A MITEL
PRODUCT
GUIDE

Unify OpenScape UC Application V10

OpenScape Web Client

User Guide

04/2025

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Notices

Trademarks

Contents

1 About this Document

In this section we provide information about the document on hand.

1.1 History of Changes

Date	Changes	Reason
12-10-2020	Created Document	
21-10-2020	Conference options of V10R2	UCBE-24948
26-01-2021	WebRTC video and audio settings	UCBE-25800
05-05-2021	Added note about audio announcement when joining a conference	UCBE-25803
04-08-2021	UC V10 R3 features: - Multi Line Hunt Group - Call pickup	UCBE-27436
22-09-2021	Minor fixes	UCBE-28015 UCBE-28018 UCBE-28017
02-05-2022	Added: - "Deleting a Chat Message" chapter	UCBE-29224
04-05-2022	Added: - "MS Office 365 Integration" chapter Edit: - "Searching for Contacts" chapter	UCBE-29899
22-12-2022	Added: - "Resetting your Password" chapter - "Password Expiration Notification" chapter	UCBE-31714 UCBE-31715

Date	Changes	Reason
02-03-2022	Added: - "Chat in Conference" - "Starting and using the chat in a conference call" - "Whiteboard" - "Adding, editing or hiding the whiteboard in a conference call"	UCBE-29117 UCBE-31716
30-08-2023	Added: - "Hands Up" - "Starting, using and adding to chat during a conference call" - "Adding a guest user to the conference chat " - "Conference Guest Access"	UCBE-33210 UCBE-33211 UCBE-33213
20-09-2023	Added: - "Features integrations" - "My notes" - "Searching for chats" - "Forwarding chat messages" - "Searching for	UCBE-33216
29-09-2023	Updated: - "Multi Line Hunt Group"	UCBE-33511
17-10-2023	Added: - "Headset integration"	UCBE-33547
18-12-2023	Added: - "Call quality indicator"	UCBE-33669 UCBE-33856
05-03-2024	Updated: - "Conference Invitation" Added: - "Sending a conference invitation" - "Joining a conference from invitation"	UCBE-34215

Date	Changes	Reason
11-07-2024	Added: - "Call Forwarding for internal/external call originators"	UCBE-34783
23-04-2025	Updated: - "Exclusive tab for Desktop App settings"	UCBE-35057

1.2 About this Document

This document addresses end users who deploy OpenScape Web Client as part of the UC solution.

1.3 Markups used

In this document we use the following markups to highlight specific passages.

Element	Markup
GUI elements	Select **Save** to …
Sequence of menu items	**Users& Resources** > **Resources**
Command line output	`C:> unknown command`
System input	Enter `true` in the ... field.
Directory and file names	`/var/config.xml`
File contents	`conname=%CONNECTION_NAME%`
Names of keyboard keys	Push `Esc` to …
Specifications with varying content	<user name>

1.4 Acronyms used

In this document we use the following acronyms.

Acronym	Meaning
CTI	Computer Telephony Integration
DTMF	Dual Tone Multiple Frequency
GUI	Graphical User Interface
HTML	Hypertext Markup Language
IP	Internet Protocol
ISDN	Integrated Services Digital Network

Acronym	Meaning
LAN	Local Area Network
MWI	Message Waiting Indicator
OND	One-Number Device
ONS	One-Number Service
PKI	Public Key Infrastructure
PSTN	Public Switched Telephony Network
QoS	Quality of Service
RAM	Random Access Memory
SIP	Session Initiation Protocol
TCP	Transmission Control Protocol
TC	Telecommunications
TUI	Telephony User Interface
UDP	User Datagram Protocol
UMS	Unified Messaging System
URI	Uniform Resource Identifier
XML	Extensible Markup Language

1.5 Overview of the Client

Using the client you can deploy OpenScape UCApplication features with a browser.

The client provides in particular the following features:

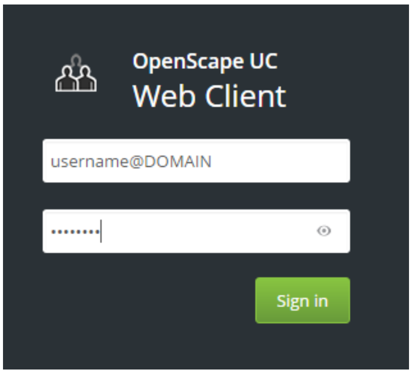
- Call features
- Conference features
- Contact features
- Presence features
- Chat
- Voicemail features
- Security features
- User Profiles

2 Getting Started

This chapter describes the first steps to start using the UC Web client.

2.1 Logging On

If the system is not configured for an automatic login, please ask your system administrator to get your credentials (User Name and Password) to use this product.



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Once you have signed in the OpenScape Web Client the user interface is displayed.

IMPORTANT: If a new UC user is added in CMP and, subsequently, the first login on the WebClient is performed, the full registration will be completed after 10 minutes. The client will be fully functional only after 10 minutes.

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.

2.2 Logging Off

You may want to log off before closing your browser to show the other users that you are no longer connected to the system:

To log off click on your login name in the header bar and select **Sign out**.

2.3 Changing your Password

It is highly recommended to change your password regularly to prevent unauthorized access to your account.

Step by Step

1) Click on your login name in the header bar and select **Profile** > **Change password**.
2) Enter the new password and click **Save**.

2.3.1 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 OpenScape Web Client.

Follow the steps below to reset your password:

Step by Step

1) On the login screen of your Web Client, click **Forgot your 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.

2.3.2 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 your OpenScape Web Client.

You will receive an email notification and a warning in OpenScape Web Client 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.

To set a new password, refer to Resetting your Password on page 11.

2.4 Determining your Preferred Device

You can choose a device for initiating outgoing calls or receiving incoming calls.

Step by Step

1) Click in the header bar.

   The settings menu opens.

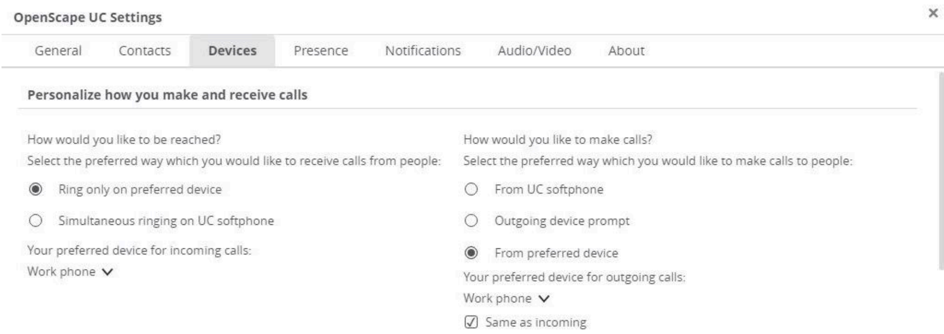
2) Select a device under **Incoming calls** and under **Outgoing calls**

You have now determined your preferred device for incoming and outgoing calls.

You can also set your preferred device via **Settings**

2.5 Options to make and receive calls

You can make or receive calls using the preferred device, the UC softclients or other devices.



2.5.1 Outgoing calls

You can make outgoing calls in three different ways:

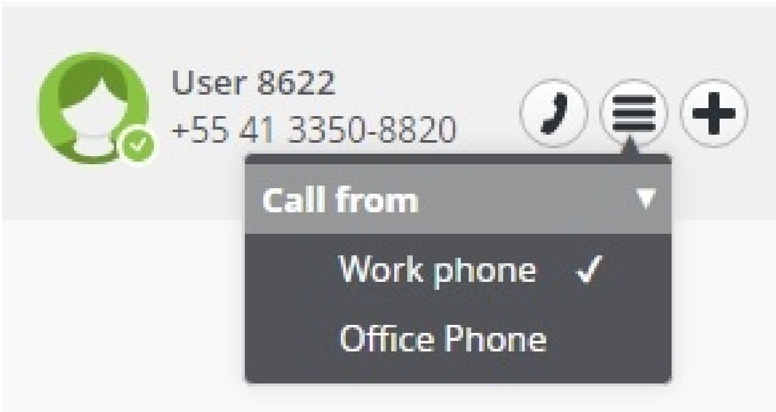
- Using the outgoing preferred device;
- Bypassing the preferred device setting and using the UC softphone device for outgoing calls;
- Choosing the device from a menu prompted for every outgoing call.

The menu prompted to choose the device for outgoing calls is only shown for the first outgoing call. Second calls, transfer calls and consultation calls will use the same device as previously chosen.

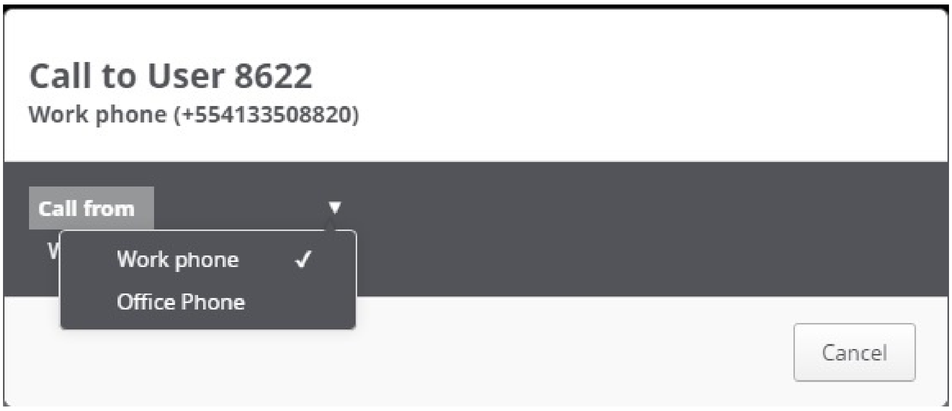
Each time the user chooses a different device in the prompt, the outgoing preferred device changes.

When choosing to make outgoing calls from prompt or from UC softphone, the outgoing preferred device menu will not be shown in the main window.

When choosing to make outgoing calls from prompt, the default menu will be displayed as in the figure below:



In case the hotkey feature is used, a pop-up window will be displayed as in the figure below:



2.5.2 Incoming calls

You have two different ways to receive calls:

- Alerting only the incoming preferred device;
- Getting a simultaneous signal on the softphone.

Using simultaneous ring, when a call comes in to the user, the UC sotphone gets an audible ring, regardless of the incoming preferred device ring. When pressing the answer button in the UC client, the call is automatically handed over to the softphone and answered.

