A MITEL
PRODUCT
GUIDE

Unify OpenScape Xpressions V7

optiClient 130

User Guide

11/2018

A31003-S2370-U104-4-7619

Mitel

Contents

History of Changes

Date	Changes	Reason
2012-05-07	SAP Business byDesign integration and ACD deleted.	FRN 5712
2017-10-24	remove Windows XP references	review

Tables

1 About this Manual

This section provides information on the following topics:

1.1 This Manual's Target Group

This manual addresses:

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

The instructions contain important information for save and correct usage of optiClient. Follow them precisely to avoid wrong operation of optiClient and to make best use of this application.

1.2 Manual Structure

The instructions on hand are divided into the following chapters:

Chapter 1, "About this Manual"

This chapter informs you about the structure and use of these operating instructions.

Chapter 2, "optiClient – Your Communication Partner"

In this chapter you are given an introductory overview of optiClient. It comprises the program's architecture and the general requirements for its usage.

Chapter 3, "Introduction to the User Interface"

This chapter introduces the optiClient user interface and its features.

Chapter 4, "Quick Guide"

This chapter explains how to use the most important optiClient features.

Chapter 5, "Reference"

This chapter contains the optiClient reference information. It serves as reference book for the features and the optiClient user interface.

1.3 Representation Conventions

In these operating instructions, the following formatting and description conventions apply.

1.3.1 Warnings and additional Notes

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

IMPORTANT:
This symbol signalizes high priority information. Please definitely heed such notes to avoid malfunctions, loss of data or damages to property.

NOTE:
Information worth knowing is found next to this symbol.

1.3.2 Texts and Program Buttons

In this manual we use the following representations to highlight selected texts or to display optiClient buttons:

`Courier` font

Examples of screen texts, entries or outputs and file names are displayed in courier font.

Boldface

In boldface you find

- Menu names
- Menu entries
- Dialog buttons
- Dialog field descriptions
- Buttons
- Tabs.

<*Texts in pointed brackets*>

Specifications that may have individual contents appear in pointed brackets.

Examples:

- The specification `C:\<user directory>\`
  may, for example, mean:
  `C:\Meier\` or `C:\kkh\`
- The description <*address list*> represents e.g. the entries in an address list.

optiClient icons for selecting functions.
optiClient supports different color patterns. Therefore, the buttons in optiClient may vary from the representations in this manual.

1.3.3 Information on the Operating System

All information in these operating instructions that refer to the Windows operating system are based on the *Microsoft Windows XP Professional* operating system. Path specifications, menu descriptions etc. may differ under other operating systems.

1.3.4 Program Menus of the Mouse Keys

On the optiClient user interface you can open menus with the left or right mouse button in different places. In this manual we speak about a *menu* if you can open it with the left mouse button. Contrary to this, a *context menu* is opened with the right mouse button.

1.4 Continuative User Documentation

You find additional user information about optiClient in the following documentations:

- **optiClient – Quick Guide**
  Describes on two pages how to operate the most important optiClient features

2 optiClient – Your Communication Partner

This chapter provides information on the following topics:

2.1 What is optiClient?

NOTE:
Please note the individual restrictions on the listed uses that are described in the optiClient administration manual.

You can use optiClient as follows.

- As efficient client on the XPR server.
  In this function you can use it to control your desk telephone from your PC
- As SIP softphone at an SIP communication system.
- As softphone at a HiPath 3000 or Hipath 4000.

In each of these configurations you can

- initiate telephone calls,
- accept telephone calls and
- utilize more complex telephony functions – such as switching telephone conferences – from your PC.

optiClient also supports you in:

- conveniently managing private contacts in the contact list
- setting up phone connections the easy way via the team bar
- connecting external address books – e.g. via LDAP
- integrating optiClient features in Lotus Notes clients
- integrating optiClient features in Outlook clients
- integrating optiClient features in Sametime clients

If you use optiClient at an XPR server, you can deploy further special features. Among these are:

- optiClient-independent logging of successful and unsuccessful calls.
- The presence feature, which informs you about the availability of other users
- Sending and receiving instant messages
- Web conferences.

If you use optiClient as SIP softphone at OpenScape Voice, you can:

- use the above special XPR server features, if your optiClient is connected to an XPR server in parallel.

Furthermore, the modular structure of optiClient enables you to customize the features and representation of the application.

optiClient cannot only be used on individual user PCs. As CTI client, you can also deploy the program in a terminal server environment.

2.2 optiClient User Requirements

To make full use of optiClient,

- the user needs to know how to basically operate Windows application programs. For example, how to use the mouse or what to do in Windows dialogs and program windows.
- the user must be familiar with the Windows application program terminology. For example, with terms like *dialog*, *window* or *context menu*.

If optiClient is used as softphone at a HiPath 3000 or HiPath 4000, knowing how to operate the *optiPoint* telephone is an advantage.

3 Introduction to the User Interface

NOTE:
If you convert a computer system with several active monitors in a single-monitor system, optiClient does not automatically shift its windows to the remaining monitor. Before you perform such a conversion, move all optiClient windows with the mouse to the primary monitor.

NOTE:
Since you can create the optiClient program interface very individually, the representation of your optiClientmay deviate from the figures depicted here.

NOTE:
The scope of optiClient features as well as the function performance depend on the communication system at which optiClient is operated and on the optiClient modules configured on the user computer.

NOTE:
On the optiClient user interface you can open menus with the left or right mouse button in different places. In this manual we speak about a *menu* if you can open it with the left mouse button. Contrary to this, a context menu is opened with the right mouse button.

In this section you are provided with an overview of the following components of the optiClient user interface and their representation:

You find further information about the supported optiClient features and the single components of the application under:

- Section , “Quick Guide”, on page 47
- Chapter 5, “Reference”.

3.1 Main Bar

Different users can see different optiClient layouts after they have logged in. Layouts vary depending on the modules installed and activated as well as on the user preferences and window settings that were active when the program was last ended.

The main bar is the central optiClient module.

Representation of the main bar in case of connection to an XPR server

Representation of the main bar in case of usage as softphone

The main bar may contain the following elements:

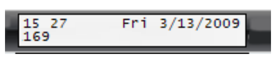
Element	Function
Telephone display *Example:* 	The main bar telephone display represents the optiClient telephone display. When you click on the telephone display, the telephone display, the function keys, the keypad respectively the dialog keys appear depending on the configuration. Their respective features correspond to the elements of a telephone tabletop unit. You will find further information about the optiClient telephone under Section 5.8, “optiClient Telephone”, on page 213.
Audio icons *Example:* 	The audio icons enable fast and efficient operation of the associated features. Which audio icons are displayed depends on whether optiClient is used at an XPR server or as SIP softphone. You find further information about the audio icons under Section 5.2.2, “The Audio Icons and Volume Controls”, on page 122.
Forwarding menu 	In the forwarding menu you administer call forwardings. If call forwardings have been configured for the telephone monitored by optiClient, they are displayed here and can be activated or deactivated. You find further information about the forwarding menu under Section 5.2.3, “Forwarding Menu”, on page 124.

