:

    You can use the 8 8 key command to directly display the list of conference participants. Thereafter, you can navigate in the menu with telephone keys as usual.

  – **Mute**

    Select this function for muting the entire conference. Invoking this function once more undoes this restriction. The current muting status of the conference is displayed in the status window (head-up display) **Conference Information** in the top right area of the video screen.

    NOTICE:

    In case of a moderated conference only the moderator can mute the entire conference; in open conferences all conference participants can mute a conference.

  – **Lock**

    Select this function if you do not wish any further conference participants to join in. Invoking this function once more undoes this restriction. The current locking status of the conference is displayed in the status window (head-up display) **Conference Information** in the top right area of the video screen.

    NOTICE:

    In case of a moderated conference only the moderator can lock the conference; in open conferences all conference participants can lock the conference.

- **Layout**

  This menu lets you set the representation mode on the video screen. The system configuration determines which options are available in this menu.

  > **NOTICE:**
  >
  > If a conference participant changes the layout settings, this setting only takes effect for the representation of his/her video device.

  - **Tiled**

    The transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.

  - **Active Speaker**

    The video sequence of the currently active speaker is highlighted by representation in a bigger tile. In addition, the transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.

    > **NOTICE:**
    >
    > If you have activated the representation of your own video image, this operation mode does not display your video image to you as "active speaker". Your video image is then integrated as small tile in the mixed video window and thus added to the other conference participants.

  - **Single**

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

  - **Self-View**

    You can use this option to display your own video sequence in addition to the video sequences of other video conference participants. If you invoke this function once more, displaying your own video sequence will be disabled to restore the defaulted state.

- **Options**

  You can use this menu to see conference and video streaming information.

  – **Conference Information**

    Select this function if you wish to display the status window (head-up display) with information about the current conference on the video screen.

    In this status window you see the following information (from left to right):

    – Name display of video-incompatible conference participants
    – Conference locked/unlocked icon
    – Conference muted/unmuted icon
    – Conference duration display
    – Number of video-incompatible conference participants
    – Number of video-compatible conference participants

  – **Video Information**

    Select this function if you wish to display the status window (head-up display) with video streaming information on the video screen.

    In this status window you see the following information (from left to right):

    – Resolution of the video signal on the current device
    – Encoder quality of the video signal in percent
    – Bandwidth for the received video signal
    – Number of data packages sent for video streaming
    – Number of complete data packages for the decoder (iFrames)

NOTICE:

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

NOTICE:

You find detailed information about this operation data in the "*OpenScape UC Application Configuration and Administration*" manual.

When operating the displayed menu please heed the following points:

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

NOTICE:

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

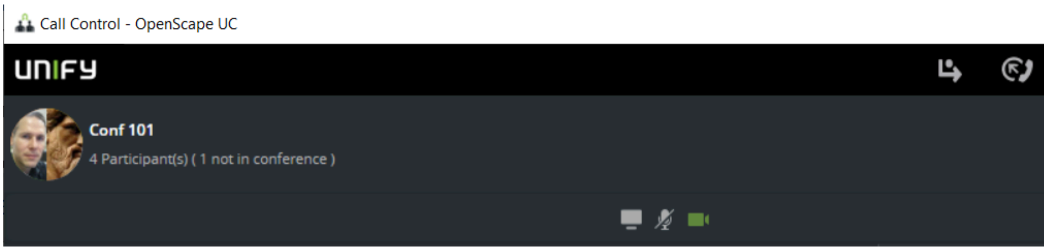
4.23.4 Video Conference Window

This section describes the options you have in the Video Conference Window.

NOTICE: **Video Window** is only possible to be seen if you have a video camera and a video scheme created in Fusion for Office. See the chapter 5.6 How to Configure a Video Device of this manual.

NOTICE: In case you have a video camera and a corresponding video scheme created, even if Fusion is not streaming, it is possible to receive the video streaming, i.e., you can see the video of other participants.

In the Conference Call Control, click on  button to show the Video Conference Window



During a video conference you can adjust the video layout section according to your preferences using the video layout buttons.

These options will be available to the conference participants depending on how the system is deployed, that can be of 2 ways:

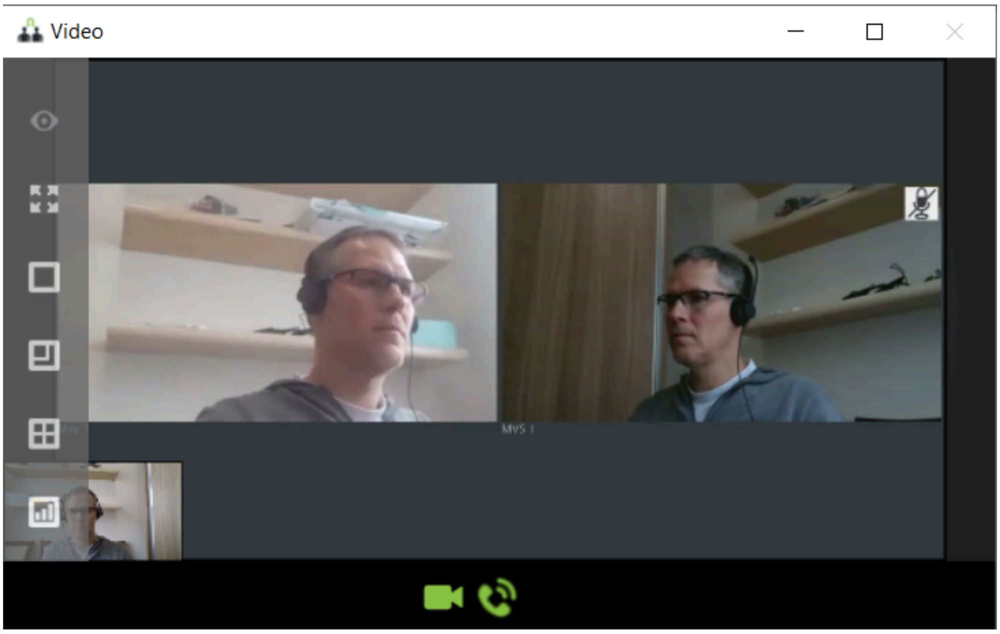
1) **Common Video View layout**: All participants will see the same video view layout.

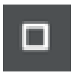
For moderated conferences, the moderators can define what video view layout will be seen by all the participants, choosing between the Single View and Tile Based View.

For open conferences, the layout cannot be changed, and all participants will see Tile Based View.

2) **Individual Video Views layout**: Every participant can choose his own video layout.

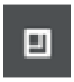
To display the video layout buttons bar, hover your mouse over the video layout section. The video layout buttons bar is displayed on the left of your interface and includes the following buttons:



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

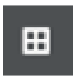
  NOTICE:

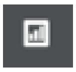
  This layout does not display your video image to you as "active speaker". Your video image is then integrated as small tile in the mixed video window and thus added to the other conference participants.

-  - **Active speaker view**: The video sequence of the currently active speaker is highlighted by representation in a bigger tile. In addition, the transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.

  NOTICE:

  This layout does not display your video image to you as "active speaker". Your video image is then integrated as small tile in the mixed video window and thus added to the other conference participants.

-  - **Basic tiles view**: The transmitted video sequences of all conference participants are displayed on the video screen in tiles of the same size.

-  - **Statistics view**: Select this function if you wish to display the status window (head-up display) with video streaming information on the video screen.

  In this status window you see the following information (from left to right):

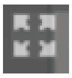
  – Resolution of the video signal on the current device
  – Encoder quality of the video signal in percent
  – Bandwidth for the received video signal
  – Number of data packages sent for video streaming
  – Number of complete data packages for the decoder (iFrames)

  NOTICE:

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

  NOTICE:

  You find detailed information about this operation data in the *OpenScape UC Application Configuration and Administration Guide*.

-  - **Enable/Disable video preview**: The option will enable/disable the video preview.
-  - **Switch to full-screen mode**: The option will switch to full screen mode. Press F11 key to switch off the full size mode.

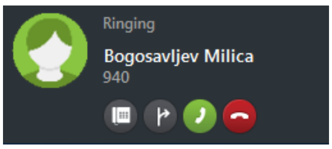
You can also stop your video streaming clicking on button and launch the conference call control clicking on .

4.24 Desktop Notifications

Desktop Notifications 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 desktop notifications depicted here on the first ring and for as long as the call continues to ring.



NOTICE:

Incoming calls show the toaster as default to answer a call. The Call Control opens when the call is answered by the toaster.

The notifier toast displays the name and/or number of the calling party if available. If such information in unavailable, the notifier toast displays unknown. 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.

  NOTICE:

  This icon is only displayed if you have configured your office phone (*ONS*) as preferred device. If you use another device from your device list as preferred device at the time the call comes in, this icon is not available in the displayed notifier toast. You can accept the call only via the currently configured preferred device.

- **Handover to**

  With a click on this option you can select the device for accepting the call. The call is redirected. You keep the control over the connection/the call control.

- **Forward call**

  Use this option to forward the incoming call to another device or another contact. To do this, enter the name or the phone number of the relevant person in the corresponding input field in the displayed **Forwarding call** dialog. After pushing the Enter key (**OK**), the **Call Control** window closes. The call is accepted by the person you have specified. The call control features have been transferred to this person.

- **Reject call**

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

Conference call

Same functions as incoming call.

Receiving a new instant message (Extended Messenger 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 **Extended Messenger** window opens, the top area of which showing the complete instant-message text.

Group pickup call toaster

NOTICE:

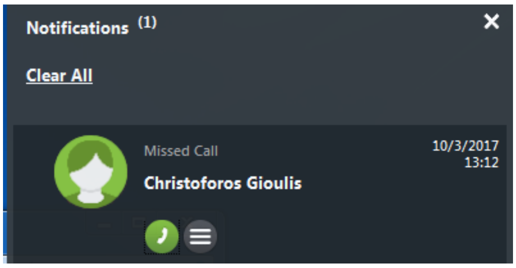
To use the *Group pickup call toaster* feature, you need to perform specific settings of the modules **Notifier Toast (Desktop Alerts)** and **SIP Service Provider** > **Codes**.

The group pickup call toaster is always displayed when a group member receives a call. It is displayed until the call is answered or the caller hangs up. The names of the caller and callee are displayed if they could be found in the configured directories. Otherwise, the names are represented as "Unknown".

You can accept the group pickup call with a click on .

Indication of missed calls

You can get informed via the Notification in the systray, by clicking on the Fusion icon.

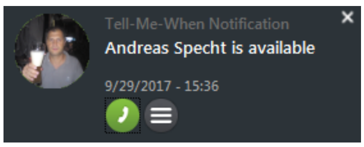


- **Start call back**
- **use Communication options** here you can use mail, chat, etc.

NOTICE:

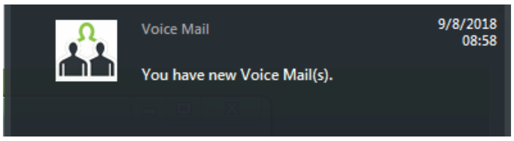
The Communication options are not always available.

Indication for Tell Me When



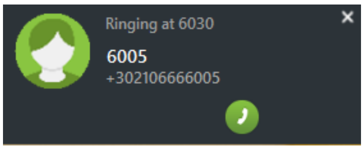
- **Initiate a call**
- **use communication options** here you can use mail, chat, etc.

Indication for Voice Mail



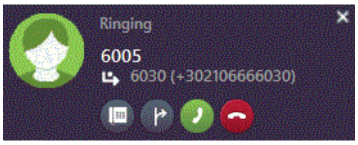
When OpenScape Views is already open and you click in the toaster then you are positioned in the Voice Mail tab.

Indication of Team invitation



- **Accept call**

Team Call Notification



- **Accept call**

  If your preferred device is on your desktop, you can either pick up the handset to answer the incoming call or click the icon to activate the speaker.

  If you have a softphone, click the icon to use the headset.

  NOTICE:

  This icon is only displayed if you have configured your office phone (*ONS*) as preferred device. If you use another device from your device list as preferred device at the time the call comes in, this icon is not available in the displayed notifier toast. You can accept the call only via the currently configured preferred device.

- **Handover to**

  With a click on this option you can select the device for accepting the call. The call is redirected. You keep the control over the connection/the call control.

- **Forward call**

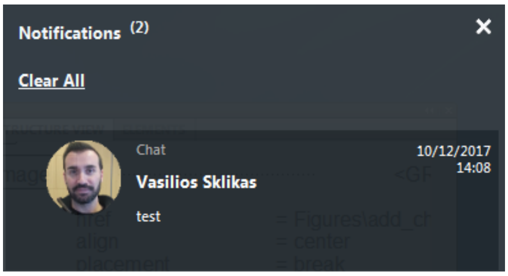
  Use this option to forward the incoming call to another device or another contact. To do this, enter the name or the phone number of the relevant person in the corresponding input field in the displayed **Forwarding call** dialog. After pushing the Enter key (**OK**), the **Call Control** window closes. The call is accepted by the person you have specified. The call control features have been transferred to this person.

- **Reject call**

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

There is a delay until this toaster is displayed in order not to disturb the team members. The original call team member needs some time to pick up the call.

Incoming Chat Notification



4.25 Call Screening

OpenScape Fusion for Office enables phone number identification (call screening). This has the following advantages:

Algorithms used

- The **OpenScape Fusion for Office** user can display information about the caller ID and about the calling subscriber such as name and phone number.
- The **OpenScape Fusion for Office** user display a pop-up window for contacts.
- The **OpenScape Fusion for Office** user forward incoming calls to the voicemail system or a colleague.

Name lookup for incoming calls is based on the following algorithm:

- If OpenScape Voice provides name information, it is used.
- In case that there is no name information provided, the OpenScape UC Application Contact Service is used for a lookup. Via OpenScape UC Application Contact Service, a lookup can search:
  - The global contact list of OpenScape UC Application
  - One or several LDAP directories (i. e. Active Directory)

4.26 Terminating OpenScape Fusion for Office

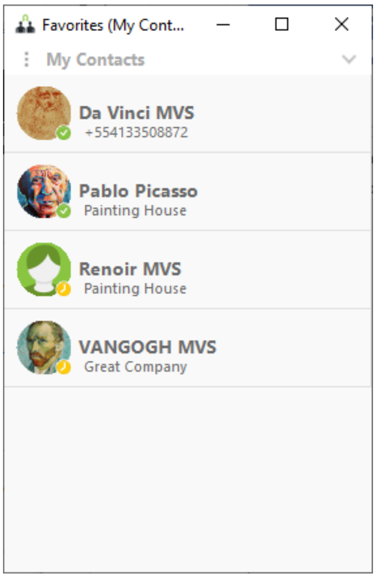
The OpenScape Fusion for Office icon, is still displayed in the notification area of the Windows task bar. With a click of the left or right mouse button on the OpenScape Fusion for Office icon and selecting the **Exit** option you can log out of the OpenScape UC Application system and terminate the OpenScape Fusion for Office.

4.27 Operation in Restricted Mode

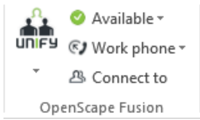
Restricted Mode (or also called Limited Mode) is entered when UC server is down (not reachable) but OpenScape Voice is still up or using also Restricted Mode.

In Restricted Mode it is only possible to make calls from

- Favorites

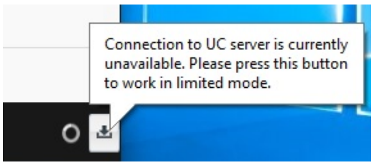


- The Outlook "Connect To"



How to detect Restricted / Limited Mode:

- The Systray icon becomes gray . (see the small gray circle inside the icon. Normally there the presence status is indicated).
- If extended view is already open, two gray circles will be displayed (one on the top of the extended view and the other one on the bottom) indicating that the communication provider is down and another icon on the bottom right corner near to the gray circle, the so called "Switching button" is displayed.



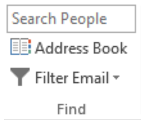
Clicking on this button forces the extended view to be closed, since it is not possible to make calls or use any other function from extended view in Restricted mode. Calls can be performed only via Contact List or with "Connect to" button.

If extended view is open and the user receives a call while in Restriction Mode, the extended view will be collapsed to the native call control after the call is answered.

4.28 Outlook Contact Card

The Outlook contact card of each user contact in the mail can be opened when you hover the mouse pointer over it.

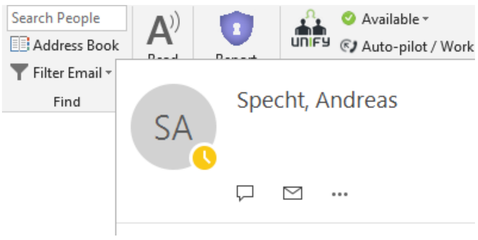
Another way to open the outlook contact card is to search in Outlook.



Enter the name under **Search People** and select from the list. Then the outlook contact card opens.

With Outlook Contact Card you are able to:

- see user presence (in the mail you can see the user presence of the contacts in the mail distribution list)
- see the contact’s email address
- see organization and membership related information
- add to contacts list, favorites or link contacts
- chat
- schedule a meeting
- view SharePoint profile
- make a call
- make conferences



Main Icons	Description
	Instant Messaging (chat)
	Mail
•••	More Options

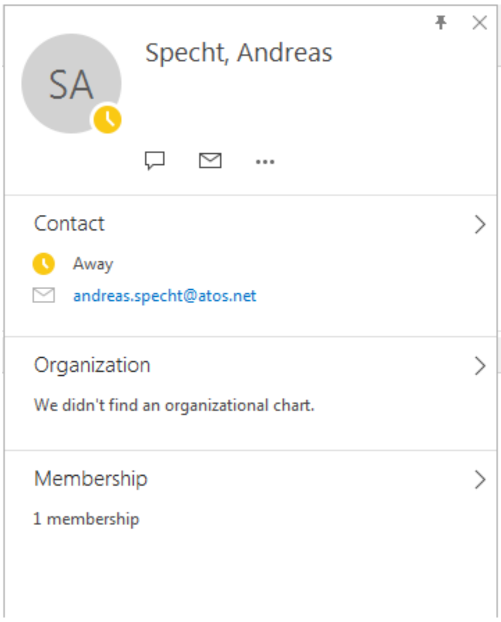
NOTICE:

If you want to make a video call, you can select a contact and

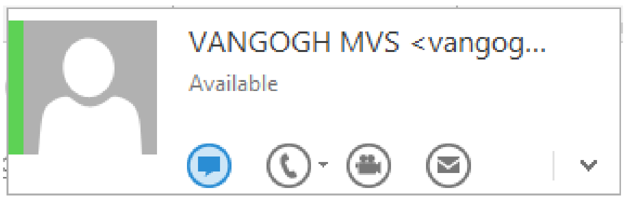
in the outlook ##contact card click the ••• icon and choose **Call @email address**. This will create a new conversation window from where you can make the video call.

With the arrows on the right side you can extend the outlook contact card and see more details about the following sections:

- **Contact** - Details about your contact's email address, presence status and IM address.
- **Organization** - Details about your contact's organization info (if any).
- **Membership** - Details about your contact's memberships like which mail distribution list the contact belongs to.



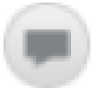
By clicking on the ••• icon you can select several functions as shown on the figure below:



4.29 Reading Pane Fusion Options

On top of email preview, Fusion buttons are available to :

- make calls
- chat
- start WebConference with the originator (Web Collaboration)
- start Conference with the e-mail distribution list
- activate TMW (Tell Me When)

icon	Description
	make calls
	start a conference
	Instant Meeting (Chat)
	start a Web Collaboration
	activate Tell Me When

NOTICE:

the Tell Me When (TMW) button changes color when it is activated.

NOTICE:

The button for Instant Meeting (Chat) maybe missing or does not work. It depends on what has been configured during installation. For more details please ask your administrator

4.30 Changes in user presence status

User presence status "Available" goes to "Busy" when the user

- makes a call
- receives a call
- keeps in conversation

NOTICE:

all other user presence states ("Be right back", "Unavailable", etc.) remain as they are.

User presence status "Available" goes to "In a Meeting" or any other suitable state when there is an Outlook appointment in place. Normally the appointment is shown as "Busy" in Outlook Calendar

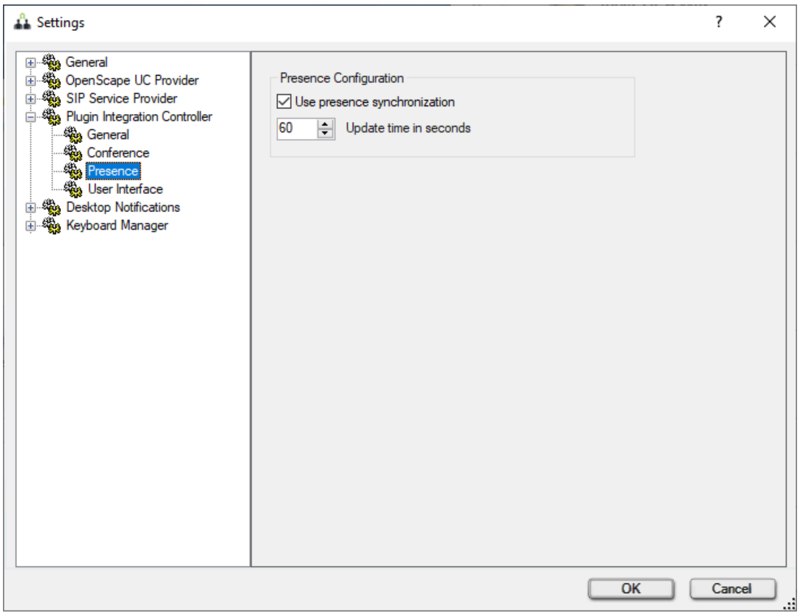
NOTICE:

all other user presence states ("Be right back", "Unavailable", etc.) remain as they are.

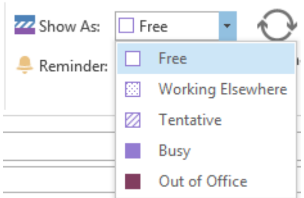
4.31 Presence synchronization with Outlook Calendar

The Presence state is synchronized with Outlook Calendar.

Navigate to **Fusion Ad#vanced Client Settings** > **Plugin Integration Controller** > **Presence** from settings option in the systray menu. The presence state will change up to "x" seconds after the appointment started. The default value is 60. This feature is enabled by default. (See check box "**Use presence synchronization**")



When you create an appointment you can set the "**Shown As**" field:



In dependance on what has been selected in the calendar for "**Shown As**" in the appointment the presence state will change as follows:

- When the presence is "**Available**" and the appointment showing as "**Busy**" starts, the user's UC presence state will change to "**in a meeting**".
- When the presence state is "**Available**" and the appointment showing as "**Out of Office**" starts, the user's UC presence state will change to "**Away**"

When the presence state if different to "**Available**" there will be no change related to the presence state.

4.32 Fusion Main Ribbon

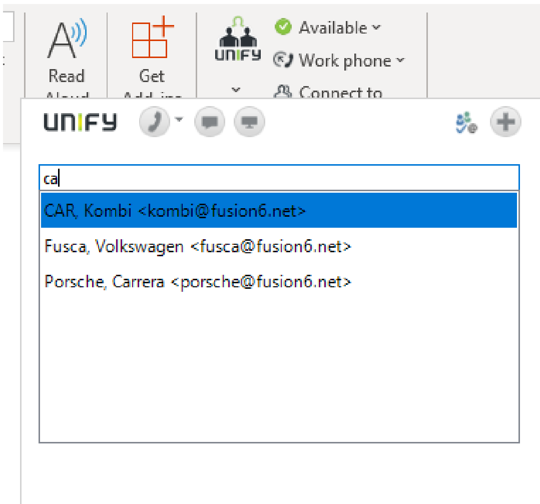
4.32.1 "Connect to Button"

With the "**Connect to**" button feature the following functionality is available:

- **Quickly connect** to your Outlook and OpenScape Desktop Client **contacts**[2].

  You just[3] need to type the contact's (partial) name and select / scroll between the results.

  After you have found the desired Outlook contact, press enter thus the call will be executed.



- **Quickly** make **calls** and **chat** and perform **Web Collaboration** .

2 Contacts are suggested while user is typing a part of the contact name.

3 After you have created a new Outlook contact it may be necessary to restart Outlook in order to get this contact included within Outlook cache.

- **Search** for contacts in OpenScape Contacts and in Exchange Address Book.

  About the "Search" feature:

  The search implemented is a generic one (to improve response time during connections with other tools like Outlook).

  Any / all letters entered are searched for within the available **cache**.

  Such **cache** is composed by:

  – the **Outlook Contacts** created
  – **emails** (sent)
  – and outgoing **calls** performed via **"Connect to"** feature

  There is not any kind of "advanced search rules" to be applied.

  So there is **no** advanced search like "only for **given** Name" or "only for **last** Name".

  It is important to notice that despite of no available "**search rules**" it is possible to search generic for any contact.

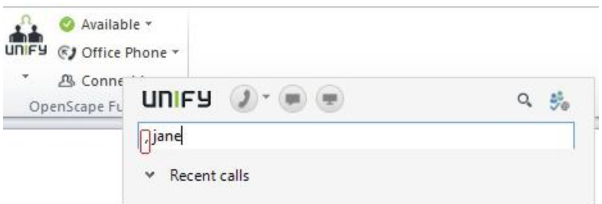
  For example to search for a **family name**: Just enter the **family name (or part of it)** and the window will show all entries with a name or last name that match to this specific subset of typed chars.

  Below there is an example for the **Family Name "Doe"**:

  Examples which do **NOT work** (since there are not any advanced Search rules):

  – "**,Jane**" or "**, Jane**" ==> This does not list contacts with given Name "**Jane**".

    This will search names with **comma (,Jane)** or **comma + space (", Jane")** inclusive:



  – "**,J**" or "**, J**" ==> Similar as before, this will not find any contacts beginning with "**J**"

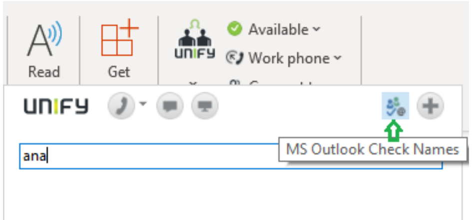
    This will search for names containing "**J**" but right before it with **comma (",J")** or **comma + space (", J")**.

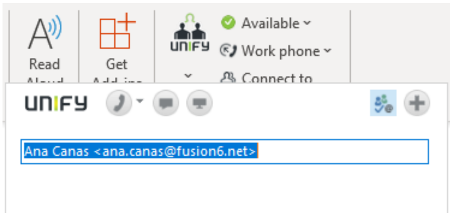
  About the "Search via MS Exchange" feature

Despite of the cache created (as explained before), it is still possible to search directly via **MS Exchange**, like search for the email / phone of a specific person that you do not know (You neither called this person before nor you had any contact either).

One way to achieve this is searching via **MS Exchange** button:

So once entered[4] any **given name / family name** (that the user knows) you just need to click the **MS Outlook Check Names button** [5]as follows:



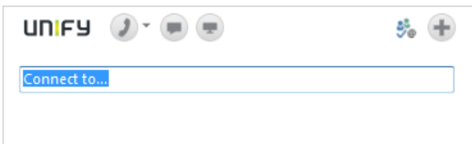


- **Final warnings / instructions:**
  – **Wrong Calls: Incorrect** contact could eventually be dialed / callout if User enters a partial name / number and the list does not have an exactly match (only partial). In this situation if User still presses **ENTER** then the Call will be performed to the first option of list with in common entered letters / numbers.

4.32.1.1 Extended Connect to functions

You can use "connect to" with more than one contact, e.g. you plan a multiple chat or conference.

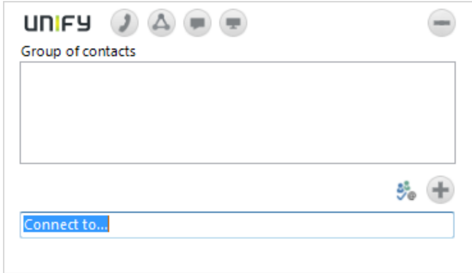
Click on "connect to" in Outlook.



Now you can expand the "connect to" by clicking on the big plus top right.

4 In this situation it is also possible to use any advanced Search rule which MS Outlook works with (since the string created is sent to MS Outlook in order to get the results later)

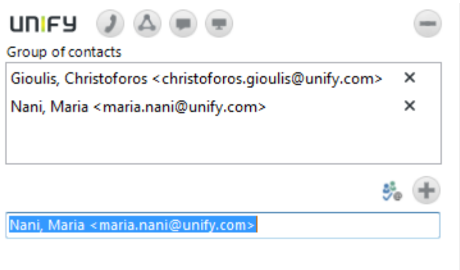
5 Despite of the search is over MS Exchange, the button is called "MS Outlook Check Names" because technically the search is (could be) at MS Exchange and Outllook (contacts)



Enter now a name and click on in order to check the name.

Then click on (bottom right) in order to add the contact to the Group of Contacts.

Now enter names and add them to the Group of contacts until you have added all contacts. It could look now like this.



Then you can start a chat, conference or a web conference with your contacts by using the appropriate button on the ribbon.

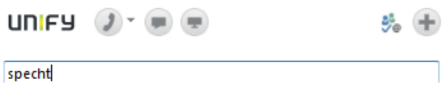
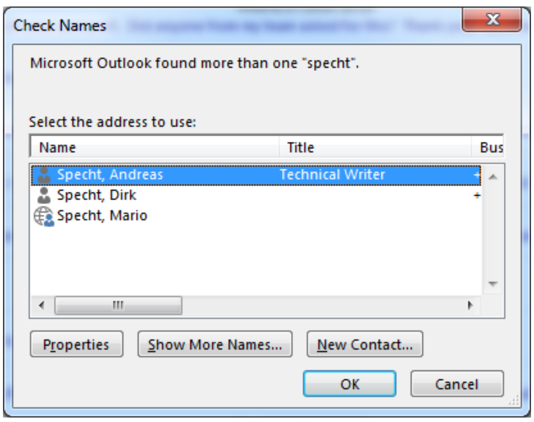
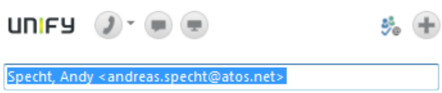
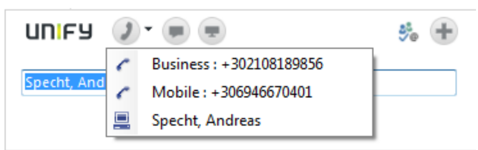
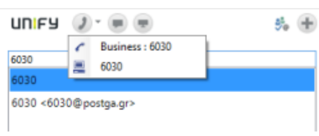
You can remove a contact by clicking on the small "x" right to the name.

Also you can collaps the window to its original view by clicking on the big minus on the top right.

4.32.1.2 Cached / Non Cached Mode

You can work with cached or non-cached mode. It depends on what the administrator has configured.

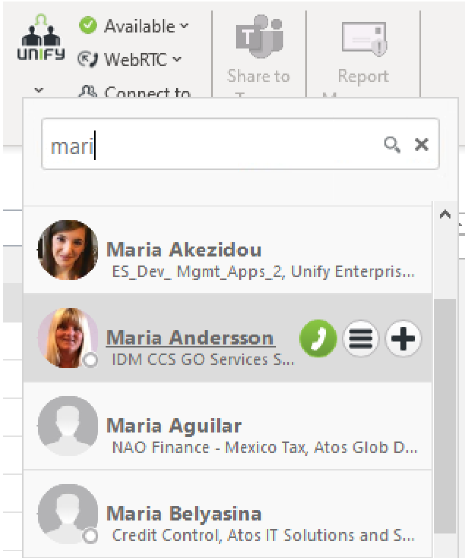
Cached Mode	Non Cached Mode
Shows the search results automatically while you are typing	Same as Cached Mode
Search for contacts which "**contain**" the text you are typing either in surname or first name	Same as Cached Mode
The **automatic** search looks for contacts in OL Auto-Complete, OL private contacts and OpenScape UC user private contacts. To look for contacts in Exchange Address Book, then the user has to hit "MS Outlook Check Names" button in Connect To.	Same as Cached Mode

Cached Mode	Non Cached Mode
In case the user is not found by automatic search, you can try to look for the name in Exchange Address Book, pressing the MS Outlook Check Names button of Connect To. If the search results match exactly the contact you are looking for, the contact is automatically resolved and displayed in Connect To. If more than one contact is found, you have to select in the list as shown below.  Click on on top right. Then the Outlook Address book opens. Select the correct name (here one of the "Specht") you want and press "OK".  Connect To will resolve the name and show the phone numbers  	Same as Cached Mode
Show the contact phone numbers exactly as it is registered in the Contact, either in Outlook or in OpenScape UC private Contacts.  	If there is a UC user with the same e-mail address of the found Outlook Contact, it will show the phone number of the OpenScape UC user. 
Search for Numbers - it searches in Outlook Address Book only. User has to press the MS Outlook Check Names button in Connect To. It doesn’t search in OpenScape UC private contacts	Not possible. It doesn’t search contacts by phone number

4.32.1.3 Connect To by Search or Dial

Connect-To can now open the Search or Dial pane to look for the Contacts provided by OpenScape UC Directory service like: UC User private contacts, UC Users, GW integrated contacts and integrated LDAP Directories.

It's the same "search or dial" mechanism currently available in several parts of OpenScape Fusion.



The user can also dial to a phone number entering the desired number in Search or Dial field and clicking on or just pressing ENTER.

Hover the mouse over a Contact to have access to the following options:

- Click on to call the Contact
- Click on to have the options to send a chat, e-mail, setup a Tell Me When, as well as the access to call additional phone numbers;

Connect To by Search or Dial is activated by means of the following parameter in deployment.xml file:

```
<Outlook_Plugin_ConnectToEx>True</
Outlook_Plugin_ConnectToEx>
```

4.33 Fax Form

NOTICE:

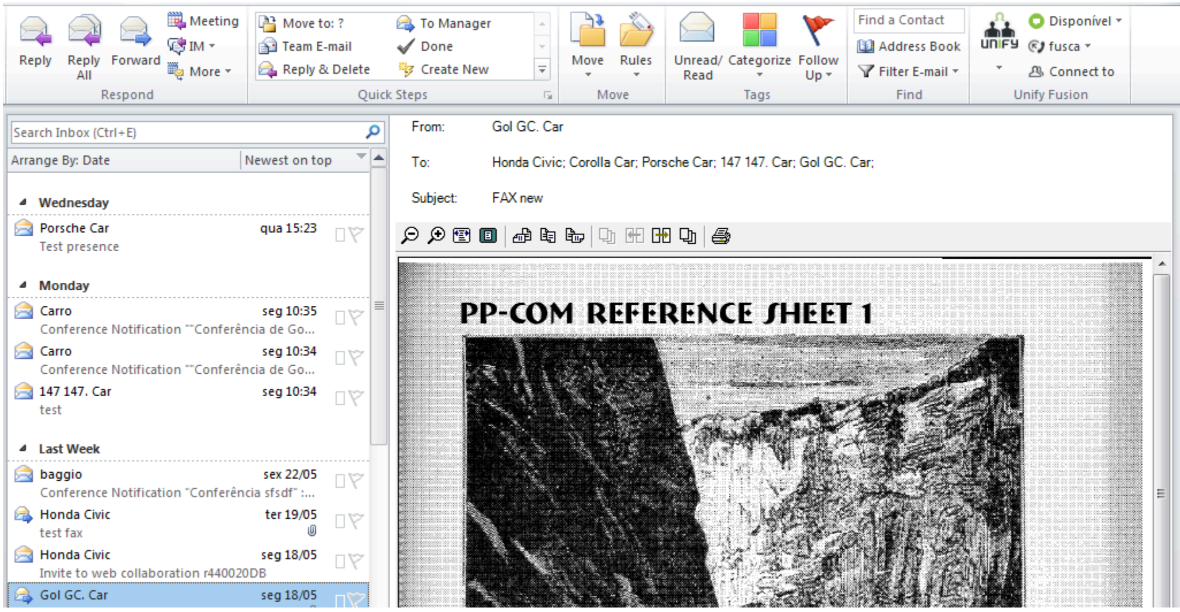
Fax Forms are no longer offered.