2.6 Adding a new Device

You can select a device from your list to make it your preferred device. New devices can be added to this list anytime.

Step by Step

1) Click on your login name in the header bar and select **Settings** > **Devices**.

2) Select **Add a new device** under **Your phones** and enter the **Device name** and **Phone number**

3) Determine your **Ring and redirection preferences**.

4) Click on **Add device** and then click **Save**.

You have added a new device to the device list under **Your phones**.

2.7 Audio and Video Settings

When using WebRTC as the preferred device, you can perform Audio and Video Calls using your UC Desktop App as a softphone.

To check the settings of the audio and video devices to be used, click on your login name in the header bar and select **Settings** > **Audio/Video**.

2.7.1 Using Video effects

You can use video effects to change your background in video calls or conferences or when you are idle.

IMPORTANT: It is not recommended to change the video effect or camera settings while video streaming is running. Turn off video streaming, then do any video configuration changes.

Prerequisites

- An OpenScape UC administrator has enabled the video effects feature on your system.

Step by Step

1) Click on your login name in the header bar, then click **Settings**.

2) Navigate to the **Audio/Video** tab.

The **Video effects** are displayed in the drop-down menu below the camera preview window. By default, when no video effect is selected, the value is set to **None**.

3) Click the **Video Effects** drop-down menu and select an effect from the list.

The following video effects are available: **Blur**, **Office**, **Room**, **Shelf**, **Painting**, **Company**.

4) Click **Save**.

Your background is updated and you can see it in the camera preview window.

2.8 Setting your Presence Status

Displaying your current presence status to other users can indicate your general communication readiness.

Step by Step

1) Select the icon of your current presence status– for example – in the header bar to open the presence setting menu.

2) Select your new presence status (Available, Do not disturb. Busy, etc).

Your new presence status is displayed in the header bar.

> **NOTICE:** The installation of OpenScape Conference Extensions is required to synchronize the presence status with MS Outlook or HCL Notes Calendar and automatically change the status to “In Meeting” when an appointment starts.

To also define the presence status to be assumed when you log in or log off, go to **Settings** > **Presence** > **My presence status during login / logout**.

2.9 Accepting a Call

Incoming calls addressed to your One-Number-Service (ONS) will reach your incoming preferred device and a signaling bar will indicate that this device is ringing.

Click on  in the signaling bar to accept the call.

2.10 Calling a Contact

You can start a call with one of your contacts

Step by Step

1) Enter the last name, fist name or directory number of the contact in the search field of the contact area.
2) Move your mouse over the contact you want to call.
3) Click on  and select the directory number for the call.
4) Click on  in the signaling bar:

A call control bar opens, displaying the new connection.

2.11 Initiating a Chat

You can start a chat with a contact.

Step by Step

1) Move the mouse pointer onto the contact in the contact list to see additional controls.
2) Click on .

   You see the phone numbers and addresses under which the contact can be reached.

3) Click on **Chat**.

The chat window opens in a minimized format at the bottom screen margin.

3 WebClient Features

Using the client you can deploy OpenScape UCApplication features with a browser.

Call features

- Managing calls

Conference features

- Creating and initiating persistent audio and web conferences
- Initiating scheduled audio, video, and web conferences
- Using the UC Guest Access feature to join conferences

Contact features

- Creating and organizing private contacts or teams

Chat

- Chats with a single or more than one communication partners

Profiles

- Creating and editing profiles for handling rules and communication scenarios

Voicemail features

- Displaying and playing voicemails

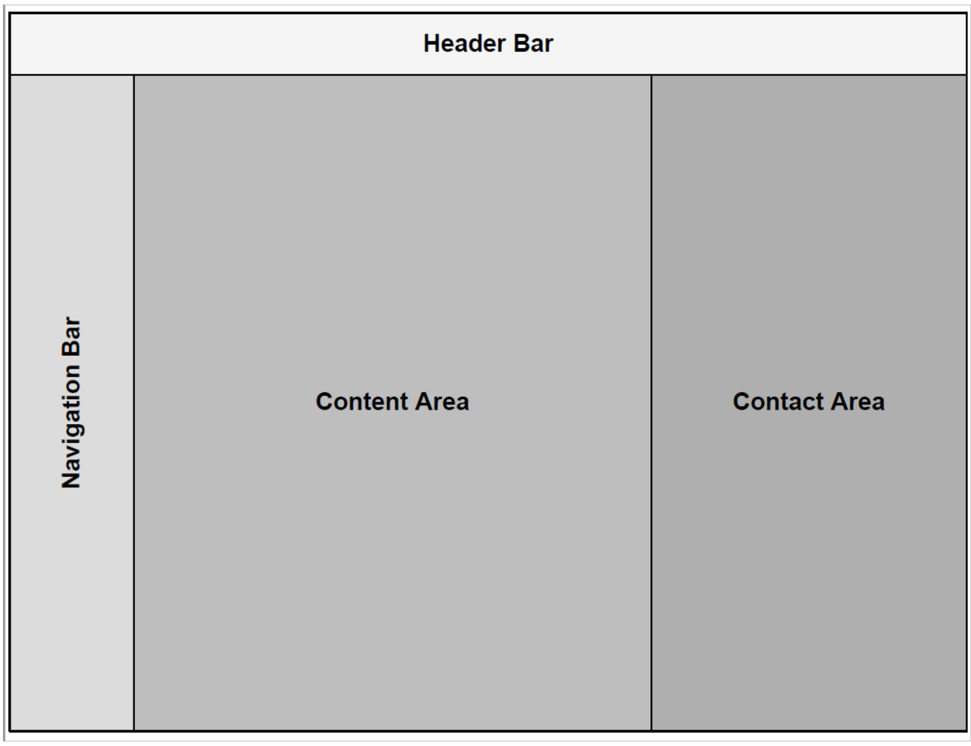
Accessibility features

- Enabling visual keyboard indicator
- Using screen reader feature
- Adjusting interface contrast

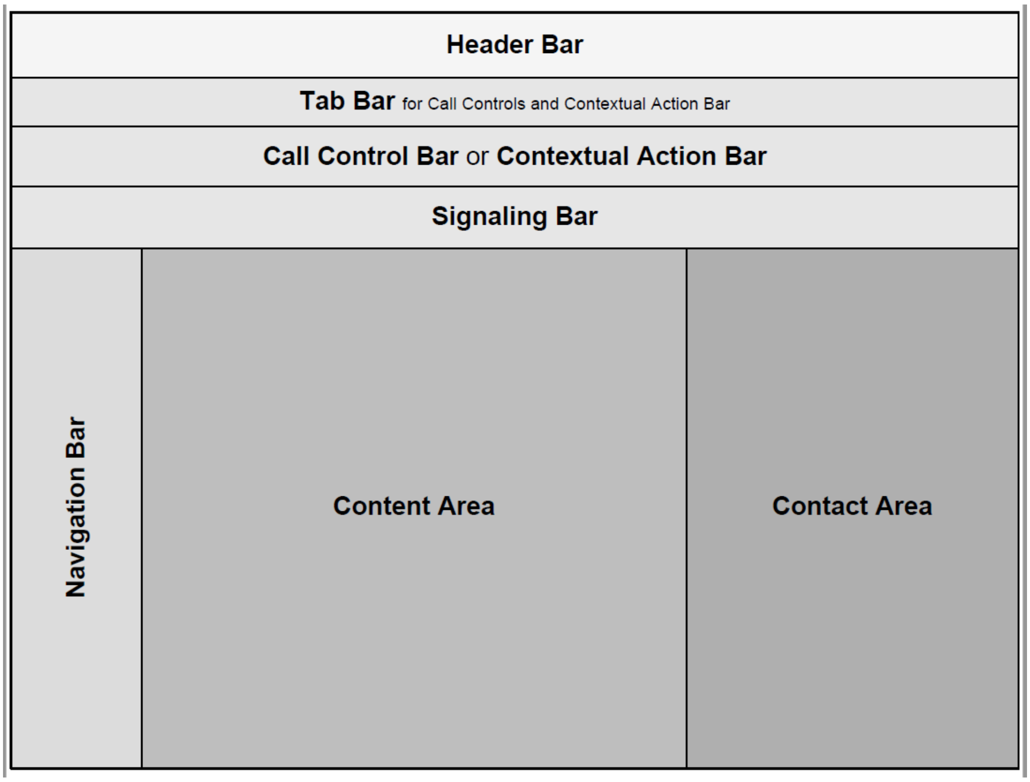
3.1 Structure of the User Interface

The different sections of the user interface are displayed in the figure below:

Without optional areas:

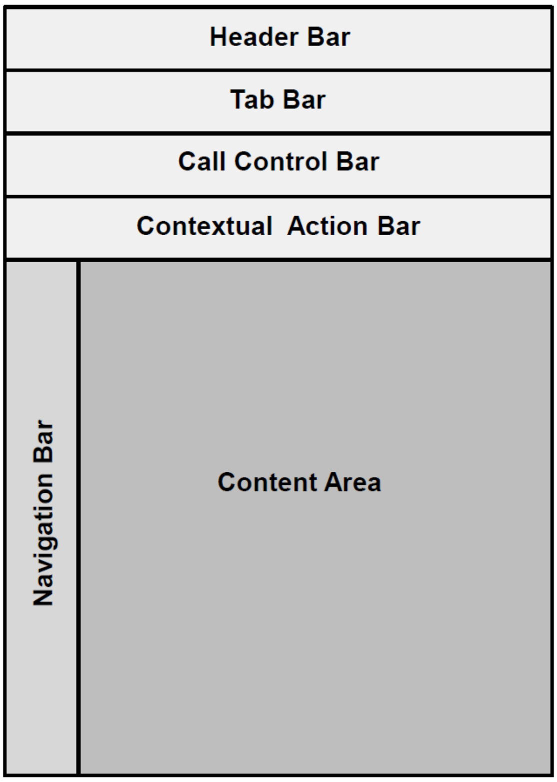


With all possible optional areas:



Mini view

The OpenScape Web Client is designed in a responsive web design. As a result, the OpenScape Web Client is adaptive to the browser size, displaying all of its components in a mini view when the browser is restored down to a smaller size. When the OpenScape Web Client is displayed in the mini view, the Contact Area is shown in the Navigation Bar, while the contact details are displayed in the content area.