Table 1 Main Bar Elements

Element	Function
Web conference 	In a web conference, subscribers can reciprocally access the PC desktop of the communication partner. Beyond that, web conferences enable mutually viewing and editing documents or files. Besides the standard communication between two subscribers it is also possible that more than two subscribers collaborate in a web conference. Via the web conference icon in the main bar you can establish conferences in particular for those partners for whom you have not created a contact entry in optiClient. To establish a web conference session for a optiClient contact, the best option is to use the context menu of the relevant contact. **Note:** Web conferences are only available when optiClient is used on an XPR server. You find continuative information about web conferencing in the OpenScape *Web Collaboration Operating Instructions*.
Chat 	Via instant messages you can fast and discretely contact other optiClient users on text basis. The addressed users must be logged in with their optiClient at the same XPR server like you with your optiClient. Instant messages are exchanged in the scope of chats in which at least two subscribers take part. You find further information about the chat feature under Section 5.19, “Instant Messaging”, on page 305.
Presence profile 	The presence profile provides information that refers to the presence of the respective user at his/her work place. It is not controlled by the XPR server but by the respective user and is individually defined and activated. You find further information about the presence profile under Section 5.16, “Presence Feature”, on page 277.
MyPhone *Example:* 	MyPhone eases operating the individual telephone provided optiClient is used as CTI client on the XPR server. It is always present in the team bar and can also be displayed in the main bar in addition. You find further information about the personal phone under Section 5.15, “MyPhone”, on page 271.
Telephony icons *Example:* 	In Functional Mode (not in SIP Functional Mode), you can position entries from the telephony menu on the main bar as individual icons. This enables quick selection of telephony features often used. **Is only displayed in case of usage as softphone.** You find further information about this under Section 5.2.4, “Telephony Menu and the Telephony Icons”, on page 126.

Table 1 Main Bar Elements

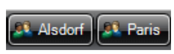
Element	Function
Telephony menu 	In Functional Mode (not in SIP Functional Mode), you can access the telephony menu in the main bar. This menu lists the telephony features provided for you by the connected communication system. **Is only displayed in case of usage as softphone.** You find further information about the telephony menu under Section 5.2.4, “Telephony Menu and the Telephony Icons”, on page 126.
Call journal *Example:* 	Via these icons you open the respectively associated call journal. The arrow on the respective icon shows you the call category. The displayed number defines how many new entries the relevant category comprises. There are the call categories *Incoming – reached*, *Incoming – not reached*, *Outgoing – reached* and *Outgoing – not reached*. **Note:** The call journal is only available when optiClient is used on an XPR server. You will find further information about the call journal under: • Section 5.11, “Call Journal”, on page 231 • Section 5.5.1, “Settings of the Call Journal”, on page 153.
Speed dialer *Example:* 	With each of the speed dialer icons you open a list with the contacts of the associated contact list group. When you select a list entry, you automatically establish a connection to the associated phone number. For further information about the speed dialer refer to: • Section 5.2.6, “Speed Dialer”, on page 128 • Section 5.5.9, “Speed Dialer Settings”, on page 164.
Volume control 	Using the volume control you can set the volume for the call tone, the speaker and the receiver or headset. **Is only displayed in case of usage as softphone.** You find further information about the volume control under Section 5.2.2, “The Audio Icons and Volume Controls”, on page 122.
Volume menu 	Using the volume menu you can set the volume for the call tone, the speaker and the receiver or headset. **Is only displayed in case of usage as softphone.** You find further information about the volume menu under Section 5.2.2, “The Audio Icons and Volume Controls”, on page 122.

Table 1 *Main Bar Elements*

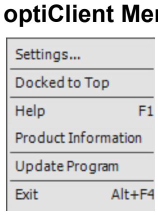
Element	Function
Module menu 	Via the module menu you open the implemented optiClient user interface modules. The type and scope of the menu entries depends on the user interface modules installed for optiClient. You find further information about the module menu under Section 5.2.7, “Module Menu”, on page 129.
Fault signaling 	If optiClient detects an operation-critical error or the system issues warnings, the module menu icon turns red. You find further information about fault signaling under Section 5.2.8, “Fault Signaling”, on page 132.
Help 	Via this icon you open the optiClient online help. You find further information about the online help under Section 5.26, “Online Help”, on page 315.
Minimize window 	With a click on this icon you can minimize all open optiClient windows and dock them to the main bar. You find further information about this under Section 3.3, “Display Options for Module Windows”, on page 33.
Main bar control 	With these icons you control the general optiClient display behavior. For example, you can minimize optiClient on the desktop or dock the main bar to the top screen margin. **Attention:** **In a terminal server environment you must never perform features via which GUI elements of optiClient are docked to a screen margin.** You find further information about the main bar representation under Section 3.2, “Main Bar Display Options”, on page 31.
Exit 	Closes optiClient.
optiClient Menu 	The optiClient menu provides basic features for controlling and configuring the program. The menu opens after a click with the right mouse button on a free spot of the main bar. You find further information about the optiClient menu under Section 5.2.1, “The optiClient Menu”, on page 120.

Table 1 Main Bar Elements

3.2 Main Bar Display Options

NOTE:
Depending on the optiClient settings, the main bar representation may automatically vary when specific events occur. See Section 5.4.5, “Settings for the Connection Status Change”, on page 146.

The following options are available for the optiClient main bar representation:

- Docking the main bar to the top screen margin
- Positioning the main bar freely
- Minimizing the main bar with all optiClient windows.

Docking the main bar

To dock the main bar at the top screen margin, click the icon at the right end of the main bar.

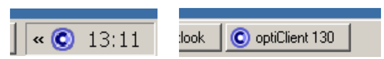
IMPORTANT:
In a terminal server environment you must never perform features via which GUI elements of optiClient are docked to a screen margin.

Positioning the main bar freely

Select the icon at the right end of the main bar so that the docked main bar can be freely positioned again.

Minimizing the main bar with all optiClient windows

For minimizing the main bar select the at the right end of the main bar. Depending on the general program settings, an icon is displayed in the info area respectively a button appears in the task bar for optiClient in this representation (cf. Section 5.4.4, “Settings for the Representation in Task Bar and Info Area”, on page 145).



If the contact list is opened in the form of the team bar while you minimize optiClient, the list remains visibly on the screen.

Restoring the minimized main bar

To restore the minimized main bar, select the optiClient icon in the info area or the optiClient button in the task bar.

3.3 Display Options for Module Windows

For many optiClient modules you can open individual operating windows. For displaying and handling these windows, the following general options apply.

Docking or freely positioning module windows

To dock a module window at the main bar, simply drag the window close to the main bar. The window is automatically docked when it gets close enough.

To undock the window, simply drag it away from the main bar until it is far enough to be released. You can then position it anywhere on the desktop.

Minimizing and restoring module windows

To minimize or restore a module window, click the minimize or restore icon in the module window's title bar. When minimized, only a window's title bar is visible; this is then automatically docked at the main bar.

NOTE:
When optiClient is minimized, the main bar including all open optiClient windows is also minimized. If optiClient is restored, the windows that were previously opened are also restored.