In the Fax Form there are buttons with which you can

- zoom-in
- zoom-out

- rotate left
- rotate right
- page forward
- page backward
- print

the fax content.



4.34 Call Control

You can have the Call Control in the or in more detailed.

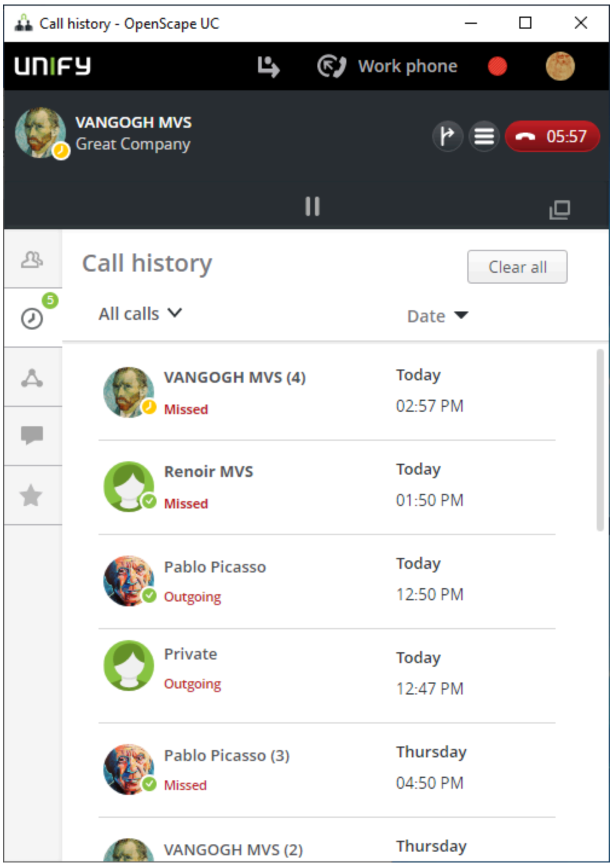
- **Standalone View**

  in this mode you have all the basic functions.

Click on the **More** button in order to switch to the **OpenScape View**.

- **OpenScape View**

  This mode needs more memory (CPU) compared to the **Standalone View**.



With the symbol you can switch back to the **Standalone View**.

Furthermore in both views you can transfer the call or start a conference via the communication options (chat, email or start a web collaboration)

With the symbol you can handover the call to another device.

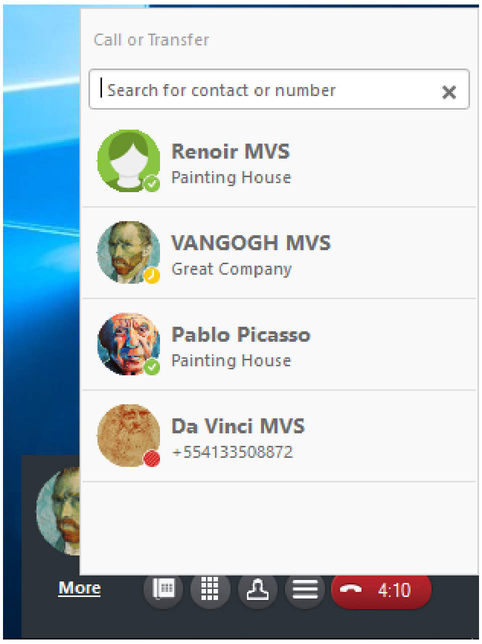
With symbol you can transfer the call to call waiting or perform call transfer depending on your current state.

With symbol you can use one of the communication option (chat, email or start a web collaboration).

4.35 Transfer Incoming call

When you receive an incoming call you see on the right bottom the following symbols .

- In OpenScape View, the call transfer symbol is .
- In CallControl only view, the **Call or Transfer** option is used for reaching an other contact by a consultation or transferring call.



4.36 Voicemail settings

You can configure your voicemail for the announcements (greetings) with user defined recordings.

You reach this menu via **Settings** > **OpenScape UC**. Click then on the **voicemail** tab.

There are several announcements / greetings available

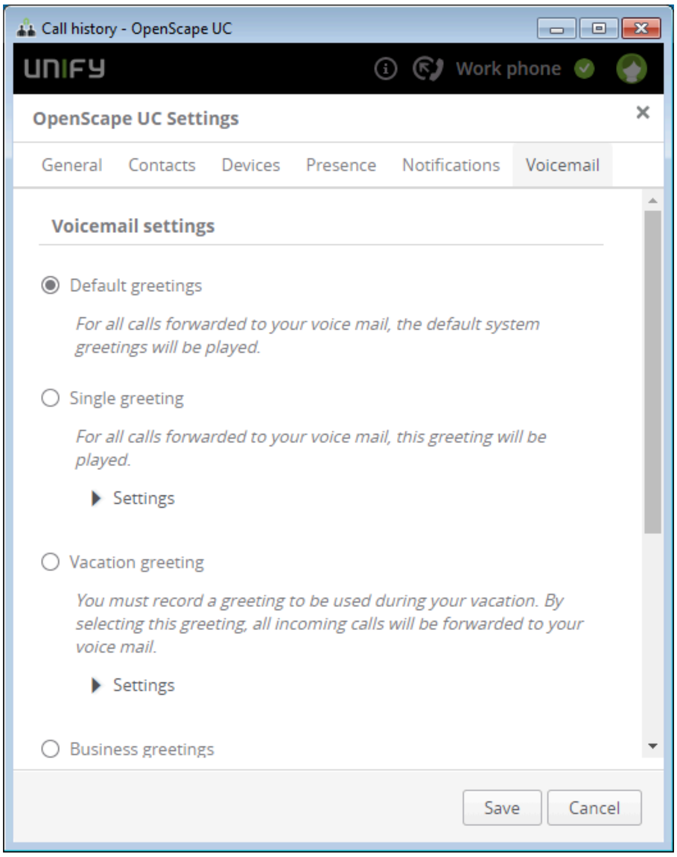
- Default greetings
- Single greeting
- Vacation greeting
- Business greetings

Also you can record your name which is used for the default greetings

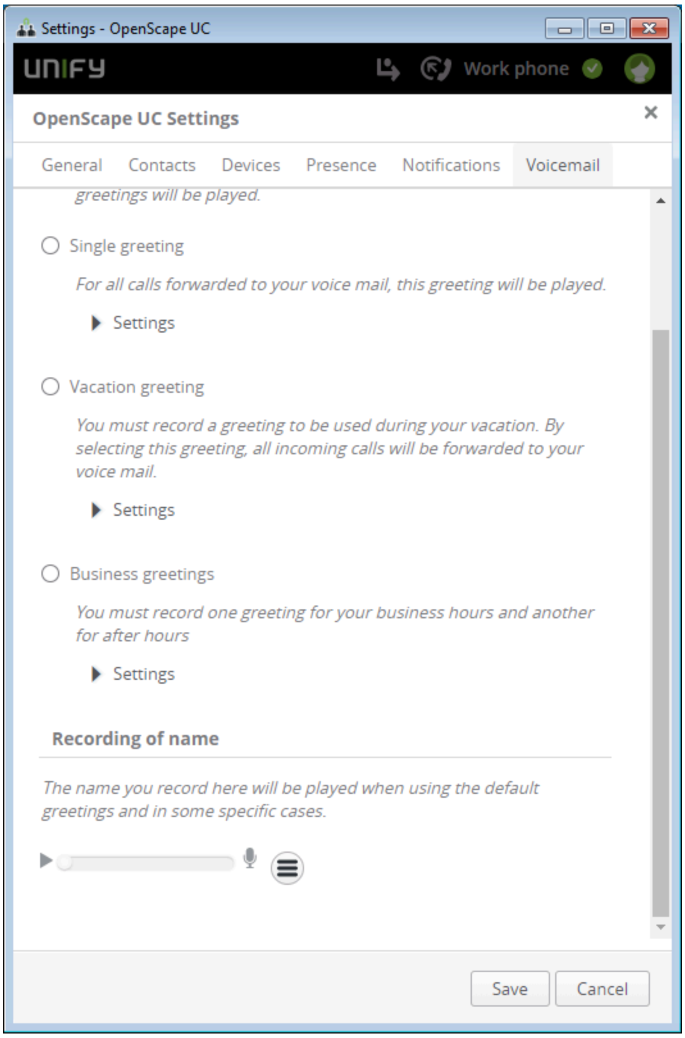
4.36.1 Default greetings

When you select the **Default greetings** the system default announcement / greeting will be played. This is the default.

1) Select the **Default greetings** if not already selected.



Optionally you can record your name (you may need to scroll down)

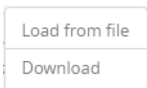


Here you can play your name recording (click onplay ▶)

You can also record your name. click on the microphone in order to start recording and again on the microphone to stop the recording. While the recording is running the microphone icon is red.

or download or load from a file (click oncommunication options).

In case you click on communication options, the following opens:



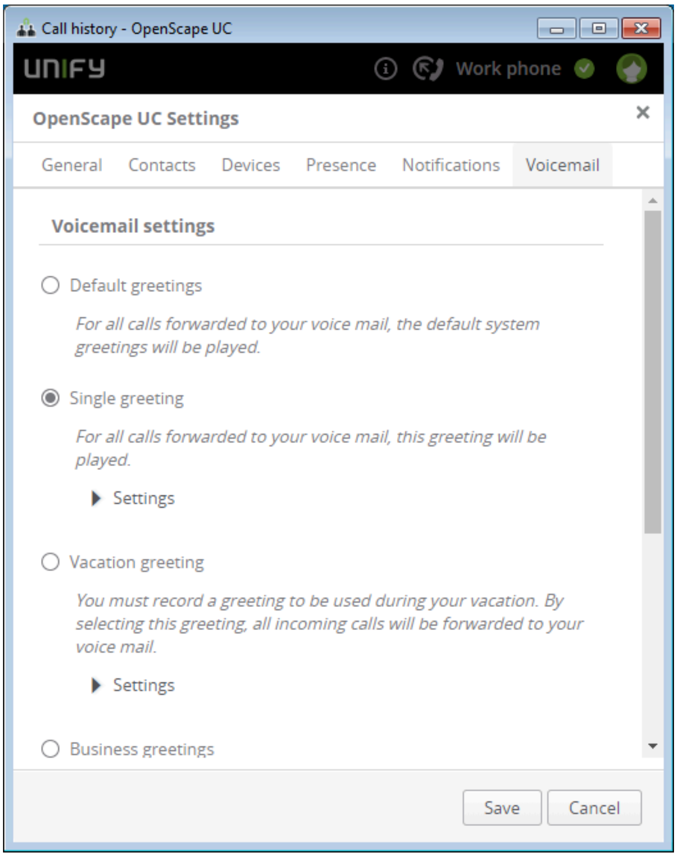
In case you have selected to **Load from file** you need to select a `wav` file.

2) Click on **Save**.

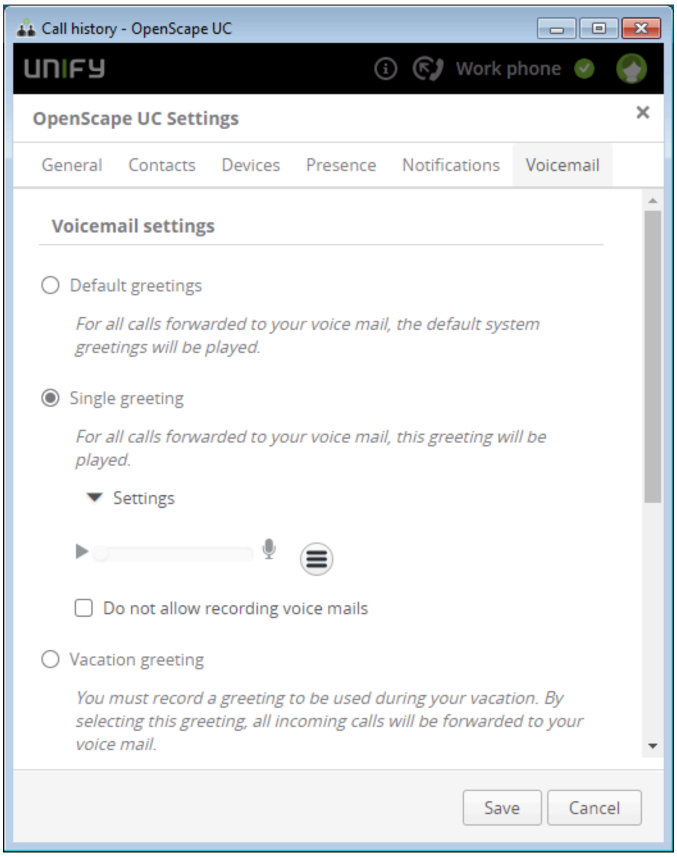
4.36.2 Single greeting

You can use a greeting which applies for all incoming calls.

1) select the radio button **Single greeting**.



2) Click on the arrow near to **Settings**.

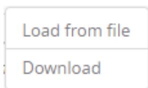


Here you can play your single greeting (click onplay)

You can also record a greeting. click on the microphone in order to start recording and again on the microphone to stop the recording. While the recording is running the microphone icon is red.

or download or load from a file (click oncommunication options).

In case you click on communication options, the following opens:



In case you have selected to **Load from file** you need to select a `wav` file.

Furthermore you can enable the check-box **Do not allow recording voice mails**. This results that the caller can hear your greeting but cannot leave a message.

3) Click on **Save**.

4.36.3 Vacation greeting

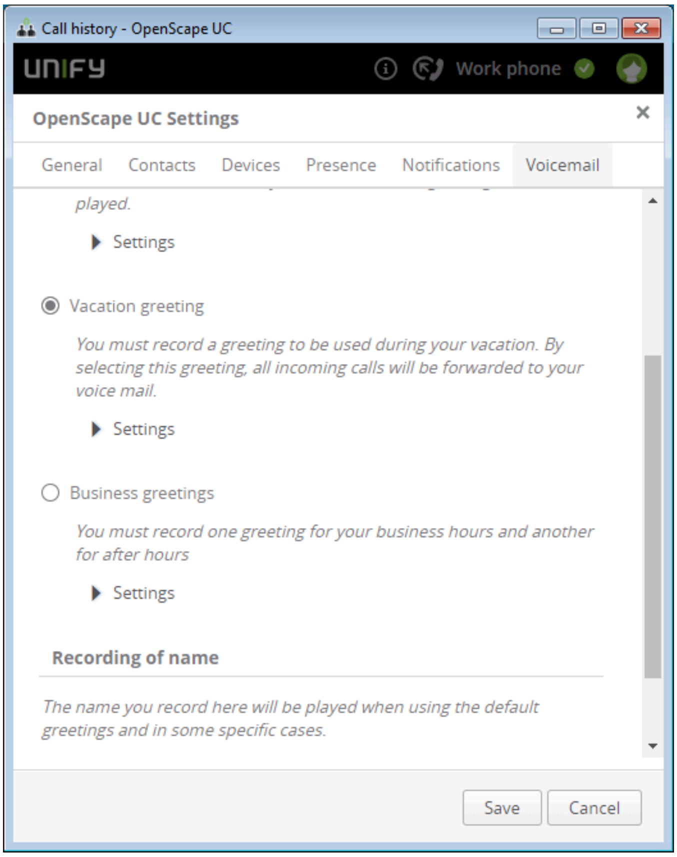
When you are on vacation you can have a special greeting which e.g. informs when you are back or who is your substitute, etc.

When Vacation greeting has been selected all calls will be redirected to your voice mail box.

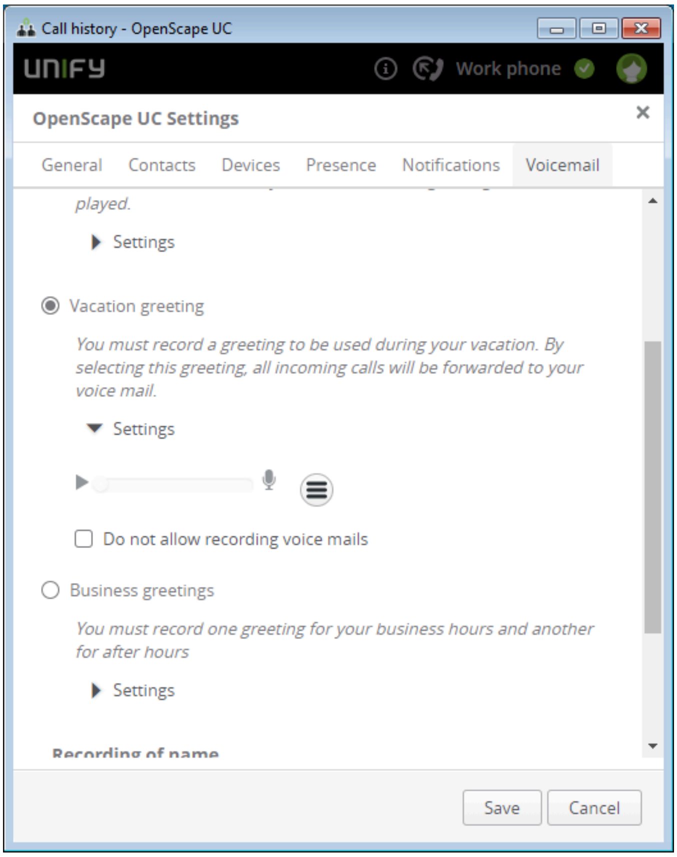
NOTICE:

When using the vacation greetings feature if an other call forwarding rule is already set, the automatic call forward to voicemail will not be enabled. If you have an active profile then some calls might be forwarded before they reach your voicemail. For both these scenarios you will see a warning message displayed when selecting the **Vacation greeting** radio button.

1) Select the radio button **Vacation greeting**.



2) Click on the arrow near to **Settings**.

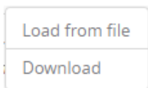


Here you can play your vacation greeting (click onplay)

You can also record a greeting. click on the microphone in order to start recording and again on the microphone to stop the recording. While the recording is running the microphone icon is red.

or download or load from a file (click oncommunication options).

In case you click on communication options, the following opens:



In case you have selected to **Load from file** you need to select a `wav` file.

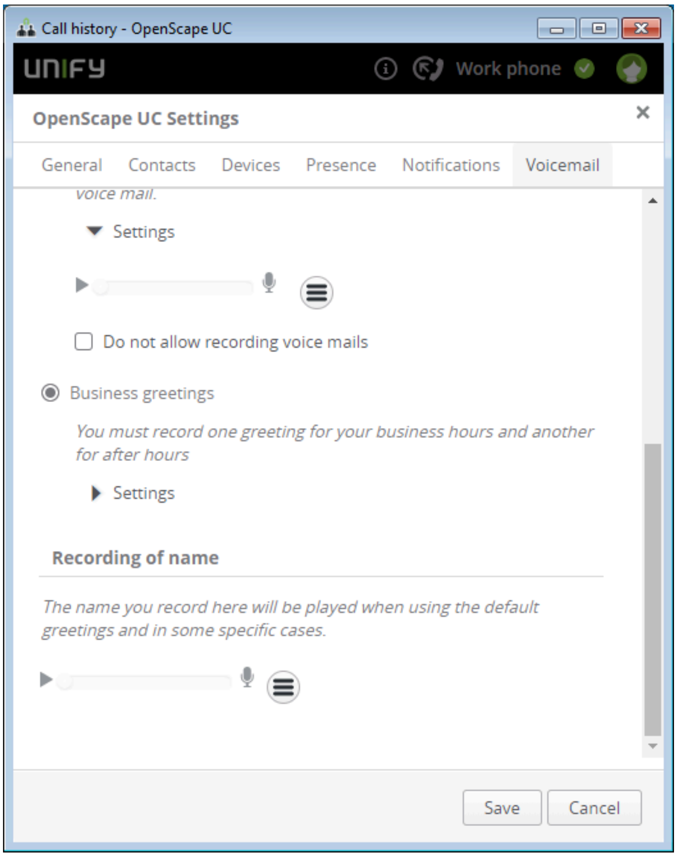
Furthermore you can enable the check-box **Do not allow recording voice mails**. This results that the caller can hear your greeting but cannot leave a message.

3) Click on **Save**.

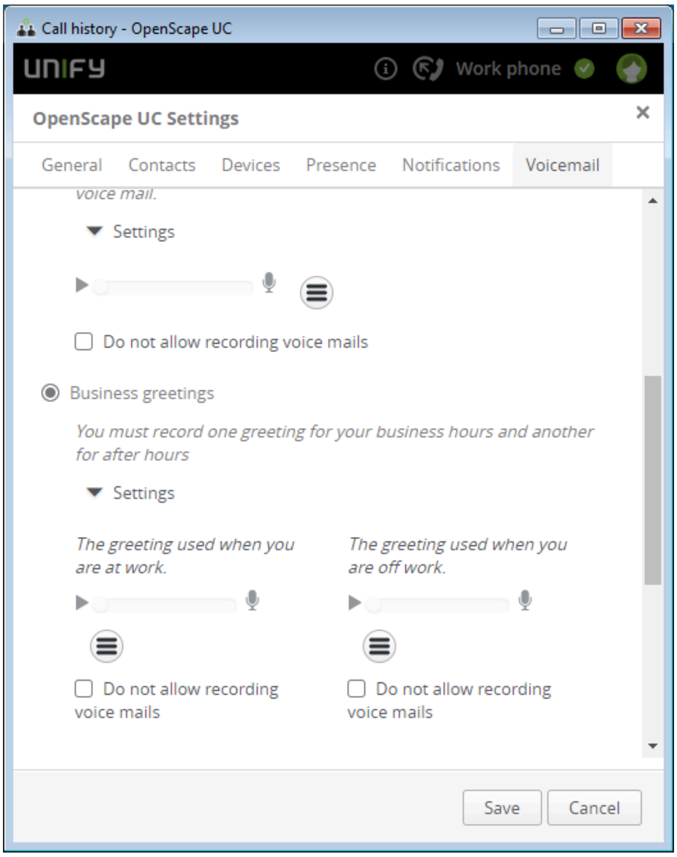
4.36.4 Business greetings

Here you can define greetings which are inside business hours and outside business hours.

1) Select the radio button **Business greetings**.



2) Click on the arrow near **Settings**.



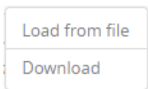
The following needs to be applied for "**greeting used when you are at work**" and also "**greeting used when you are off work**".

Here you can play your business greeting (click onplay ▶)

You can also record a greeting. click on the microphone in order to start recording and again on the microphone to stop the recording. While the recording is running the microphone icon is red.

or download or load from a file (click oncommunication options).

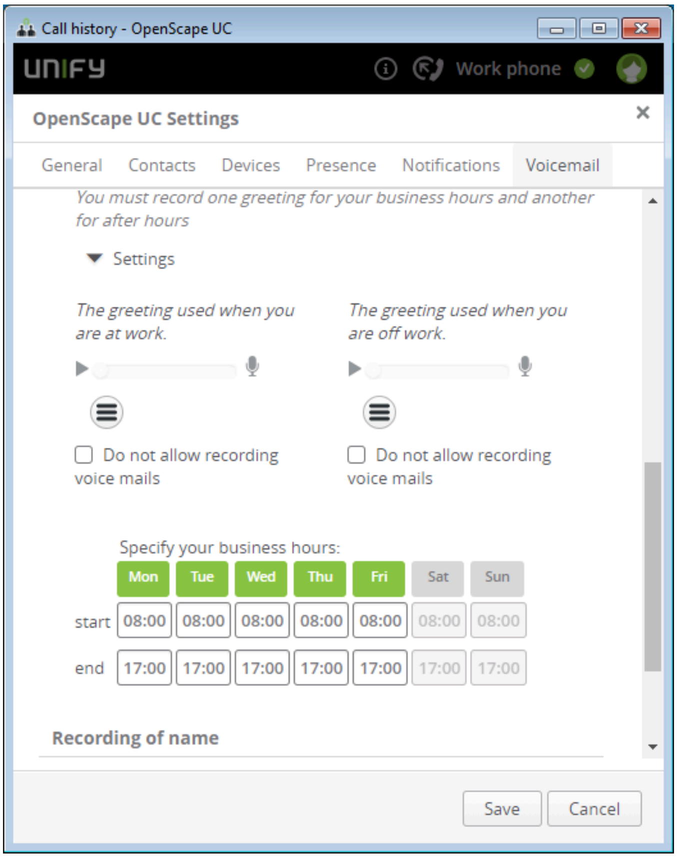
In case you click on communication options, the following opens:



In case you have selected to **Load from file** you need to select a `wav` file.

Furthermore you can enable the check-box **Do not allow recording voice mails**. This results that the caller can hear your greeting but cannot leave a message (also for at work and off work separately).

Then scroll down and specify your business hours.



The selected days are colored in green.

Then you need to specify for each day the hours you go to work or are in the office. By default the start is 08:00 and the end is 17:00.

3) Click on **Save**.

4.36.5 Rules and restrictions for greetings

Regarding the Greetings feature, you have to keep in mind the following rules and restrictions:

- Upgraded scenarios from simplified, enhanced and system administrator greetings are not supported. You should switch to the default system greeting and then you should record or upload your greetings using the new interface
- Previous recorded greetings will not be retrieved in the New Voice Mail Settings interface
- This feature is not supported in Internet Explorer and Safari browsers
- You need a secure connection (*https*) to support recording via the webclient.
- The supported file type for greetings is .wav
- Play and Record by phone (hard phone) is not supported
- Fusion4Office CTI mode (DEFAULTPROVIDER=OSA-Provider) is not supported by this feature
- It is not recommended to record greetings announcements or change the greetings settings using TUI (XPR Phonemail) or XPR WebAssistant

---

IMPORTANT:

Fusion4Office CTI mode (DEFAULTPROVIDER=OSA-Provider) is not supported by the greetings feature.

4.37 Multi Line Hunt Group

You can use the softphone for Multi Line Hunt Group (MLHG) as One Number Service (ONS).

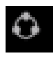
Fusion can be connected to OpenScape Voice or OpenScape 4000. However, the following apply regarding this feature:

Fusion connected to OpenScape Voice, supports:

- Stop at me / Resume
- Login / Logoff

NOTICE:

The state of the MLHG busy feature on the physical devices is opposite to the state displayed on the UC clients (Web Client, Desktop App, Fusion for Notes and Fusion for Office):

Feature activated / deactivated	MLHG busy state	UC client meaning	Led on physical device	UC client UI
Activated	Busy	Logged off	ON	
Deactivated	Not busy	Logged in	OFF	

NOTICE: WebClient, UC DeskApp and Fusion do not support the OSV feature “Reverse Hunt Make Busy LED Display”.

Fusion connected to OpenScape 4000, supports:

- Login / Logoff

In order to indicate the status of the MLHG an icon is displayed on the Fusion bar.

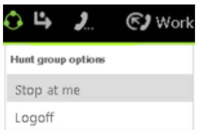
You can login / logout of the hunt group clicking on the Fusion bar.

NOTICE:

The Fusion bar opens when you either double click on the Fusion icon in the task bar or if you go via **Settings** > **OpenScape Views** > **Fusion bar**

Options when available

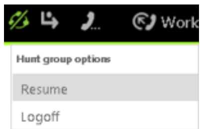
When you are logged into the hunt group and you are available you have the following options by clicking on the icon :



- Stop at me (OpenScape Voice)
- Logoff

Options when status is available but set to busy

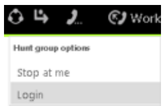
When you are logged into the hunt group and you are available but set to busy you have the following options by clicking on the icon :



- Resume (OpenScape Voice)
- Logoff

Options when status is logged off

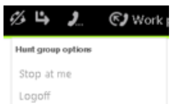
When you are not logged into the hunt group you have the following options by clicking on :



- Stop at me (OpenScape Voice)
- Login

Options when status is no manual changes allowed

When you are logged into the hunt group but no manual changes are allowed you have the following options by clicking on :



- Stop at me (OpenScape Voice)
- Logoff

4.38 Fusion for Office on VDI Systems (Citrix, VMWare Horizon)

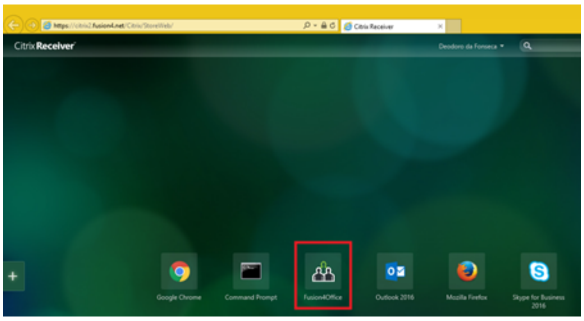
Virtual Desktop Infrastructure (VDI) under Citrix or VMWare Horizon provides the functionality to work transparently and remotely on the server and so most of process and memory consumption needs not to go through the remote desktop. There are several other benefits so that software needs to be installed and maintained on a single place.

NOTICE:

For more information refer to OpenScape UC Application V10, VDI Systems Installation Guide.

4.38.1 Working with Citrix (VDI)

You are working on the Citrix client which accesses the Citrix server. So most of the work is done on the server and files etc. are not anymore on your own machine. If you do not use SSO you have to logon to Citrix Client and start then from there Fusion for Office.



In all menus where SIP Service Provider is seen, you will se "virtual SIP Service Provider".

NOTICE:

If users cannot access their local drives, they have to infrom the administrator to grant permission.

4.38.2 Session Expiring Timeout

The terminal with VDI (Citrix) enters stand-by mode after 15 minutes. In case of lacking communication with the softphone installed in the user’s terminal. This can happen for several reasons:

- result of hibernating the terminal computer
- result of sleeping the terminal computer
- missing network

The following warning message will be presented in this situation:

The session has expired because your terminal is out for more than 15 minutes

This warning message reports that Fusion for Office went to stand-by/safety mode in order to optimize resources in the Citrix Terminal server.

4.39 Add Mail-Address

In Active Directory you can add mail addresses via the **proxyAddresses** attribute. Do NOT use the **mail** attribute.

4.40 Change Language

You cannot change the language.

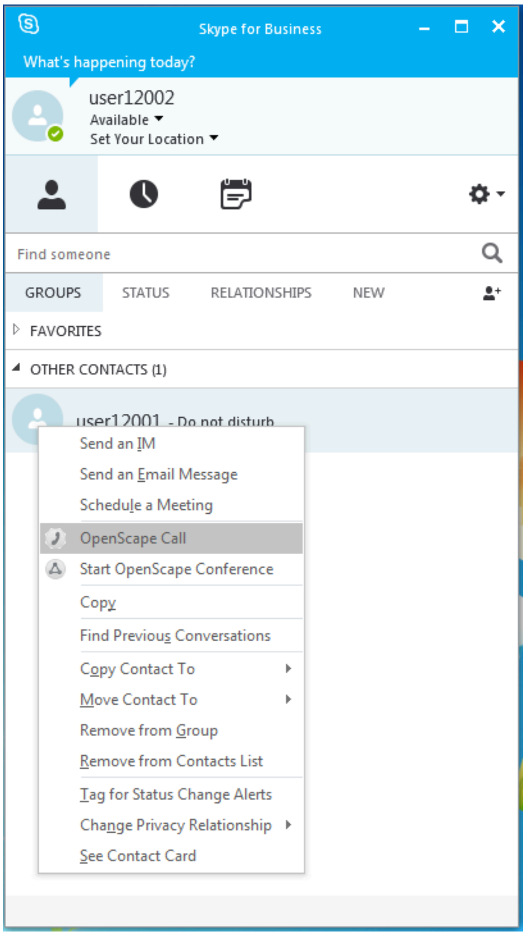
- Outlook gets the language of the Office package installed.
- Fusion gets the language in which the PC is installed.

4.41 Skype for Business

The OpenScape Fusion for Office plug-in for Skype for Business enables the UC features for call and conference.

In order to access the UC features you can do the following:

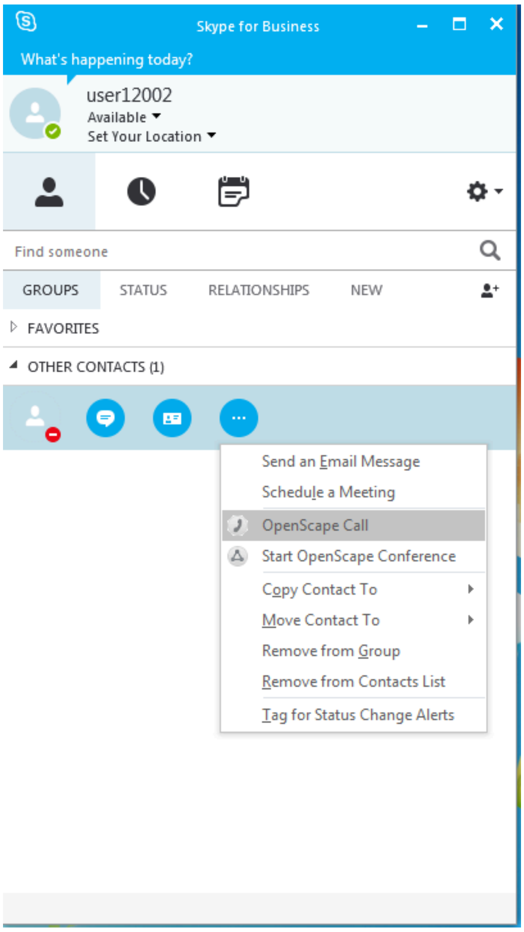
- Click with the right mouse button on the contact(s) you wish to call or initiate a conference.



- Or click on the contact you wish to call or initiate a conference. Click on the elipsis button and choose the desired function.

NOTICE:

You can add more participants in a conference once you initiate it.



4.41.1 Skype for Business Scenarios

There are several scenarios possible, it depends on what the administrator has configured during installation.

The following scenarios are possible:

- Instant messaging (Chat) and Desktop Sharing are from Skype for Business

  In this case the Chat and Desktop Sharing are performed from Skype for Business and the UC Application invokes the functions from Skype for Business.

  Everytime a chat is performed (e.g. from My contact Board, extended View, Outlook contact card, Fusion Ribbon, from E-Mail, etc.) the corresponding application is started from Skype for Business and not from UC.