3.2 General Call Control

Using the client you can initiate and control general call features on your preferred device.

General call features comprise in particular:

- Initiating a call
- Accepting / rejecting calls
- Forwarding calls
- Initiating consultation calls
- Placing a call on-hold
- Toggling simultaneous calls
- Transferring calls

3.2.1 Calling a Directory Contact

You can call a contact who is not one of your private contacts but whose data is available in the directory.

Step by Step

1) Enter the name or number in the search field of the contact area and press **Enter** or click on the  icon.

2) Select and select a phone number.

3) Click in the signaling bar.:

A call control bar opens, displaying the new connection.

3.2.2 Dialing feature codes

Users can dial feature codes (DARs) from their UC clients (for all types of endpoints) and WebRTC clients to activate or deactivate features.

For UC with OpenScape 4000, the following DARs are available:

1) **Hunt group in/out**

   Example for hunt group in:

   - The AHTVCE WABE code for *hunt in* is *13.
   - An UC user (12100) who wants to change the hunt group status needs to dial *13.

   NOTICE: There is no UI element in UC to mark the hunt group status (IN or OUT).

2) **Number/name suppression on/off**

   Example of number suppression:

   - The activation code for number suppression ON is *50.
   - An UC user (12100) who wants to call another UC user (13100) with number suppression needs to dial *5013100.

3.2.3 Rejecting a Call

To reject an incoming call click in the signaling bar.

3.2.4 Terminating an Active Call

While conducting a phone call click in the call control bar: If you use the terminal device's receiver for the call, simply put it down.

3.2.5 Placing an Active Call On-Hold

During an active call you can select to place the connection on hold and resume it whenever you wish. To do so, click in the call control bar of the phone connection.

3.2.6 Transfering a Call to Another Subscriber

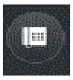
While you are in call, select the  button in call control bar.

A field to select to whom you want to transfer the call is displayed. You can look for a contact or type the number you want to transfer the call to. The call is transferred by pressing the  button that appears when you select the contact.

3.2.7 Handing an Active Call over to Another Device

Using the call controls of this call control bar you can hand the active call over to another device without having to terminate the call.

Step by Step

1) Select  in the call control bar of the phone connection.

A menu with a list of devices is displayed.

2) Select the device for resuming the call.

The active call is being handed over.

The device rings.

3) Accept the call on the device.

3.2.8 Alternating between Calls

Not matter how many phone connections you are running at the same time, you can only conduct only one active call at a time. All other phone connections are automatically placed on-hold.

The signaling bars of the various phone connections are represented as tabs in the tab bar. The tabs of held calls are grayed out. Using the controls in the tabs you can decide which of the phone connections to deploy for conducting a call. This process is called alternating between calls.

While connected simultaneously to two or more phone connections.

- Click on  in the associated tab to place a currently active call on-hold.

  The call is placed on-hold.

- Click on  in the associated tab of the tab bar to reconnect to a held call.

  The other call(s) are automatically placed on-hold.

Example

NOTICE:

It is not supported to Alternate/Reconnect between incoming calls established on a preferred device being an External OND e.g. a mobile phone.

Alternating between these calls can only be administered via the external OND.

3.2.9 Making a Consultation Call

While talking to a conversational partner you can connect to a second conversational partner in parallel, by either answering an incoming call or placing a call to an other user. The first call is then placed on-hold. After finishing the second call you are automatically reconnected to the first conversation partner.

You can call another person from the button in **Call Control** or directly from the **Contacts** List.

3.2.10 Making a Video Call

While conducting a call, you have the option, if your system supports it, to stream video via your configured camera. There is a specific view in the Call Control section, for displaying video.

To start streaming video in a conversation or in an active call, click on button.

3.2.11 Initiating Screen Sharing

During an active call with a UC WebClient user or during a conference call, you have the option to share your screen. In conference calls, 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 in a conference call, 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.

You can use the **Take picture** option to capture a picture of what is being shared and see a list of additional options. For more information, see Integrating screen share with other features on page 64.

The other call party will see your screen sharing in the designated Call Control section. You can also access the Mouse Pointer, Comment Pointer and Remote Desktop Control functionalities, as described in the Conferences section.

This screen sharing functionality is only available if your system is deployed to support it.

3.2.11.1 WebRTC Screen Sharing in a call to an external contact

This feature allows you to share screen information with an external contact by sending a unique URL for this purpose and a unique PIN password.

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 a unique URL is generated.

2) Send the URL link to the external call participant.

Upon receiving and opening the received link, the external participant will be requested to enter the unique PIN as show in the figure below:

3) Click on the **Show PIN** option under Sharing Options from Step 1.
The PIN is revealed. Share this 6-digit PIN with your external contact.Once that external user enter the corresponding PIN they will be able to view your shared screen content.

NOTICE:

The screen share access to external participant will be cancelled if the active call is set to on hold for any reason. On resuming that call, you (as presenter) will have to provide a new URL and a new PIN if you want to proceed on sharing information.

3.3 Contacts

You may have access to a public directory that contains all information to work together with users of this system. It also includes other contacts of public active directories that you may contact via phone calls, emails or chat.

On top of this, you can create your own list of contacts by adding new contacts or by changing the information coming from these public directories.

3.3.1 Creating a new Contact

You can create new contacts in the contact area. Using these contacts, you can then initiate communication relationships – for example make calls, send instant messages or start a conference.

Step by Step

1) Click on in the contact area.

The display changes for adding a contact.

2) Specify the contact information:.

Optional:

- Select a contact image
- Assign this contact to a contact group, by selecting the group’s name under **Groups**

3) Click **Save**.

You have created a new contact.

3.3.2 Searching for Contacts

Type the name of the contact you are looking for. The contacts found in the private list are automatically displayed while you are typing the text. To perform the search function in the System Directory press the icon.

If your system is integrated with MS Office 365, the contact search will also look for contacts in your Outlook Private Contacts List. The found Outlook contacts will be displayed separately, at the end of the search result.

Alternatively, you can click on **Advanced Search** for a more specific search. It is possible to search with multiple criteria in parallel.

3.3.3 Grouping Contacts to perform group functions

You can group contacts to execute group functions, like conference calls and group chat.

Select the contacts with the **+** button via the action bar. Click the button to open the action menu and select what group function you want to initiate.

3.4 Call History

You can see the history of your calls by clicking on in the navigation bar.Each call is logged in the call history with the following information:

- Connection type (incoming, outgoing, accepted, missed)
- Date and time
- Phone number of the caller / callee
- Further phone numbers in case of a forwarding
- Further information about the caller or callee – for example name or presence status

3.5 Conferences

The OpenScape UC Application supports the following conference types.

- Web conferences
- Ad-hoc conferences
- Persistent conferences
- Scheduled conferences
- Device-controlled conferences (Large Conference).

3.5.1 Creating a Conference

You need to start a conference so that participants can dial into and join. Moderated conferences can be started by a moderator only.

Step by Step

1) Click on in the navigation bar and move your mouse pointer to the conference

2) Click on .

3) Click on in the signaling bar and follow the announcements of the conference portal.

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.

3.5.2 Creating a Scheduled or Persistent Conference

You can create persistent or scheduled conferences.

Scheduled conferences will be start at the configured time and will be active for as long as the conference is in progress.

Persistent conferences can be started at anytime. After a persistent conference ends, it remains configured and can be started again later.

Step by Step

1) Create a conference in one of the following ways:

- In the contacts area, hover over the contacts you want to add to the conference and click to add them to the action bar. Next, click on the action bar and select **Create a conference**.

  or

- Click on the left navigation bar to open the **Conferences** panel, then click **+ New Conference**.

2) Configure your conference settings:

a) Enable the **This conference is moderated** option to create a moderated conference.

In moderated conferences, only moderators can start and control the conference, share their screen with other participants and start video streaming.

A moderated conference can have one or more moderators.

When a conference is created or edited, the creator of the conference can assign the moderator role to the desired participant/s by checking the **Moderator** check box next to their name in the participants list.

The moderator role can also be assigned by a moderator to another participant during a running conference. For this, the moderator needs to select an active participant, then click ☰ > **Add as Moderator**. This role is valid only during the conference and cannot be given to guest users.

Moderators can also enable video and screen sharing capabilities for guest users via the **media sharing**.

NOTICE:

In case OpenScape UC is deployed to use **Individual Video View Layout**, even in moderated conferences, all participants can share a screen and stream video.

b) Enable the **Set time for conference** option to create a scheduled conference.
If this option is not enabled, the conference is set as a persistent conference.

c) Add participants to the conference and configure the following settings:

- **Moderator**: flag which indicates the moderator/s of the conference, in case of moderated conferences.
- **Device**: the device on which the participant will be called, in case of dial out conferences.
- **Call In/out**: call in participants have to dial in to join the conference, while call out participants will be automatically called when the conference starts.

3) Click **Create**.

A new conference is created and it is available in the **Conferences** panel.

Next steps

Once a conference is created, you can send invitations to participants. For more information, see Conference Invitation on page 35.

3.5.3 Initiating an Ad-hoc Conference

Start an ad-hoc conference with contacts from your contact list.

Step by Step

1) Click the + button next to a selected contact.

2) Select further contacts and click on the phone icon in the action bar

3) Click on the phone icon in the signaling bar

The conference is set up and a call control bar is displayed.

3.5.4 Initiating a Web Collaboration

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.

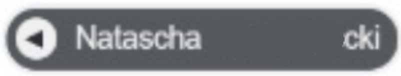
3.5.5 Using Mouse Pointer and Comment Pointer during WebRTC Screen Sharing

In case your UC system is deployed with WebRTC Screen Sharing, you can also use the mouse pointer or comment pointer features.

The screen sharing presenter must use the UC Desktop App or Fusion for Office Clients to enable other participants to point or to provide comments to the shared information.

The presenter has to share the entire screen to select the option to enable or disable the mouse pointer. This will enable both the mouse pointer and comment pointer features.

All conference participants, on any client, can click on the screen to draw attention to a specific point of the shared screen. The clicks are shown to all other conference participants alongside their names, as displayed in the figure below:



All conference participants, on any client, can also press the `Ctrl` key on the keyboard and click on the screen to add a comment in a specific point of the shared screen. Participants can use the comment pointer functionality to insert comments with text or emojis in specific parts of a presentation. The comments are shown to all other conference participants alongside their names, as displayed in the figure below:

3.5.6 Requesting 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 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 screen,

   However, the presenter can stop the remote control process at anytime by clicking on **Stop**.