Docking all module windows minimized at the main bar

To dock all open module windows minimized at the main bar, select the icon at the right end of the main bar.

Changing the module window size

To change the size of a module window, drag the window edge or a window corner until the window has reached the desired size.

Editing the column sequence and column width of tables

For module windows that have a display in column format (e.g. directories) applies:

- To change the column sequence in the table, drag the heading of the column to be moved to the desired position with the mouse button kept pressed. The column and all its entries will be moved.
- To change a column's width, move the associated right column separator in the table header.

Sorting tables and changing the sequence of a sorting

For module windows that have a display in column format (e.g. directories) applies:

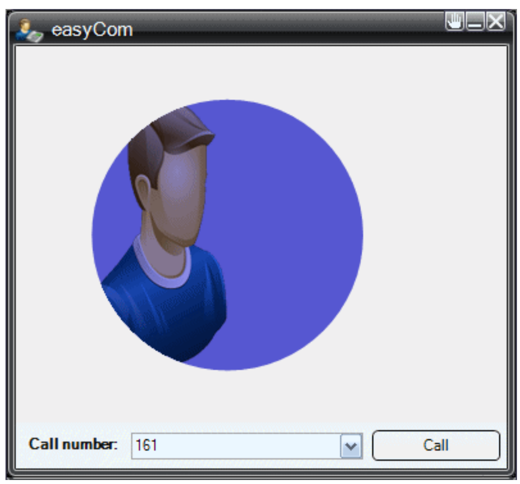
- To sort the table entries in alphabetic order, click on the column heading according to which you want to sort the table entries.
- To reverse the sequence of a sorting, click on the column heading according to which the table is sorted. The sorting then changes from ascending to descending or from descending to ascending.
- So that you can quickly see the sequence of the current sorting, a small arrow is displayed in the sorting column. This arrow indicates the direction of the current sorting.

Tab view for module windows

NOTE:
The free phone window cannot be represented in tab view.

In order to display multiple opened module windows conveniently while saving space, you can cascade these windows in the tab view. This is done in the following way:

- Drag a window with the hand icon from the title bar to another window. When the windows line up, you switch to the tab view and tabs appear in the lower part of the window.
- In the tab view you place a window in the foreground with a click on the associated tab.
- To separate a window from the tab view, drag it by its tab from the tab view. It is subsequently displayed as individual window again.
- To close a window in the tab view, click on the close icon of the associated tab .



3.4 Presence Feature

NOTE:
The presence feature is exclusively available for XPR users and thus only on optiClient connected to an XPR server.

The presence feature enables you to obtain the following information about the user:

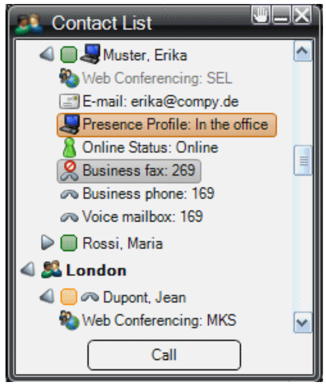
- the telephone status,
- the Online status
- the presence profile

Furthermore, you can configure your own, individual presence profile and make it visible for other users. Thus it is possible for other users to e.g. recognize whether you are logged on at the XPR server, whether your telephone is free, whether you are having a break, whether you are on holiday or on a business trip.

So that you can use the presence function in optiClient to display and define status information without restrictions,

- optiClient must be used as CTI client on an XPR server
- the CTI APL must be installed in the XPR server.
- the Presence APL must have been installed in the XPR server
- users must not have configured individually restricted access privileges for the status information display (cf. Section 5.16.7.3, “Administration of Access Rights”, on page 294).
- the use of status information must have been released in the XPR server.
- the Server Presence Provider must be added to the optiClient configuration
- the PBX must provide the corresponding status information for the phone numbers.

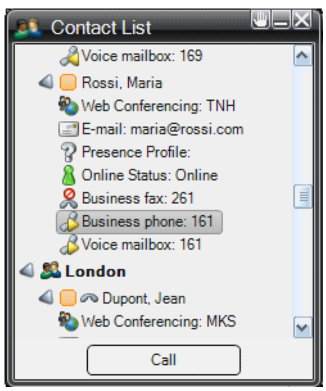
The telephone and online status as well as the presence profile appear exclusively in a contact entry's address list by default.



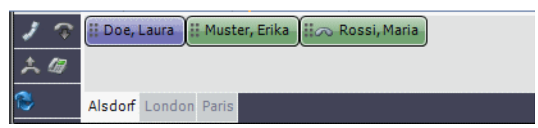
Beyond that, the statuses can also appear independently and directly before the associated contact entry in the contact list and team bar. For that, you simply need to show the status to be indicated for the relevant contact.

A total status combines all presence information. It is displayed as colored square that precedes each contact in a list or serves as background color for contacts that appear as button – e.g. in the team bar.

Telephone status in the contact list



Telephone status in the team bar



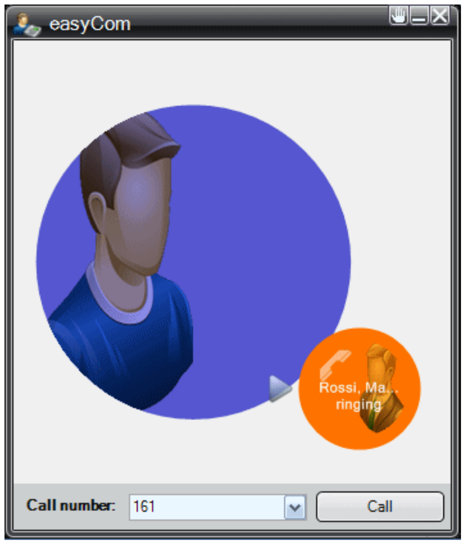
Showing this status is done via the menu option **Display icons** in the context menu of the contact list or the team bar. See Section 4.11.6, “Displaying the Status Information of a Contact”, on page 87.

You find further details about status information in Section 5.14.2, “Representation of Status Information”, on page 256.

You find further information about the presence feature scope in Section 5.16, “Presence Feature”, on page 277.

3.5 easyCom Communication Circle

The easyCom communication circle offers an alternative interface for using telephony features. Connections and connection states are represented here via an intuitive and convenient interface using graphic elements.



You will find further information on the easyCom communication circle under:

- Section 5.5.3, “easyCom Settings”, on page 160
- Section 5.10, “easyCom Communication Circle”, on page 221.

3.6 Call Journal

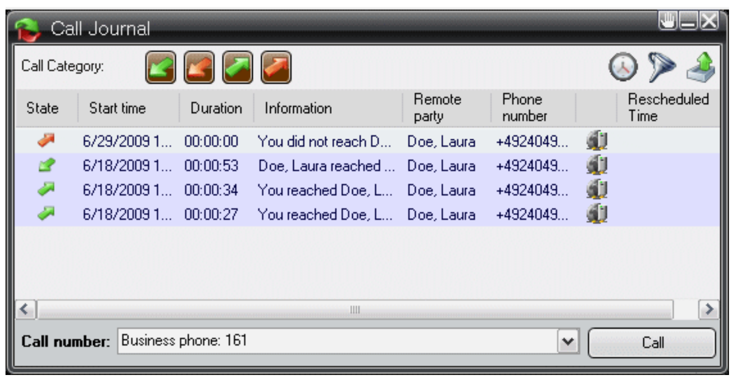
NOTE:
The call journal is only available when optiClient is used at an XPR server.