  Everytime when Desktop Sharing (Web Collaboration) is performed (e.g. from My contact Board, extended View, Outlook contact card, Fusion Ribbon, E-Mail, etc.) the corresponding application is started from Skype for Business and not from UC.
- The Softphone is used from Skype for Business (CTI mode) and Chat and Desktop Sharing.

  In this case the corresponding call control is used from Skype for Business and not from UC, chat and Desktop Sharing are also used from Skype for Business.

  Everytime a chat is performed (e.g. from My contact Board, extended View, Outlook contact card, Fusion Ribbon, from E-Mail, etc.) the corresponding application is started from Skype for Business and not from UC.

  Everytime when Desktop Sharing (Web Collaboration) is performed (e.g. from My contact Board, extended View, Outlook contact card, Fusion Ribbon, E-Mail, etc.) the corresponding application is started from Skype for Business and not from UC.

  Everytime when a call is performed or received the corresponding call control from Skype for Business is used.
- Using Skype for Business and MS Mediation Server.

  In this case the corresponding call control is used from Skype for Business and not from UC, chat and Desktop Sharing are also used from Skype for Business. Furthermore the preferred device will be from Skype for Business

  Everytime a chat is performed (e.g. from My contact Board, extended View, Outlook contact card, Fusion Ribbon, from E-Mail, etc.) the corresponding application is started from Skype for Business and not from UC.

  Everytime when Desktop Sharing (Web Collaboration) is performed (e.g. from My contact Board, extended View, Outlook contact card, Fusion Ribbon, E-Mail, etc.) the corresponding application is started from Skype for Business and not from UC.

  Everytime when a call is performed or received the corresponding call control from Skype for Business is used.

  The preferred device will be from Skype, so a device with the name "Skype" must be created and selected as preferred device.
- Using two softphones, one from Skype for Business and one from OpenScape Fusion for Office.

  This scenario is possible but it is not recommended. But since the administrator has configured it, you can use it, but you must be aware about the following restriction.

  You cannot use both softphones in parallel, so if you are involved in a call, you either have to reject the new incoming call and keep the running call, or you disconnect the running call and then accept the new call.

4.42 Recommendation for Antivirus

Please configure the following processes as trusted exceptions in your antivirus software to ensure optimum use of OpenScape Fusion as SIP Softphone:

Under `C:\Program Files (x86)\Unify\Fusion for MS Office \FusionClient\Client`:

Under `C:\Program Files (x86)\Unify\Fusion for IBM Notes \FusionClient\Client`:

- `Unify.OpenScape.exe`
- `Unify.OpenScape.WebViewer.exe`
- `SecomSDK.exe`

Under `C:\Program Files (x86)\Unify\Fusion for MS Office \FusionPlugins`:

- `FusionExecutor.exe`
- `OpenScapeFusion.Lync.exe`

Under `C:\Program Files (x86)\Plantronics\Spokes3G SDK`

- `PLTHub.exe`

5 Step-by-Step

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

5.1 How to Log on to the OpenScape UCApplication System

This section tells you how to log on to the OpenScape UCApplication system at the first start after the installation.

Prerequisites

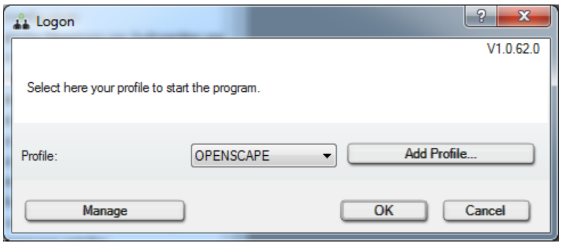
For you, being an OpenScape Fusion for Office user, a profile with the appropriate module settings has already been configured.

To log on to the OpenScape UCApplication system at the first start after the installation proceed as follows:

Step by Step

1) Start your MicrosoftOutlook client.

The **Logon** dialog opens after a short period.



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

3) Then click on **OK**.

The login dialog closes.

You are logged in at the OpenScape UCApplication system. The function group **OpenScape Fusion** on the **Start** tab and the **OpenScape Fusion** tab are loaded.

NOTICE:

The **Logon** dialog appears only at the first start of the MicrosoftOutlook client after the OpenScape Fusion for Office installation. Any further start of MicrosoftOutlook or of OpenScape Fusion for Office occurs automatically under the profile used last. To display the **Logon** dialog, you need to keep the **shift key** pressed when starting the MicrosoftOutlook client.

NOTICE:

If Single Sign-On has been configured for your Windows user account, the **Logon** is not displayed. The Single Sign-On (SSO) function enables you to use the OpenScape UCApplication features after logging in at your workstation without having to additionally authenticate against the OpenScape UCApplication system.

5.2 How to Create a new User Profile

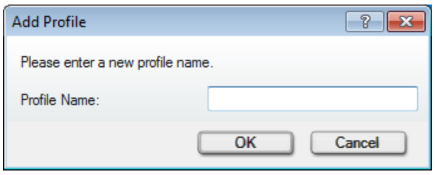
You can create a new user profile only during the default logon to the program by proceeding as follows:

Step by Step

1) Start the **MicrosoftOutlookIBM Notes** client.

The **Logon** dialog opens after a short period.

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. Subsequently, you need to perform the desired settings in the **Settings** dialog for using the profile.

5.3 How to Configure Single Sign-On in OpenScape Fusion for Office

This section explains how to configure OpenScape Fusion for Office to enable using the Single Sign-On (SSO) feature.

Prerequisites

A user account has been configured for the Windows user in the Active Directory of his/her domain controller.

The Single Sign-On feature is active in your system.

OpenScape Fusion for Office has been shut down.

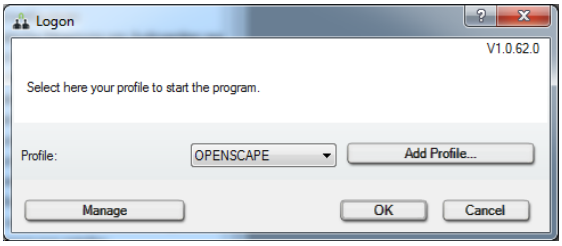
MicrosoftOutlook has been shut down.

To configure the application for using SSO, execute the following steps at the initial start after the OpenScape Fusion for Office installation:

Step by Step

1) Start your MicrosoftOutlook client.

The **Logon** dialog opens after a short period.



NOTICE:

The **Logon** dialog appears only at the first start of the MicrosoftOutlook client after the OpenScape Fusion for Office installation. Any further start of MicrosoftOutlook or of OpenScape Fusion for Office occurs automatically under the profile used last. To display the **Logon** dialog again, close Outlook and the Fusion for Office client, then you need to keep the **shift key** pressed when starting the Fusion for Office client. Afterwards you can start Outlook and Fusion for Office (if not already running).

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

The menu for managing the configuration settings opens.

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

The **Settings** dialog opens.

4) Switch to the tab **Advanced** > **OpenScapeServlet Provider** > **Connection**.

5) Activate the **Use the Windows logon (SSO)** option.

6) Enter the FQDN of the OpenScape UCApplication application computer in the **Server** input field.

7) Select on the tab **Advanced** > **OpenScapeServlet Provider** > **Web Access**.

8) Disable the **Use default Connection Address** option.

You can now change the setting in the **Server** field.

9) Enter the URL of the OpenScape UCApplication front-end computer in the **Server** input field. Depending on whether or not the **Secure Communication via HTTPS** option is set, the URL has one of the following formats:

- https://<FQDN of the OpenScape UCApplication front-end computer>
- http://<FQDN of the OpenScape UCApplication front-end computer>

The port number in the **Port** field is automatically adjusted to the state of the **Secure Communication via HTTPS** option.

10) Click on **OK**.

Your modifications have become valid. The **Settings** dialog closes.

You have now configured OpenScape Fusion for Office for using the Single Sign-On feature.

NOTICE:

SSO configuration for webclient extended view and Fusion client login and also SOAP SSO for Outlook conference plugin (Calendar) is required

---

5.4 How to Configure an Audio Device

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

To configure an audio device proceed as follows:

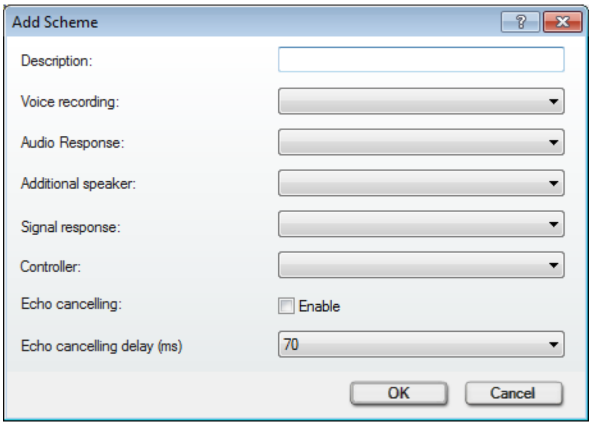
NOTICE:

With Fusion V2.xxx and higher the audio device can be set directly with the Fusion Systray. Left or right click on the Fusion icon in the taskbar and then for Fusion V2.xxx. **Settings** > **Audio Schemes** > **Audio Scheme Settings**.

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 indication of additional speaker is displayed in Fusion bar and **OpenScape View** menus.
- **Signal response**

  Speaker for the signal output (ringing).
- **Controller**

  Select the hardware you use. If this hardware is not contained in the selection list, then use **Soundcard**.

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

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

6) Confirm the settings of the new audio scheme with **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.

NOTICE:

Always change the current audio device via the audio schemes, not via the Windows control panel. Because you cannot synchronize the respective settings, the audio device set in the Windows control panel would be used but the client would display the audio device set last via the audio schemes.

5.5 How to React to Automatic Audio Device Detection

Under certain circumstances, **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** can detect new audio devices as soon as you connect them to the computer.

When **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** is operating and you connect your computer with an audio device for which Windows has the required drivers, the **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** Softphone menu displays the **New Audio Device** icon.

How to configure a new audio scheme for the automatically detected device and add it subsequently:

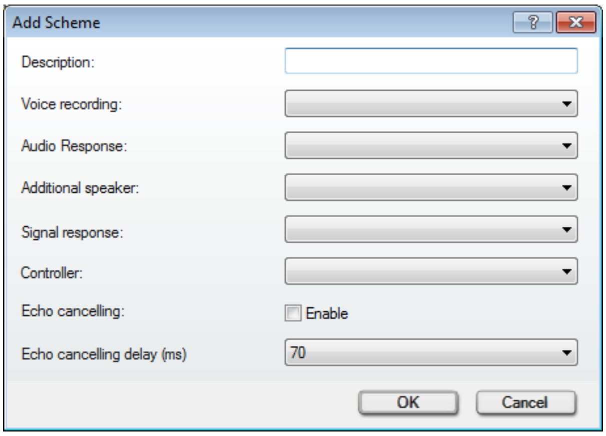
Step by Step

1) Click on the freshly displayed icon.

   A message appears, informing you that a new audio device has been detected.

2) Click on **Yes** in this message.

   The **Add Scheme** dialog opens.



3) Assign a name to the new audio scheme in the **Description** field.
4) In the **Voice recording** combo box select the audio hardware of the user computer to be used by **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** for voice recording.
5) In the **Audio Response** combo box select the audio hardware of the user computer to be used by **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** for voice playback.
6) In the **Additional speaker** combo box select an additional speaker for voice output if required. If an additional speaker has been selected here and this audio scheme is active, the Softphone menu of the **Call Control** of the **Video** window display the icon for the *open listening* feature.

   NOTICE:

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

7) In the **Signal response** combo box select the audio hardware of the user computer to be used by OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes for ringtone output.
8) Select the audio hardware of the user computer to be used for controlling special hardware in the **Controller** field.
9) Activate the **Echo cancelling** option.
10) Select the value suitable for your system under **Echo cancelling delay (ms)**.
11) Confirm the settings of the new audio scheme with **OK**.

You have now added and configured a new audio scheme for the automatically detected audio device. The **Add Scheme** dialog closes. The newly defined audio scheme appears as first entry in the list of the configured audio schemes on the **Audio Schemes** tab.

5.6 How to Configure a Video Device

Using the Video Telephony feature requires your computer being equipped with a video device (video camera). The hardware settings are grouped in video schemes.

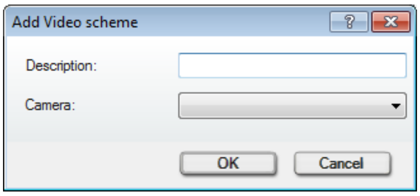
To configure a video device proceed as follows:

Step by Step

1) Switch to the tab **Advanced** > **SIP Service Provider** > **Video schemes** in the **Settings** dialog.

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

The **Add Video scheme** dialog opens.



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

4) In the **Camera** combo box select the video hardware of the user computer to be used by **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** for sending video signals.

5) Confirm your settings with **OK**.

The **Add Video scheme** dialog closes. The new video scheme appears on the **Advanced** tab in the list of configured video schemes.

6) Perform the settings for your **default video configuration**:

a) Select the default view for your video screen under **Layout**.

b) Select the setting for the camera preview (own video image) under **Preview**.

c) Activate or disable the **Mirrored** option to determine whether or not your own image shall be displayed mirrored in the **Video** screen.

Configuring the desired video device and performing the default video configuration is now complete.

5.7 How to React to Automatic Video Device Detection

Under certain circumstances, **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** can detect new video devices as soon as you connect them to the computer.

When **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** is operating and you connect your computer with a video device for which Windows has the required drivers, the **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** Softphone menu displays the

 **New Video Device** icon.

How to configure a new video scheme for the automatically detected device and add it subsequently:

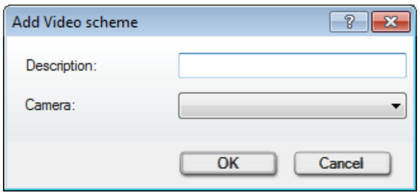
Step by Step

1) Click on the freshly displayed icon.

A message appears, informing you that a new video device has been detected.

2) Click on **Yes** in this message.

The **Add Video scheme** dialog opens.



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

4) In the **Camera** combo box select the video hardware of the user computer to be used by OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes for sending video signals.

5) Confirm your settings with **OK**.

The **Add Video scheme** dialog closes. The new video scheme appears on the **Advanced** tab under **SIP Service Provider** > **Video schemes** in the list of configured video schemes.

6) Perform the settings for your **default video configuration** there:

a) Select the default view for your video screen under **Layout**.

b) Select the setting for the camera preview (own video image) under **Preview**.

c) Activate or disable the **Mirrored** option to determine whether or not your own image shall be displayed mirrored in the **Video** screen.

You have now added and configured a new video scheme for the automatically detected video device and completed the default video configuration.

5.8 How to Configure an individual Ring Tone

To select an individual ring tone for signaling incoming connection requests at an SIP communications system proceed as follows:

Step by Step

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

The *OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes* context menu opens.

2) Select the **Personal Settings** > **Ring tones** option.

The **Settings** dialog opens. The **Advanced** tab with the **Settings** > **Advanced Client Settings** > **SIP Service Provider** > **Ring tones** option appears.

3) Activate the **Use individual ring tones** check box.

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

   The **Open** dialog is displayed.

5) In the **Open** window switch to the folder that contains the desired `WAV` or `MP3` file.

6) Select the desired file.

> **NOTICE:**
>
> You can find default wav-files under: `C:\Program Files(x86)\Unify\Fusion for MS Office\Fusion-Client\Client\Ringtones.`

7) Click the **Open** button.

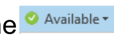
   The **Open** dialog is closed.

The selected audio file has been adopted as ring tone of OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes.

5.9 How to Set your Presence Status Manually

To set your current presence status manually proceed as follows:

Step by Step

1) Click on the Fusion Icon in the task bar and then click on the 

button.

> **NOTICE:**
>
> Alternatively you can open the **OpenScape View** or click in Microsoft Outlook on the available button.

> **NOTICE:**
>
> Alternatively you can open the extended view or click in Lotus Notes on the available button.

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

The icon and text change depending on the respective status.

> **NOTICE:**
>
> It's also possible to set the Presence via Fusion Bar.

5.10 How to Set your Status Text

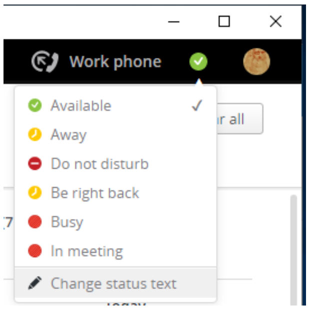
To add a text to be displayed to other users in addition to your presence status proceed as follows:

Step by Step

1) Click in the in the extended view on the 

button.

The presence status menu is displayed.



2) In the field **Change Status Text** enter your text.

> **NOTICE:**
>
> This text is independent from the selected presence status and appears also after a modification to the personal presence status.

3) Press enter

> **NOTICE:**
>
> From this moment the new text is displayed instead of Change Status Text.
>
> You can delete the status text by just clear the field and press enter. Then again Change Status Text is displayed.

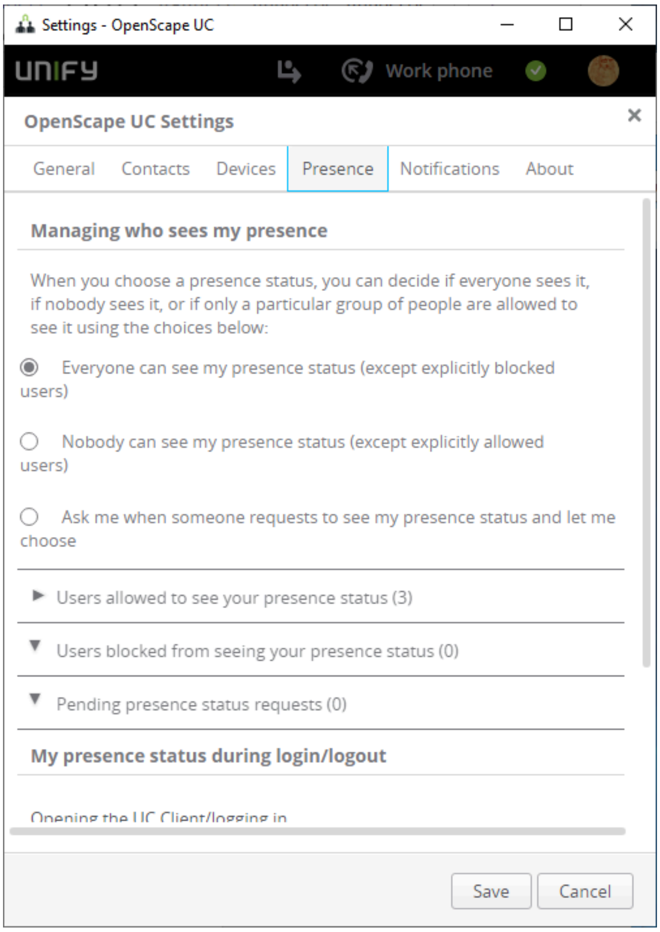
5.11 How to Allow Monitoring your Presence Status

How to allow displaying your presence status in the contact list of other OpenScape UCApplication users:

Step by Step

1) In the Extended View click on the avatar (right to the presence status on the top) and select settings.

2) Click on the presence tab.



3) Select **Everyone can see my presence status** (except explicitly blocked users)

4) Click on **Save**

5.12 How to Block Monitoring your Presence Status

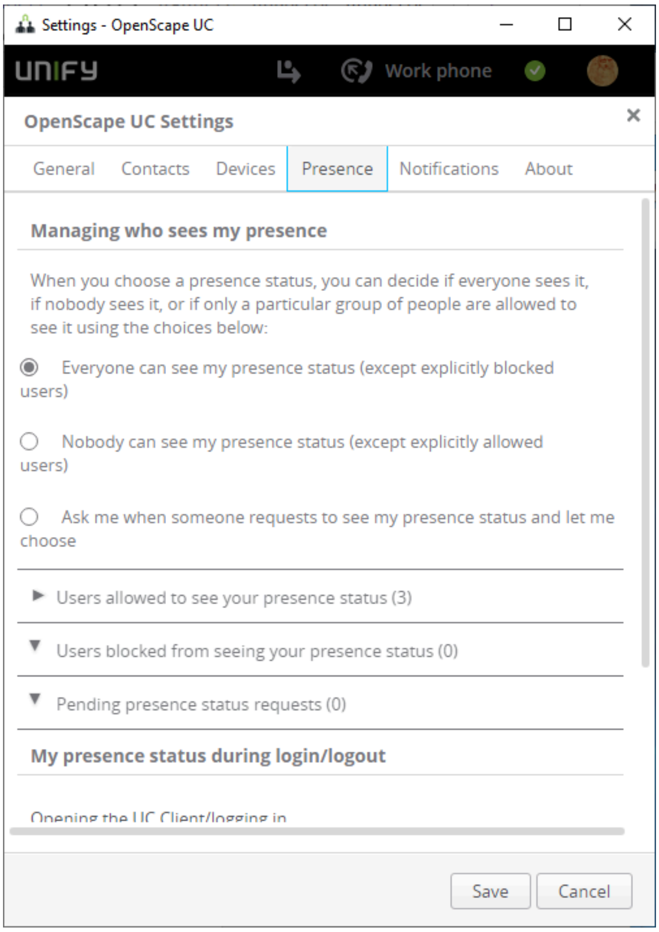
How to block the display of your presence status in the contact list of other OpenScape UCApplication users:

Step by Step

1) In the Extended View click on the avatar (right to the presence status on the top) and select settings.

   Reach this menu also via Fusion Icon > Settings > OpenScape UC Settings.

2) click on the presence tab.



3) Select Nobody can see my presence status (except explicitly allowed users)

4) Click on Save

5.13 How to Set the Default Behavior with Regard to Presence Status Requests

The default behavior in case of presence status requests of OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes specifies how the program behaves when another OpenScape UCApplication user adds you to his/her contact list.

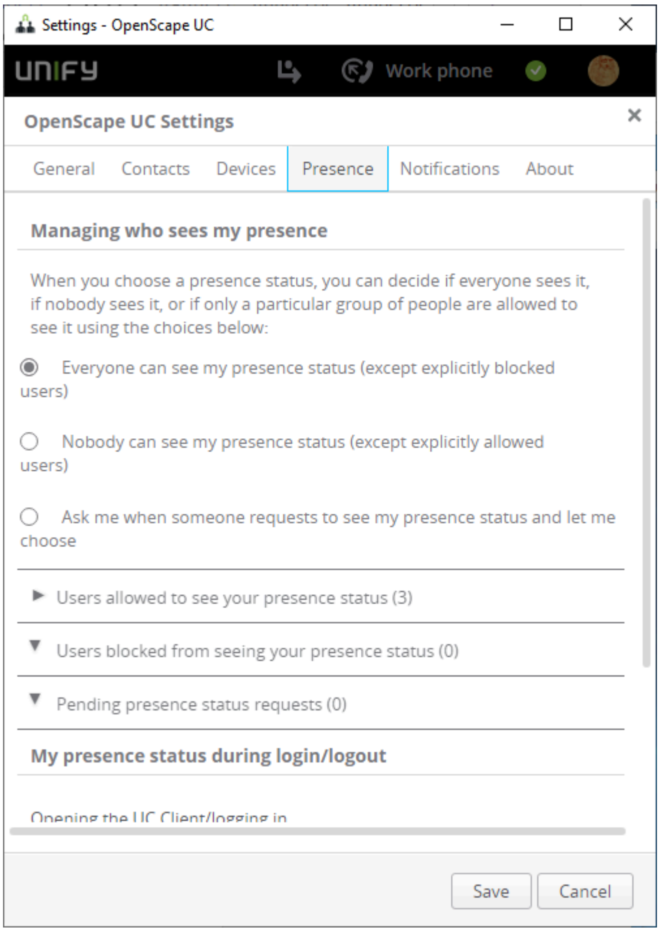
To configure the default behavior in case of presence status requests of OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes proceed as follows:

Step by Step

1) In the Extended View click on the avatar (right to the presence status on the top) and select settings.

You reach this menu also via Fusion Icon > Settings > OpenScape UC Settings.

2) click on the presence tab.



3) Select Ask me when someone requests to see my presence status and let me choose

4) Click on Save

5.14 How to Create a new Contact

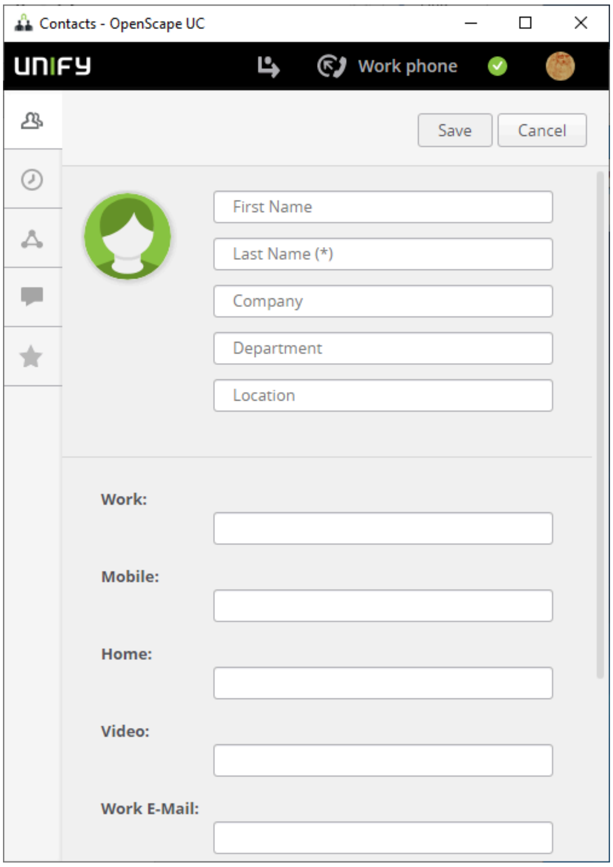
How to add a new contact to your **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** contact list:

Step by Step

1) Open Extended View

2) Click on  in order to open the contacts.

3) Click on an the following mask opens:



4) Enter the corresponding fields

The fields marked with an asteriks (*) are mandatory.

5) Click on Save

Your entries are saved. The input mask for creating a new contact closes. The new contact entry appears in the contact list of the **Contacts** window.

5.15 How to Add a Contact from a Directory

To search a directory for a contact and add him/her to your **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** contact list proceed as follows:

Step by Step

1) Open **OpenScape Contacts View**

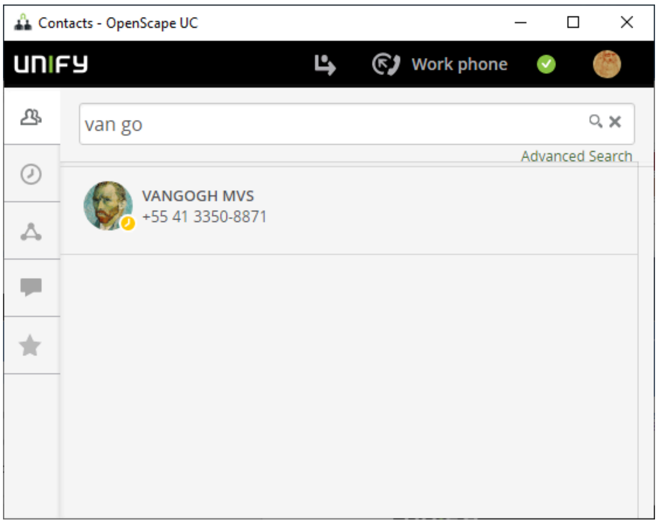
NOTICE:

You can use also contact list instead, then step 2 is not necessary.

2) Click on in order to open the contacts.

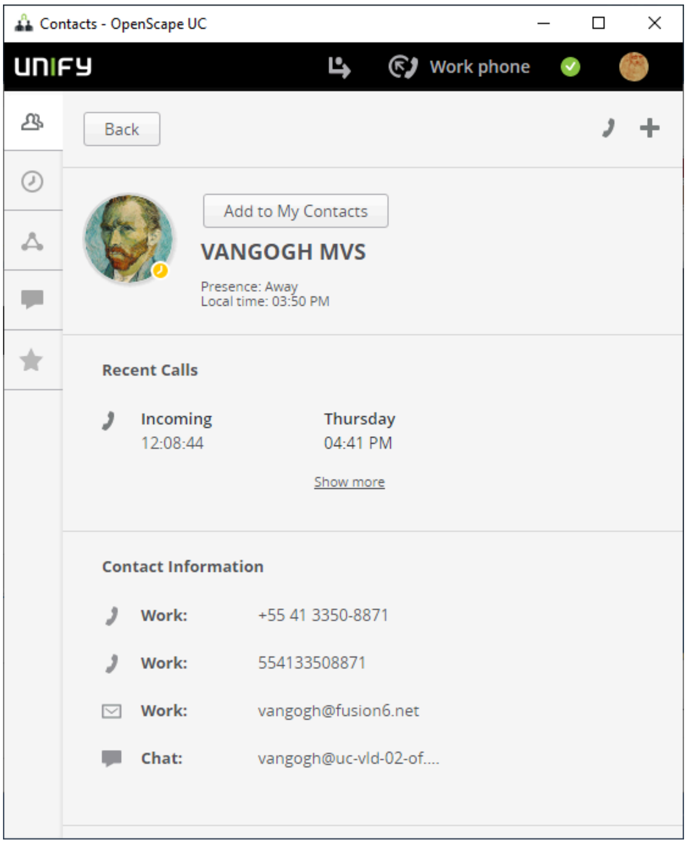
3) Either fill under search the name or use Advanced search. Press the 🔎 icon to search the contact in the directories"

The following is displayed



4) Click on the name

The following is displayed



5) Click on a **Add to My Contacts**

NOTICE:

The **Add to My Contacts** is only displayed when the contact does not already exist as private contact.

You have added a contact from the directory

5.16 How to Create a new Address Group

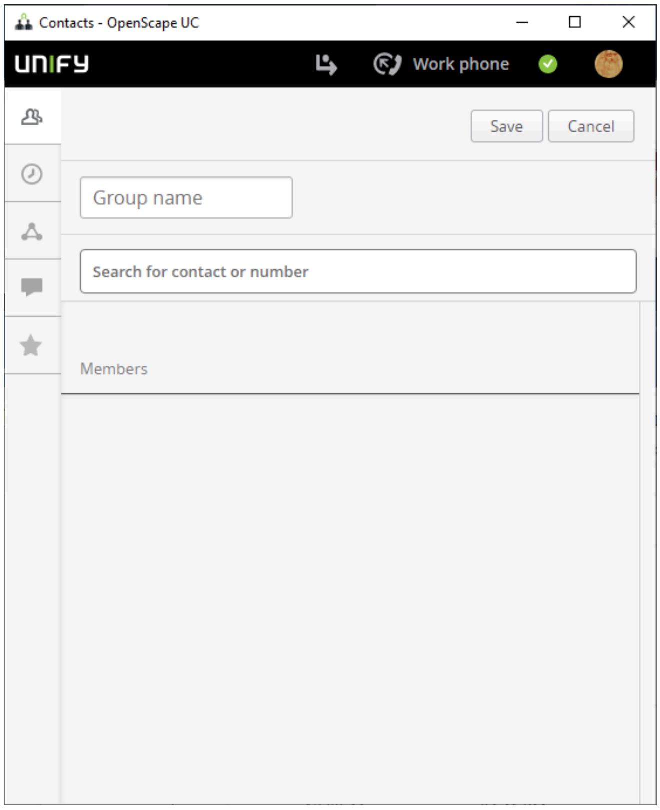
To add a new address group to your **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** contact list proceed as follows:

Step by Step

1) Open Extended View

2) Click on  in order to open the contacts.

3) Click on  and select **Create new Group** and the following mask opens:



4) Under **Group name** specify the name for your group

5) Under **Search for contact or number** enter a name or number and press enter when selected.

6) Repeat step 5 until you have added all your members.

7) Click on Save

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.

> **NOTICE:**
>
> It is also possible to create a group from the **Favorites** menu.

5.17 How to Assign an Address Group to a Contact

Prerequisites

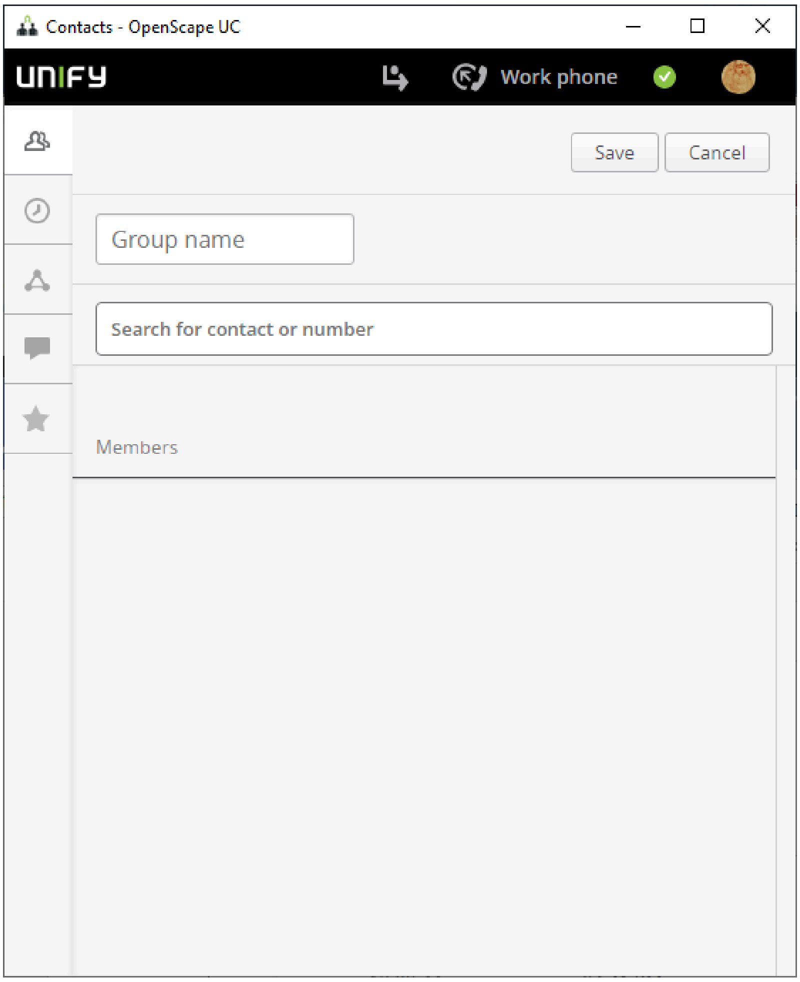
You have already created the desired address group(s).

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

Step by Step

1) Select under contacts All Contacts

2) Click on the contact you wish to assign to a group.



3) Under **Groups** you see the available groups. Click on the group or groups (When you click on them they are high lighted in green).

5.18 How to Create a new Team

In this section we describe how you create a new team.

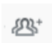
Prerequisites

You have team administrator privileges, i. e. the system administrator has assigned you the default **Team Administrator** profile or another profile with the privilege of **managing groups** in the CMP.