3.5.7 Conference Guest Access

If you are creating a conference, it is possible to provide a link in order to allow any external participant to join your conference. This participants are named "guests" and therefore this link is known as "Guest Access" over the internet.

A guest can join a UC conference via a WebRTC connection using the Guest Access link. In order to use the Guest Access feature you need to have the WebRTC function configured in your UC system.

For more information please contact your system administrator.

3.5.7.1 Joining a Conference using a Guest Access link

You can join a UC Web Conference anytime, whether you are a UC user or not, as long as you support the WebRTC functionality.

Step by Step

1) Open a web browser and enter the Guest Access link you have been provided with.

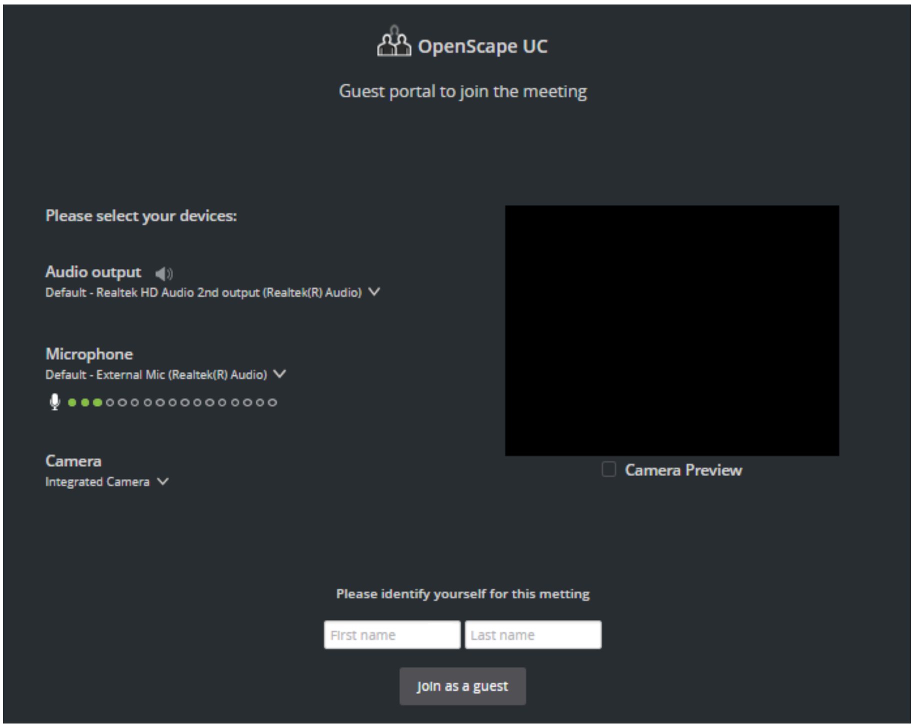
   You are prompted to select how to join the conference.

   The following options are available:

   - **Join using your account**, for UC users.
   - **Join as a guest**, for non-UC users.

2) Click **Join as a guest** for guest access to the conference.

The Guest portal opens.



3) Before joining the conference, select your devices:

a) Under **Audio output**, choose an audio devices from the drop-down list (e.g. your headset).

You can test its audio quality by clicking . A preview plays so you can hear what it sounds like.

b) Under **Microphone**, choose a devices from the drop-down list (e.g. your headset).

c) Under **Camera**, choose a video device from the drop-down list (e.g. your integrated camera).

You can test its video quality by enabling the **Camera Preview** option. A video preview displays so you can see what it looks like.

If an OpenScape UC administrator has enabled the video effects feature on your system, you can also select a video effect. The following video effects are available: **Blur**, **Office**, **Room**, **Shelf**, **Painting**, **Company**.

4) Enter your **First name** and/or **Last name**, then click **Join as a guest**.

You have now joined the conference as a guest and your name appears in the list of participants.

During the conference, you can change your audio and video settings at anytime. For more information, see Changing audio/video settings for guest users on page 31.

By default, guest users cannot screen media, unless a moderator gives them permissions for it. For more information, see Granting media sharing permissions to guest users on page 31.

3.5.7.2 Changing audio/video settings for guest users

During conference calls, guest users can change their audio and/or video settings at any time.

IMPORTANT: It is not recommended to change the video effect or camera settings while video streaming is running. Turn off video streaming, then do any video configuration changes.

Prerequisites

- An OpenScape UC administrator has enabled the video effects feature on your system.

Step by Step

1) Click at the top-right of the conference screen, next to the end call button.
2) Select **Audio and Video settings** from the drop-down menu.

   A pop-up window opens with the audio and video settings configured before joining the conference as a guest.
3) Change the audio and video settings as you desire.
4) Click **Save**.

The audio and video configuration is updated.

Next steps

As a guest user, you can also see a camera preview while you are in a conference. To do so, click and select **Show camera preview**.

Camera preview opens in the top left corner of the conference screen.

If you have selected a video effect before joining the conference, it will be displayed by default in camera preview.

3.5.7.3 Granting media sharing permissions to guest users

As a moderator, you can allow guest users to share media during a conference call.

Step by Step

1) Click on the list of participants at the right of the conference screen and select **Guest participant(s)** from the drop-down list.

   The list of guest participants is displayed (if any).
2) Hover over the participant's name you want to grant media permissions to.

   The icon appears next to the participant's name.
3) Click and select **Allow media sharing**.

The guest user can start sharing media.

3.5.8 Initiating a Large Conference

This is a type of conference that connects all the subscribers you are currently connected to on your terminal device:

Prerequisites

You have set up several simultaneous phone connections.

Step by Step

1) Click on in the call control bar of a phone connection.

You see a menu with connecting options.

2) Select **Merge calls together**.

All of your phone connections are combined to a conference.

3.5.9 Moving participants from a 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 additional features, such as video and screen sharing, improving the collaborative work in a longer discussion.

Prerequisites

You are in an active Large Conference

Step by Step

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.

3.5.10 Conference Call Control

A conference view displays basic information like for example the number of conference participants. Using the options of the call control bar you can display further details.

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
-  - Start whiteboard
-  - Start chat

Conference Recording:

Click on  and select **Record Conference** to start recording. 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 

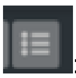
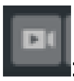
.

Once the conference has ended, all the participants of an open conference will receive an e-mail with the conference recording file. In a moderated conference, only the moderators will receive the e-mail.

3.5.10.1 Conference view layout options

The Active Speakers layout is displayed In the main view of your conference call. The current active speaker's window is highlighted with a green color.

During a Conference call you can control the conference view details according to your preferences using the following buttons:

- : display/hide the list of participants
- : display/hide the active speakers view
- : display/hide video view of active speakers

3.5.10.2 Video view layout options

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:

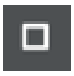
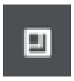
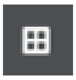
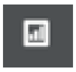
1) **Common Video View layout:** All participants will see the same video view layout.

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.

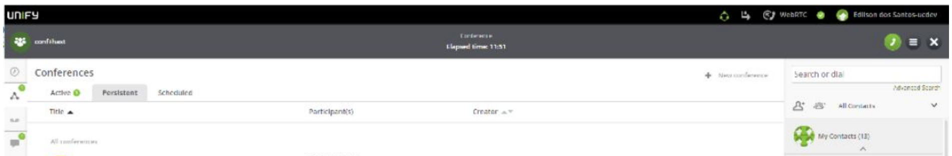
2) **Individual Video Views layout:** Every participant can choose his own video layout.

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, that will appear depending on how the system is deployed as explained above:

-  - **Single view**: Click this button to display a single participant's video screen.
-  - **Active speaker view**: Click this button to display the active speaker(s) video screen.
-  - **Tile based view**: Click this button to display the basic video layout in tiles.
-  - **Statistics view**: Click this button to display the statistics of the video conference.

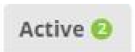
3.5.10.3 Active Conference Notification

The active conference notification allows users to be notified about all running conferences that they are invited to.



3.5.10.4 Active Conference Tab and Avatars

All active conferences are available in the **Active** tab of the WebClient's **Conference** section, as displayed in the figure below:



The **Active** tab displays the following information about active conferences:

- The title of the conference;
- The elapsed time;
- The conference participants;
- The creator of the conference.

Each conference will be displayed using a colored avatar.

3.5.10.5 Options Menu for Conferences

The options menu is available for active and non-active conferences.

To access the options menu, click the icon.

For active conferences, the options menu allows users to:

- Chat with conference participants;
- Email conference participants;
- Invite users to the conference;
- Display the list of active participants.

For non-active conferences, the options menu allows users to:

- Chat with conference participants;
- Email conference participants;
- Invite users to the conference;
- Set a new conference PIN.

3.5.10.6 Automatic Connection to Conferences via UC Softphones

When using the UC softphones, the users will be able to connect to conferences with one single click.

To automatically connect to a conference, navigate to the **Conference** section and click the icon on the conference you want to join.

3.5.11 Conference Invitation

A conference invitation includes information for participants who want to join a conference.

A conference invitation displays the following information:

- The conference title and subject;
- The creator of the conference;
- The date and time when the conference will take place;
- A link to join the conference via computer or mobile app.
- The conference bridge number and PIN to join the conference via phone;
- Other bridge numbers.

You can send conference invitations after a conference is created or when the conference is in progress.

3.5.11.1 Sending a conference invitation

After a conference is created, you can send conference invitations to inform participants about how to join the conference.

Step by Step

1) Click on the left navigation bar to open the **Conferences** panel.

2) Hover over the conference for which you want to send an invitation.

3) Click and select **Invitation**.

The **Invitation** pop-up window is displayed with the conference details.

4) Click **Copy** to copy the invitation message to clipboard and send it to participants.

You can also invite participants to join a conference while it is in progress. For this, click on the conference call control and select **Invitation**. Copy the invitation message and send it to the desired participants.

3.5.11.2 Joining a conference from invitation

You can easily join a conference for which you have received an invitation.

To join a conference from invitation:

Step by Step

1) Open the invitation with your preferred email client and **Click here to join the meeting**.

The conference opens in a new browser window.

2) Select how to join the conference:

- It the OpenScape UC DesktopApp is install on your computer, you are automatically prompted to select if you want to join the conference via the DesktopApp. Click **Open UCDesktopApp** to join the conference using this app.
- Click **Join using your account** and sign in with your OpenScape UC account to join the conference.
- Click **Join as a guest** if you do not have an OpenScape UC account.