In an XPR-based CTI environment the XPR server logs all incoming and outgoing calls that concern the XPR users' telephones. This logging is independent from the relevant user having started optiClient or not.

optiClient can access the entries of this journal via the call journal. The following call categories are distinguished:

- Incoming – connected
- Incoming – not reached
- Outgoing – connected
- Outgoing – not reached

It is also possible to establish connections to logged communication partners from the call journal in a simple way.



You will find further information about the call journal under:

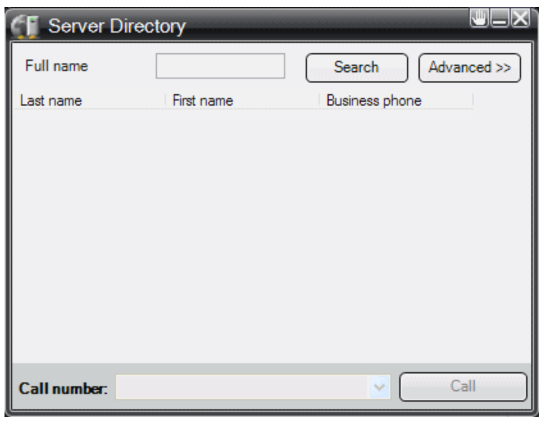
- Section 5.5.1, “Settings of the Call Journal”, on page 153
- Section 5.11, “Call Journal”, on page 231.

3.7 Server Directory

NOTE:
The call journal is only available when optiClient is used at an XPR server.

In an XPR server environment the contact information of all XPR users is administered in an XPR server user directory. If optiClient is connected to the XPR server in such an environment, it can access the content of this directory via the Server Directory Provider and look for contact information.

Persons that were found during a search in the server directory can subsequently be contacted by means of a connection established via one of the available addresses.



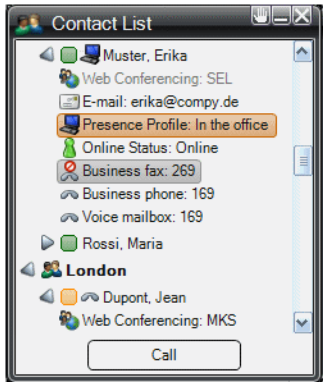
You will find further information on the server directory under:

- Section 5.5.12, “Directories Settings”, on page 166
- Section 5.12, “Server Directory”, on page 241.

3.8 Contact List

In the contact list, you can import individual contacts from various directories and then group them there to suit your own requirements. The groups / contacts in the contact list can be displayed in various views of the contact list.

Connections to individual contacts can be set up directly from the contact list.



A special type of the contact list representation is the team bar.

NOTE:
The team bar is not supported in a Terminal Server environment.
In this case the contact list must not be docked at the screen margin.

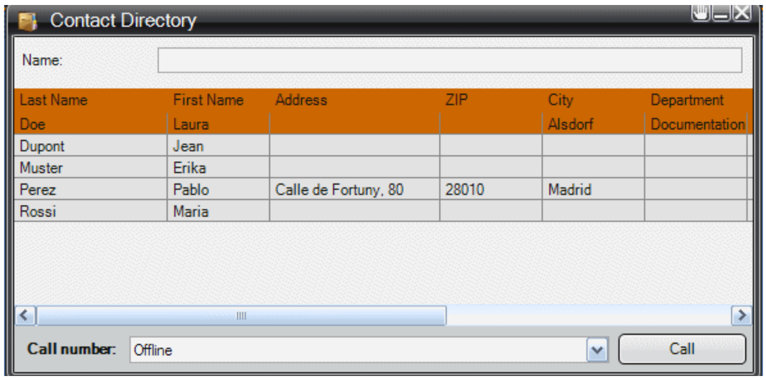
You find further information about the contact list and the personal phone under:

- Section 5.5.7, “Settings for Contact Directory and Contact Lists”, on page 163
- Section 5.14, “Contact List”, on page 251
- Section 5.15, “MyPhone”, on page 271.

3.9 Contact Directory

The contact directory can be used to manage individual contacts independently from other directories. You can copy contacts from other directories to your personal contact directory.

It is also possible to directly establish connections to single contacts from your contact directory.



You will find further information on the contact directory under:

- Section 5.5.7, “Settings for Contact Directory and Contact Lists”, on page 163
- Section 5.13, “Contact Directory”, on page 245.

3.10 Web Conferences

optiClient supports web conferences. This requires optiClient being operated at an XPR server.

In a web conference, subscribers can reciprocally access the PC desktop of the communication partner. Beyond that, web conferences enable mutually viewing and editing documents or files.

Besides the standard communication between two subscribers it is also possible that more than two subscribers collaborate in a web conference.

Requirements for using web conferences in optiClient:

- optiClient must be used at an XPR server
- the Con APL must have been installed in the XPR server
- the Presence APL must have been installed in the XPR server
- the web conference server must have been installed in the XPR server.

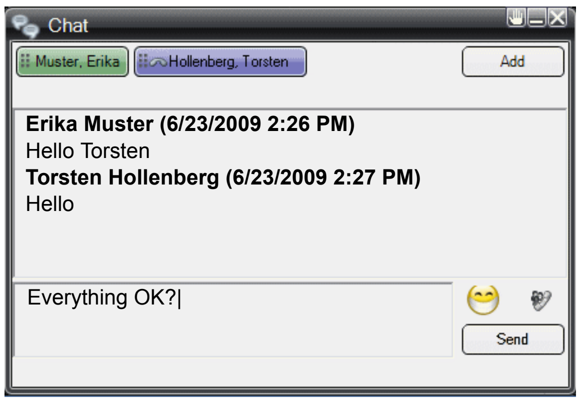
You find continuative information about web conferencing in the *OpenScape Web Collaboration Operating Instructions*.

3.11 Instant Messaging

optiClient supports sending and receiving of instant messages (instant messaging). This requires optiClient being operated at an XPR server.

Via instant messages you can fast and discretely contact other optiClient users on text basis. The addressed users must be logged in with their optiClient at the same XPR server like you with your optiClient.

Instant messages are exchanged in the scope of chats in which at least two subscribers take part.



You find further information about the instant messaging support under:

- Section 5.19, “Instant Messaging”, on page 305.

3.12 Web Browser

optiClient provides a web browser in which you can open Internet pages often used without having to leave optiClient. The Internet pages made available in the web browser must have previously been configured in optiClient.

The optiClient web browser provides basic operating features.

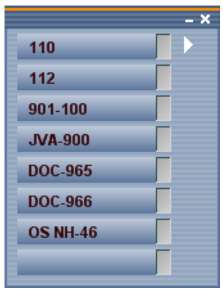
You find further information about the web browser directory under:

- Section 5.5.5, “Web Browser Settings”, on page 161
- Section 5.17, “Web Browser”, on page 299.