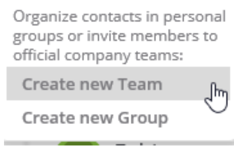
To create a new team proceed as follows:

Step by Step

1) Click in the extended view on contacts

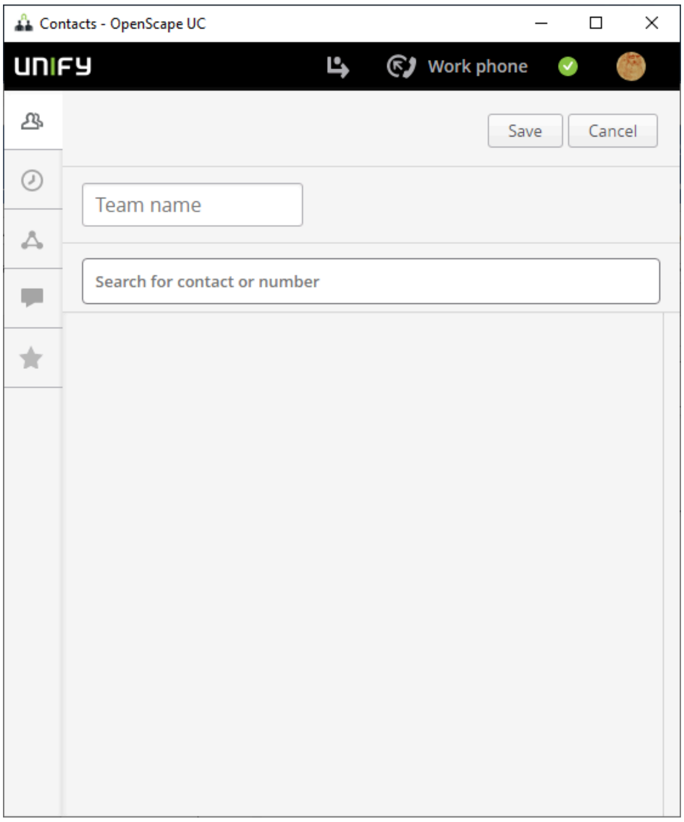
Click on the icon .

The following menu opens



2) Select **Create new Team**.

The following menu opens



3) Enter a name for the team.

4) Enter a member (type name or number)

5) Click on **Save**.

NOTICE:

When you add a member an invitation is sent to the member. The member has to accept the invitation.

NOTICE:

It is also possible to create a team via the **Favorites** menu.

5.19 How to Assign a new Member to a Team

In this section we describe how you can integrate a new member in your team.

Prerequisites

You have team administrator privileges, i. e. you are the team creator or the system administrator or another team administrator has assigned you team administrator privileges for the team.

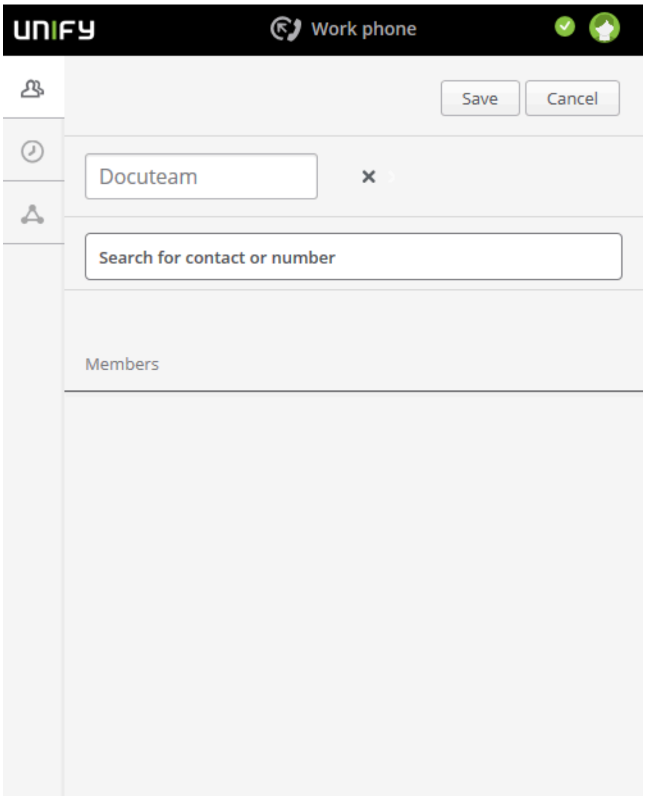
To add a new member to a team you created by yourself proceed as follows:

Step by Step

1) Hover the mouse over the team you want to add a member.

2) Click on the  and select Edit Team

The following is displayed:



3) Under **search for contact or number** enter a name or number.

NOTICE:

The name can be partly specified, when you click on search you get a list to select. When the name is in the private contact list, it appears while typing.

---

4) Select the name

NOTICE:

You can add additional members by repeating step 3 and 4.

---

5) Click on **Save**

NOTICE:

The privileges **Monitoring of the own Device** and **Journal Accessibility** are not automatically granted with integration in the team. The team member decides for himself/herself which privileges to grant to the other team partners.

5.20 How to Start a Chat via the OpenScape Fusion for Office Favorites

To start a chat with another OpenScape UCApplication user from your **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes, Favorites** proceed as follows:

Step by Step

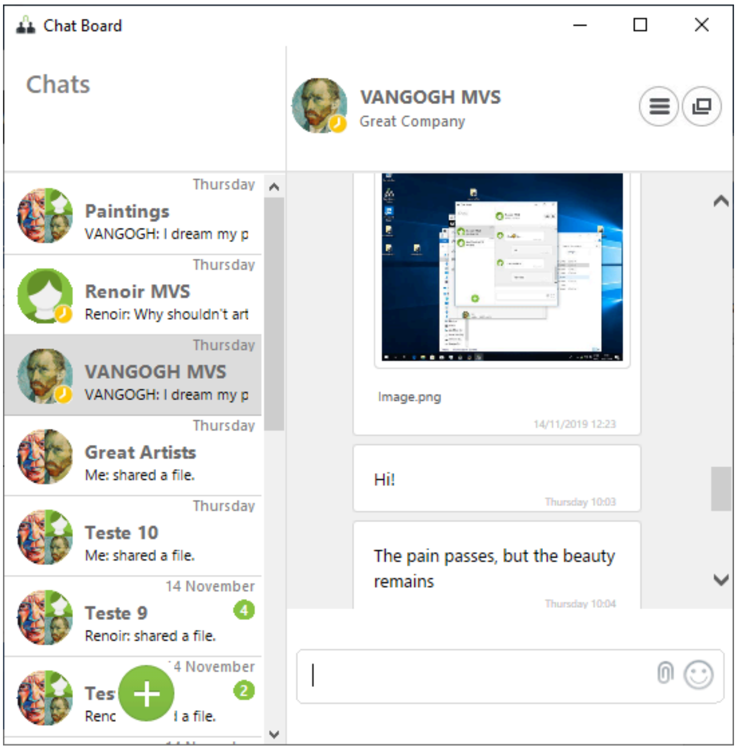
1) Hover over the contact with the mouse

2) Click on the communication option icon 

3) Select Chat

4) The following window opens

The chat opens in the combined view.



Depending on the chat mode of the chat partner - *Available* or *Unknown* - the chat message is delivered:

- Directly after it was sent, if the chat partner is logged in at the OpenScape UCApplication system and/or chat service
- Delivery is not possible because the chat partner has logged out of the OpenScape UCApplication system and/or chat service.

5.21 How to Start a Chat via the MicrosoftOutlook Contact List

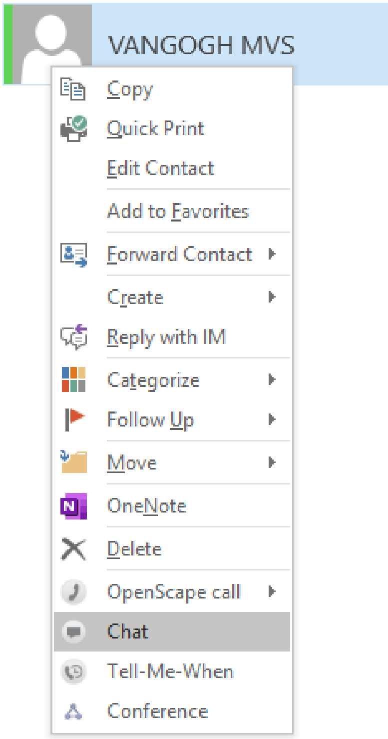
To start a chat with another OpenScape UCApplication user from your MicrosoftOutlook contact list proceed as follows:

Step by Step

1) Select the desired chat partner in the MicrosoftOutlook contact list.

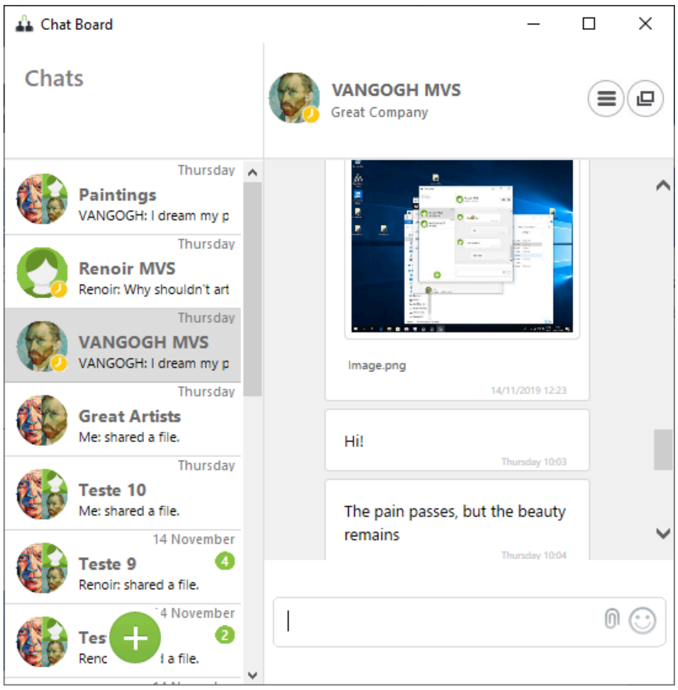
2) Click on the already selected contact entry with the right mouse button.

The following (example) context menu opens:



3) Select the **Chat** option.

The **Chat Board** window opens.



The chat opens in the combined view.

4) Enter the instant message your wish to send to the chat partner in the bottom entry area of the chat window.
5) Press **Enter** button.

Depending on the IM mode of the chat partner - *Available* or *Unknown* - the instant message is delivered:

- directly after it was sent, if the chat partner is logged in at the OpenScape UCApplication system and/or IM service
- Delivery is not possible because the chat partner has logged out of the OpenScape UCApplication system and/or IM service.

5.22 How to Send a Chat attachment

To send a chat attachment to an other OpenScape UC Application user from your contacts' list, proceed as follows:

Step by Step

1) Select the desired chat contact in your Fusion for Office contact list and open a new chat conversation, or open an existing one from the **Chat Board**.
2) Click on the button in the bottom entry area of the chat window..

   A new window opens from where you can select the file you want to attach.
3) Double click on the file that you wish to attach or select it and click **Open**.
4) Press the send button to send your attachment once the file has been uploaded on your chat thread.

Please note that there are certain limitations regarding chat attachments. For more information refer to chapter Chat attachments.

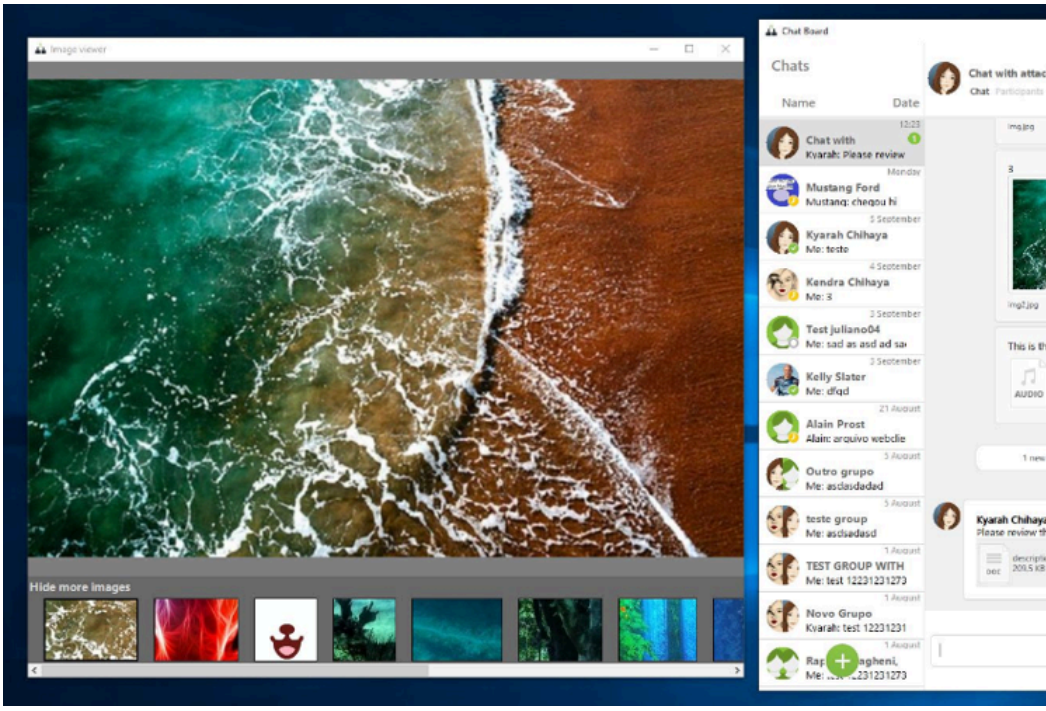
5.23 How to Open the Chat Images Viewer

When attaching an image to a chat conversation. all chat participants are able to see a preview of the image. To open n attached image to Fusion's native image viewer follow the steps below:

Step by Step

1) Double-click on the image in your conversation window to enlarge it in the internal viewer. In the chat internal enlarged image view, screen. :

   Other images already downloaded for this conversation are also displayed in the bottom part of the image viewer.
2) Navigate through the image files of this chat conversation by clicking on a certain image in the image view or by using your keyboard.



5.24 How to Enable Tell-Me-When via the OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes Contact List

To configure the "Tell-Me-When" feature for one of your OpenScape UCApplication contacts from the **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** contact list proceed as follows:

Step by Step

1) Click in the **OpenScape UC Application Features** function group of the **OpenScape Fusion** tab on the **Contacts** button.

> **NOTICE:**
>
> Alternatively you can open the Contacts also from Outlook Plugin or from Systray -> Settings -> OpenScape Views -> Contacts.

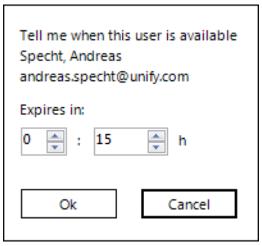
> **NOTICE:**
>
> Alternatively you can open the Contacts also from Notes Plugin or from Systray -> Settings -> OpenScape Views -> Contacts.

The **Contacts** window opens.

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

3) Click on and select **Set Tell me When options**

The following dialog opens.



4) Select the the Notification settings

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

6) Click on **OK**.

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

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

5.25 How to Enable Tell-Me-When in an open email

To configure the "Tell-Me-When" feature for a OpenScape UCApplication user from an email proceed as follows:

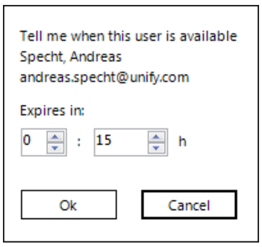
Step by Step

1) Open the related E-mail

2) Select the **Tell-Me-When** option.

from reading pane: click on the Tell Me When icon .

from Outlook Contact card: From there you can open drop down menu and select the Tell Me When.



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

4) Click on **OK**.

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

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

5.26 How to Disable Tell-Me-When

To disable the Tell-Me-When feature for an OpenScape UCApplication contact proceed as follows:

There are several ways to disable Tell me When

Step by Step

1) Click in the **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** main toolbar on the **Favorites.**

> **NOTICE:**
>
> Alternatively you can use the OpenScape Views and select contacts.

The **Contacts** window opens.

2) Select the contact for whom Tell-Me-When is active.

3) Click on .

4) Select the **Tell-Me-When** option.

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

Another way would be to open the contact in the mail

In the ribbon make a right click on the Tell-Me-When icon which is green (in order to indicate active Tell-Me-When)

You receive a message that you won’t be notified when the user is available

Click on O.K.

5.27 How to Configure a new Device

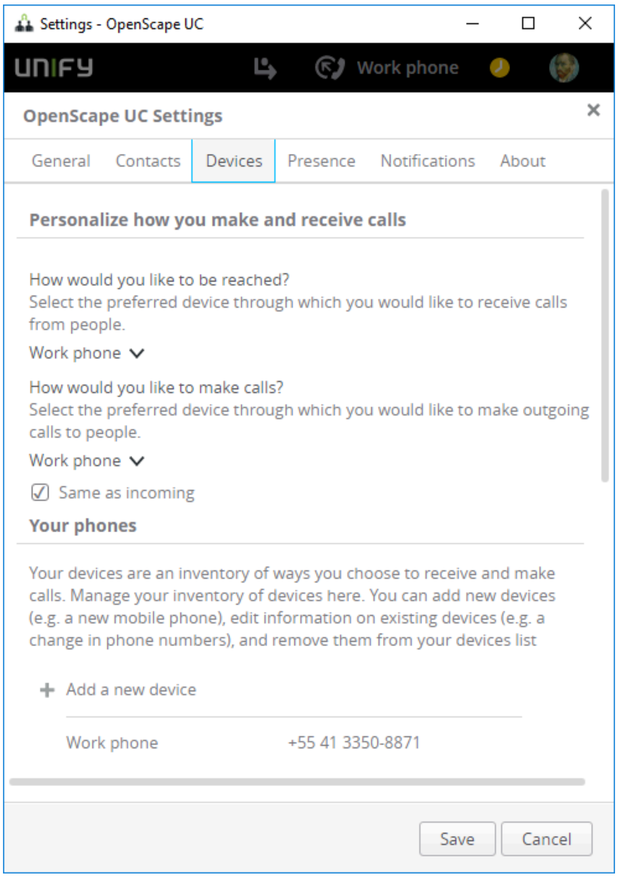
To configure a new preferred device proceed as follows:

Step by Step

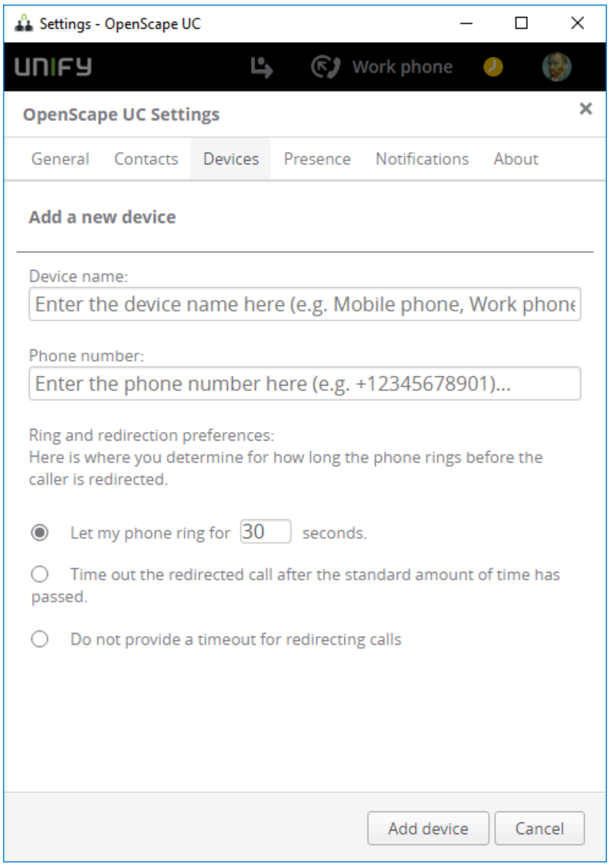
1) In the **OpenScape View** click on **Settings**

You can use the **Fusion Icon > Settings > OpenScape UC Settings**.

2) Select the **Devices** tab



3) Click on the Add a new Device



4) Enter all the relevant data (Device Name, Phone number, ringing settings etc.)

5) Click on Add Device

The device has been added and the screen from step 2 is displayed.

5.28 How to Configure a new Named Device List

A named device list supports you in configuring various routing lists for call forwardings.

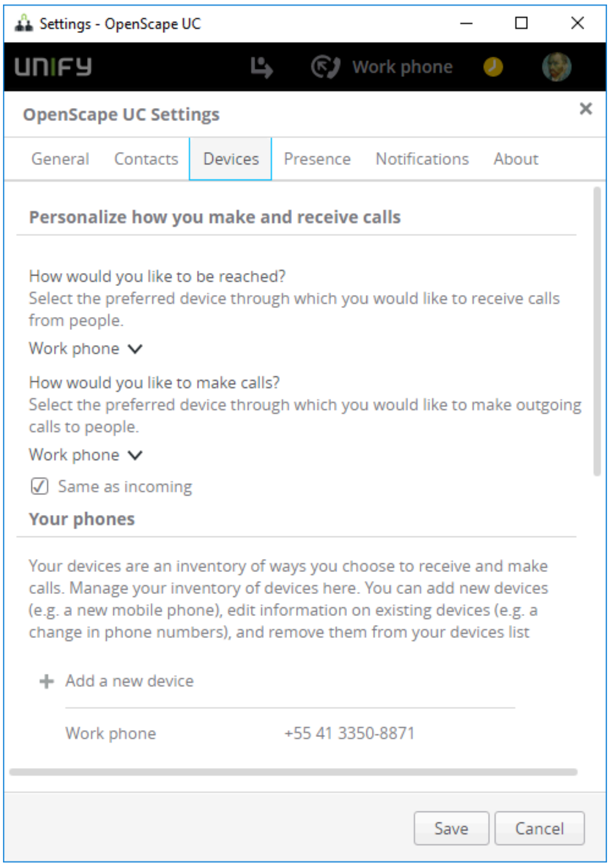
To create a new named device list proceed as follows:

Step by Step

1) In the Extended View click on Settings

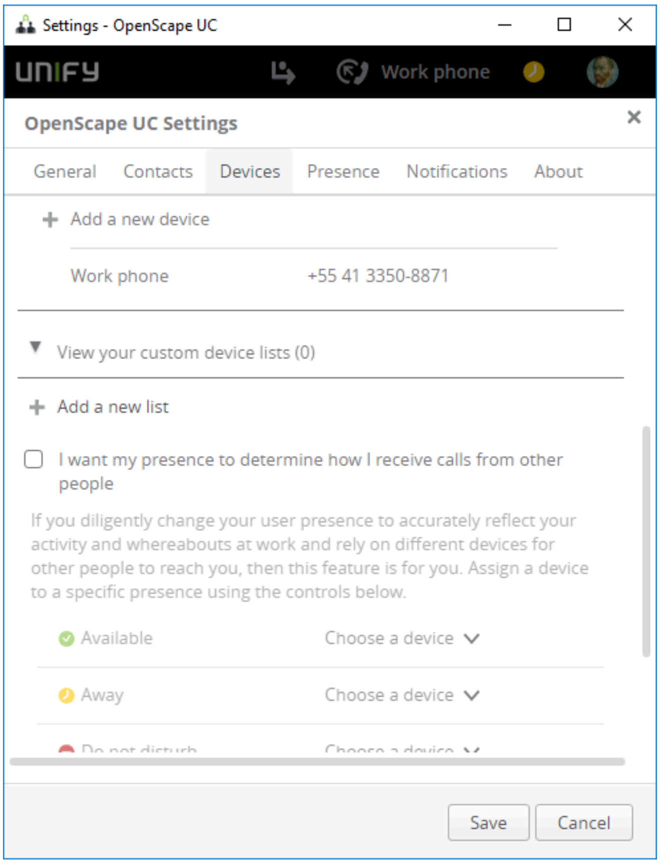
You can use the Fusion Icon > Settings > OpenScape UC Settings.

2) Select the Devices tab

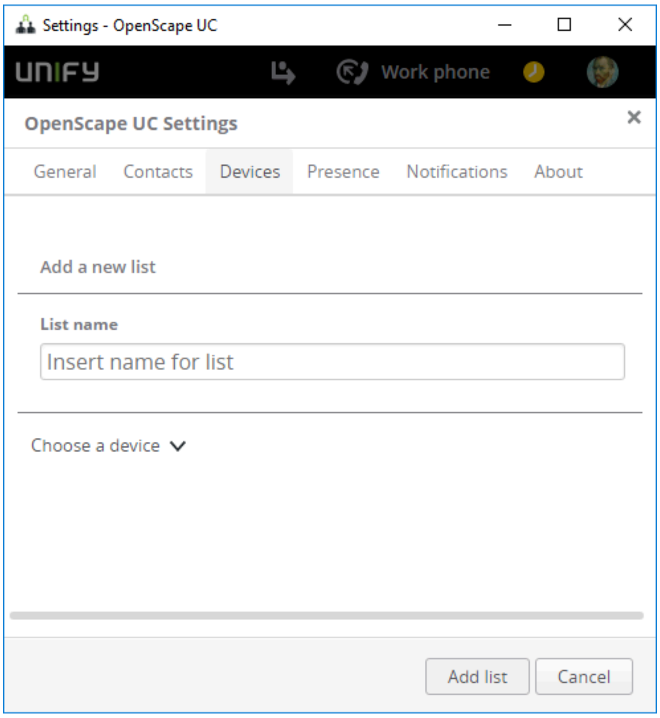


3) Scroll down until you see View your custom device lists

4) If you do not see the Add a new list, then click on View your custom device lists. The screen should be look like this:



5) Click on **Add a new list**.



6) Enter a name for the device list

7) Then choose your device.

NOTICE:

Here you see your added devices

8) Repeat steps 6 and 7 until you have added all your devices.

9) Click on **Add list**

This dialog closes and then you see the previous screen (from step 4).

10) Click on **Save**

Your settings are saved. You can select the new named device list via the combo box for your preferred devices in the **OpenScape Fusion** function group of the **Start** tab or in the **Presence Self Management** function group of the **OpenScape Fusion** tab.

The dialog closes. Your entries are saved. You can now select the new named device list via the selection list for your preferred devices in the **OpenScape Fusion for IBM Notes main toolbar**.

5.29 How to Set your currently Preferred Device

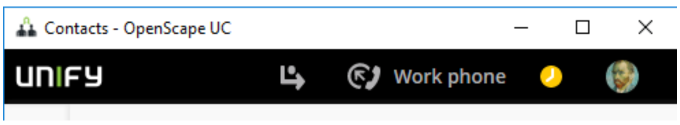
In case you are a member of a Multi-Line Hunt Group (MLHG) and you want to set a named device list or your voice mail box as preferred device for incoming / outgoing calls the following must be ensured:

- The OpenScape Voice services Computer Supported Telephone Adapter (CSTA) and One Number Service (ONS) must be configured for the subscriber of the Multi-Line Hunt Group and also for the pilot of the Multi-Line Hunt Group. For more details please ask your administrator.

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

Step by Step

1) At the top of the OpenScape View you can set your preferred device.



NOTICE:

Alternativelly you can set the device also via the Fusion systray menu or in Outlook via the Fusion Plug-in.

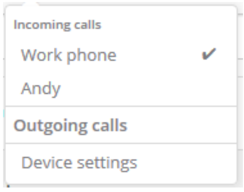
NOTICE:

Alternatively you can use OpenScape Fusion for IBM Notes main tool bar or a click on the Fusion icon in the task bar.

In the example here the preferred device is the Work phone.

2) Click on the preferred device (here Work phone).

A drop down menu opens.



3) Select your device

The setting becomes immediately effective. The device or named device list currently used is indicated on the device selection button in the **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** main toolbar.

5.30 How to Initiate a Video Call (SIP only)

In the following we describe how to set up a video call step-by-step.

Prerequisites

The **OpenScape Fusion for OfficeOpenScape Fusion for IBM Notes** is connected to an OpenScape Voice V10 or later.

You and your conversational partner have an installed and operable video camera (webcam).

In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.

The settings of the **Default video configuration** apply for the video scheme selected in the dialog **Settings** > **Advanced** > **SIP Service Provider** > **Video schemes**: the **Preview** is enabled (**On**) and **Mirrored**, the Layout is **In call**.

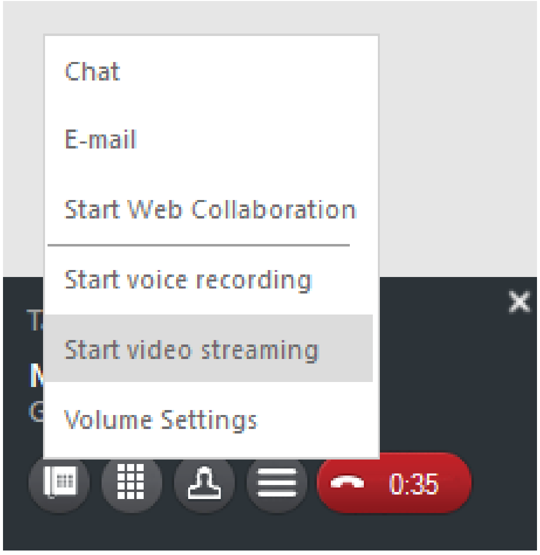
Proceed as follows to initiate a video call:

Step by Step

1) Initiate a call to the contact you want to call.

Call Control opens.

2) Start video streaming from the menu option of the Call Control:



The Video window opens automatically and shows your own image and the image of your conversational partner if he is also streaming his video.

5.31 How to Play Voicemails

Execute the following steps to play your voicemails:

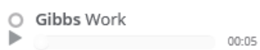
Step by Step

1) In extended view click on the voice mail icon .

You can use Fusion Icon > OpenScape Views > Voice Mail.

2) Put on your headset or enable speaker. It depends on what you have configured.

3) Click on the playback icon ▶ .



The voicemail playback starts immediately.

5.32 How to Initiate an Ad-hoc Conference via the MicrosoftOutlook Mailbox

Prerequisites

At least one phone number has been configured for the MicrosoftOutlook contacts to take part in the Ad-hoc conference.

To initiate an Ad-hoc conference with several e-mail originators via your MicrosoftOutlook mailbox proceed as follows:

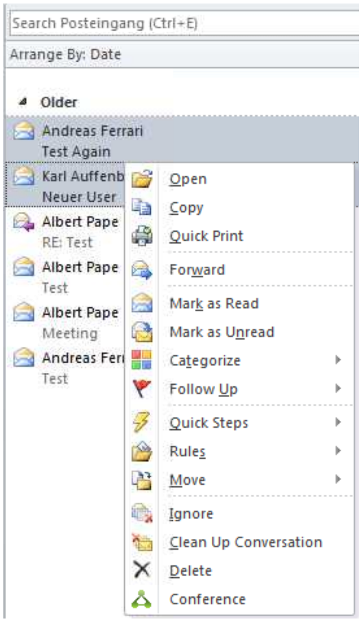
Step by Step

1) Switch to the mailbox view in your MicrosoftOutlook client.

2) Keep the **[Ctrl]** button pressed and select the e-mails the originators of which you wish to have as conference participants.

3) Click on one of the selected e-mails with the right mouse button.

The following context menu opens:

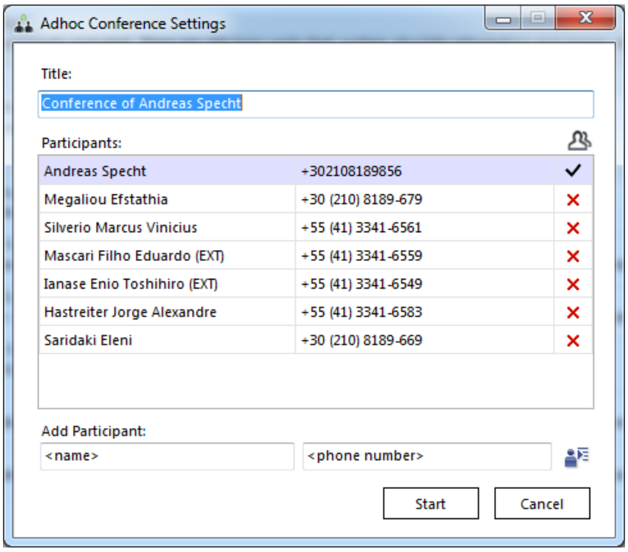


4) Select the **Conference** menu option.

NOTICE:

The **Conference** menu option is unavailable, if the selected conference participants/e-mail originators have signed the e-mails digitally.

The e-mail addresses of the originators are resolved by the Microsoft Exchange server. The **Conferences** dialog opens.



5) Assign a **Name** to the conference.

6) You can add persons to the list.

7) With the x on the right side you can remove participants.

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

The **Conferences** settings dialog closes. The performed conference settings apply for the current conference but cannot be saved.

The Ad-hoc conference starts immediately. The **Call Control** window opens.

5.33 How to Initiate Screen Sharing

Before participants can dial into a scheduled or persistent conference, it must be started. Moderated conferences can only be started by a moderator.

Click on  in the signaling bar. Depending on how your system is deployed, the functionality can be one of the two modes below:

a) The file of the OpenScape Web Collaboration participant module will start downloading in your web browser. Open this file once finished downloading to start the web conference.

b) The options to select the screen you want to share will be automatically displayed without the need to download any file.

If another conference participant starts screen sharing, a screen sharing window is automatically open for you to see the contents.

5.34 How to Enable WebRTC Screen Sharing in a call with an external contact

This feature allows you to share screen information with an external contact by sending an URL for this purpose.

Prerequisites

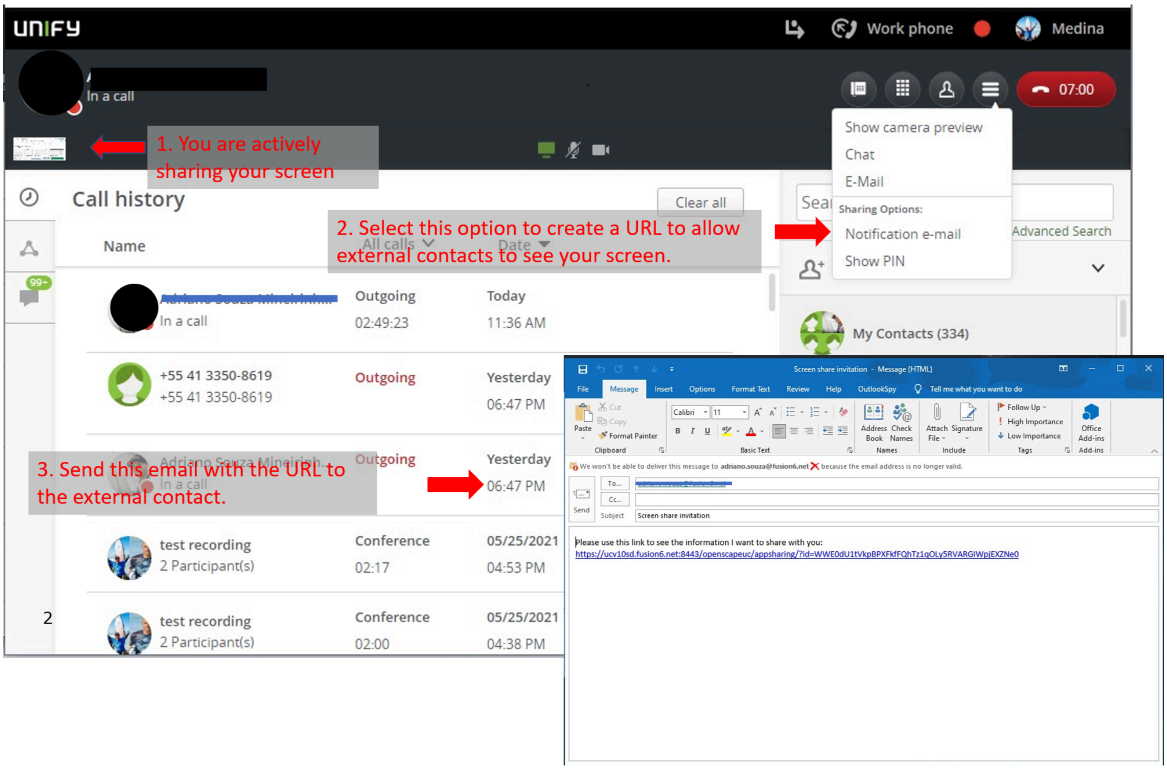
You are sharing your screen.