3.5.12 Searching for conferences

You can easily search through the list of conferences you are part of to find a specific one.

Step by Step

1) Click in the left navigation bar to open the **Conferences** tab.
2) Click on the top right of the screen.
   A pop-up window containing a search field is displayed.
3) Type the title of the conference you are searching for in the search field.

The search results display the list of conferences that matches your search (if any).

3.6 Voicemail

3.6.1 Displaying your Voicemails

Click button in the navigation bar to show the voice messages recorded for you. To use this function, you user account needs to be configured with a voice mail service.

3.6.2 Playing a Voicemail

You can play a voicemail via your preferred device or PC.

Step by Step

1) To play a voicemail on your preferred device:
   a) Move the mouse pointer onto the voicemail entry.
      You see additional controls.
   b) Click and select **Play on phone**
2) To play a voicemail via your PC, click on :

3.6.3 Using the Voicemail Greeting Feature

It is possible to record greetings which are played when a call is redirected to your voicemail.

There are several greetings options available:

- **Default greetings**

  This is a system generated greeting and is selected by default. You may want to access the option **Record of Name** to record your name to be played when using this default greeting
- **Single greeting**

  This can be used to inform who is your delegate or when you are available again to answer calls.

- **Vacation greeting**

  When selecting this option all your calls are redirected to your voicemail. This also can be used to inform who is your delegate or when you are back again from your vacations.
- **Business greeting**

  It allows you to record two greetings, one to be used during your business hours and the other to be used outside your business hours. You can also specify your business hours for each day of the week.

The greetings can be defined in the **voicemail** tab under settings.

You reach the **voicemail** tab with the following steps:

1. Click on your login name (avatar) on the header bar

2. Click on **Settings**

3. Click on the **voicemal** tab

You can record, playback, download or load your greeting. Press the **Settings** button under the Greeting you want to use:

a) When you click on the microphone you can record your greeting.While the recording is active the microphone icon turns red. Clicking again on the microphone icon stops the recording.

b) When you click on the communication options icon you can select **Load from File** or **Download**.

NOTICE: Only .wav files are supported.

NOTICE: To use the **Load from file** option, the following properties are recommended: .wav File - 128 kbps bit rate, 8 kHZ sample rate, 16-bit resolution and channel mono.

c) You can click on the playback icon to hear what you have recorded.

d) When you enable the check box **Do not allow recording voice mails** the caller cannot leave a message, just here your greeting.

4. Click **Save** to save your settings.

3.7 Team Feature

Using the OpenScape UCApplication team feature you can group OpenScape users to teams. The Team feature allows every member of a team to pick up a call of every other colleague in the same team.

Teams may also be created and managed by the OpenScape UCApplication administrator.

3.7.1 Creating a Team

Create teams and invite contacts to be members.

Step by Step

1) Click  in the contacts area and select **Create new Team**.
2) Configure the new team's details and add contacts from the **Search Directory.**
3) Click **Save**.

The contacts you have invited are displayed under **Invited users** and will receive an invitation. When a contact accepts your invitation, it will appear under the **Members** list and you will be notified.

3.8 Multi Line Hunt Group

This feature is available when using WebRTC as your primary work phone (ONS) or as a preferred device (OND). The WebRTC number must be a member of the Multi Line Hunt Group (MLHG).

Restriction: If the UC user has set an OND (e.g. not ONS) as preferred device, calls distributed by Multi Line Hunt Groups (MLHG) cannot be handed over to other devices while they are ringing. The reason is that OpenScape Voice does not allow a second deflect for MLHG calls.

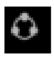
Your Web Client can be connected to OpenScape Voice or OpenScape 4000. However, the following apply regarding this feature:

Client 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”.

Client connected to OpenScape 4000, supports:

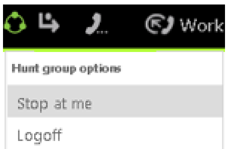
- Login / Logoff

In order to indicate the status of the MLHG an icon is displayed on the client bar.

You can login / logout of the hunt group clicking on the client bar.

Options when available

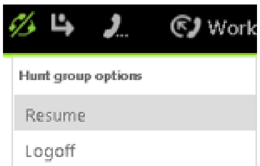
When you are logged into the hunt group and you are available you have the following options by clicking on the icon :



- Stop at me (OpenScape Voice)
- Logoff

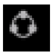
Options when status is available but set to busy

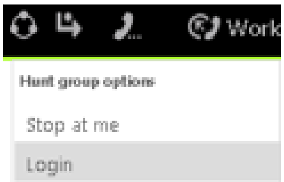
When you are logged into the hunt group and you are available but set to busy you have the following options by clicking on the icon :



- Resume (OpenScape Voice)
- Logoff

Options when status is logged off

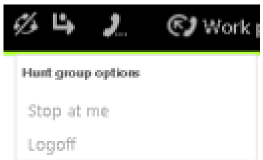
When you are not logged into the hunt group you have the following options by clicking on :



- 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

3.9 Chat

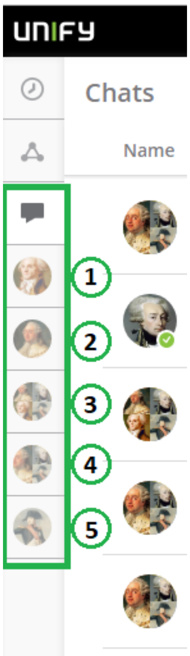
You can chat with an individual contact or with a group of contacts.

3.9.1 Displaying your Chat History

To display your chat history, click on  in the navigation bar.

3.9.2 Pin a Chat Conversation

You can pin one or more chat conversations in order to easily access them from the Navigation tab on the left corner of your WebClient interface. The pinned chats will be displayed below the chat tab and user is allowed to pin 5 chat

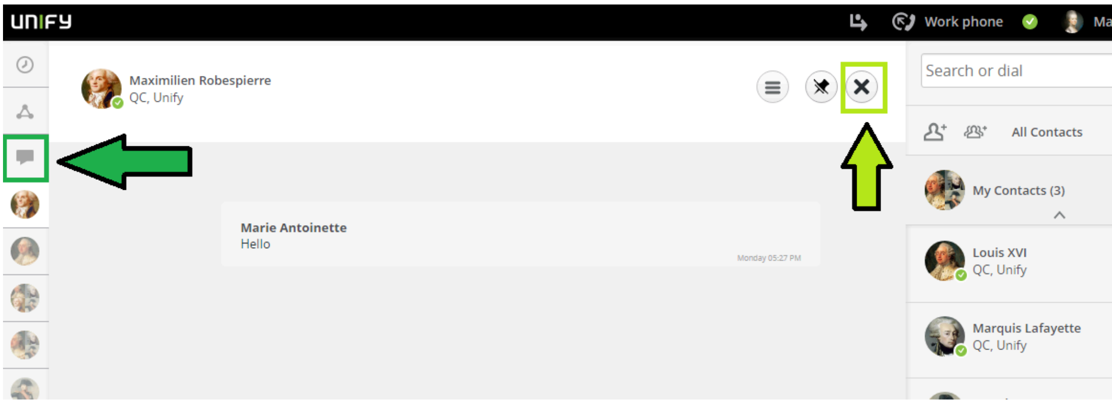


conversations.

In the main window of the chat conversation, click the pin button , This will pin the specific conversation to the left Navigation bar as shown in the figure above.

To unpin a conversation, select it and click the unpin button

You can return to the chatlist by clicking the "X" button as shown in the figure below.



3.9.3 How to Add Users to a Chat

You can add further participants to an active chat.

Prerequisites

You are conducting a chat.

Instant-messaging addresses are available for the additional chat participants – for example as associated entries in your private contacts.

Your private contacts' IM status is **Available**.

Step by Step

1) Select ≡ in the title bar of the chat window.

   You see an action menu.

2) Select **Add user**.

   The dialog for selecting users opens.

3) How to add a user from your private contact list:

a) Enter one of the following search items in the search field of the contact area:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Move the mouse pointer onto the private contact.

You see additional controls.

c) Select ⊕.

The contact is displayed in the contextual action bar.

4) How to add a user from the directory:

a) Enter one of the following search items in the search field of the window:

– Full second name or part of a second name

– Full first name or part of a first name

– Full phone number or part of a phone number

If your private contacts deliver search hits, they are displayed beneath the search field, continuously updated.

b) Select 🔍 beneath the search field and the private hit list.

The contact is searched for in the directory.

If search hits are found, they are displayed beneath the search field.

c) Move the mouse pointer onto the contact.

You see additional controls.

d) Select ⊕.

The contact is displayed in the contextual action bar.

5) Select **Done**.

The additional users may now also post messages in the chat.

3.9.4 Adding an Attachment to a Chat Message

You can add an attachment to a message with one of the following ways:

- Click the paper clip icon 📎 next to the message box to browse and select a file from your local computer.
- Copy and paste images directly into the message box.
- Drag and drop a file into the message box (one file at a time).

3.9.5 Deleting a Chat Message

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

3.9.6 Leaving a Chat

You can leave from an active group chat. This chat will be removed from your **Chat history** tab by clicking on the actions menu icon in the title bar of the chat window and selecting **Leave chat**.

You have successfully left the group chat. The other participants will be notified that you have left the chat by a short message in the chat's window.

NOTICE:

Once you leave a chat you wont be able to see the chat's history. You can only access the certain chat history if one of the participants adds you again.

3.9.7 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.

3.9.8 Starting, using and adding to chat during a conference call

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

Guest participants can use the conference chat only if a moderator adds them to it.

Only moderators are allowed to start the chat during a conference call.

3.9.8.1 Starting the chat during a conference call

During a conference call, non-guest participants can start the chat.

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.

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

The chat panel is displayed for non-guest participants. Guest participants will be able to see the chat only if a moderator adds them to it.

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

3.9.8.2 Using the chat during a conference call

During the conference, participants can do the following actions using the chat:

- Type a new message in the message box and send it by click the icon or pressing the `Enter` key.
- Send an emoji, by clicking the icon displayed on the right side of the message box.
- Add attachments, by clicking the icon, displayed on the right side of the message box.
- 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.

3.9.8.3 Hiding the chat during a conference call

Guest and non-guest participants can hide the chat when they no longer want to see it or they want other panels to appear larger.