3.13 Extended Keypad

NOTE:
The extended keypad can only be used with optiClient being deployed at a HiPath 3000/4000.

The extended keypad provides freely programmable feature keys for allocating phone numbers or telephony features frequently dialed respectively used.



You find continuative information about the extended keypad under:

- Section 5.35.1.1, “Device”, on page 399
- Section 5.9, “Extended Keypad”, on page 217.

4 Quick Guide

IMPORTANT:
If you change optiClient configurations, such modifications will not be saved in the configuration files until optiClient has subsequently been shut down in a proper manner.
This applies in particular to: information about newly added, removed or modified contacts and information about newly added, removed or modified modules.

NOTE:
The scope of optiClient features as well as the function performance depend on the communication system at which optiClient is operated and on the optiClient modules configured on the user computer.

NOTE:
On the optiClient user interface you can open menus with the left or right mouse button in different places. In this manual we speak about a *menu* if you can open it with the left mouse button. Contrary to this, a context menu is opened with the right mouse button.

In this chapter you find all necessary information to execute the basic optiClient features in short time. Precondition is that optiClient is completely installed and configured on the user PC.

The following information comprises:

For further information on the supported optiClient features please refer to Chapter 5, “Reference”.

4.1 optiClient Program Start and End

4.1.1 Starting optiClient

You can start optiClient on the user computer in the following way:

Double-click the optiClient shortcut on the desktop of the user computer.

NOTE:
optiClient always starts under the user ID used last. If a user password has been assigned for this ID, the user login dialog appears immediately after the program start. If there is no user password for this ID, optiClient starts without further login procedure.
To change the user ID then, you need to push the `shift key` at the program start. In this case the user login dialog is also displayed if no password has been defined for the last user.

IMPORTANT:
The `shift` key may not be supported with a terminal server installation.

4.1.2 User Login

The login dialog varies depending on the optiClient system environment.

We distinguish

- Login for the initial user
- Default login.

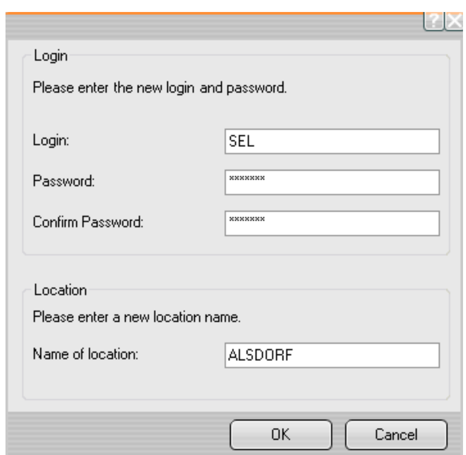
Login for the initial user

optiClient always starts with the initial user login, when no optiClient user profile has yet been defined under the active Windows account. If a user profile already exists under the active Windows account, optiClient starts with the default login (see Section 4.1.2, “Default login”, on page 52).

How to log on to optiClient as initial user:

1. Start optiClient (see Section 4.1.1, “Starting optiClient”, on page 49).
2. In the **Login** field of the logon dialog, specify the user ID that you want to use in optiClient.

NOTE:
The language of the operating system on the user PC determines the language displayed in the dialog for the initial login. If, for example, an English operating system has been installed on your user PC, the login dialog appears in English.



3. Enter the user password that you want to use in the **Password** and **Password confirmation** field.

NOTE:
If you do not assign a user password for your login, future optiClient starts will occur without further login procedure.
To change the user ID then, you need to push the `shift key` at the program start. In this case the user login dialog is also displayed if no password has been defined for the last user.

IMPORTANT:
The `shift` key may not be supported with a terminal server installation.

---

4. Enter a name for you location in the **Name of location** field.
5. Confirm your entries with **OK**.

You have thus specified the first optiClient user under the active Windows account under which optiClient can now start.

Default login

optiClient always starts with the default login when a optiClient user already exists under the active Windows account.

How to log on to optiClient using the default login:

1. Start optiClient (see Section 4.1.1, “Starting optiClient”, on page 49).
2. Enter your user ID in the **Login** field of the logon dialog.

3. Then enter you user password in the **Password** field.
4. Select a **Location** and a **Language**. The latter defines in which language optiClient is started.

NOTE:
The **Location** and **Language** fields of the login dialog can be suppressed by the administrator (cf. Section 5.4.2, “Settings for Starting the Program”, on page 140).

---

5. Confirm your entries with **OK**.

   optiClient starts under the specified user ID.

4.1.3 Ending optiClient

To shut down optiClient, select the **Close** icon in the program's main bar.

4.2 Changing the User Password

IMPORTANT:
If you use optiClient via a terminal server, you **always** have to assign a password for the login at optiClient. If you fail to do so, you may not be able to reach the login dialog during the program start.
If this is the case, you can neither change your login settings, nor the settings that may only be changed via the **Manage** button of the login dialog.

NOTE:
The user password can only be changed during the Default login.

How to change a password configured for your user login:

1. Start optiClient (see Section 4.1.1, “Starting optiClient”, on page 49).
2. Enter your currently valid password in the **Password** field.
3. Select the **Change password…** button.

   The **Change Password** dialog opens.
4. Enter a new password of your user ID in the **Password** field and repeat the entry in the **Password confirmation** field.
5. Confirm your entry by clicking the **OK** button.

You have thus successfully changed your password. In the **Password** field you need to specify the new password for the running login.

4.3 Basic Features of the Main Bar

This section describes the most important optiClient main bar features.

These are:

- Adding a new Forwarding from page 55
- Activating a Forwarding from page 56
- Deactivating a Forwarding from page 57.

For further information on the main bar refer to:

- Chapter 3, “Introduction to the User Interface”
- Section 5.2, “optiClient Main Bar”, on page 119.

4.3.1 Adding a new Forwarding

Configuring forwardings in the optiClient forwarding menu offers the possibility to easily divert your telephone later on.

How to configure a new forwarding:

1. Open the forwarding menu in the main bar.
2. Select the **Add...** option from the menu.

   The **Add Forwarding** dialog opens.
3. Select the type of the new forwarding in the **Type** field.

   NOTE:
   The communication system used determines which forwarding types are available in the **Type** field.

   ---
4. Enter the phone number to which a call is to be forwarded in the **Destination** field.
5. Enter a short description for the new forwarding in the **Optional text** field. This description will later be displayed in the forwarding menu for selection.

You have thus successfully added a new forwarding.

NOTE:
A forwarding configured in this way is not active yet. To forward calls according to the settings made here, continue with the following section – Section 4.3.2, “Activating a Forwarding”, on page 56.

4.3.2 Activating a Forwarding

IMPORTANT:
Forwardings activated in optiClient still take effect after you have closed optiClient.

The forwarding menu allows you to easily divert your telephone. This requires you to have previously defined a forwarding, though (cf. Section 4.3.1, "Adding a new Forwarding", on page 55).

How to activate a previously configured forwarding:

1. Open the forwarding menu in the main bar.

   NOTE:
   Forwardings already active are displayed highlighted in the forwarding menu. Forwardings set but not available any more are faded gray.
   An already activated forwarding is deactivated when selected in the forwarding menu.