Step by Step

1)

During screen sharing click on the button and under **Sharing Options** click on **Notification e-mail**.

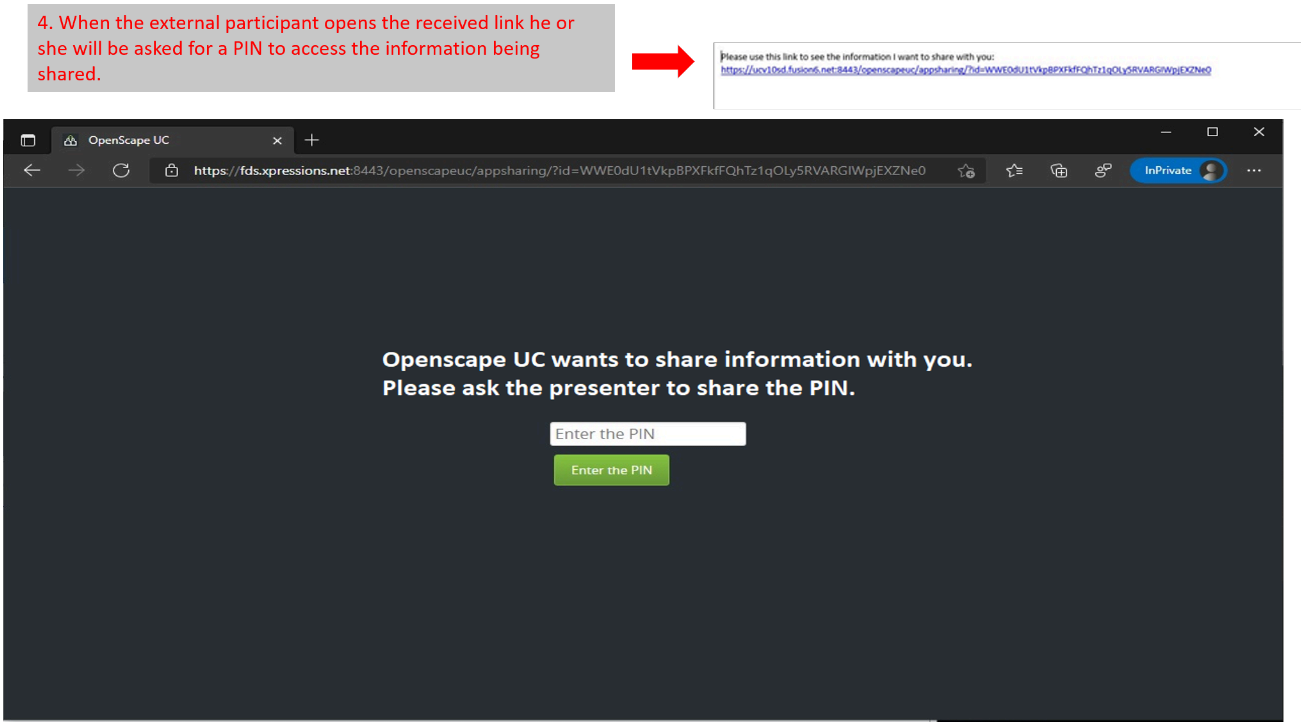
A Screen share invitation email with the URL is generated.



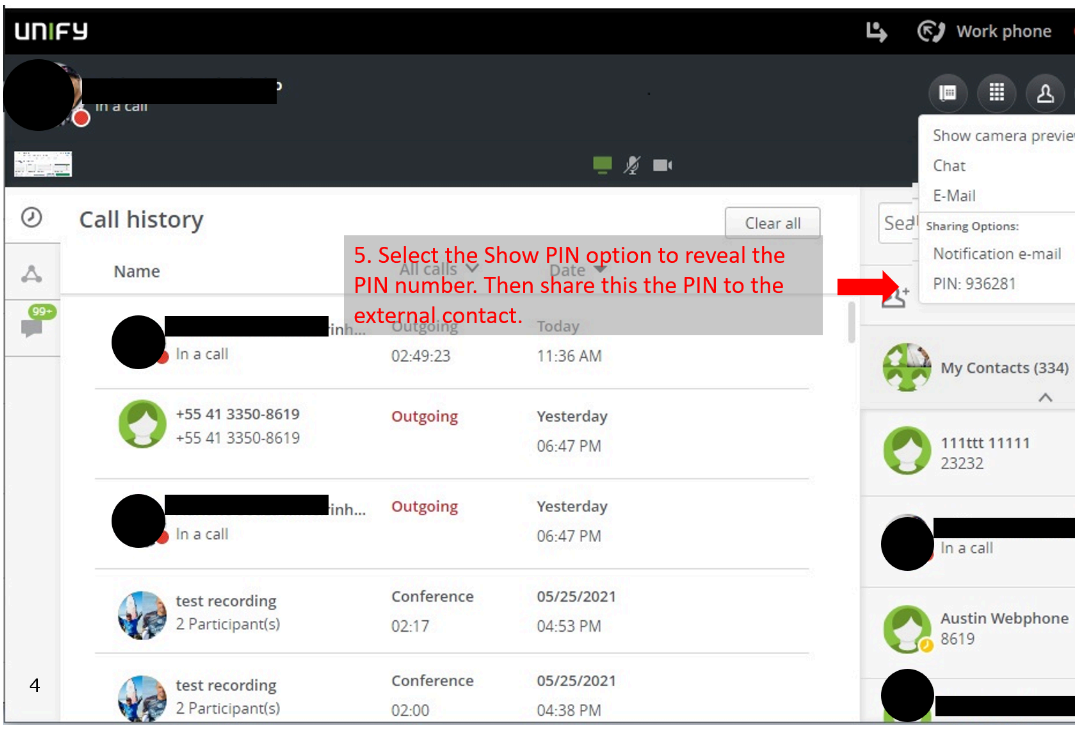
2) Send the e-mail with the URL link to the external call participant.

3) The external participant receives the e-mail and has to open the attached URL address.

Upon receiving and opening the link, the external participant will be requested to enter a PIN as show in the figure below:



4) Click on the **Show PIN** option under Sharing Options as show in the figure below to reveal the 6-digit PIN:



5) Share tthe 6-digit PIN with your external contact to grant them access to your shared screen content.

6) Once the external contact enters this PIN to the URL page (Step 3) then they are able to view your shared screen.

5.35 How to Use Mouse Pointer during WebRTC Screen Sharing

In case your UC system is deployed with WebRTC Screen Sharing, you can also use the mouse pointer functionality. The screen sharing presenter must be using the UC Desktop App or Fusion for Office Clients to enable the mouse pointer functionality.

When you select to share your entire screen you have the "Enable Pointer" check box option available to you. You can disable or keep it enabled as it is by default. When the mouse pointer option is enabled, all conference participants, on any client, can click or perform a long press on the screen to draw attention to a specific point of your shared screen. Clicks and long presses are shown to all other conference participants alongside their names, as displayed in the figure below:

5.36 How to Request Desktop Remote Control during WebRTC Screen Sharing

As a conference call participant, during a screen sharing session, you can request remote control from the presenter.

Prerequisites

A conference participant is sharing entire screen.

The conference participant sharing the screen must be using the UC Desktop Application or Fusion for Office.

Step by Step

1) Click on the  button to send a request message to the screen sharing presenter.

2) The current presenter receives a prompt with a message about your request for remote control and can click to **Allow** or **Decline**.

3) If you are granted with remote control, you can now control the shared scree. However, the presenter can stop the remote control process at anytime by clicking on **Stop**.

5.37 Initiating Screen Sharing

During an active call with another user, you have the option to share your screen. You can also share the system's audio for an improved sharing experience.

To start the Screen Sharing session, click on the button. You will be prompted to select which screen to share in order to start the session. Once selected, the other party will start seeing your screen.

If you wish to share your system's audio along with your screen, enable the **Share audio** option when prompted to select which screen to share. This option is only displayed when you select to share the **Entire Screen** or the browser's tab.

The other call party will see your screen sharing in the designated Call Control section. You can also have access to the Mouse Pointer, Comment Pointer and Remote Desktop Control functionalities. This screen sharing functionality is only available if your system is deployed to support it.

5.38 How to open Outlook Contact Card

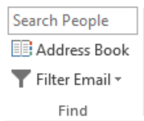
To open an Outlook Contact Card proceed as follows:

Step by Step

1) Hover the mouse over an email contact.

NOTICE:

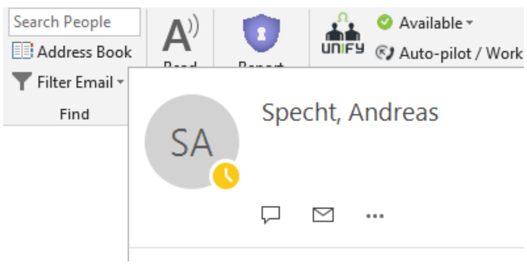
Alternatively you can search for a a contact through Outlook’s search bar.



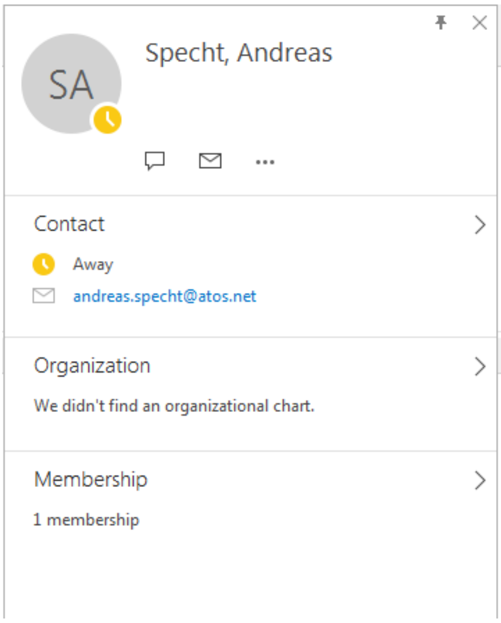
Enter under **Search People** the person you are looking for and select from the list.

---

2) A pop-up window appears like the figure below.



3) Click on the arrow pointing down to expand the Contact Card and reveal more details about this contact.



5.39 How to read Pane Fusion Options

In order to read Pane Fusion Options proceed as follows:

Step by Step

1) click in the email

2) on email preview you can see the buttons for

icon	description
	make a call
	start a conference
	start Instant messaging (chat)
	start a web collaboration
	activate TMW (Tell Me When)

NOTICE:

The button for Instant Meeting (Chat) maybe missing or does not work. It depends on what has been configured during installation. For more details please ask your administrator

5.40 How to Initiate a Scheduled Conference

Prerequisites

All conference participants have been informed about the service access number, the conference start time and the defaulted conference PIN by e-mail or phone.

How to perform a scheduled conference:

Step by Step

1) Dial into the conference via the service access number for scheduled conferences at the agreed time.

2) Enter the agreed conference PIN via phone keypad or computer keyboard.

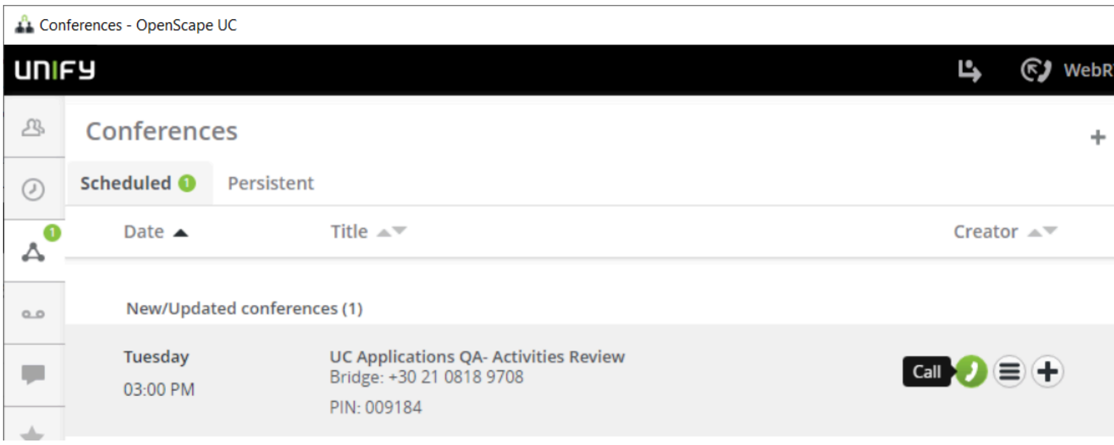
> **NOTICE:**
>
> In case of a scheduled conference you can enter the PIN via computer keyboard or phone keypad even if the video window is in focus.

3) Conclude the PIN entry with the # key.

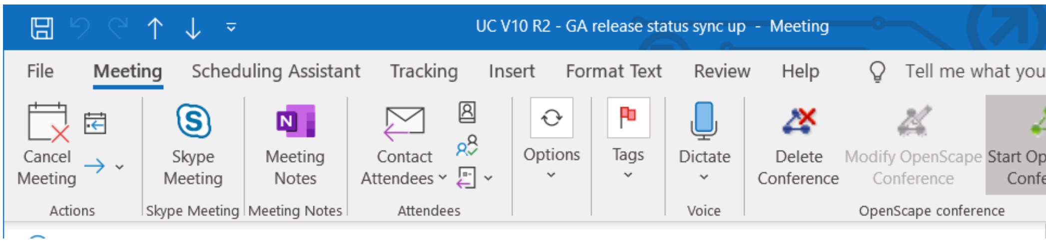
You are directly connected to the scheduled conference. If you have an operable video camera as well as a configured video scheme in the **SIP Service Provider** settings, the **Video** window opens automatically.

Alternatively, the Scheduled Conferences can also be started by:

1) Clicking on the phone button of the corresponding Conference in the OpenScape View **Conferences** List.



2) Clicking on **Start OpenScape Conference** button in the Conference invitation in Outlook.



5.41 How to use "connect to" from Fusion Main Ribbon

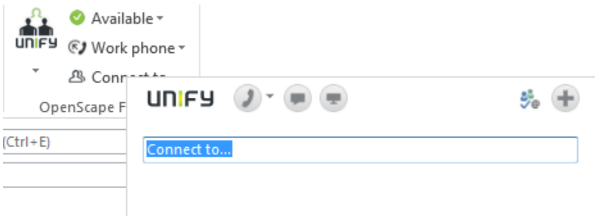
In order use the Fusion Main ribbon follow the following steps

Step by Step

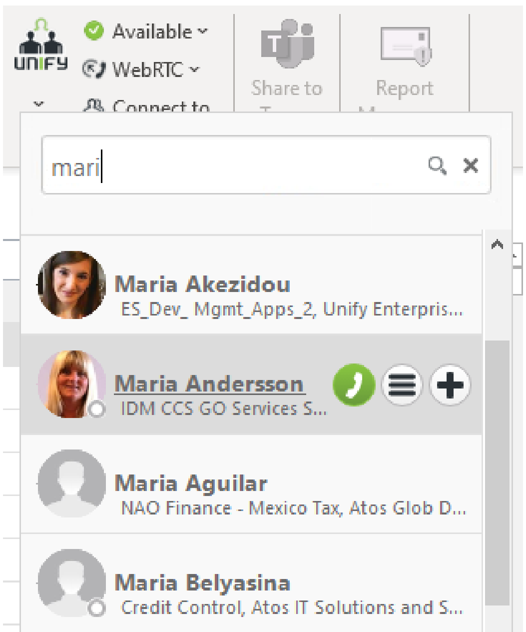
1) Press "Connect To Button" in Fusion Main Ribbon Features

2) Enter a number or parts of a contact name

3) Press Enter



Connect To by Search or Dial



5.42 How to Record a Web and Audio Conference simultaneously

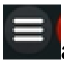
An active conference is displayed by a call control bar. A web collaboration session has been initiated.

Prerequisites

You are connected to a conference.

You must be a moderator of the conference to record the conference session (audio and video if available + the web collaboration session).

Step by Step

1) Click on  and select **Record Conference** to start recording.

The REC box appears on top of the side bar. The conference and web collaboration session is being recorded 

.

2) You can also pause and resume the recording from the same menu or directly clicking on the recording indication buttons in the Call Control 

or 

.

3) Once the conference has ended, all the participants of an open conference will receive an e-mail with a link to download the conference recording file. In a moderated conference, only the moderators will receive the e-mail.

NOTICE:

You must add the back-end FQDN to the hosts file of your computer in order to be able to download the recording file after clicking the E-mail recording URL.

NOTICE:

Up to four video sending parties should be shown directly in the active speaker recording layout (which is 1 large content + 4 small tiles on the right).

With more than 5 sending parties the active speaker tile should be on top right and the remaining is filled in the order of entering /starting video sending.

For filling the small tiles below the active speaker the moderators should have preference over users so that there is a sort of small discussion panel of moderators which is always visible in the video.

- Grace periods (greyed out tile) in case of temporary disconnect

- Grace period (greyed out tile) in case of a person is no longer sending a video (if applicable)

- Showing one person in both his / her tile and the active speaker tile to avoid rearrangements

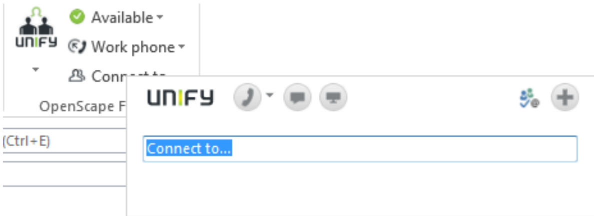
---

5.43 How to Dial a Phone Number (via Connect to)

To set up a connection to any phone number proceed as follows:

Step by Step

1) Click in the **OpenScape Fusion for Office** Outlook Plugin in the **Connect To**field.



2) Enter the desired phone number in the **<Connect to>** field.

3) Then click on  or press ENTER.

The call is initiated and represented in the **Call Control** window.

NOTICE:

If you use the ONS number assigned to you in the CMP by your system administrator as preferred device and the *auto-answer* feature is active in the PBX for this number, the desired conversational partner is directly connected. In contrast, if you have set for example your mobile phone as preferred device, a connection from the PBX to your preferred device is set up first. You need to accept this call before the connection to the conversational partner can be established.

5.44 How to Dial a Phone Number (via Contacts)

To set up a connection to any phone number proceed as follows:

Step by Step

1) open the contacts (e.g. via Systray -> Settings -> OpenScape Views -> Contacts)

2) In the field **Search or Dial** enter the number and press enter.

5.45 How to Dial a Phone Number (via Favorites)

To set up a connection to any phone number proceed as follows:

Step by Step

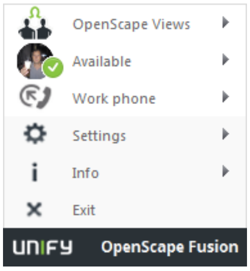
1) open the Favorites (e.g. **Systray -> Settings -> OpenScape Views -> Favorites** or via a double click on the Fusion icon in the taskbar)
2) **Search or Dial** field opens automatically when you start typing the number. Alternatively you can open search field from the Favorites menu. Press enter to dial.

5.46 How to open menu from taskbar

Step by Step

1) click in the taskbar on the Fusion icon .

   The following menu opens:



2) Select the menu item you want to open

5.47 How to Accept an incoming call

Prerequisites

You are beeing called

Step by Step

1) In the bottom right corner the symbols appear.
2) Click on symbol .

   You are now in call. Also Call Control opens (if not already opened).

5.48 How to Reject an incoming call

Prerequisites

You are beeing called

Step by Step

1) in the bottom right corner the symbols appear.
2) Click on .

   This call has been rejected.

5.49 How to Transfer an incoming call

Prerequisites

You are being called

Step by Step

1) On the right bottom you see the following symbols .
2) Click on symbol .
3) Select Call Transfer.

5.50 How to switch Call Control from Standalone mode to Detailed OpenScape View

Call control provides several information / actions

Prerequisites

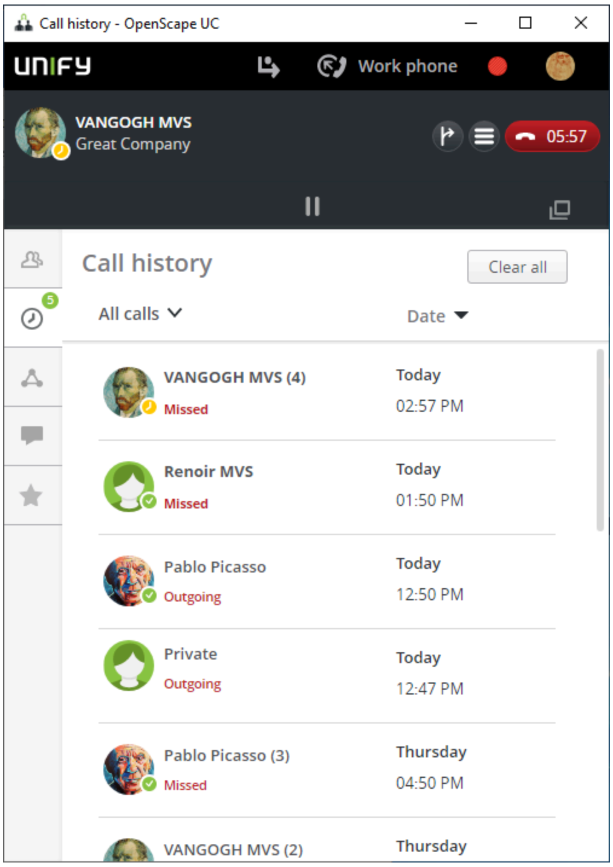
You are in a call.

Step by Step

1) Standalone Call Control has been opened.

2) Click on the link **More**.

You are now in extended mode.



5.51 How to switch from OpenScape View to only Call Control mode

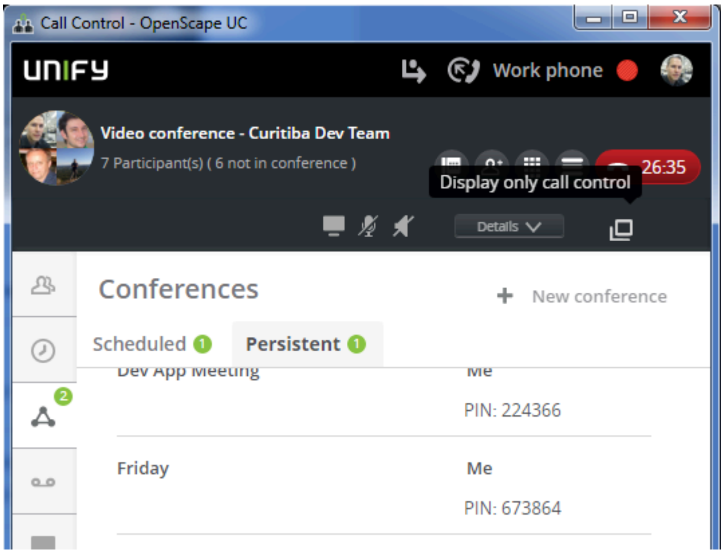
The switch between OpenScape View and Call Control provides several additional information / actions

Prerequisites

You are in OpenScape View mode during a call.

Step by Step

1) In the right top corner you see the symbol .



2) Click on the symbol shown above.

You are now in only OpenScape View mode.

5.52 How to Transfer a running call

Prerequisites

You are in a call.

Call Control is open

Step by Step

1) In call control click on symbol .

2) Select from the list: transfer to another person.

The call has been transferred and call control closes.

NOTICE:

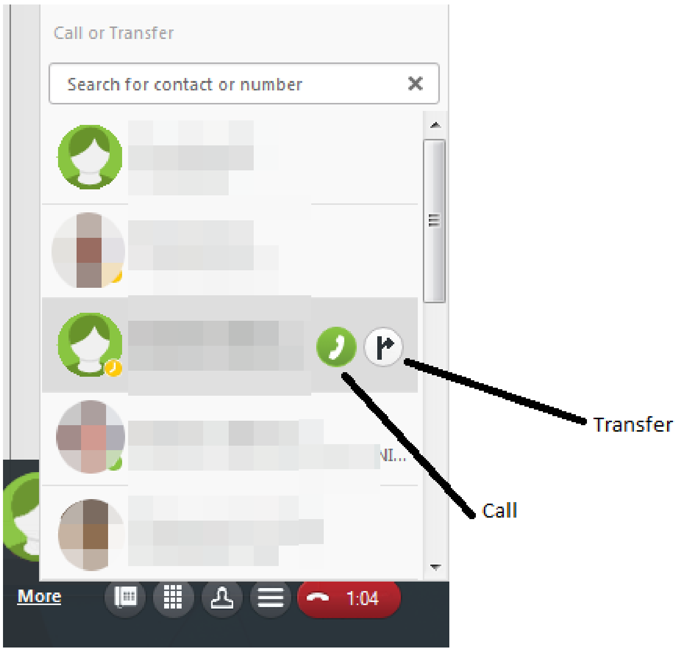
In the list of Call Transfer you can perform several actions provided in the list, e.g. transfer to call waiting.

Example

In the only Call Control view, the transfer call button opens your contacts list. Next to each contact you can perform the two following actions:

-  Call that specific contact

- Transfer the call to that specific contact



5.53 How to use communication options in a running call

With communication options you have some more choices.

Prerequisites

You are in a call.

call control is open

Step by Step

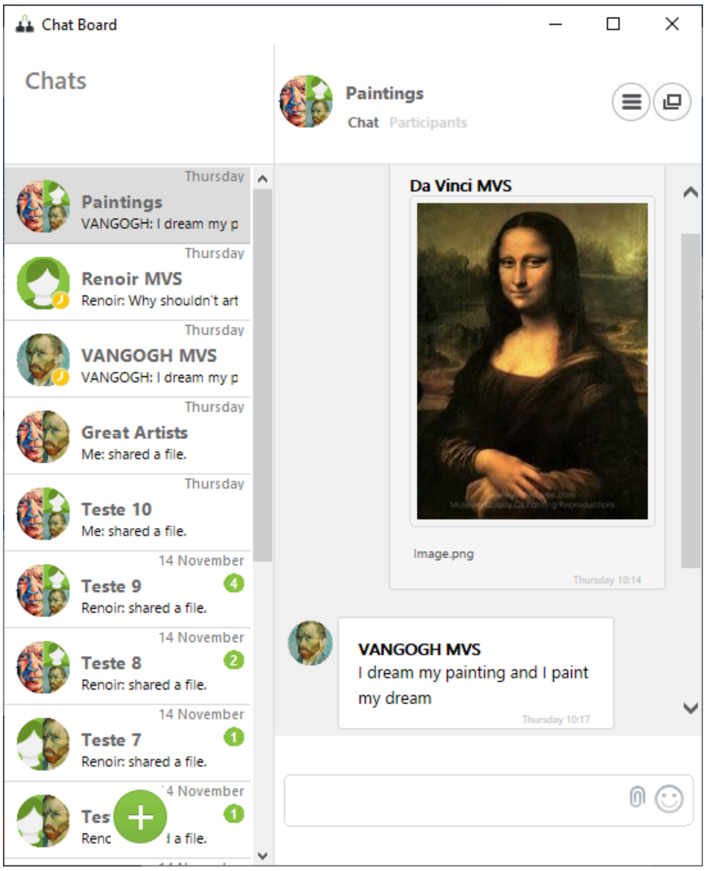
1) In call control click on .

2) Select the option (chat, E-Mail, Web Collaboration) you would like in the scroll down menu.

5.54 How to use Chat

Chat is used to communicate synchronous and asynchronous in written form (Instant Meeting). You can be involved in several chats.

- working in a one-to-one chat or group chat

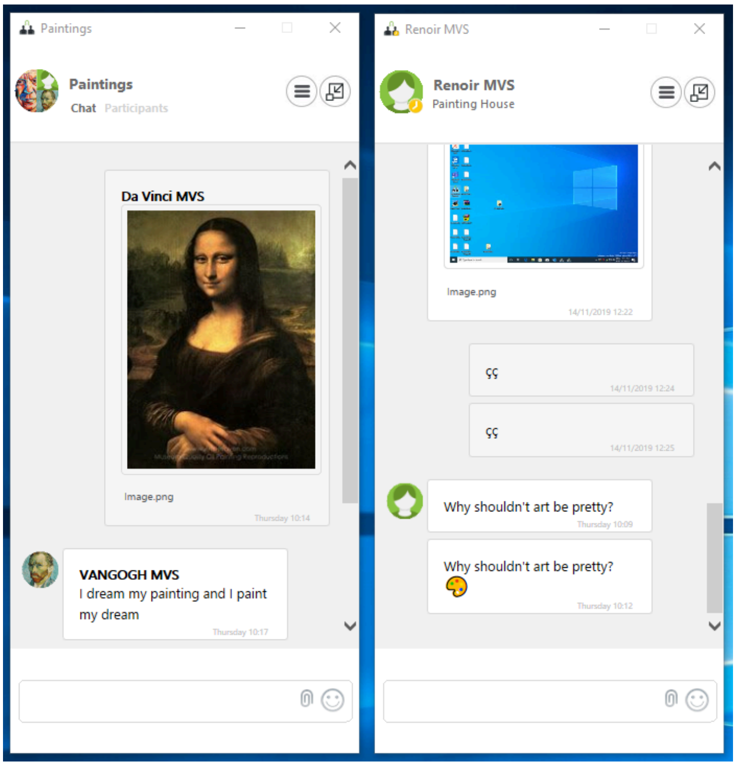


The presence status is shown inside the avatar.

On the top right with the symbol  you can see the available communication option in a menu. (You can add also a chat partner with this)

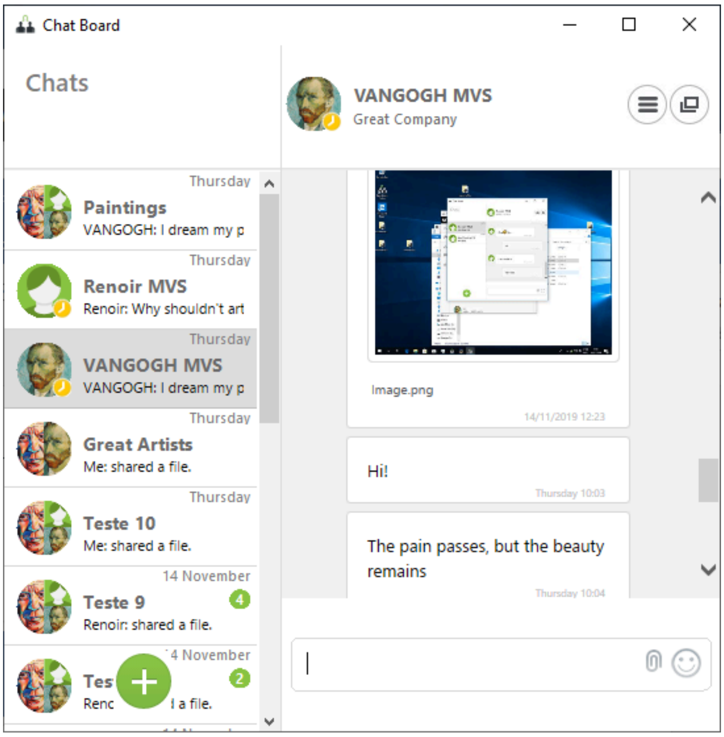
- working with more than one chat you can either have all the chat windows opened or you can see them in one window.

  Working in more than one window:



Here you see per chat window the same as you see for a 1-to-1 chat or group chat.

If you click on the small icon on the top right  you can switch to one window view (combined view).



Here you see everything in one window.

When you click on the small icon  on the top right you can switch again to the more window view (expand).

You see also here on the top right the communication options . You can add also a chat partner.

The option **leave chat** is also offered. Then the chat is removed from the chat history.

With the symbol at bottom left  you can create a new chat.

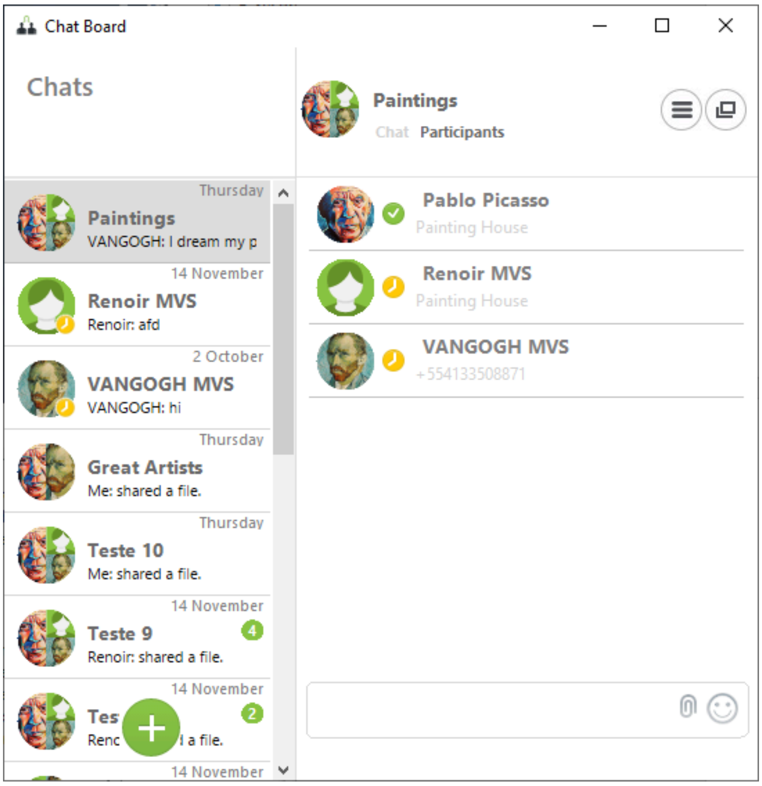
NOTICE:

For chat partners you can use names and also numbers.

NOTICE:

The presence status is displayed only for chat partners in your private contacts.

For Group Chat you can click on Participants to see the presence status of each user.



5.55 How to work with Chat History

The chat history from Fusion is seen in the combined chat view.

5.56 How to Import CSV-files

In the **extended view -> Settings -> Contacts** window you can configure various setting options for managing address data. Such options enable changing display options as well as importing contact data.