To hide the chat panel, 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.

3.9.8.4 Adding a guest user to the conference chat

By default, if the chat has been started during a conference, guest participants cannot see or use it unless a moderator added them to it.

Prerequisites

- You are a moderator.
- You have joined the conference using the WebClient, UC Desktop App or Fusion for Office.

Follow the steps below to add a guest user to the conference chat:

Step by Step

1) Click on the list of participants at the right of the conference screen and select **Guest participant(s)** from the drop-down list.

The list of guest participants is displayed (if any).

2) Hover over the participant's name who you want to add to the conference chat.

The icon appears next to the participant's name.

3) Click and select **Add to chat**.

The chat is displayed to the guest participant selected.

Guest participants can use the chat the same as non-guest participants. For more information about actions using the chat, see Using the chat during a conference call on page 46.

3.9.8.5 Viewing chat messages after a conference ends

After a conference ends, you can view the chat messages and files exchanged during the conference.

Prerequisites

- You have joined the conference as 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) Click to open the **Conferences** tab.

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

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

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.

3.9.9 Searching for chats

You can easily search through the list of chats you are part of to find a specific one.

Step by Step

1) Click in the left navigation bar to open the **Chats** tab.
2) Click on the top right of the screen.
A pop-up window containing a search field is displayed.
3) Type the title of the chat you are searching for in the search field.

The search results display the list of chats that matches your search (if any).

3.9.10 Forwarding chat messages

You can forward a message from one chat to another or to your notes space.

NOTICE: You can only forward one chat message at a time.

Follow the steps below to forward chat messages:

Step by Step

1) Click on the left navigation bar to open the **Chats** tab.
2) Open the desired chat and locate the message you want to forward.

3) Click ⋯ at the bottom right of the message, then select one of the available options:
   a) If you want to forward a message to an existing chat, select **Forward to a chat** and select the desired chat.
   b) If you want to forward a message to a new chat, select **Forward to a chat**, then click **+ Forward to a new chat** in the top right of the screen.

      This allows you to create a new chat to forward the message to. You can select between creating a 1-to-1 chat or a group chat.
   c) If you want to forward a message to your notes, select **Forward to My Notes**.

Alternatively, you can copy the text of a message and send it manually in a chat or save to your notes. For this, click ⋯ at the bottom right of the desired message, select **Copy text**, then paste it in the desired location.

Forwarded messages appear in chat with the text **Forwarded** below sender's name.

3.10 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.

3.10.1 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 1: Whiteboard tools

Whiteboard tool	Description	How to use it
	**Take picture**	Capture a picture of the whiteboard.
	**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.
	**Other options**	Display additional options: • Set or change the background of the whiteboard.

When you select **Take picture**, you can see a preview of the picture and the actions you can do with it. For more information about the options available, see Integrating whiteboard with other features on page 65.

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.

3.11 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.

3.11.1 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.

3.11.2 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.

3.11.3 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**.

3.11.4 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.

3.11.5 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.

3.11.5.1 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.

3.11.5.2 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.

3.11.5.3 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.

3.11.5.4 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.

3.11.6 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.

3.12 Hands Up

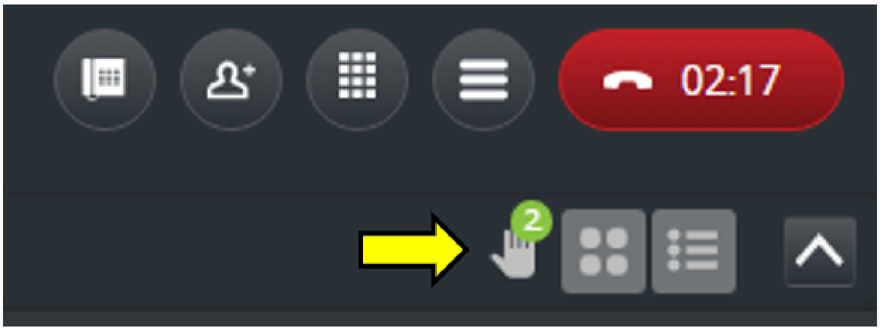
The Hands Up feature in conference calls allows active participants to raise or lower their hands and indicate to the moderator/s or other panelists whether they want to speak.

> **NOTICE:** This feature is available to guest and non-guest participants.

3.12.1 Viewing the Hands Up

You can view the list of participants whose hands are up, in the order they have been raised, in one of the following ways:

- Click the hand icon at the right of the conference call control bar.



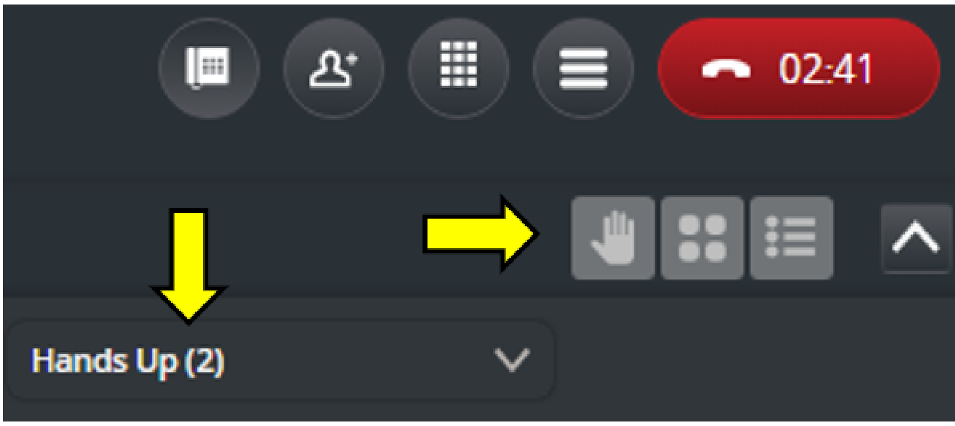
This icon appears only when at least one conference participant has raised their hand.

It also displays a green counter with the total number of hands raised. The counter increases or decreases when participants raise or lower their hands.

- Click on the list of participants at the right of the conference screen and select **Hands Up** from the drop-down list.

A list of guest and non-guest participants whose hands are raised and the total number of hands up are displayed.

NOTICE: When the Hands Up list is displayed, the green counter does not appear anymore. Instead, the total number of hands raised is displayed next to the list name.



3.12.2 Raising your hand during a conference

During a conference, you can click **Hands Up**  on the conference call control bar to announce you want to speak.

When you raise your hand:

- The **Hands Up** icon turns green for you.

- The number of hands up increases.

  If at least one participant has their hand up, a hand icon appears at the right of the call control bar and displays a green counter with the total number of hands raised.

  For example, if two participants have raised their hands, the icon displays .
- All other conference participants receive a notification that your hand is up, at the bottom right of their screen. To view the notification, the UC client must be in focus mode.

  NOTICE: Participants do not receive a notification when raising their own hand.

- Your name is displayed in the **Hands Up** list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 58.

Moderators verbally announce the participants who raised hands when they can talk.

When permissions to talk are given, participants can unmute themselves and contribute to the discussion.

3.12.3 Lowering your hand during a conference

During a conference, you can click **Lower Hand**  on the conference call control bar to lower it, if needed.

When you lower your hand:

- The **Lower Hand** icon turns gray for you.
- The number of hands up decreases.

  NOTICE: If no other participant has their hand raised, the hand icon with a green counter is no longer displayed at the right of the call control bar.

- Your name is no longer displayed in the **Hands Up** participants list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 58.

Participants who lowered their hand previously can raise their hands when they want to speak again.

3.12.4 Lowering hands as a moderator

Moderators can lower hands for participants who have already spoken, so others can speak too.

NOTICE: It is not possible to lower all hands at once.

Follow the steps below to lower hands as a moderator:

Step by Step

1) Display the **Hands Up** list in one of the following ways:

- Click the hand icon with a green counter at the right of the conference screen.
- Click on the list of participants at the right of the conference screen and select **Hands Up** from the drop-down list.

The **Hands Up** participants list opens and you can view participants whose hands are raised, if any.

2) Hover over the participant's name whose hand you want to lower.

The **Lower Hand** icon appears next to the participant’s name.

3) Click .

When moderators lower a participant's hand:

- The **Lower Hand** icon turns gray for this participant.
- The name of the participant is no longer displayed in the **Hands Up** list.

  For more information about the **Hands Up** list, see Viewing the Hands Up on page 58.
- The number of hands up decreases.

> **NOTICE:** If no other participant has their hand raised, the hand icon with a green counter is no longer displayed at the right of the call control bar.

Participants whose hands have been lowered by a moderator can raise their hands when they want to speak again.

3.13 My notes

My notes is a temporary chat repository where you can store notes, files and pictures for yourself.

It is possible to populate the your notes space in one of the following ways:

- Use the **Add to my notes** option or the `Alt + J` key combination during a conference call.
- Navigate to **My notes** area of your UC client and create a note.

The following UC clients support this feature: WebClient, UC Desktop App and Fusion for Office.

3.13.1 Adding to My notes during a conference call

In a conference call, participants can add to their notes in one of the following ways:

- During a screen sharing session

- During a whiteboard session
- Using a key combination
- Using the **Communication Options** button, on the conference call control bar

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NOTICE: This feature is only available to UC users.

Follow the steps below to add a note during a conference call:

Procedure

- Hover the mouse over the screen share panel or the whiteboard and click **Take picture**, then select **Add to my notes**.
  For more information, see Integrating screen share with other features on page 64 and Integrating whiteboard with other features on page 65.
- Press the `Alt` and `J` keys on your keyboard at the same time.
- Click on the conference call control, then click **Add to My Notes**.

  A pop-up window is displayed and you can type a new message, insert an emoji or add an attachment to your note.

  Click **Send** to save the note.

All notes are available in the **My notes** area of your UC client.

3.13.2 Viewing notes in My notes

To view your notes, click **My notes** in the left navigation bar of your UC client.

You are navigated to your notes space and you can view the following tabs:

- **Notes**: contains a list of notes created previously (if any).
- **Files**: contains all attachments included in notes.

3.13.3 Creating a new note in My notes

You can create a new note in your notes space via the **My notes** tab.

Step by Step

1) Click **My notes** in the left navigation bar to open your notes space.
   The notes created previously (if any) are displayed in this area.
2) Click **+ New note** in the top right of the screen.
   A pop-up window is displayed and you can type a new message, insert an emoji or add an attachment to your notes.
3) Click **Save** or press `Enter`.