   NOTE:
   If optiClient is connected to an XPR server, forwardings that are configured, activated or deactivated at the desktop telephone are also represented in their current state in the forwarding menu.

2. Select the forwarding that you want to activate from the list.

You have thus successfully activated a forwarding.

4.3.3 Deactivating a Forwarding

How to deactivate an active forwarding:

1. Open the forwarding menu  in the main bar.

NOTE:
Forwardings already activated are highlighted in the forwarding menu list.
A deactivated forwarding is activated when selected in the forwarding menu.

NOTE:
If optiClient is connected to an XPR server, forwardings that are configured, activated or deactivated at the desktop telephone are also represented in their current state in the forwarding menu.

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2. Select the forwarding that you want to deactivate from the list.

You have thus successfully deactivated a forwarding.

4.4 Basic Features of the optiClient Telephone

IMPORTANT:
To use the optiClient telephone features, the *Telephone* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

The optiClient telephone provides a clear dialing interface. With the help of this interface you can easily control a telephone connection.

This section describes the most important features of the optiClient telephone.

These are:

For further information about this topic please refer to Section 5.8, “optiClient Telephone”, on page 213.

4.4.1 Opening the optiClient Telephone

To open the optiClient telephone, select the **Free phone** entry in the module menu.

The optiClient telephone window opens.

4.4.2 Setting up a Phone Connection

You can establish a phone connection to a subscriber in the following way:

1. Open the optiClient telephone (see Section 4.4.1, “Opening the optiClient Telephone”, on page 58).
2. Use the optiClient telephone keypad to dial the phone number of the desired subscriber.

   The number being entered appears in the telephone display.
3. Select the telephone's confirmation key to initiate dialing the phone number specified.

   optiClient sets up the connection and the corresponding call sign sounds. If optiClient can find the name of the called subscriber, it appears in the telephone display after completely entering the phone number.

4.4.3 Accepting incoming Calls

How to accept an incoming call:

When a call comes in, click the icon in the main bar. You will then be connected to the calling subscriber.

4.4.4 Closing an active Telephone Connection

How to terminate an active telephone connection:

Select the icon in the main bar. The active connection closes down.

4.4.5 Function Keys

If optiClient is used via the HiPath Provider at a HiPath 3000 or HiPath 4000, the telephone displays four feature keys.

Via these feature keys you can control the following optiClient telephone features:

- Service menu
- Redial
- Microphone
- Speaker.

The features of these keys correspond to those of a HiPath desk telephone.

4.5 Basic Features of easyCom

IMPORTANT:
To use the easyCom communication circle features, the *easyCom* interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

The easyCom communication circle offers an alternative interface for using telephony features. Connections and connection states are represented here via an intuitive and convenient interface using graphic elements.

This section describes the most important features of the easyCom communication circle.

These are:

For further information about this topic please refer to Section 5.10, “easyCom Communication Circle”, on page 221.

4.5.1 Opening the easyCom Communication Circle

To open the easyCom communication circle, select the **easyCom** entry in the module menu.

The easyCom communication circle window opens.

4.5.2 Setting up a Phone Connection

You can establish a phone connection to a subscriber in the following way:

1. Open the easyCom communication circle (see Section 4.5.1, “Opening the easyCom Communication Circle”, on page 62).
2. Enter the phone number of the desired subscriber in the **Call number** field.
3. Select the **Call** button.

   The easyCom communication circle features a connection circle, which is outside your central circle and displays information about the called subscriber and the connection status.

   After the called subscriber has accepted the call, the connection circle moves into your central circle – you are connected.

4.5.3 Accepting incoming Calls

How to accept an incoming call:

1. Open the easyCom communication circle (see Section 4.5.1, “Opening the easyCom Communication Circle”, on page 62).
2. Select the **Accept the call** entry from the context menu of the subscriber's connection circle.

You have thus answered the incoming call.

4.5.4 Performing a Consultation

NOTE:
Before you initiate a consultation you need to be connected to a conversational partner.

How to perform a consultation:

1. Select the **Consultation to...** entry from the context menu for the connection circle of the active subscriber.
2. In the opening window specify the phone number of the subscriber to whom you want to set up a consultation.

   NOTE:
   The entry in the EasyCom **Call number** field does not affect the connection setup for the consultation.

   The currently active connection is set to connection status *on hold*, and its connection circle moves partly into the central circle. A new connection circle indicates the parallel connection establishment for the consultation.

   If the consulted subscriber accepts the call, the consultation connection circle moves into your central circle.
3. Select the **Disconnect** entry from the context menu for the consultation connection circle to end the consultation.

   You are automatically reconnected to your original partner.

4.5.5 Transferring a Call after Consultation

How to pass a call on to another subscriber:

1. During the call, consult the subscriber that you want to pass this call on to. See Section 4.5.4, “Performing a Consultation”, on page 63.
2. Select the **Transfer** entry from the context menu for the connection circle of the held subscriber.

   The associated connection circles disappear from your easyCom communication circle.

Both subscribers are directly connected.

4.5.6 Initiating a Conference

How to initiate a conference:

1. During a call, consult the subscriber that you want to include in the current call. See Section 4.5.4, “Performing a Consultation”, on page 63.
2. Select the **Set up Conference** entry from the context menu for the connection circle of the held subscriber.

   You are in a conference with both subscribers.

4.5.7 Finishing an initiated Conference

How to close down all connections to the participants of a conference that you have initiated:

Select the **Disconnect** entry from the context menu for the conference connection circle.

Subsequently all conference connections will be terminated and disappear from your central circle.

4.5.8 Closing an active Telephone Connection

Select the **Disconnect** entry from the context menu for the subscriber's connection circle to close an active phone connection.

4.6 Basic Instant Messaging Features

IMPORTANT:
For sending and receiving instant messages, optiClient must be operated at an XPR server.
Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
For sending and receiving instant messages, the *Presence* user interface module and the *Server Presence Provider* must have been added to the optiClient configuration.
You find further requirements for using these modules in the optiClient administrator manual.

Via instant messages you can fast and discretely contact other optiClient users on text basis. The addressed users must be logged in with their optiClient at the same XPR server like you with your optiClient.

In this section we describe how to start a new chat and send a new instant message therein.

You find further details about instant messages in Section 5.19, “Instant Messaging”, on page 305.

How to start a new chat for instant messages and send instant messages therein:

NOTE:
To start a chat with a user this user must be logged in (online) at the XPR server.

1. Open e.g. in the contact list the context menu for the contact with whom you want to start a chat.
2. In the address list of the context menu select the **Presence Profile: <…>** or **Online Status: <…>** entry with a doubleclick.

   The chat window opens.
3. Enter the instant message that you want to send to the chat partner in the bottom entry field of the chat window and select **Send**.

   The message appears in the top text-display, which also shows the further communication.

4.7 Basic Web Conference Features

IMPORTANT:
XPR For using web conferencing, optiClient must be operated at an XPR server. Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
For using web conferencing, the optiClient
configuration must have been furnished with the interface modules *Web Conferencing* and *Presence* and with the provider modules *Web Conferencing Provider* and *Server Presence Provider*.
You find further requirements for using these modules in the optiClient administrator manual.