Overview

The following options are possible:

- Contact display settings
- Contact Import

Contact display settings

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

There are radio buttons where you select how contacts are displayed and sorted.

- how to see contact names

  First name, Last name

  Last name, First name

- how to sort contacts

  First name, Last name

  Last name, First name

Then click on **Save** or on **Cancel**.

Contact Import

On this section you perform settings for importing addresses.

Click on **Import** in order to import a csv-file.

NOTICE:

Normally the csv-file has been exported from Outlook, WebClient 1.0 or Comassist.

NOTICE:

Import mechanism only supports UTF-8 scheme encoding. Make sure that the CSV file is saved with UTF-8 encoding before importing.

To save a CSV file by using the UTF-8 encoding format, follow these steps:

1. Open the CSV file by using Notepad.
2. In Notepad, click the File menu, and then click Save As.
3. In the Encoding list, select UTF-8, and then click Save.

IMPORTANT:

It is not recommended to create the csv-file manually, the import may fail. Also do not modify the csv-file manually.

You are informed about the result.

5.57 How to work with the action bar (OpenScape Contacts)

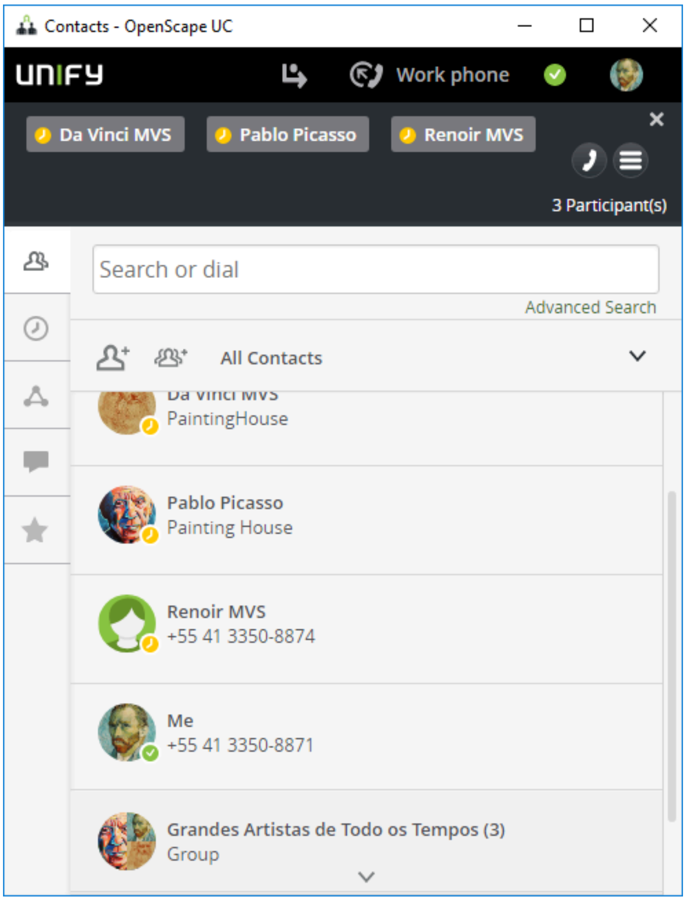
First you have to add contacts to the action bar.

You can add contacts to the action bar by using the **add to action bar** icon .

The contacts can be taken from:

- Call History
- Contacts
- Directory search

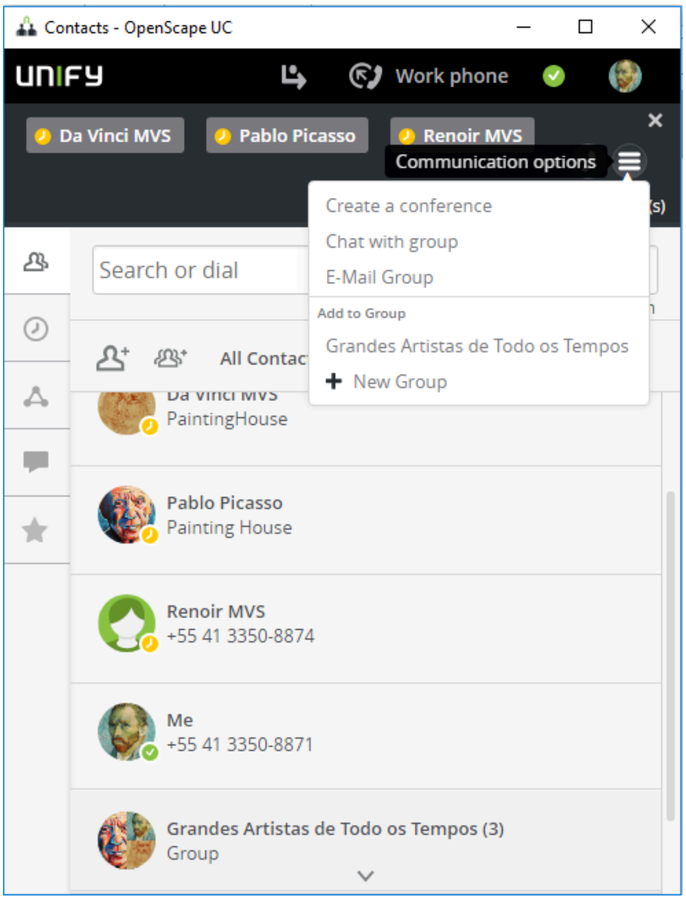
When you have added all the required contacts (e.g. you plan a multiple chat or a conference) the screen may look like this:



With the telephone symbol you can call them.

You can use also the communication options .

With this you have several options, e,g, conference, chat.



With the small "x" above the communication options you can clear the action bar.

In order to remove a single contact from the action bar, hover with the mouse over the contact to be removed and click on the big "X" (which appears) on the contact.

5.58 How to work with the action bar (Favorites)

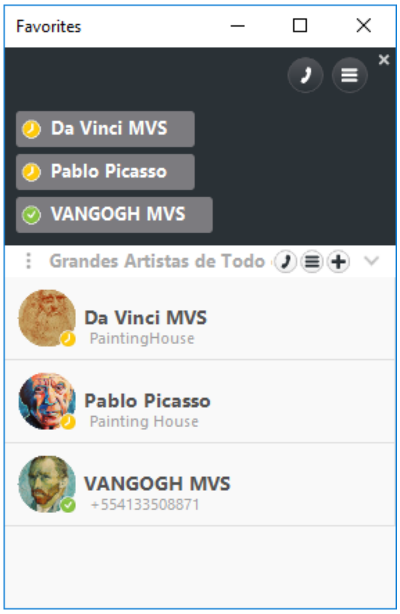
First you have to add contacts to the action bar.

You can add contacts to the action bar by using the **add to action bar** icon .

The contacts can be taken from:

- Contacts / Groups
- Directory search

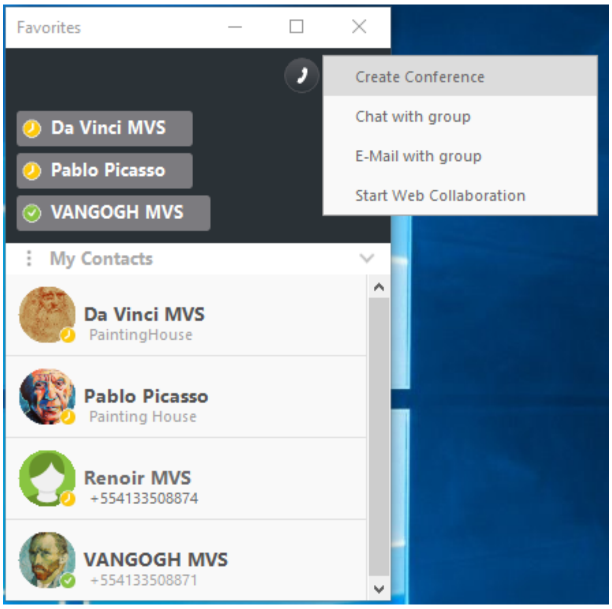
When you have added all the required contacts (e.g. you plan a multiple chat or a conference) the screen may look like this:



With the telephone symbol you can call them.

You can use also the communication options .

With this you have several options, e,g, conference, chat.

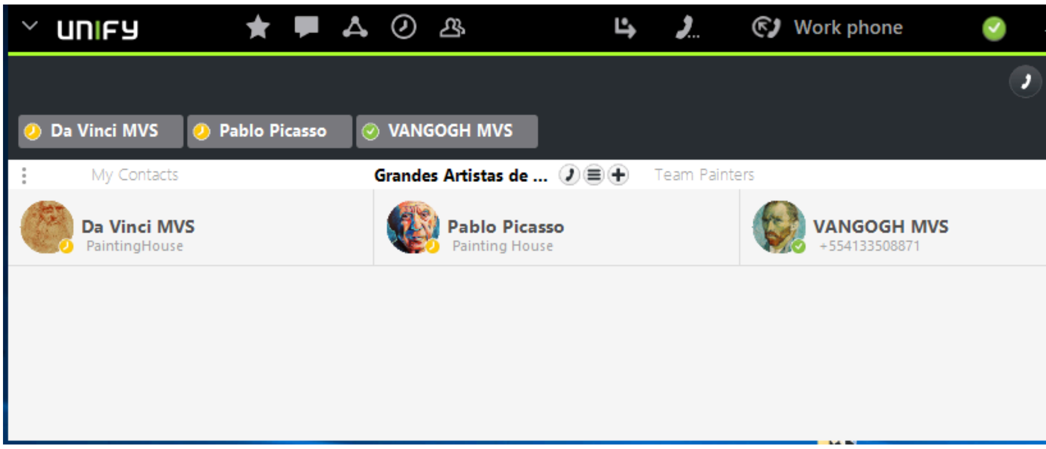


With the small "x" above the communication options you can clear the action bar.

In order to remove a single contact from the action bar, hover with the mouse over the contact to be removed and click on the big "X" (which appears) on the contact.

The action bars of **Contacts** and **Favorites** are different and independent. But the functionality is the same.

In the figure below you can see how favorite feature looks like when docked to Fusion bar.



A difference is also when in the action bar **Conference** is selected from the communication options from **Favorites** (the Ad-hoc Conference is opened while from **OpenScape Contacts** a scheduled / persistent conference is triggered.

5.59 How to Configure the displayed Number of Rows (Docked Favorites)

It is possible to choose how many rows (2, 4 or 6) of group/team contacts are displayed in your Favorites bar.

Prerequisites

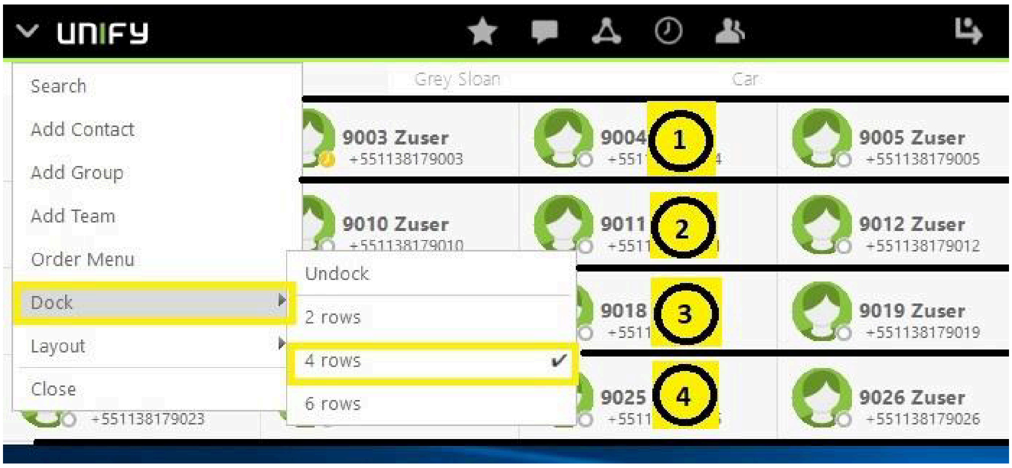
Favorites is docked to Fusion Bar.

Step by Step

1) Click on the three dots options menu on the Fusion bar (top or bottom).

2) Navigate to **Dock** in the options list.

3) Select one of the available options to define the number of displayed rows:
   - **2 rows**
   - **4 rows**
   - **6 rows**



5.60 How to Change Order Menu and Hide from Favorites

It is possible to change the order that groups/teams appears in favorites and to hide groups/teams from Favorites display

Prerequisites

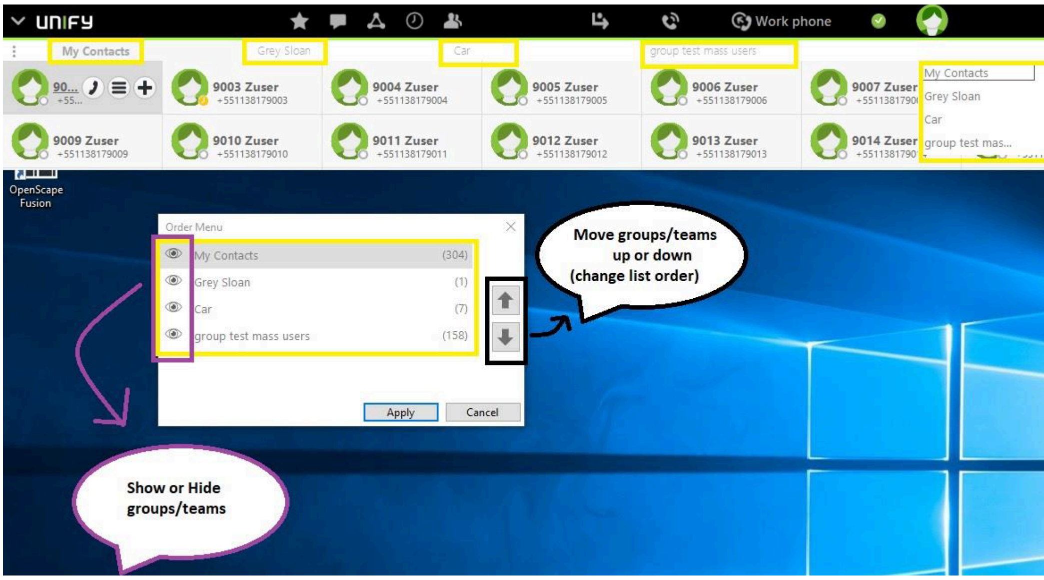
Favorites is docked to Fusion Bar.

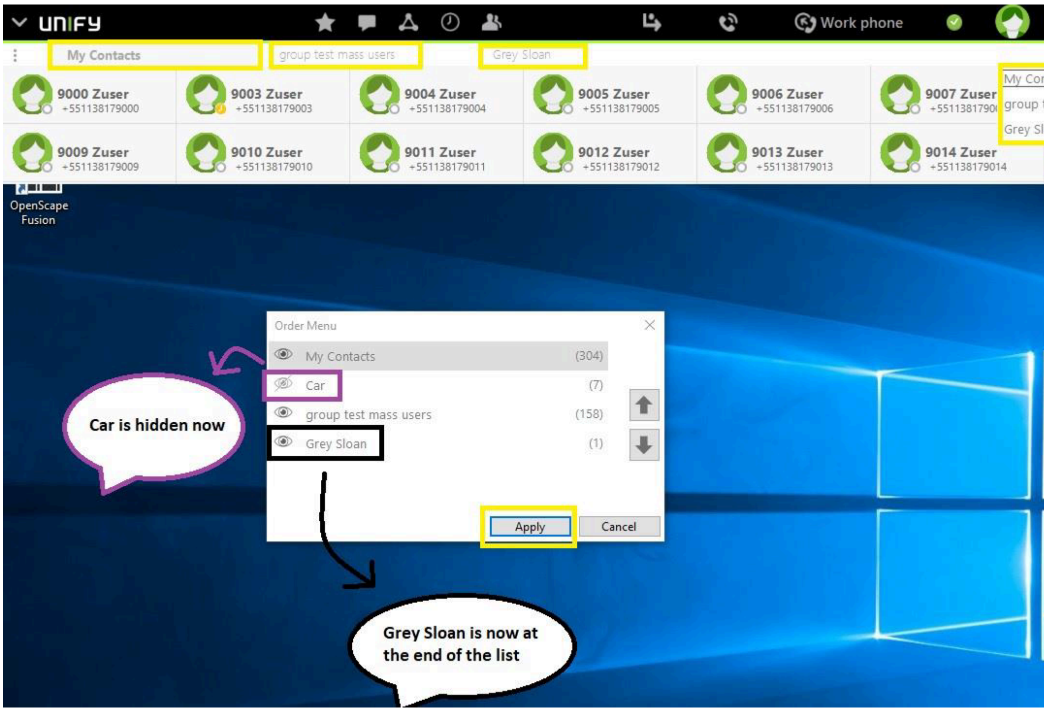
Step by Step

1) Click on the three dots options menu on the Fusion bar (top or bottom).

2) Navigate to **Order Menu** in the options list.
3) In the **Order Menu** window you can:
   - Move groups/teams up or down using the arrow buttons, to change the order of appearance:
   - Hide or display certain groups/teams by clicking the icon.
4) Click **Apply** to save changes.

Please refer to the following figures to see an example of this feature.

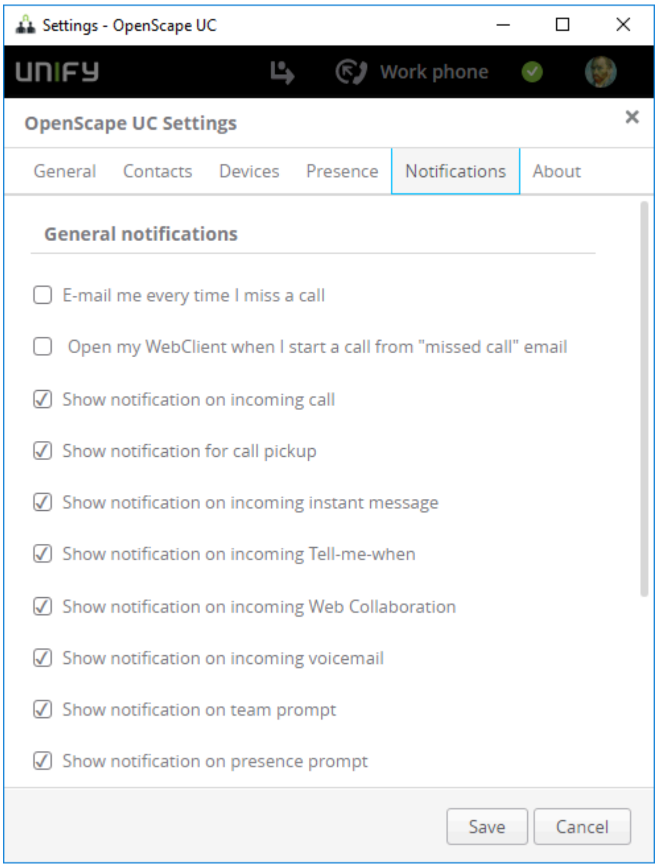


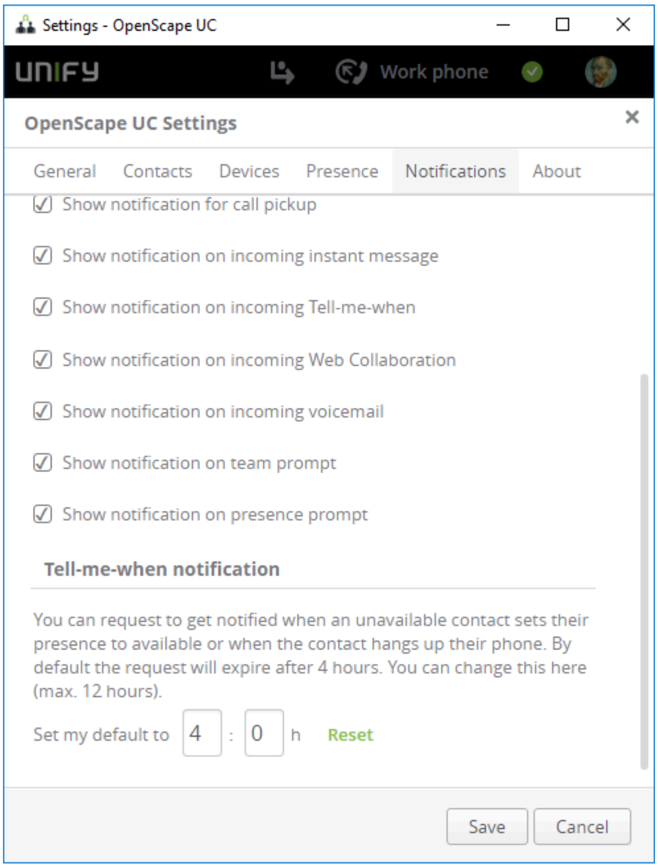


5.61 How to enable / disable desktop notifications

It is possible to enable / disable desktop notifications

Under **Fusion** > **Settings** > **OpenScape UC Settings** click the **Notifications** tab.


Settings - OpenScape UC
Work phone
OpenScape UC Settings
General
Contacts
Devices
Presence
Notifications
About
General notifications
E-mail me every time I miss a call
Open my WebClient when I start a call from "missed call" email
Show notification on incoming call
Show notification for call pickup
Show notification on incoming instant message
Show notification on incoming Tell-me-when
Show notification on incoming Web Collaboration
Show notification on incoming voicemail
Show notification on team prompt
Show notification on presence prompt
Save
Cancel


Settings - OpenScape UC
Work phone
OpenScape UC Settings
General
Contacts
Devices
Presence
Notifications
About
Show notification for call pickup
Show notification on incoming instant message
Show notification on incoming Tell-me-when
Show notification on incoming Web Collaboration
Show notification on incoming voicemail
Show notification on team prompt
Show notification on presence prompt
Tell-me-when notification
You can request to get notified when an unavailable contact sets their presence to available or when the contact hangs up their phone. By default the request will expire after 4 hours. You can change this here (max. 12 hours).
Set my default to
4
0
h
Reset
Save
Cancel

Here you can select which desktop notification will be displayed or suppressed.

In order to be notified (notification is displayed) activate the appropriate check box.

In order to suppress the desktop notification de-activate the appropriate check box.

The following desktop notifications can be enabled / disabled:

- Incoming Call
- Call Pickup
- Incoming Instant Message
- Incoming Tell-me-when
- Incoming Web Collaboration
- Incoming Voicemail
- Team prompt
- Presence prompt
- Team Call Notification

For the way to work with the Notifier toasters, refer to Desktop Notifications

6 Rules

6.1 Applying the Rules - Examples

The rules support you in the most different situations. The following three scenarios are examples and intended to familiarize you with the rule functionality.

Scenario 1: "In the office" - Redirecting calls depending on phone numbers

In this scenario, all calls should basically go through to you. If, however, persons from your unwanted-callers list call, they are to be routed to your secretary.

Scenario 2: "In meeting" - Redirecting calls depending on presence status and phone numbers

In this scenario, you take part in a company meeting. During the meeting, all calls are to be redirected automatically to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to you.

Scenario 3: "On business trip" - Redirecting calls depending on date and time

In this scenario, you are on a business trip and all calls during your absence are to be redirected to your secretary. If, however, preferred customers or a member of your family call, the call is to be routed to your cell phone. Your preferred customers may only call you from Monday to Friday 8:00 a.m. to 4:00 p.m. Your family may reach you any time.

Realization

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

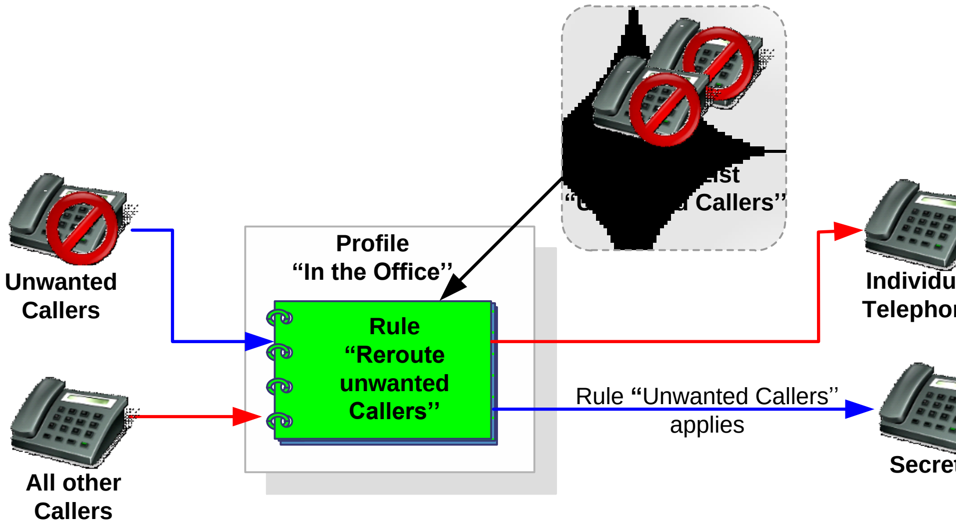
6.1.1 Scenario 1: "In the Office"

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 "Unwanted callers" list of persons. If so, the call is redirected to the secretary. If not, the call is put through.

6.1.1.1 How to Configure the "In the Office" Rule Profile

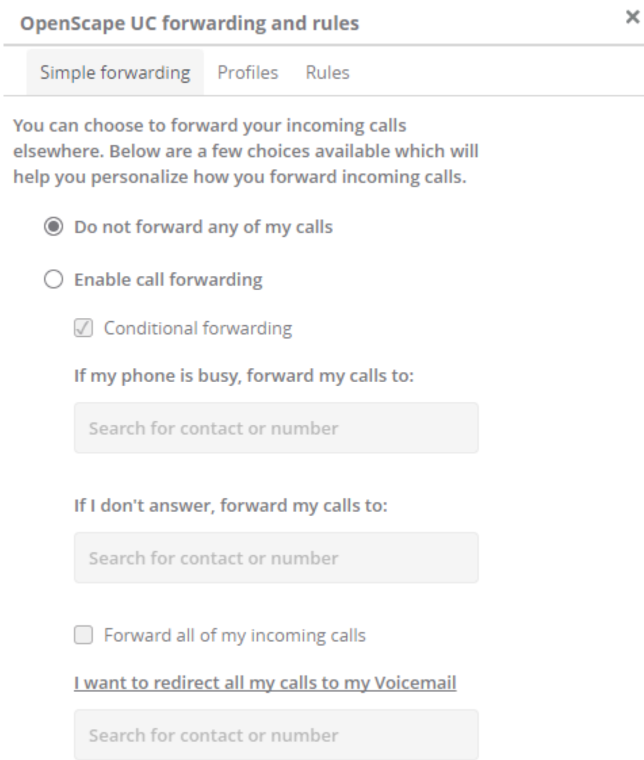
This section contains the step-by-step guide to creating the example rule profile "In the Office".

Step by Step

1) Under **Settings** open the **Forwarding and Rules**.

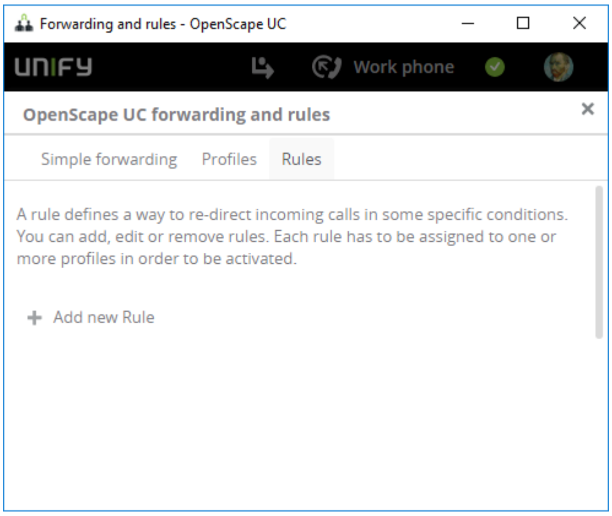
2) Select the **Forwarding and rules** option.

The **Rules** dialog opens.



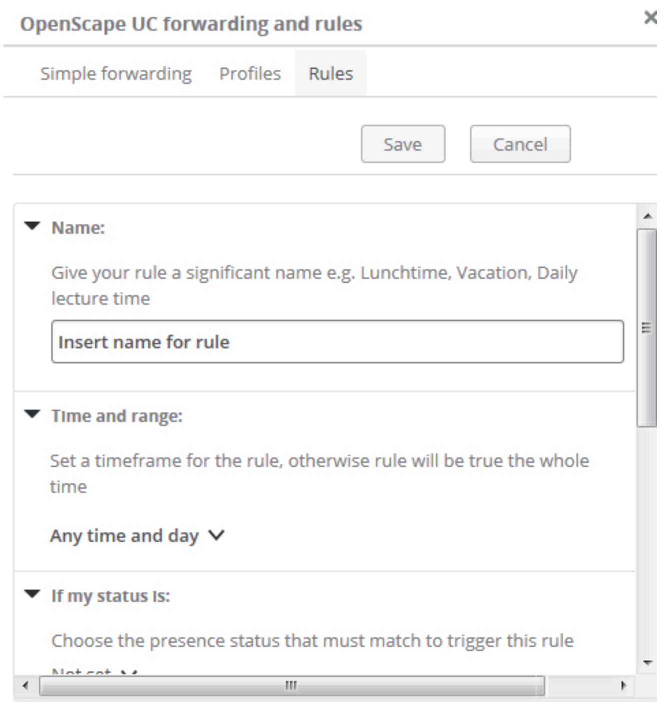
3) click on the **Rules** tab

The following window opens:



4) Click on **Add new Rule**

The following window opens.



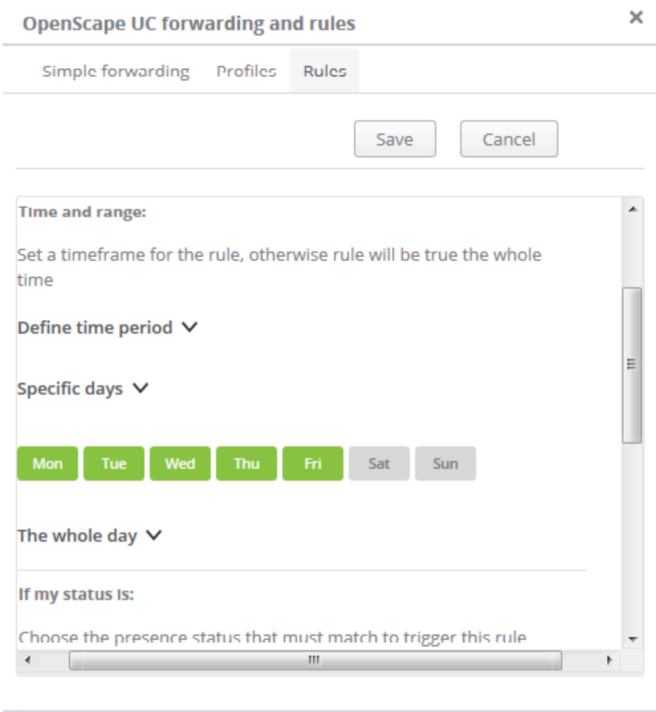
5) At Name enter a name for the rule, e.g. "Unwanted Callers"

6) under Time and range click on the arrow at **Any time and day** and select **Define time period**

Now **Choose day or date** is visible

a) click on the arrow at **Choose day or date** and select **Specific days**

b) Select the days you want to apply this rule (e.g. Mon Tue Wed Thu Fri)



NOTICE:

The weekdays you select are getting green.

c) click on the arrow at **The whole day** and select **Set time frame**

d) Click in the boxes and select the times.

NOTICE:

You can add more time periods (e.g. 08:00 am to 02:00 pm and 03:00 pm to 06:00 pm (use Add time)

7) click on the arrow **Not set** at **If my status is** and select the presence status which must match in order to trigger this rule.

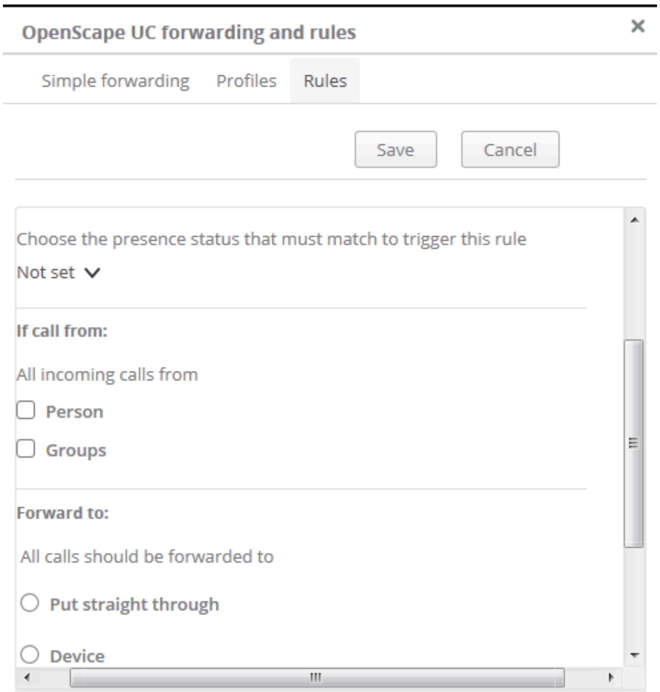
NOTICE:

You can leave the **Not set**.

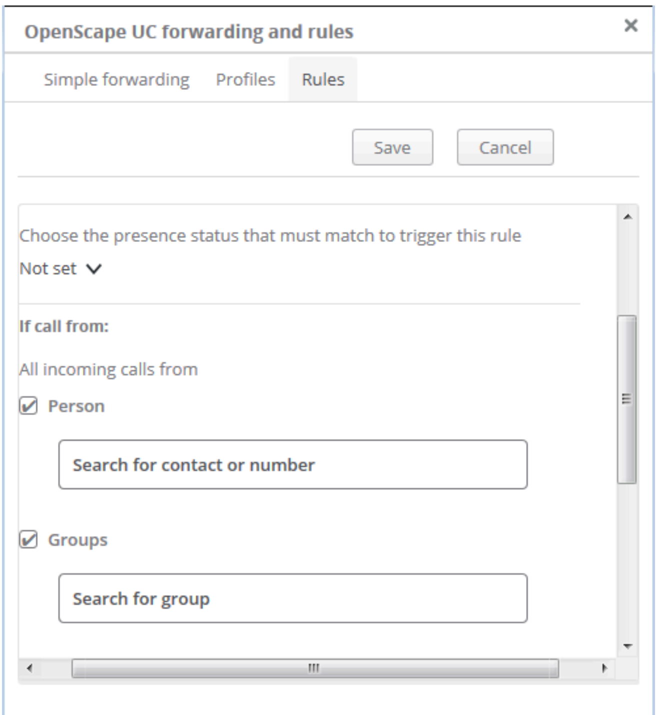
8) Specify the person and or groups which should be directed to your secretary.

Click on **If call from**.

Click on the check boxes **Person** and **Groups**



a) It should look now like this:



b) specify under **Person** a single unwanted caller.