The new note is displayed in **My notes**.

3.13.4 Deleting a note from My notes

You can delete a note that you don't need anymore from your notes space.

NOTICE: It is not possible to delete all notes from your notes space at once. You can only delete notes one by one.

Follow the steps below to delete a note:

Step by Step

1) Click **My notes** in the left navigation bar to open your notes space. The notes created previously (if any) are displayed in this area.

2) Locate the note you want to delete and click **Delete** on its right.

3) Click **Yes** to confirm the action.

The note is removed from **My notes**.

3.13.5 Forwarding a note

You can forward a note from your notes space to another chat.

NOTICE: You can only forward one note at a time.

Follow the steps below to forward a note:

Step by Step

1) Click on the left navigation bar to open the **My Notes** tab.

2) Locate the note you want to forward.

3) Click ··· at the bottom right of the note, then select **Forward to a chat**.

4) Select one of the available options:

a) If you want to forward the note to an existing chat, select the desired chat from the list of chats.

b) If you want to forward the note to a new chat, click **+ Forward to a new chat** in the top right of the screen.

This allows you to create a new chat to forward the note to. You can select between creating a 1-to-1 chat or a group chat.

Alternatively, you can copy the text of a note and send it manually in a chat. For this, click ··· at the bottom right of the desired message, select **Copy text**, then paste it in the desired chat.

Forwarded notes appear in chat with the text **Forwarded** below sender's name.

3.14 Features integrations

During a conference call, you can use specific features separately or in combined mode.

The following features can be used together: screen share, whiteboard, chat in a conference and My notes.

3.14.1 Integrating screen share with other features

During a screen sharing session in a conference call, participants can capture a picture of what is being shared and do one of the following actions:

- Add the picture to My notes
- Add the picture to the conference chat
- Add the picture to the whiteboard
- Set the picture as background for the whiteboard
- Download the picture locally

Prerequisites

- A conference participant shares their screen.

Follow the steps below to use the integration between screen share and other features:

Step by Step

1) Hover the mouse over the screen share panel and click **Take picture**.
A pop-up window displays and you can see a preview of the picture and the actions you can do with it.

2) Select one of the available options:

a) Click **Add to my notes** to add the picture to your notes.
The picture will be added to the notes space of your UC client. For more information, see My notes on page 61.

b) Click **Add to chat** to send the picture as an attachment in the conference chat.
The picture will be available in the **Files** tab. For more information about the chat in conference feature, see Starting, using and adding to chat during a conference call on page 45.

c) Click **Add to whiteboard** to display the picture inside the whiteboard.
All whiteboard tools can be used. For more information about using the whiteboard, see Adding, editing or hiding the whiteboard in a conference call on page 49.

d) Click **Set as whiteboard background** to add the image as background for the whiteboard.

e) Click **Download** to save the picture locally.

3.14.2 Integrating whiteboard with other features

During a whiteboard session in a conference call, participants can capture a picture of what is being displayed inside the whiteboard and do one of the following actions:

- Add the picture to My notes
- Add the picture to the conference chat
- Add the picture to the whiteboard
- Set the picture as background for the whiteboard
- Download the picture locally

Prerequisites

- A non-guest conference participant starts the whiteboard.

Follow the steps below to use the integration between whiteboard and other features:

Step by Step

1) Hover the mouse over the whiteboard and click **Take picture**.
A pop-up window displays and you can see a preview of the picture and the actions you can do with it.

2) Select one of the available options:

a) Click **Add to my notes** to add the picture to your notes.
The picture will be added to the notes space of your UC client. For more information, see My notes on page 61.

b) Click **Add to chat** to send the picture as an attachment in the conference chat.
The picture will be available in the **Files** tab. For more information about the chat in conference feature, see Starting, using and adding to chat during a conference call on page 45.

c) Click **Add to whiteboard** to display the picture inside the whiteboard.
All whiteboard tools can be used. For more information about using the whiteboard, see Adding, editing or hiding the whiteboard in a conference call on page 49.

d) Click **Set as whiteboard background** to add the image as background for the whiteboard.

e) Click **Download** to save the picture locally.

3.15 Call quality indicator

The call quality indicator ( ) shows the quality of audio, video and screen sharing connections during an active call (conference call or one-on-one call).

The indicator shows up to three bars:

- Three bars: call quality is high and all values are within the expected range.
- Two bars: call quality is medium, some values are below the expected range.
- One bar: call quality is low, several values are below the expected range or packet loss is high.

- No bars: call quality is poor, most indicators are below the expected range or packet loss is very high.

3.15.1 Viewing call quality metrics

While on an active call (conference call or one-on-one call) you can check the quality of the connection using the call quality indicator (). Call metrics are displayed for the following connection types: audio, video and screen sharing.

Call quality statistics are available after the call is established and for as long as the call is active.

Prerequisites

- You have joined the call using the WebClient or UC Desktop App, with WebRTC resource.

> **NOTICE:** UC Desktop App only supports this feature on Windows operating systems.

- You are using the WebClient from within Goggle Chrome or Microsoft Edge browsers.

To view the call quality statistics of an active call, click on the left on the all control bar. A pop-up window with the call statistics appears.

The following values are collected in real time for **Upstream** and **Downstream**:

- **Used bandwidth** is measured in kilobits per second and indicates the bandwidth used by the connection.
- **Packets lost** is calculated as the percentage of packets that don't make it from the other party in the call.
- **Jitter** is measured in milliseconds as the variation between packet delays.
- **Latency** is measured in milliseconds as the amount of time it takes for a packet to be sent and for the acknowledgment of the packet to be received.

Values exceeding their threshold are displayed with a warning sign (⚠).

When the quality of the connection is poor, the following warning message is displayed above the call control bar: **Low network performance is detected**. If the quality of the connection improves, the message is no longer displayed.

3.15.2 Rating call quality

At the end of an active call, you can rate the overall quality of the connection.

Prerequisites

- An OpenScape UC administrator has enabled the rating call quality feature on your system.

The rating call quality dialog is displayed to UC users who have joined the call using the WebClient or UC Desktop App. The metrics for how often the call rating dialog is presented are determined based on the settings that your OpenScape UC administrator has configured on your system.

When the rating dialog appears, you can rate the call quality on a scale of 1 to 5 stars, where more stars means better experience.

To rate a call, select the number of stars that describes your call experience the best, then click **Submit** on the pop-up window. Your rating is registered and it will be used to for performance improvements.

If you want to skip the rating, click **Cancel** on the pop-up window.

3.16 Forwarding and Rules

The OpenScape UC Application can automatically analyze incoming calls and route them to a specific contact or terminal, according to forwarding or rules settings. For example, if you are out on business frequently and not able to accept your incoming calls personally, you can specify that calls arriving during a recurring meeting are automatically routed to a colleague, or your secretary, etc.

Incoming-call routing may occur according to the following criteria:

- Simple Forwarding settings:
  - Depending on whether the phone line is busy, the incoming call is unanswered or unconditional forwarding.
- Profiles
  - Depending on one or more forwarding rules defined in the desired profile.
- Rules:
  - Depending on the caller's phone number.
  - Depending on the date or time at which the call comes in.
  - Depending on your presence status.

The OpenScape UC Application also supports **Backward Compatibility** with rules created in previous OpenScape UC releases.

3.16.1 Creating a Simple Forwarding

You can forward your incoming calls to other phone lines (e.g.: home phone, a meeting room or a secretary office) when your phone line is busy, when you do not answer or for all calls without conditions.

IMPORTANT:

The option of simple forwarding is only available when the preferred device is set on the work phone, that is the number configured by the system administrator as your primary number (ONS) in OpenScape UC. If you set another phone as preferred device, like your mobile phone, the simple forwarding doesn’t take effect and the call will be redirected to this phone.

Simple forwarding is always valid until they are canceled or overwritten by a rule.

NOTICE:

Phone line busy is different of user presence busy. Phone line busy is when your pbx phone line is not free to answer a call, like already busy in other call, ringing in a call or even when a desk phone device is off-hook. The user presence busy is a user availability status, that is not only for when the user is in a call, but can be set manually by the user in many other situations, like to denote he is busy taking notes, busy in a presentational meeting or at lunch break.

So, the simple forwarding doesn’t consider the user presence busy status, but the phone line busy status. User presence is a criteria considered by rules, as you will see in the next chapter.

Step by Step

1) On the task bar, click on and select **Forwarding and rules settings**.

2) Click on the **Simple forwarding** tab and select **Enable call forwarding**.

a) To use conditional forwarding activate the check box Conditional forwarding. You can further configure this rule by selecting Search for contact or number and choosing:

- To forward your call when you are busy, enter a name or number in the field under **If my phone is busy, forward my calls to**:
- To forward your calls when you don’t answer, enter a name or number in the field **Search for contact or number** under **If I don’t answer, forward my calls to**:

You can have the call forwarding for busy and don’t answer in parallel.

b) To forward all your incoming calls, click on the check box **Forward all my incoming calls**.

Enter a name or number in the field **Search for contact or number**.

c) To redirect all your calls to the voicemail box click on **I want to redirect all my calls to my Voicemail**.

You have created a forwarding rule.

Next steps

To deactivate call forwarding at any time, click on the task bar, then select **Deactivate forwarding** from the drop-down menu.

3.16.2 Call Forwarding for internal/external call originators

You can configure additional forwarding rules for your internal and external incoming calls.

Prerequisites

- An OpenScape UC administrator has enabled call forwarding for internal/external call originators on your system.

  When this feature is enabled for you, a new option is available under **Forwarding and rules settings** > **Simple forwarding** and allows you to configure call forwarding for internal and external incoming call originators.

Step by Step

1) On the task bar, click on and select **Forwarding and rules settings**.
2) Select the **Simple forwarding** tab.
3) Check the checkbox next to the option **Check to distinguish internal from external calls** to enable call forwarding for incoming calls based on their origin (internal or external).

   Enabling this option will display the following additional forwarding options:

   - **External to**: only your incoming calls that come from external originators are forwarded to another number.
   - **Internal to**: only your incoming calls that come from internal originators are forwarded to another number.
4) Configure call forwarding according to your needs.
5) Click **Save**.

Your incoming calls are now forwarded based on your configuration.

You can view the forwarding type and destination by hovering over on the task bar.

Next steps

To deactivate call forwarding at any time, click on the task bar, then select **Deactivate forwarding**.