In a web conference, subscribers can reciprocally access the PC desktop of the communication partner. Beyond that, web conferences enable mutually viewing and editing documents or files.

Besides the standard communication between two subscribers it is also possible that more than two subscribers collaborate in a web conference.

A maximum of one web conference can be started in optiClient.

This section describes the most important web conference features.

These are:

For further information about this topic please refer to Section 5.18, “Web Conferencing”, on page 301.

4.7.1 Starting a Web Conference with one optiClient User

How to start a web conference with another optiClient user:

1. Open e.g. in the contact list the context menu for the desired contact.
2. Select the **Web Conference: <…>** entry in the address list of the context menu.

   optiClient sets up a web conference to the relevant user. After the contacted user has accepted the conference request, the dialog for sharing PC applications opens on your user PC.
3. Select **Share all** to share all applications of your PC for the web conference.

You are then connected to the selected member in a web conference.

4.7.2 Starting a Web Conference with a non-optiClient User

How to start a web conference with a non-optiClient user:

1. Select the web conference icon in the main bar.

   optiClient starts a new web conference on the XPR server.

2. Select the module menu entry **Web Conferencing > Session Information**.

   The **Web Conferences** window opens, which contains the connection information for the established web conference.

3. Transmit all displayed connection information to the desired subscriber. Select e.g. **Conference > Send as EMail** , to send this information to the desired subscriber in an e-mail.

   After the contacted user has joined the web conference, the dialog for sharing PC applications opens on your user PC.

4. Select **Share all** to share all applications of your PC for the web conference.

You are then connected to the selected member in a web conference.

4.7.3 Accepting an incoming Web Conference

An incoming web conference is indicated via the optiClient notification window.

To accept the incoming web conference, select **Accept** in the notification window.

4.7.4 Controlling a Web Conference

You find a detailed description of how to control a web conference in the OpenScape *Web Collaboration Operating Instructions*.

4.7.5 Adding a Web Conference to another optiClient User

To add another optiClient user to an existing web conference, proceed precisely as described under Section 4.7.1, “Starting a Web Conference with one optiClient User”, on page 67.

4.7.6 Adding another non-optiClient User to a Web Conference

How to add another non-optiClient user to an existing web conference:

1. Select the module menu entry **Web Conferencing > Session Information**.

   The **Web Conferences** window opens, which contains the connection information for the established web conference.

2. Transmit all displayed connection information to the desired subscriber. Select e.g. **Conference > Send as EMail** , to send this information to the desired subscriber in an e-mail.

After the contacted user has connected to the web conference, he/she is integrated in the existing conference.

4.7.7 Closing a Web Conference

To end the web conference, simply close the window of the web conference client.

4.8 Basic Features of the Call Journal

IMPORTANT:
To use the call journal features, optiClient must be operated at an XPR server. Cf. Section 5.33, "Telephoning at an XPR Server", on page 351.

IMPORTANT:
To use the call journal features, the *Call Journal* user interface module and the *Server Call Journal Provider* must have been added to the optiClient configuration.
You find further requirements for using these modules in the optiClient administrator manual.

The call journal shows the content of the CTI journal that is centrally active on the XPR server. Thus you can access a journal that logs the incoming and outgoing calls of your telephone even if your optiClient has not been started. Thus you can e.g. see which subscribers called without reaching you.

This section describes the most important call journal features.

These are:

For further information about this topic please refer to Section 5.11, "Call Journal", on page 231.

4.8.1 Opening the Call Journal

To open the call journal, select the **Call Journal** in the module menu.

The call journal opens.

4.8.2 Displaying selected Call Categories

How to specify the call categories for which journal entries are displayed:

1. Open the call journal (see Section 4.8.1, “Opening the Call Journal”, on page 71).
2. Select the icons of the **call categories** that you want to have displayed in the journal list.

   Your call journal displays only those entries that correspond to the selected call categories.

4.8.3 Dialing from the Call Journal

How to make a call from the call journal:

1. Open the call journal (see Section 4.8.1, “Opening the Call Journal”, on page 71).
2. In the journal list select the entry of the conversational partner you want to call.

   In the **Call number** field appears the phone number of the relevant subscriber.
3. Select the **Call** button.

   optiClient establishes a connection to the associated conversational partner and the call sign for the connection setup sounds.

4.8.4 Setting a Reminder Time for a rescheduled Call

How to set a reminder time for an entry in the call journal to repeat this call:

1. Open the call journal (see Section 4.8.1, “Opening the Call Journal”, on page 71).
2. Select the icon of the desired **call category**.
3. Open the context menu of the journal entry for which you want to configure a reminder time.

   The dialog for configuring the reminder time opens.

   - If you want to determine the reminder time on the basis of a period, select the **Remind me in** option. Then define the period after which you wish to be reminded to the rescheduled call.
   - If you want to determine the reminder time on the basis of a point in time, select the **Remind me on** option. Then define the point in time at which you wish to be reminded to the rescheduled call.
4. Select **Save**.

A reminder dialog opens at the time you have set. In this dialog you can initiate the rescheduled call, postpone it indefinitely or dismiss it altogether.

4.8.5 Deleting Journal Entries

NOTE:
Journal entries that are deleted in the call journal are subsequently automatically removed from the XPR server journal as well.

How to delete entries in the call journal:

1. Open the call journal (see Section 4.8.1, “Opening the Call Journal”, on page 71).
2. Select the icons of the **call categories** from which you want to remove journal entries.
3. Select the entries in the journal list that you want to delete.
4. Select the **Delete entry** or **Delete selected entries** option from the context menu of the entries.
5. If required, confirm the warning hint for deleting the selected entries with **OK**.

   The selected entries are removed from the call journal.

You have thus deleted the selected entries from the call journal and from the XPR server journal.

4.9 Basic Features of the Server Directory

IMPORTANT:
For using the server directory features, optiClient must be operated at an XPR server.
Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
For using the server directory features, the *Directories* user interface module and the *Server Directory Provider* must have been added to the optiClient configuration.
You find further requirements for using these modules in the optiClient administrator manual.

The server directory provides the information of the XPR user directory. This gives you the possibility to search for contact data in the user information of the XPR server.

In this section we will describe the most important features for searching in the server directory.

These are:

For further information about this topic please refer to Section 5.12, “Server Directory”, on page 241.

4.9.1 Looking for a Contact in the Server Directory

How to look for a contact in the server directory:

1. Select in the module menu **Directories > Search Server directories**.

   The dialog for searching the server directory opens.

2. If required, select the **Advanced >>** button to switch to the extended view of the dialog.

3. Define the search criterion that the contact to be found fulfills. Make an entry in at least one of the displayed fields.

4. Select the **Search** button.

   The hit list displays all server directory entries that fulfill the defined search criterion.

Using the optiClient “drag & drop” feature you can now copy a hit to the optiClient contact list.

4.9.2 Dialing from the Hit List

How to make a call from the hit list:

1. Open the dialog for searching the server directory and look for the desired contact (see Section 4.9.1, “Looking for a Contact in the Server Directory”, on page 75).