NOTICE:

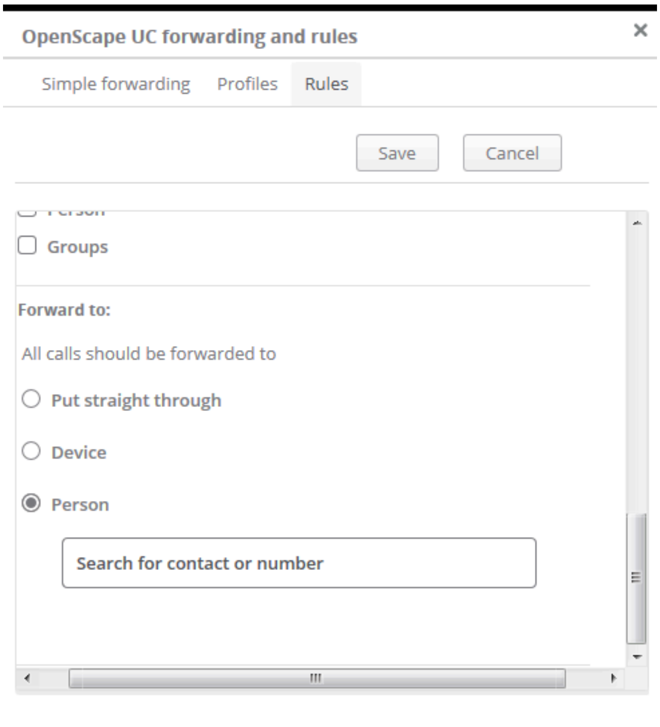
You can specify the name partly or enter a number and press enter, then select from the drop down menu.

c) specify under **Groups** a group containing unwanted callers.

NOTICE:

You can partly specify the group, press enter and select the group from the drop down menu.

9) Scroll down and at **Forward to** select **Person**



a) enter the name or the number and press enter and then select the person from the drop down menu.

NOTICE:

The name can be partly specified.

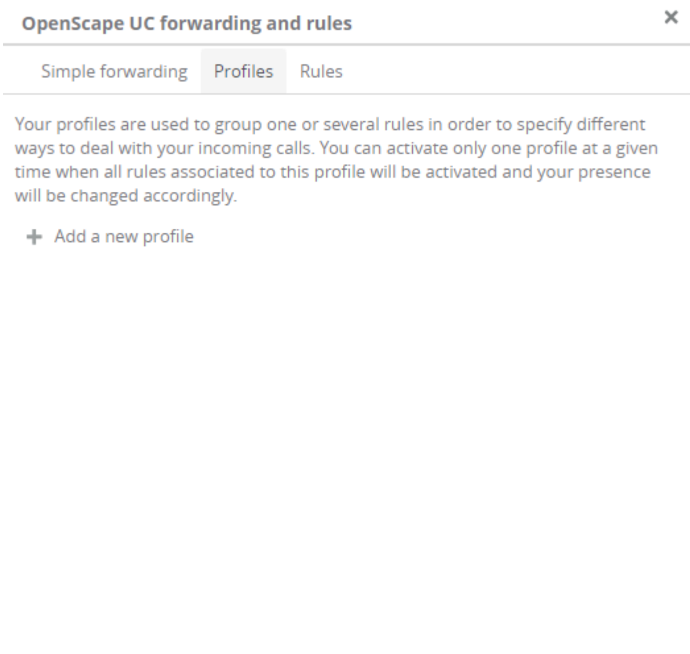
10) click on **Save** on the top

NOTICE:

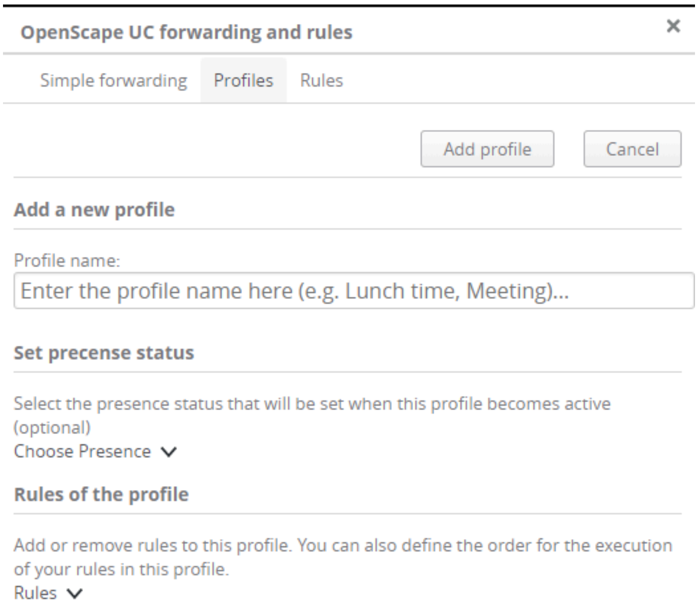
There must be no overlapping active rule, else you cannot save.

11) Finally the Profile must be created

Click on **Profiles**.



a) Then click on **Add a new profil**



12) In section **Add a new profile** for **Profile name** enter the name, e.g. Office

13) In section **Set presence status** you can set the presence status when the profile gets activated. To do so, click on the arrow near to **Choose Presence** and select from the pull down menu e.g. Do not disturb.

14) In section **Rules of the profile** click the arrow near to **Rules**.

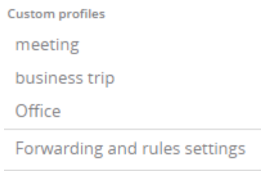
a) Select the rule "Unwanted Callers" from the pull down menu.

15) Click on **Add profile** on top right.

16) In order that this rule will be applied you need to activate it.

a) Click in the menu bar on

The following drop down menu opens



b) In the drop down menu select the profile you want to be applied (office)

You have created, configured "Office" rule.

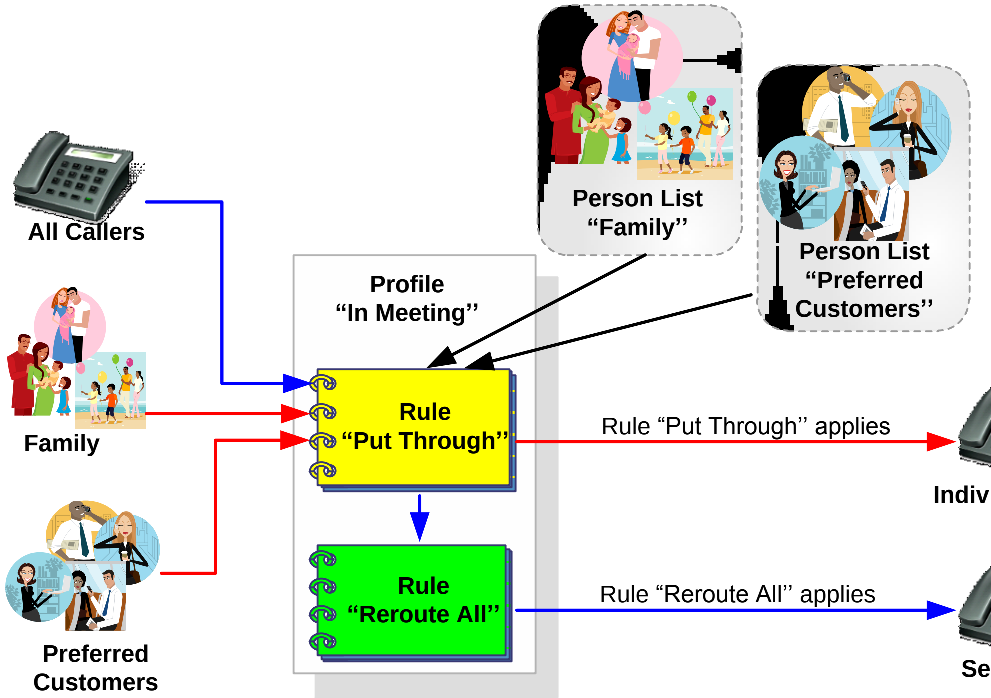
6.1.2 Scenario 2: "In Meeting"

Supposed, you take part in a company meeting and have set your *OpenScape UCApplication* 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 (for example Normal) as the "Redirect all" rule (for example Low). If not, the members of your family as well as the preferred customers would always reach your secretary as the "Put through" rule would never be applied.

6.1.2.1 How to Configure the "In Meeting" Rule Profile

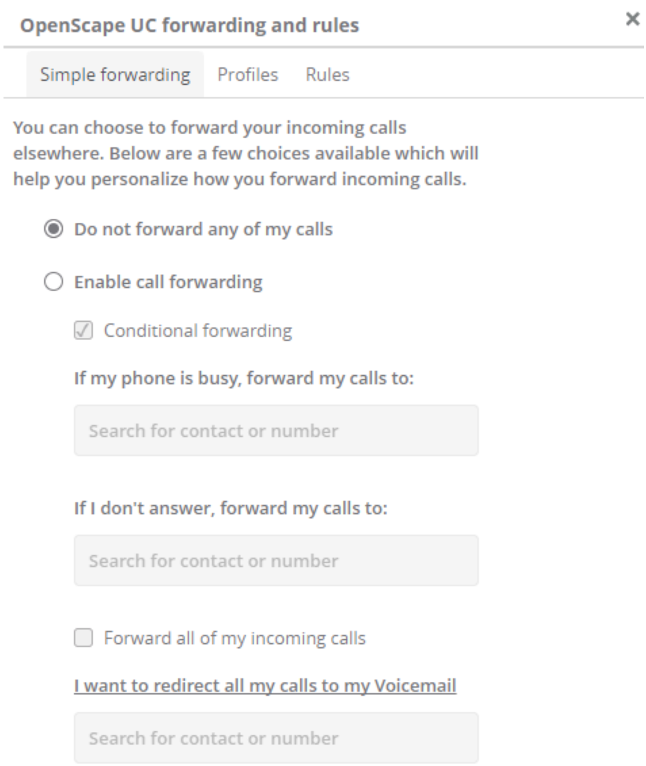
This section contains the step-by-step guide to creating the example rule profile "In meeting".

Step by Step

1) Under **Settings** open the **Forwarding and Rules**.

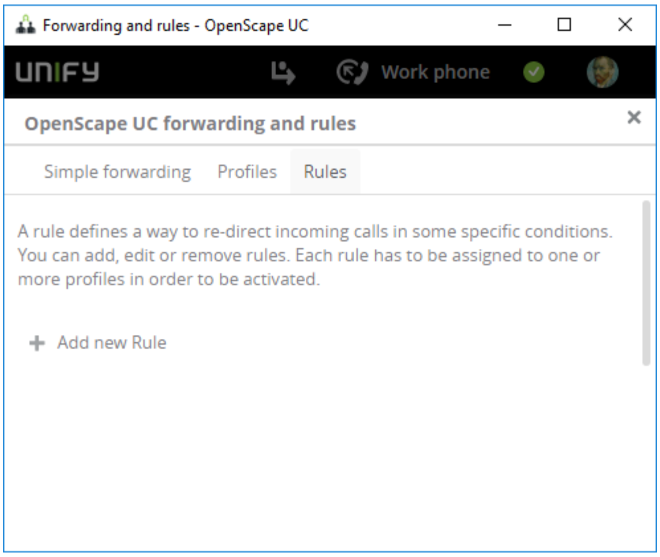
2) Select the **Forwarding and rules** option.

The **Rules** dialog opens.



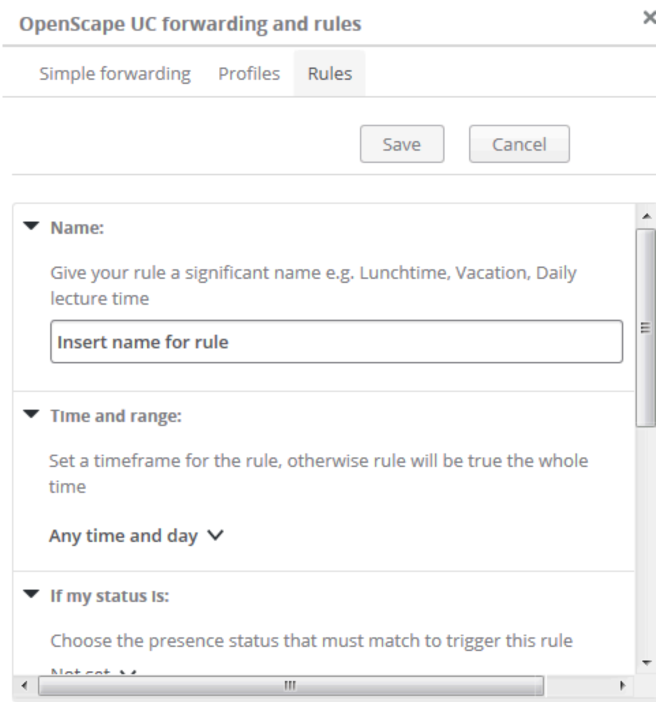
3) click on the **Rules** tab

The following window opens:



4) Click on **Add new Rule**

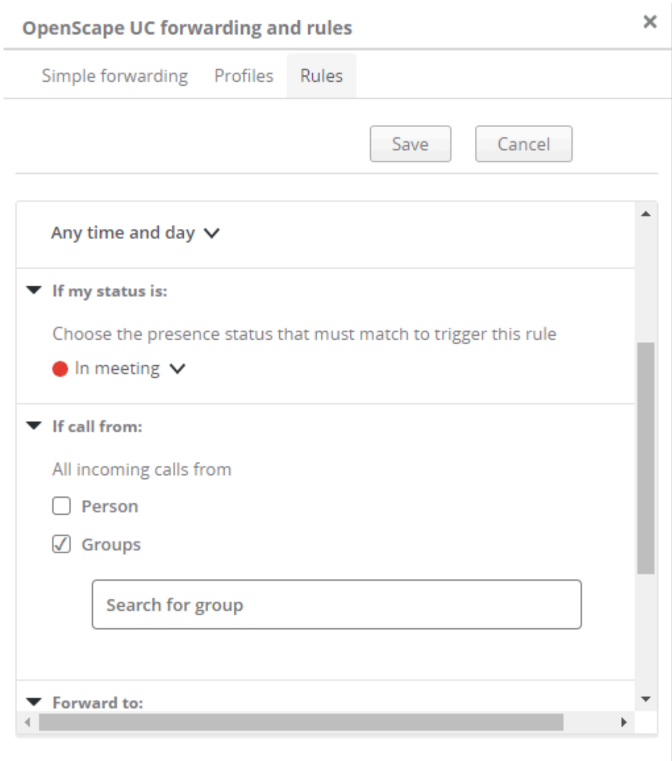
The following window opens.



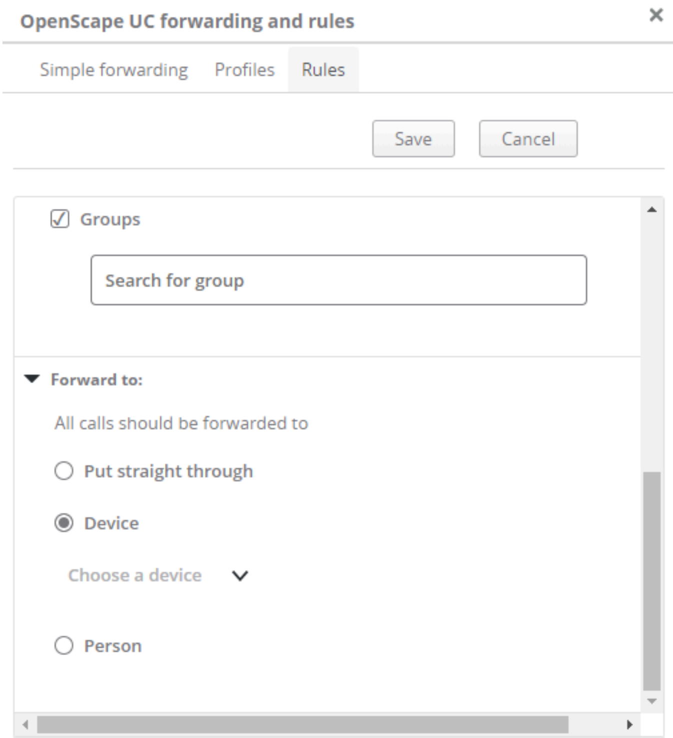
5) At **Name** enter a name for the rule, e.g. "Put_Through"

6) Leave time and range as it is (**Any time and day**)

7) Select for **If my status is** the presence state **In meeting**.



8) Under **If call from** click on the check box **Groups**.
   a) In the **Search for group** add the Family group and the preferred customers.
9) Under **Forward to** click on radio button **Device**.



10) Under **Choose a device** select your mobile phone.

NOTICE:

In case you do not see your mobile phone, you need to add it via the devices menu.

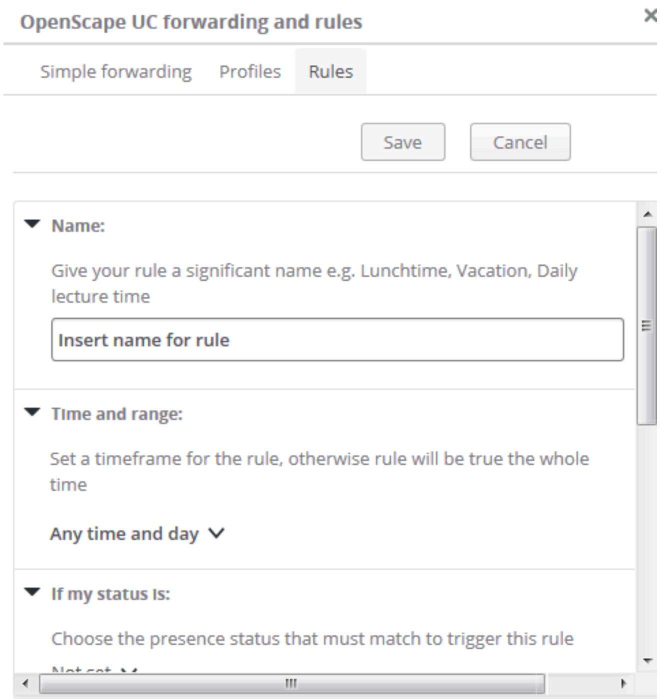
11) Click on **Save** on top.

NOTICE:

There must be no overlapping active rule, else you cannot save.

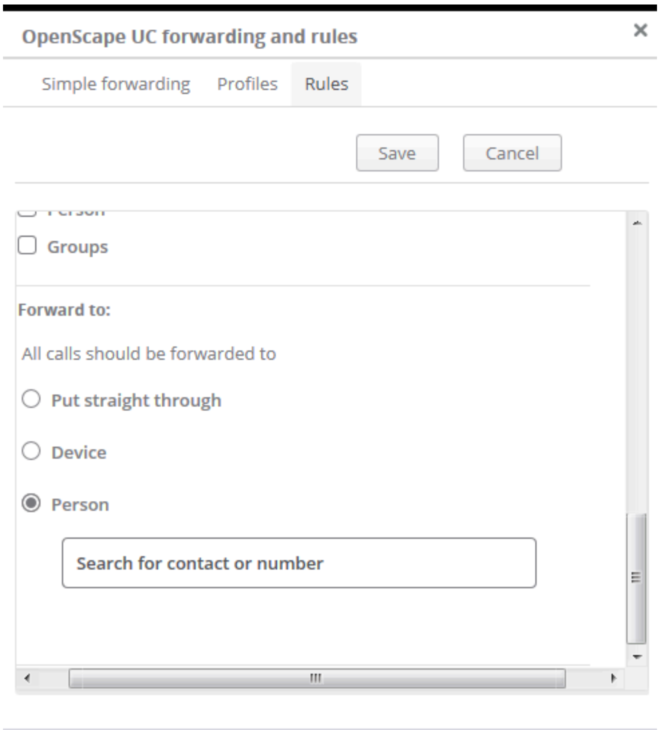
12) Now the rule redirect_all needs to be created, so again click on **add new rule**.

    The following window opens.



13) For the rule name enter redirect_all
14) Keep **Time and range** as it is (Any time and day)
15) Keep **If my status is** as it is (Not set)
16) keep **If call from** as it is (both **Person** and **Groups** are not checked).

17) Scroll down and at **Forward to** select **Person**



a) enter the name or the number and press enter and then select the person from the drop down menu.

NOTICE:

The name can be partly specified.

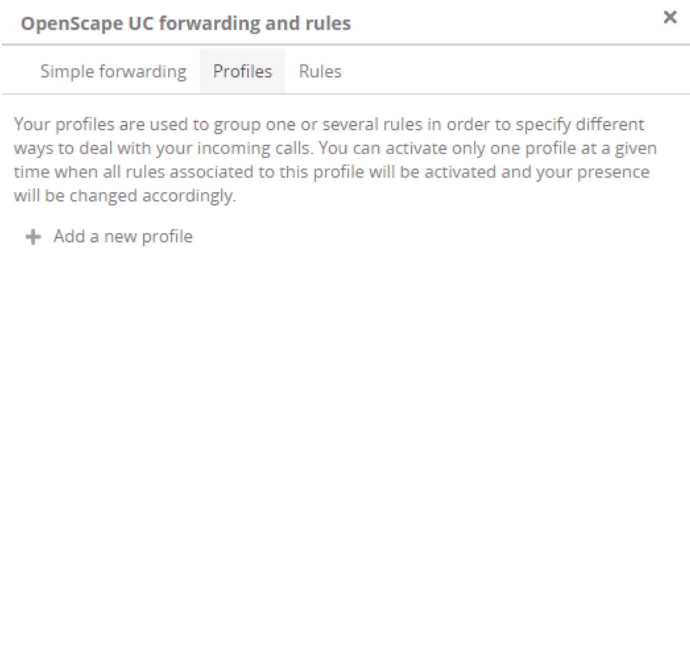
18) click on **Save** on the top

NOTICE:

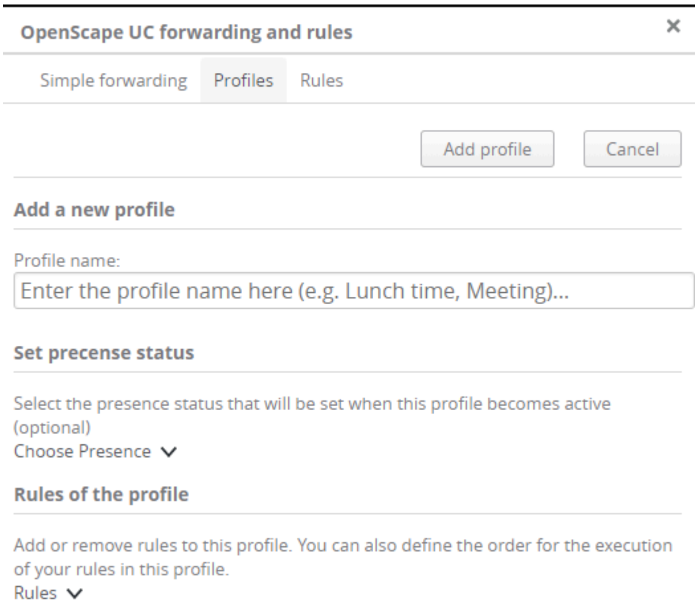
There must be no overlapping active rule, else you cannot save.

19) Finally the Profile must be created

Click on **Profiles**.



a) Then click on **Add a new profil**



20) In section **Add a new profile** for **Profile name** enter the name, e.g. Family and Important Customers

21) In section **Set presence status** you can set the presence status when the profile gets activated. To do so, click on the arrow near to **Choose Presence** and select from the pull down menu e.g. Do not disturb.

22) In section **Rules of the profile** click the arrow near to **Rules**.

a) Select the rule "Family and preferred customers" from the pull down menu.

b) Click again on the arrow near to Rules and select the rule "Redirect all"

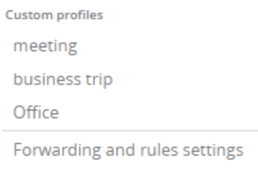
> **IMPORTANT:**
>
> The sequence of the rules is important, it should be
>
> 1) Family and preferred Customers
>
> 2) Redirect all
>
> However, if for some reason the sequence is not correct, on the right side of the displayed rules there are arrows and you can change the sequence if necessary.

23) Click on **Add profile** on top right.

24) In order that this rule will be applied you need to activate it.

a) Click in the menu bar on 

The following drop down menu opens



b) In the drop down menu select the profile you want to be applied (meeting)

You have created, and configured the rules for "In meeting".

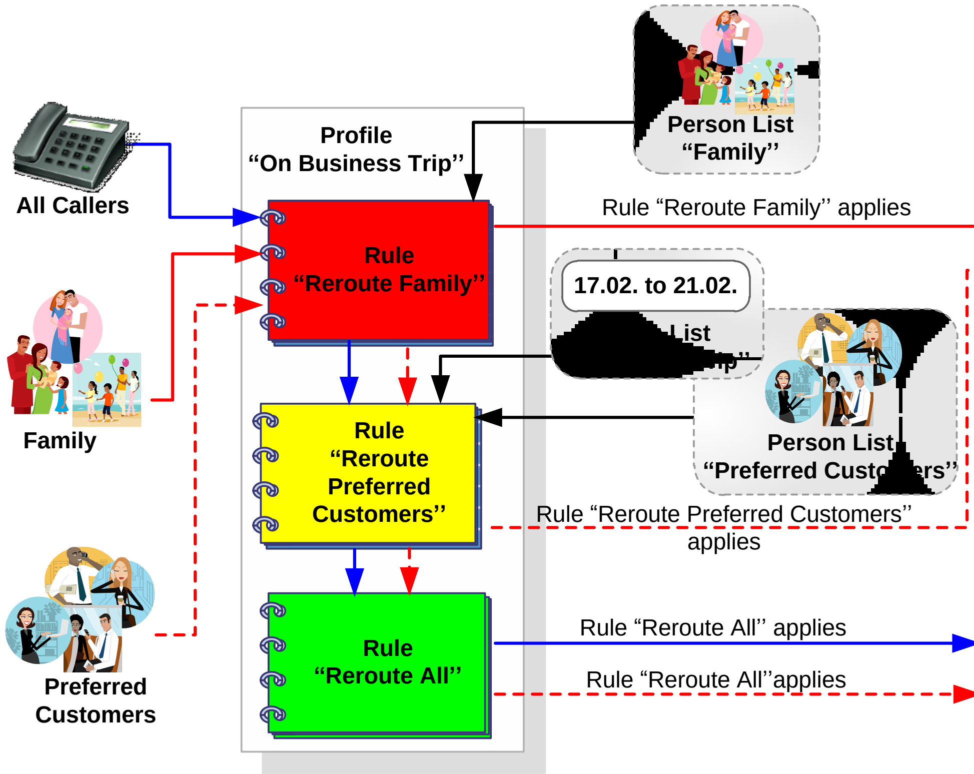
6.1.3 Scenario 3: "On Business Trip"

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

To set up the scenario, you need:

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

Function



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

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

6.1.3.1 How to Configure the "On Business Trip" Rule Profile

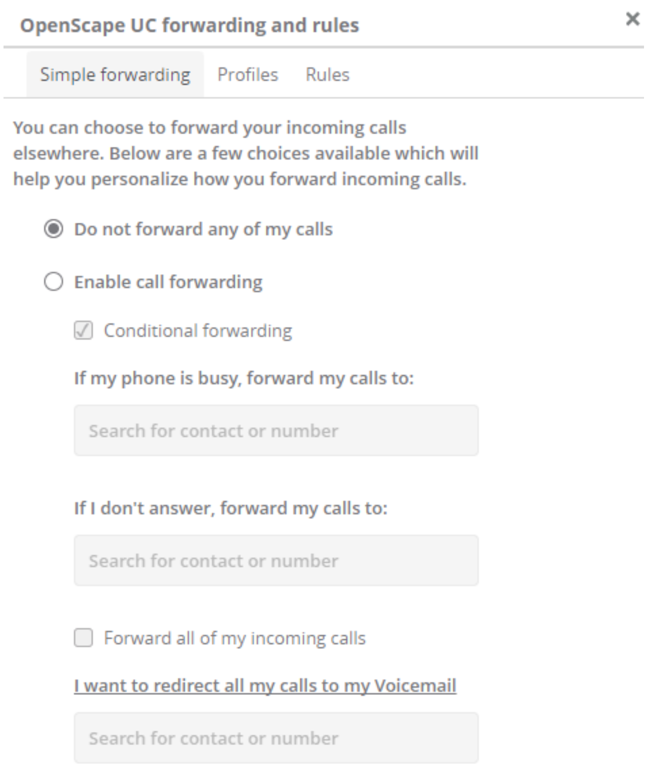
This section contains the step-by-step guide to creating the example rule profile "On Business Trip".

Step by Step

1) Under **Settings** open the **Forwarding and Rules**.

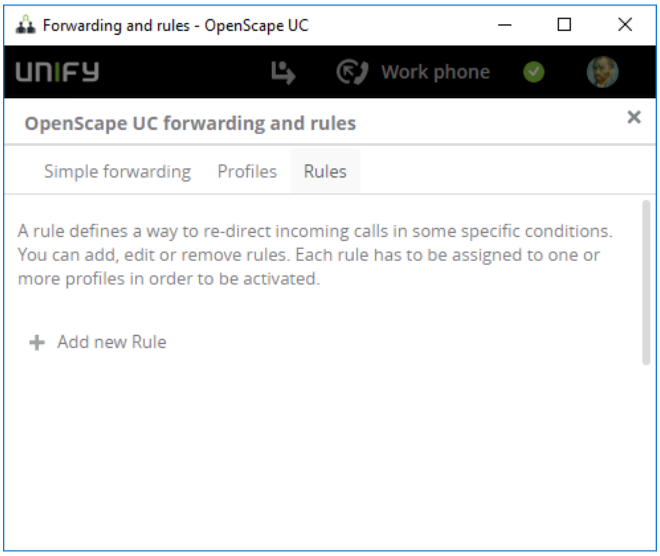
2) Select the **Forwarding and rules** option.

The **Rules** dialog opens.



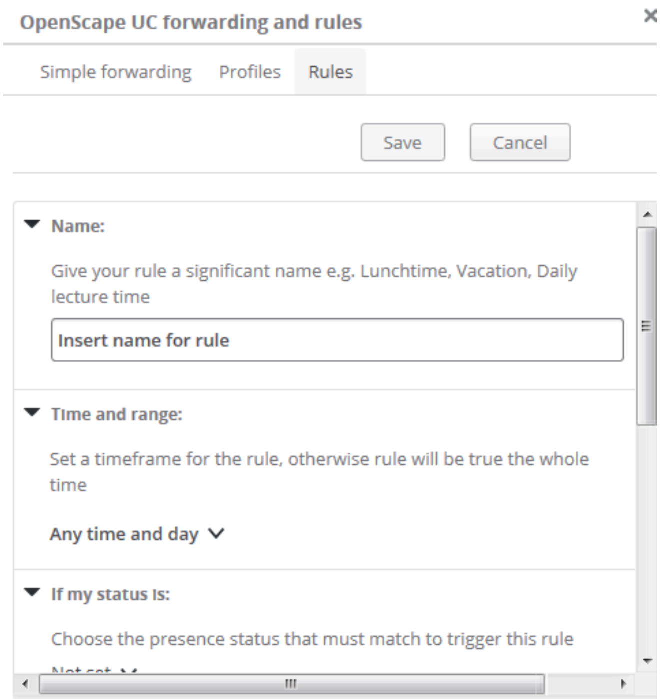
3) click on the **Rules** tab

The following window opens:



4) Click on **Add new Rule**

The following window opens.

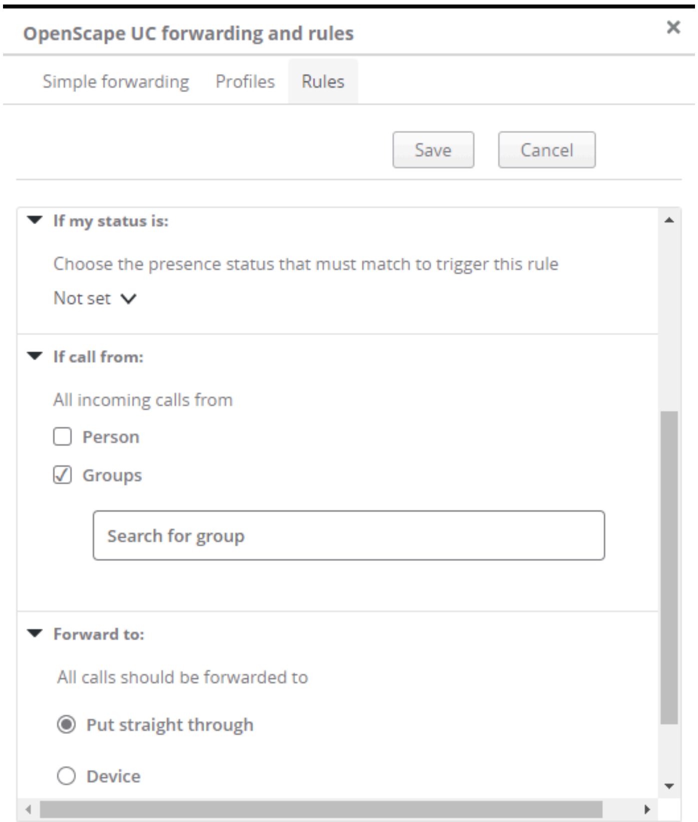


5) At the **Name** enter a name for the rule, e.g. Family.

6) Keep **Time and range** as it is (**Any time and day**)

7) Keep **If my status is** as it is (**Not set**)

8) For **If call from** click on the check box for **Groups**



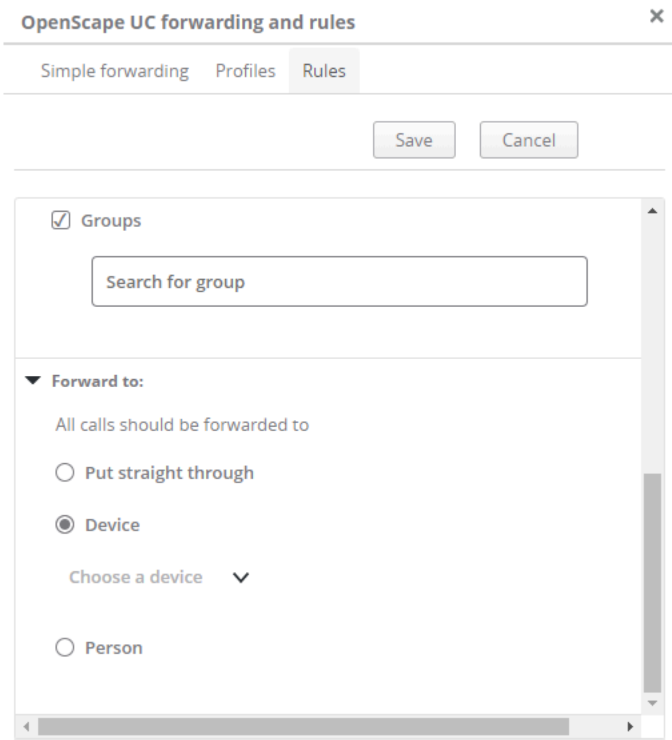
a) Enter the group (Family) in the field **Search for groups**

NOTICE:

Enter the name (can be partially specified) and press enter

---

9) Under **Forward to** click on the radio button **Device**.



10) Under Choose a device select your mobile phone.