3.16.3 Creating a Rule

You can create forwarding rules, which are valid for a set time range, for a selected caller phone number or contact list and for a specific presence status.

For example, you may want to forward your calls to a meeting room when your presence status is “In Meeting” or to your mobile phone when your presence is “Away”. See more about user presence in section Setting your Presence Status on page 14.

Based on the Time and Range condition you can define in which days of the week the rule will take effect, if it will be valid for a whole day or for a period of time.

You can set multiple conditions in the same rule.

IMPORTANT:

Rules bypass preferred devices and simple forwarding settings.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Rules** tab and select **Add new Rule**.
3) Configure the **Name**, **Time and range**, **If my status is**, **If call is from** and **Forward to** sections.
4) Click **Save**.

You have created your rule. In order for the rule to be applied it needs to be assigned to a Rules Profile. For more information on Rules Profiles, please refer to section Creating a Rules Profile.

3.16.4 Rules Profiles

Profiles are used to handle rules so e.g. to define scenarios for meetings, business trips.

In the profile you can

- define a presence state which is set when the profile is active
- assign one or more rules which are applied when the profile is active.
- set a hierarchy of the rules, the sequence is important.

IMPORTANT:

Only one profile can be at a time active.

NOTICE:

The profiles **SmartClient rules** and **Standard Profile** are automatic profiles created for imported rules, when you migrate from previous versions. If you unassign the rules associated with these profiles, the profiles will be automatically hidden and not be available any more.

3.16.4.1 Creating a Rules Profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Profile** and select **Add a new profile**.
3) In the Profile configuration window, configure your **Profile name** and **Set presence status**.
4) In section **Rules of the profile** click on the arrow next to **Rules**.
   a) You can add further rules by clicking on the arrow again.
   b) If you have assigned more than one rule on the right side you see arrows so you can modify the sequence of the rules. The order is important.

5) Click on **Add profile**.

You have successfully created a new Rules Profile.

3.16.4.2 Editing a Rules Profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Profile** and click on the pencil icon next to a profile.
3) Edit the sections you want to change and click on **Save profile**.

   Refer to Creating a Rules Profile to see what can be entered in the sections.

3.16.4.3 Activating/Deactivating a Rules Profile

To activate a certain rules profile from your profiles list click on on the task bar, select **Forwarding and rules settings** and click on the profile you want to activate.

To deactivate a profile follow the same step as above and click on **Deactivate profile**.

3.16.4.4 Deleting a Rules Profile

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Profile** and click on the **x** icon next to a profile

3.16.5 Editing a Rule

You can edit the details of rules.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on **Rules** and click on the pencil .icon next to a profile
3) Edit the sections you want to change and click on **Save**.

3.16.6 Disabling a Rule

You can disable a rule.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Profile** tab
3) You can remove the rule from the profile which is active by editing the profile. Another option is to deactivate the profile.

   For more information regarding profiles, please refer to Editing a Rules Profile and Activating/Deactivating a Rules Profile.

3.16.7 Deleting a Rule

You can delete a rule.

Step by Step

1) On the task bar click on and select **Forwarding and rules settings**.
2) Click on the **Rules** tab and click on the **x** icon next to a rule.
3) Click **Save**.

3.17 UC and Microsoft Teams Integration

OpenScape UC can be integrated in Microsoft Teams. A new OpenScape UC tab can be added in the Microsoft Teams tab panel.

For detailed information on how to configure and use the Microsoft Teams Integration feature please refer to the *OpenScape UC Application V10, Microsoft Teams Integration, Deployment Guide.*

3.18 MS Office 365 Integration

OpenScape UC users can activate the integration with MS Office 365 to have access to the following features:

- Contacts search can look also for your Outlook 365 personal contacts. See chapter Searching for Contacts on page 24 for more details.
- Display the “Out of Office” notification for contacts with accounts in Outlook 365:
  - In **Call Control**, the icon appears next to the called contact name. You can click this icon to read the notification.

    The same icon is displayed in **Call History**, when you select the call details.

    In **Contact Details**, the **Out of Office** link is displayed below the contact name. You can click the link to read the notification.

To activate it in your Client, go to the **OpenScape UC Settings**, **Contacts** tab and click the option to access contacts and information from your Office 365 account. You will be prompted to sign in with your Office 365 account. Allow the required permissions to use the above features.

NOTICE: An integration with Office 365 is also required in OpenScape UC Server side for this feature. Contact your system Administrator to check if this is available in your system.

NOTICE: OpenScape UC users must perform only one authentication per client session.

3.19 UC and OpenScape Add-ins Integration

OpenScape UC can be integrated with Microsoft Outlook via the OpenScape Add-ins integration.

For detailed information on how to configure and use the OpenScape Add-ins integration, please refer to the *OpenScape UC Application V10, OpenScape Add-ins, User Guide*.

3.20 Headset integration

OpenScape Web Client supports headset integration via Headset Service Standalone. This allows you to control OpenScape UC calls directly from a range of headsets.

IMPORTANT: Headset Service Standalone should not be used on the same machine where UC Desktop App is installed.

Headset integration allows you to use your device's control buttons to:

- Answer/end a call
- Reject a call (for supported headset models)
- Mute/unmute
- Volume up/down

Prerequisites

- An OpenScape UC administrator has enabled the headset integration on your system.

You can download the headset integration from the **Settings** > **General** area on your UC client.

3.20.1 Supported headsets and restrictions

OpenScape Web Client is compatible with the following headsets: Jabra, Sennheiser/EPOS, Poly/Plantronics, and Yealink.

NOTICE: The usage of the same headset by two different applications (e.g. OpenScape Web Client and Microsoft Teams) may lead to unexpected behaviors in certain scenarios, such as dropping calls.

For specific headsets, you must install additional software, as described in below:

Additional software
Plantronics Hub software
Sennheiser/ EPOS EPOS Connect software

Restrictions

- Headset integration is only supported on Windows machines.
- Call controls via your headset are supported when you are using OpenScape Web Client with Google Chrome or Microsoft Edge.

3.20.2 Downloading and installing Headset Integration

You need to download and install the headset integration to make the integration available on your UC client.

Prerequisites

- You have installed .NET Framework (version 4.7.2 or newer).

Step by Step

1) In your UC client, click your user name, then select **Settings** > **General**.

2) Locate the **OpenScape Headset integration** area and click **Download OpenScape Headset**.

A `zip` file containing the integration files is downloaded to your computer.

3) Locate the `zip` file (usually in the Download folder) and extract it.

The following file is extracted: `uc-headset`.

4) Double-click on the `OpenScape.HeadsetService.Setup.exe` file to start the installation process.

5) Follow the instructions on the installation wizard to install the integration.

Next steps

After you have installed the headset integration, you can enable it on your UC client. For more information, see .

3.20.3 Enabling the headset integration

Follow the steps below to enable the headset integration on your client:

Step by Step

1) In your UC client, click your user name, then select **Settings** > **Audio/Video**.

2) Locate the **Headset integration** area and tick the check box next to **OpenScape Headset integration**.

3) Click **Save**.
A pop-up message appears and you are prompted to open the OpenScape Headset Service.
4) Click **Open OpenScape Headset Service** in the pop-up message.

The headset integration is enabled on your client and you can use it to control UC calls.

If the OpenScape Headset Service doesn't start or is disconnected unexpectedly, a warning message is displayed in OpenScape Web Client and you are prompted to try connecting the service again.

3.21 Accessibility Features

OpenScape Web Client supports multiple Accessibility Features thus making the client more accessible to users with visual or mobility impairment.

The Accessibility features are:

- **Screen reader support**.
- **Keyboard-operable interface**:.

  Keyboard shortcuts can be used to automate tasks in JAWS.
- **Visible keyboard focus**.
- **High contrast text**.

3.21.1 Enabling the visual keyboard indicator

This feature helps keyboard-only users and people with attention limitations that need a clear focus indicator to navigate easily through the interactive elements of Web Client.

Step by Step

1) Click your user name and navigate to **Settings > General > Accessibility**.
2) Check the **Display a colored frame around the element on focus** box.

   A coloured frame is displayed around the element on focus.

3.21.2 Activating High Contrast

This feature can help users with vision impairment and people with little or color perception issues to be able to read text easier.

Step by Step

1) Click your user name and navigate to **Settings > General > Accessibility**.
2) Check the **Enable high contrast mode for the header bar** box.

The header part in the top of your web browser, should be significantly darker compared to the grey color used by default:

3.21.3 Using the Screen Reader feature

This is an advanced technology that can help visually impaired users navigate the Web Client’s interface with the assistance of audio. Currently, only JAWS is supported

Step by Step

1) Open your Screen Reader program.

2) In your Web Client interface, navigate to any tab, contact or option.

You will hear the automatic screen reader voice reading out loud the elements in your client’s interface or your selected item.

4 Usage Restrictions

The following restrictions apply:

- Currently only supported in Windows Operational Systems
- The use UC Desktop App in parallel with OSC UC WebClient, Fusion or the old Desktop Integration tool is not supported.
- For displaying all of its elements in the main window, UC Desktop App requires a display surface of 1024×768 pixels
- The following applies in the scope of the team function:

  Even if team calls are displayed to you in the client, you cannot pick up such a call if your preferred device (OND) is not idle. This is still not possible even if your preferred device (OND) signals the call.
- You must clear the cache and restart you browser after a HotFix update, in order to avoid slow performance on the OpenScape Web Client.
- The rule merging strategy is for users of WebClient 1.0 moving to the new UI.
- Browsers and languages:

  Each browser is using a different logic / source to investigate the user’s language.

  – Internet Explorer (11) uses the regional setting in control panel which also define date format and currency for the OS (regardless of the language configured in Internet Explorer settings).
  – Firefox uses the language defined in the language list in the browser setting.
  – Chrome uses the language of the Chrome UI (regardless of the language list in Chrome settings).
- Browser limitations

  Chrome66 uses the "Chrome's autoplay policy", which only allow the websites to play sounds if the user interacts with the webpage first.

5 Call Pickup

If you are member of a call pickup group in the PBX, you may receive a call toaster every time 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 can be found in the configured directories. Otherwise, the names are represented as "Unknown".

You can accept the group pickup call from the toaster or clicking on  in the main menu.

This feature is available when using WebRTC as your primary work phone (ONS) or as a preferred device (OND). The WebRTC number must be a member of the MLHG.