> **NOTICE:**
>
> In case you do not see your mobile phone, you need to add it via the devices menu.

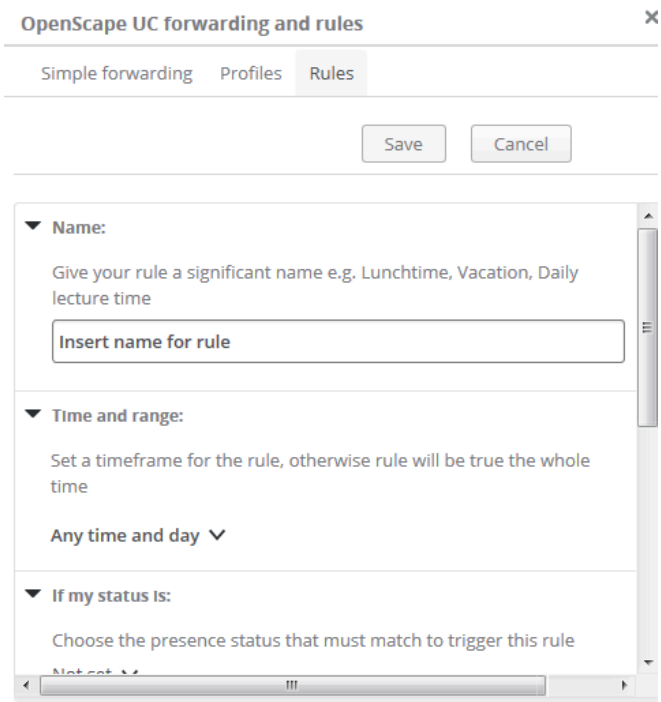
11) Click on **Save** on top.

> **NOTICE:**
>
> There must be no overlapping active rule, else you cannot save.

You have created the rule for family, now you need to create the rule for preferred customers.

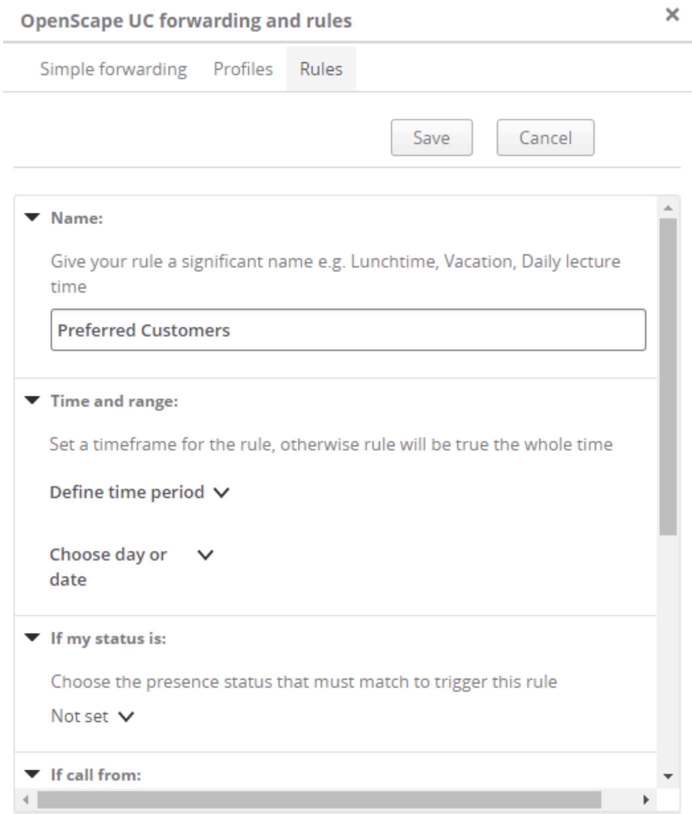
12) Click on **Add new Rule**

The following window opens.

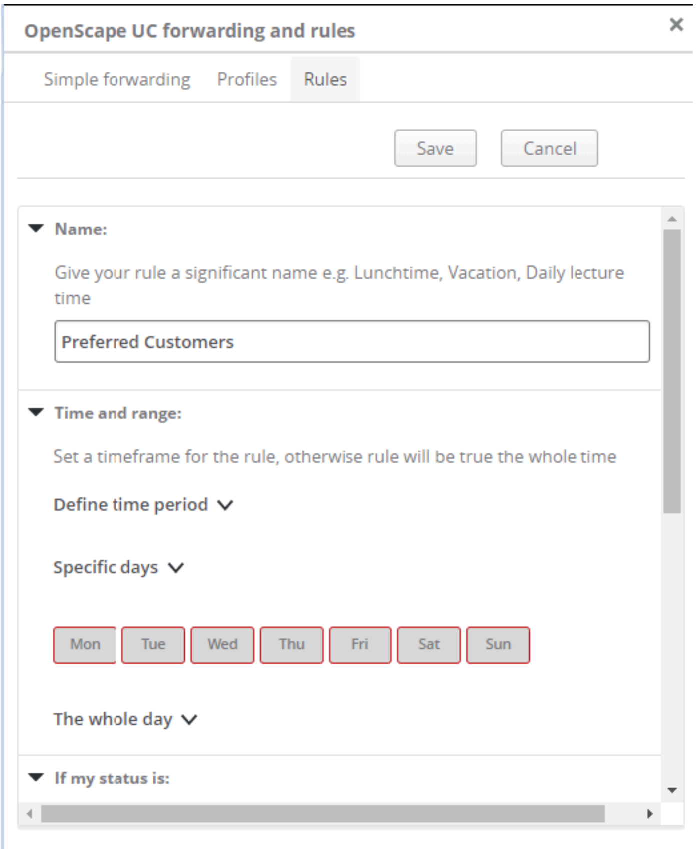


13) At the **Name** enter a name for the rule, e.g. Preferred Customers.

14) At **Any time and day** click on the arrow and set **Define time period**

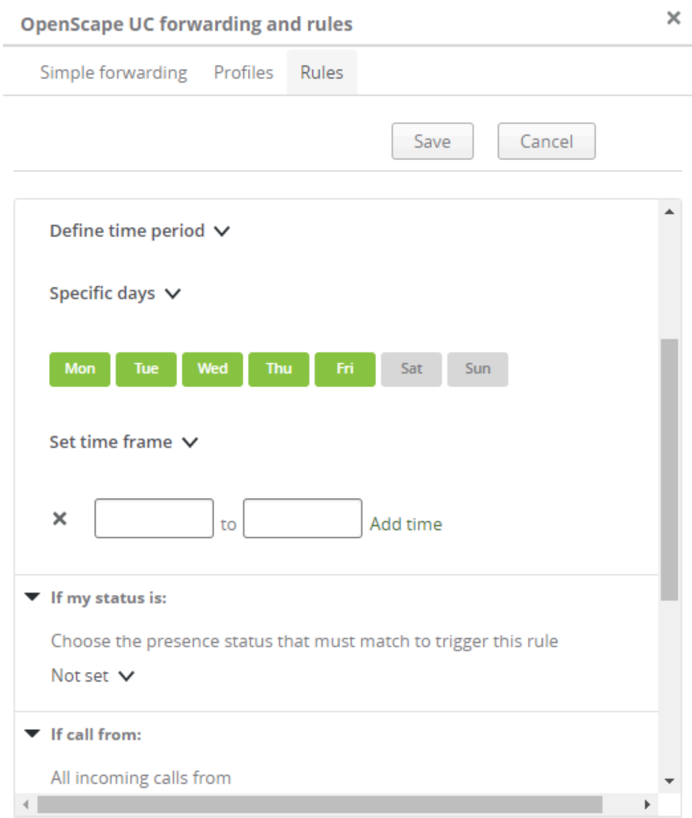


15) At **Choose day or date** select via the arrow **Specific days**.



16) Click on the days (Mon, Tue, Wed, Thu, Fri), they will highlight in green.

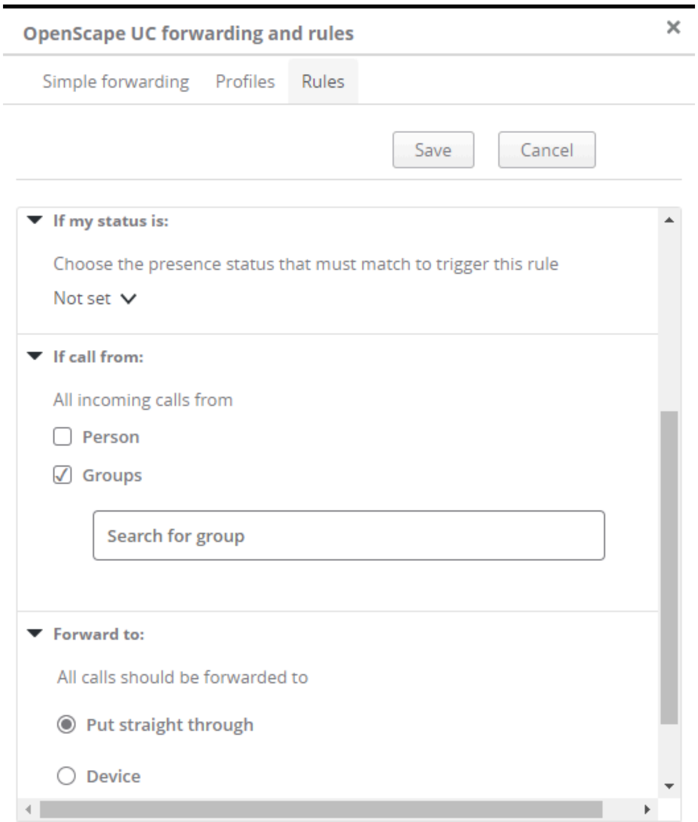
17) Click on **The whole day** and select **Set time frame**.



18) In the boxes define the time (when you click in the box, you can select the time from a drop down menu)

19) Keep **If my status is** as it is (**Not set**).

20) For **If call from** click on the check box for **Groups**

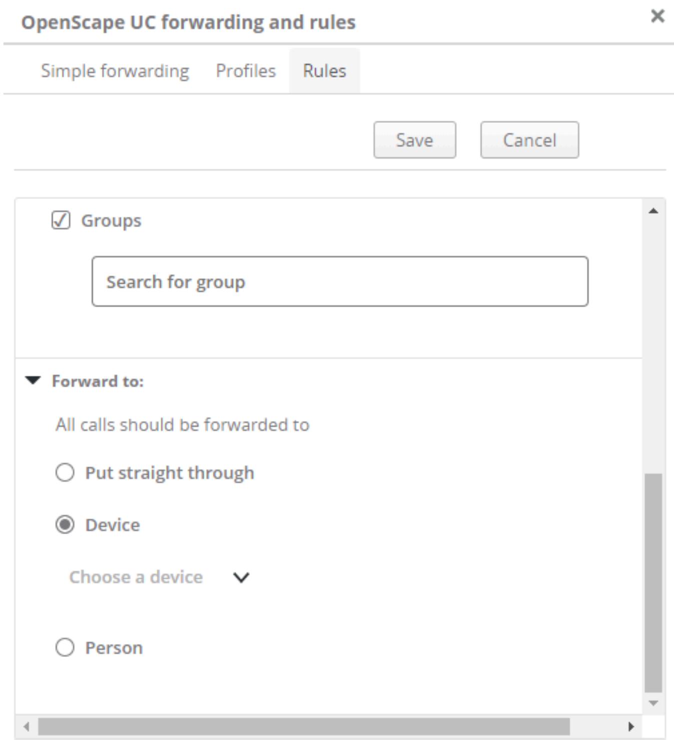


a) Enter the group (Family) in the field **Search for groups**

NOTICE:

Enter the name (can be partially specified) and press enter

21) Under **Forward to** click on the radio button **Device**.



22) Under Choose a device select your mobile phone.

NOTICE:

In case you do not see your mobile phone, you need to add it via the devices menu.

23) Click on **Save** on top.

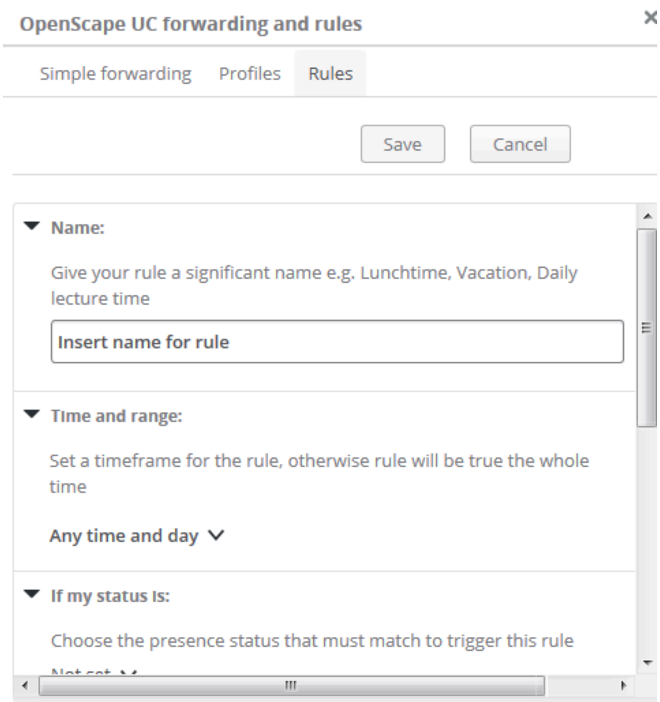
NOTICE:

There must be no overlapping active rule, else you cannot save.

You have created the rule for preferred customer, now you need to create the rule for redirect all.

24) Click on **Add new Rule**

The following window opens.



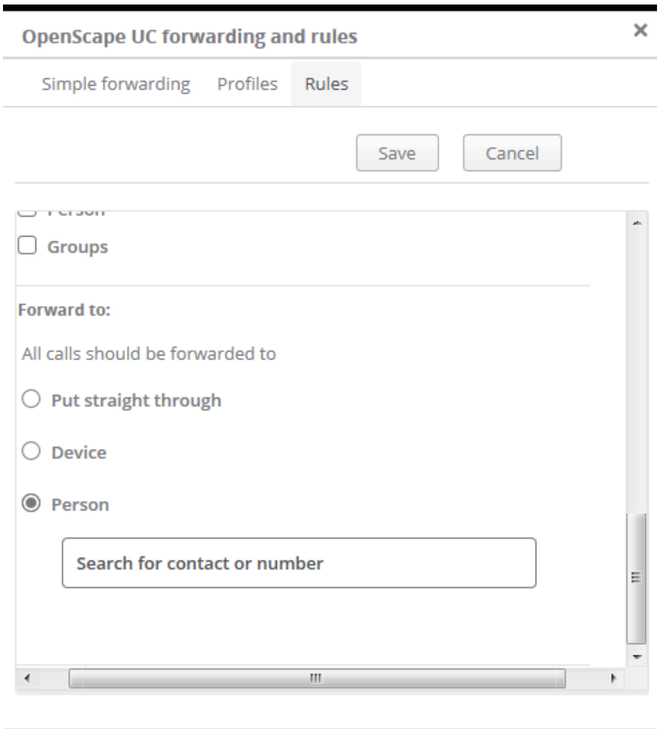
25) At the **Name** enter a name for the rule, e.g. Redirect all.

26) Keep **Time and range** as it is (**Any time and day**)

27) Keep **If my status is** as it is (**Not set**)

28) For **If call from** the check boxes **Person** and **Groups** must not be checked.

29) Scroll down and at **Forward to** select **Person**



a) enter the name or the number and press enter and then select the person from the drop down menu.

> **NOTICE:**
>
> The name can be partly specified.

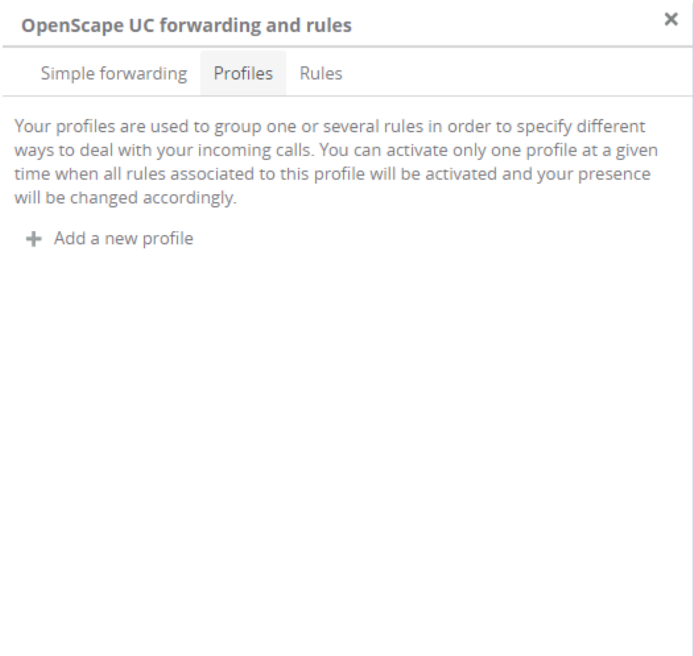
30) Click on **Save** on top.

> **NOTICE:**
>
> There must be no overlapping active rule, else you cannot save.

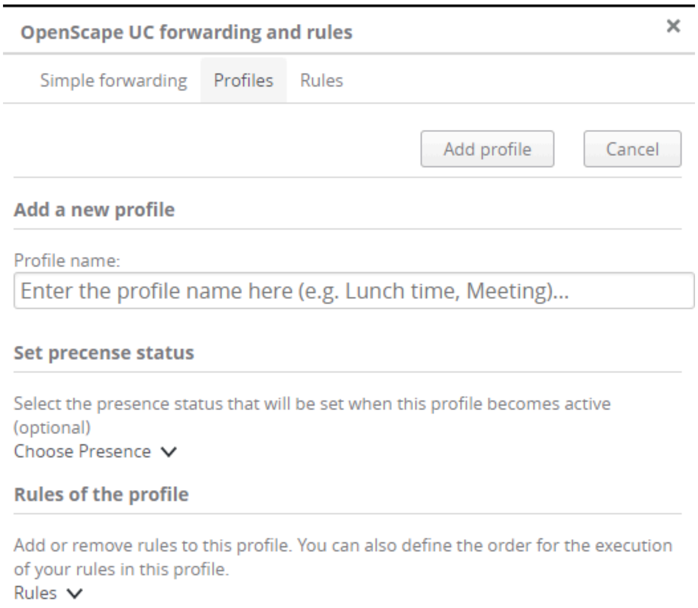
You have created the rule for preferred customer, now you need to create the rule for redirect all.

31) Finally the Profile must be created

Click on **Profiles**.



a) Then click on **Add a new profil**



32) In section **Add a new profile** for **Profile name** enter the name, e.g. Business Trip

33) In section **Set presence status** select the presence status to be applied when this rule is active, e.g. Away.

34) In section **Set presence status** you can set the presence status when the profile gets activated. To do so, click on the arrow near to **Choose Presence** and select from the pull down menu e.g. Away.

35) In section **Rules of the profile** click the arrow near to **Rules**.

a) Select the rule "Family" from the pull down menu.

b) Click again on the arrow near to **Rules** and select the rule "Preferred Customers"

c) Click again on the arrow near to **Rules** and select the rule "Redirect all"

IMPORTANT:

The sequence of the rules is important, it should be

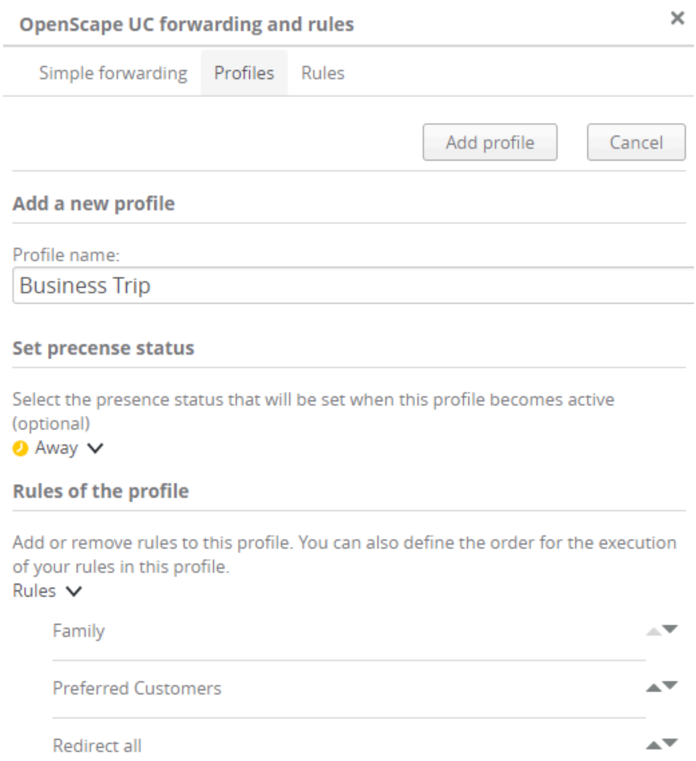
1) Family

2) Preferred Customers

3) Redirect all

However, if for some reason the sequence is not correct, on the right side of the displayed rules there are arrows and you can change the sequence if necessary.

It should look similar to this:

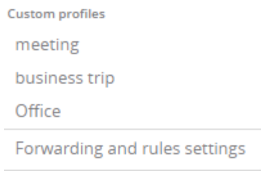


36) Click on **Add profile** on top right.

37) In order that this profile will be applied you need to activate it.

a) Click in the menu bar on

The following drop down menu opens



b) In the drop down menu select the rule you want to be applied (business trip in this case)

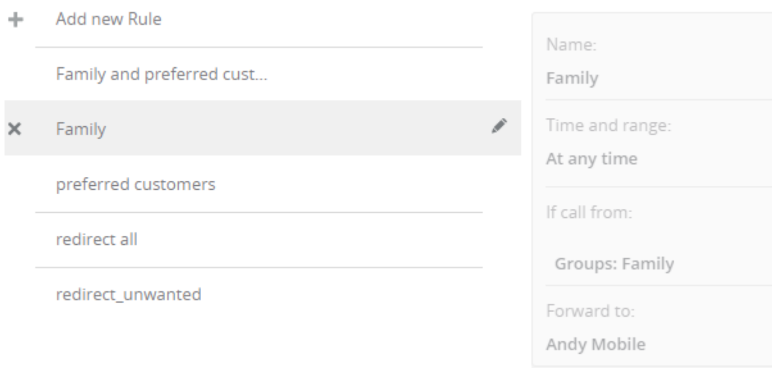
You have created, configured the Profile for "Business Trip".

6.2 Functions and Interface of the Rules

This section contains reference information about how to use rules. This information is intended to serve as reference for the functions and the user interface of the rules. The settings you see in the figures are examples and need to be replaced with the scenario settings or your own ones.

You can invoke all dialogs in which rule profiles, rules, person and date lists are specified via the **Forwarding and rules**. (Select hereby **Rules Tab**).

When a rule is already defined, you can perform the actions by hovering the mouse over the rule.



NOTICE:

In case you do not see the pencil (for edit), you either need to scroll to right or enlargen the window.

- Edit

  On the right side you can click on the pencil .
- Delete

  On the left side you can click on the small x.

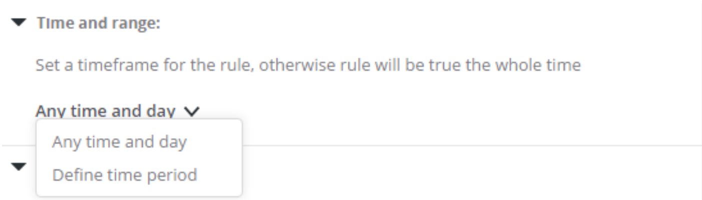
6.2.1 Section Name

Here you specify the rule name.

6.2.2 Section Time and Range

Here several time and range settings are possible, you can select with the small arrow on the right side.

Any time and day is the default value.

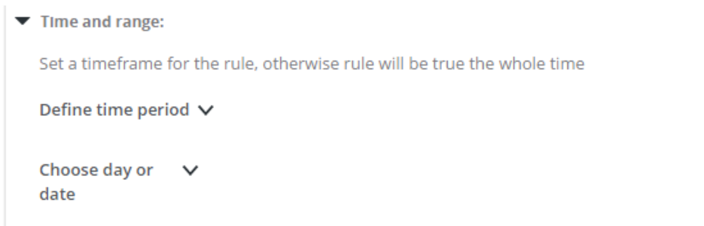


6.2.2.1 Any time and day

There is nothing more to select. The rule is always valid without further checking, since it is valid at any time and day.

6.2.2.2 Define time period

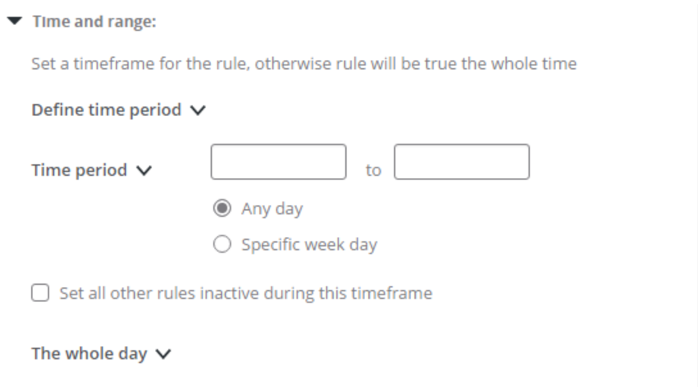
When you have selected Define time period you get a new submenu where you can select again via the arrow on the right side.



Here you can select between a time period and specific days.

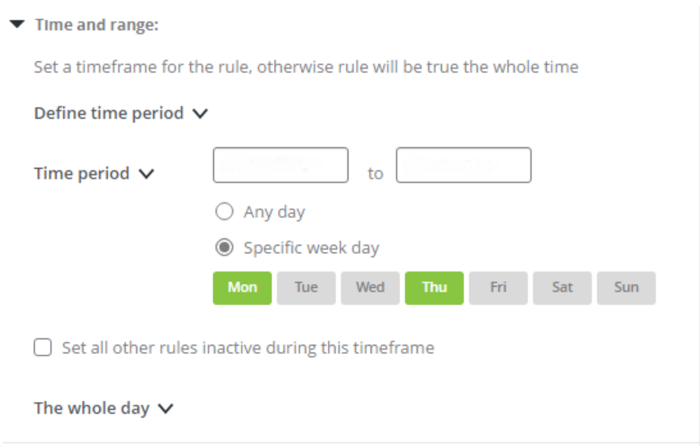
6.2.2.3 Define time period - Time Period

Here you define the time period.



At time period you specify from and to in the field. When you click in the field a calendar opens and you can select the date for start or end of the period.

When you have specified **Any day** (default) then the rule is applied every day during the time period. However you can specify **Specific week day** so that during the time period only on those specific days (e.g. only Monday and Thursday) the rule is applied.



NOTICE:

The selected days are high lighted in green.

Furthermore there is a checkbox **Set all other rules inactive during this timeframe**.

NOTICE:

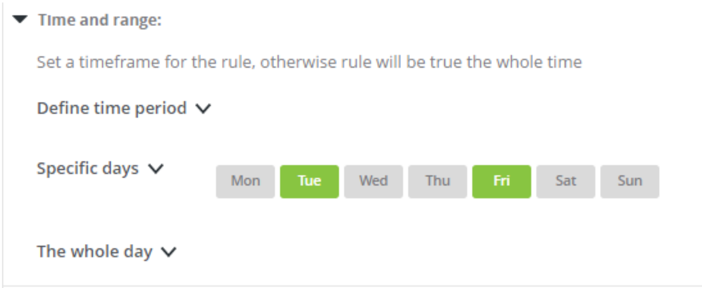
If you have overlapping active rules you cannot save the rule.

There is also another option where you can select (use the arrow) **The whole day** or **Set time frame**.

When you use the **Set time frame** option then again you see to fields where you specify the time. When you click in the field then you can select the time.

6.2.2.4 Define time period - Specific days

Here you can specify specific days where the rule is applied, e.g. every Tuesday and Friday.



NOTICE:

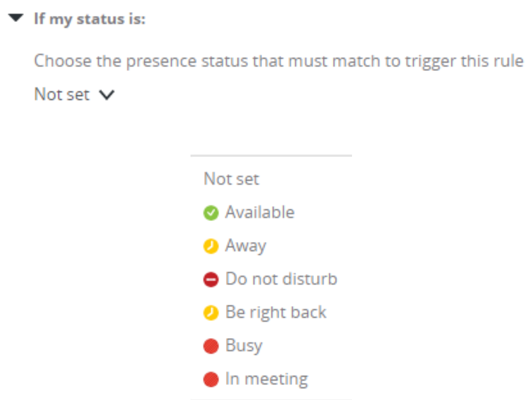
The selected days are high lighted in green.

There is also another option where you can select (use the arrow) **The whole day** or **Set time frame**.

When you use the **Set time frame** option then again you see to fields where you specify the time. When you click in the field then you can select the time.

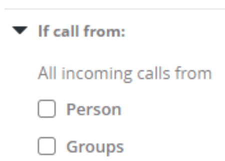
6.2.3 Section If my status is

Here you select which presence status triggers the rule. The default is **Not set**.



6.2.4 Section If call is from

Here you can specify if from Person or Groups or both.



NOTICE:

Sometimes **groups** is not displayed, this is the case when do not have created any group.

For person or groups a field opens in which zou can search for person or groups. If the call is from this persons or groups the rule will be applied.

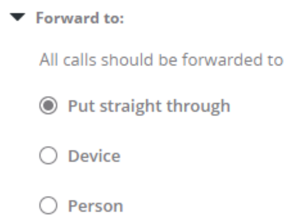
NOTICE:

If you neither specify Person nor Groups the rule will be applied for any caller.

6.2.5 Section Forward to

In this section you specify to whom or which device the call should be forwarded. Default is **Do not forward any of my calls**.

There are three radio buttons:



- Put straight through

  This is the default setting, but normally you do not use this option since with the rule you want that the call is forwarded either to another device (e.g. mobile) or to another person (e.g. secretary).
- Device

  If you select **Device** a new menu appears where you can select the device by using the arrows. The list contains all devices which have been specified.
- Person

  If you select **Person** a field appears where you can enter a name or a number. The name can be partly specified, press enter and then select from the list.

6.3 Functions and Interface of Profiles

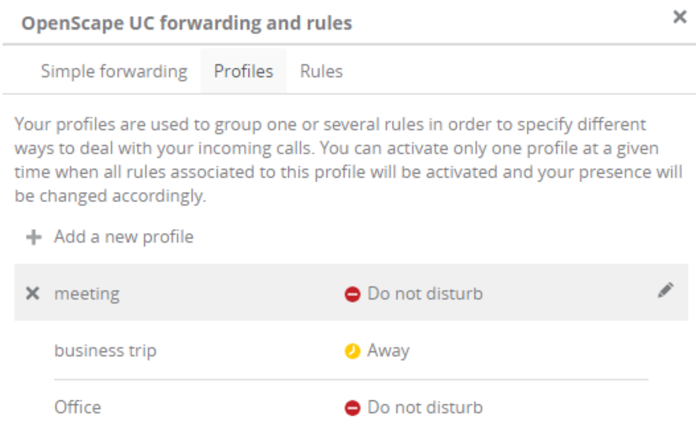
A rule or a set of rules can only be active when the rule or rules are assigned to a profile.

Only one profile can be active

You can invoke the Profile dialog via **Settings** > **Forwarding and Rules**. You need to select the **Profile** tab.

When a profile already exists

You can edit or remove it.



When you hover with the mouse over an existing profile, you can either:

- remove the profile

  Click on the left side on the small x.
- edit the profile

  Click on the right side on the pencil

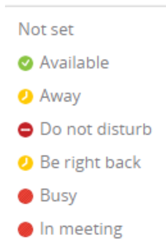
6.3.1 Section Profile Name

Enter the name for the profile

6.3.2 Section Set presence status

Here you select from the drop down menu the presence state which should be applied when the profile gets active. The default is **Not set**.

Click on the small arrow and the drop down menu opens.



6.3.3 Section Rules of the profile

Here you add the rule or rules for the profile.

Click on the small arrow and select the rule(s).

A drop down menu opens and you can select one rule.

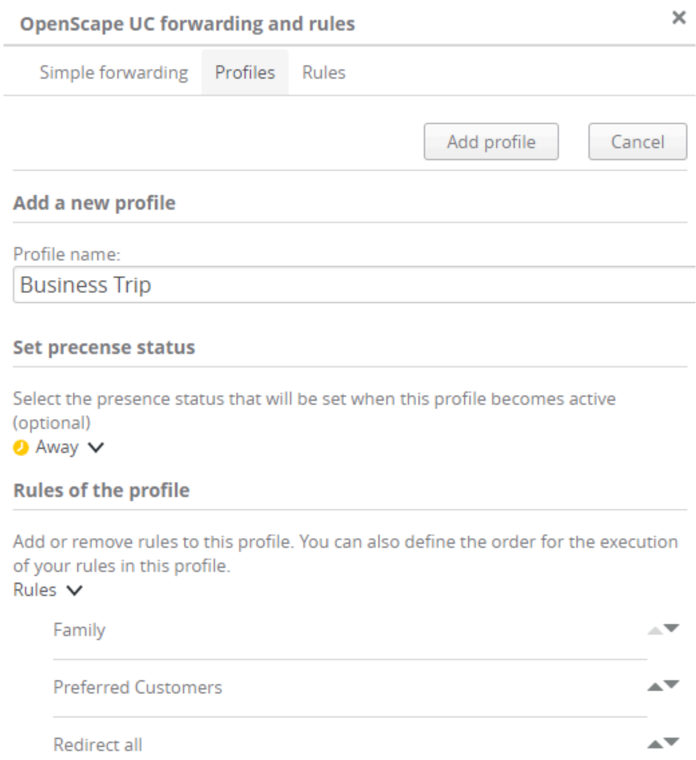
In case you have more rules, you can add one more rule by clicking again on the arrow.

When you hover over one rule, on the left side you can click on the small x in order to remove the rule (in case you added a wrong rule)

When you have added more than one rule and, on right side there are arrows and you can change the order. Please note that the sequence of the rules is important.

The first rule has the highest priority, if the rule criteria are met, the other rules will not be executed. The last rule is the least important. It will be executed only if the criteria are met and also no other rule met the criteria.

An example could be the business trip profile:



6.4 Activating / Deactivating profile

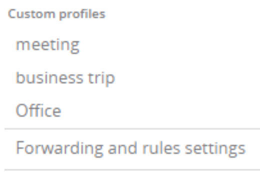
At a time only one profile can be active.

Activate profile

After you have created one or more profiles you can activate one of the profiles.

1) In the Fusion bar click on .

2) Select the profile you want to activate



NOTICE:

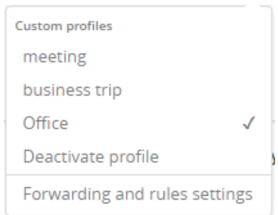
In case there is already a profile active, you can select another profile, this results that the profile you clicked on is getting activated.

Deactivate profile

When a profile is active, you can deactivate it.

1) In the Fusion bar click on .

2) Then click on **Deactivate profile**.



Index

Special Characters

A

B

C

D

E

F

G

H

I