2. In the hit list select the entry the associated conversational partner of which you want to call.

   The **Call number** field displays one of the numbers that are entered in the directory for the relevant subscriber.

3. If several phone numbers of the relevant conversational partner are contained in the server directory, select the desired one from the list in the **Call number** field.

4. Select the **Call** button.

   optiClient establishes a connection to the selected conversational partner and the call sign for the connection setup sounds.

4.9.3 Copying a Contact

A contact can easily be copied from the server directory to the contact list or contact directory. Proceed as described in Section 4.11.5, “Copying a Contact”, on page 87.

NOTE:
If you copy contacts from the server directory to another optiClient directory, the associated contact information is automatically updated with changing information of the XPR user database.
This means: if the contact information for a locally stored XPR user changes in the XPR server user database, such changes are automatically copied to your locally stored contact.

4.10 Basic Features of the Contact Directory

IMPORTANT:
To use the contact directory features, the *Contact directory and Contact list* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

The contact directory administers your personal contact information in alphabetic order. Thus you have the information of your most important contacts at hand at all times.

This section describes the most important features of the contact directory.

These are:

For further information about this topic please refer to Section 5.13, “Contact Directory”, on page 245.

4.10.1 Opening the Contact Directory

To open the contact directory, select the **Contact directory** entry in the module menu.

The contact directory opens.

4.10.2 Adding a new Contact

How to add a new contact to your contact directory:

1. Open the contact directory (see Section 4.10.1, “Opening the Contact Directory”, on page 77).
2. Select from the context menu of any contact the **Add contact...** entry.

   The **Add Contact** dialog opens.
3. Enter all desired information of the new contact in the text fields.
4. In the **Call number** tab select the **Add** button.

   The **Call number** dialog opens.
5. Enter the **phone number** of the new contact. A short **Description** serves for clarity if several phone numbers have been defined for a contact.

NOTE:
If the contact can be reached via different phone numbers, specify an individual entry for each phone number via the **Add** button.

---

6. Save your entries with **OK**.

   The **Add Contact** dialog displays the newly added phone number.

7. If you use optiClient as SIP softphone, switch to the **SIP-Address** tab and enter there the SIP addresses of the new contact.

NOTE:
The **SIP-Address** is only displayed if you use optiClient as SIP softphone.

NOTE:
You should specify SIP addresses always completely with domain name. If you have an outbound domain configured in the SIP Functional Provider, you may omit the domain portion for SIP addresses of this domain (cf. Section 5.34.1.9, “Outbound Domain”, on page 379).

---

8. If required, switch to the **Email** tab and enter the new contact's e-mail address in the same manner.

9. If required, switch to the **Presence** tab to activate the presence feature for this user (cf. Section 4.13, “Basic Features of the Presence Feature”, on page 95).

NOTE:
Activating the presence feature for a contact makes only sense if he/she is an XPR user. Only in this case relevant information about the working state and the presence profile can be provided.

---

10. Save the new contact with the **OK** button.

    The contact directory displays the newly added contact.

4.10.3 Looking for a Contact in the Contact Directory

How to look for a contact in your contact directory:

1. Open the contact directory (see Section 4.10.1, “Opening the Contact Directory”, on page 77).
2. Enter the name of the subscriber that you want to look for under **Name**.

NOTE:
When entering names it is sufficient to enter the first, uniquely identifying letter of the name.

The marked entry in the contact directory is the currently found contact.

NOTE:
Even if the contact directory does not include the name you look for, the most matching hit is always indicated during the search.

4.10.4 Making Contact from the Contact Directory

How to call a contact from your contact directory or send him/her an e-mail:

1. In the contact directory look for the entry of the conversational partner you want to contact (see Section 4.10.3, “Looking for a Contact in the Contact Directory”, on page 80).
2. Select one of the available contact addresses from the contact's context menu.

   If you have selected a phone number for the subscriber, the desired connection will now be established.

   If you have selected an e-mail address for the subscriber, your e-mail application configured under Windows opens instead.
3. In case of an e-mail edit the automatically opened new e-mail message, which is already addressed to the desired contact.
4. In case of an e-mail send the edited e-mail message as usual.

4.10.5 Copying a Contact

A contact can easily be copied from the contact directory to the contact list. Proceed as described in Section 4.11.5, “Copying a Contact”, on page 87.

4.11 Basic Features of the Contact List

IMPORTANT:
To use the contact list features, the *Contact directory and Contact list* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

The contact list enables you to administer entries of your contact directory in structured form. Therefore you can create any groups in the contact list and assign individual contact entries to these groups. This way you can e.g. organize your personal contacts in the form of a corporate structure.

This section describes the most important contact list features.

These are:

For further information about this topic please refer to Section 5.14, “Contact List”, on page 251.

4.11.1 Opening the Contact List

To open the contact list, select the **Contact list** entry in the module menu.

The contact list opens.

NOTE:
It is possible to open a single contact list group via the menu option Contact groups > <Group> of the module menu.

4.11.2 Adding a new Contact List Group

How to add a new group to your contact list:

1. Open the contact list (see Section 4.11.1, “Opening the Contact List”, on page 83).
2. From the context menu of the **Contact list** window select the **Add group...** entry.

   The **Add Group** dialog opens.
3. Enter a name for the new contact list group.
4. Confirm your input with **OK.**

   Your contact list displays the newly added group.

4.11.3 Adding a new Contact

NOTE:
After adding a new contact to the contact list, the contact is also automatically added to the contact directory.

How to add a new contact to a group of your contact list:

1. Open the contact list (see Section 4.11.1, “Opening the Contact List”, on page 83).
2. Activate the context menu for the group that you want to add the new contact to. Select the **Add contact...** entry from this menu.

   The **Add Contact** dialog opens.
3. Enter all desired information of the new contact in the text fields.
4. In the **Call number** tab select the **Add** button.

   The **Call number** dialog opens.
5. Enter the **phone number** of the new contact. A short **Description** serves for clarity if several phone numbers have been defined for a contact.

   NOTE:
   If the contact can be reached via different phone numbers, specify an individual entry for each phone number via the **Add** button.

   ---
6. Save your entries with **OK**.

   The **Add Contact** dialog displays the newly added phone number.

7. If you use optiClient as SIP softphone, switch to the **SIP-Address** tab and enter there the SIP addresses of the new contact.

NOTE:
The **SIP-Address** is only displayed if you use optiClient as SIP softphone.

NOTE:
You should specify SIP addresses always completely with domain name. If you have an outbound domain configured in the SIP Functional Provider, you may omit the domain portion for SIP addresses of this domain (cf. Section 5.34.1.9, “Outbound Domain”, on page 379).

---

8. If required, switch to the **Email** tab and enter the new contact's e-mail address in the same manner.

9. If required, switch to the **Presence** tab to activate the presence feature for this user (cf. Section 4.13, “Basic Features of the Presence Feature”, on page 95).

NOTE:
Activating the presence feature for a contact makes only sense if he/she is an XPR user. Only in this case relevant information about the working state and the presence profile can be provided.

---

10. Save the new contact with the **OK** button.

    The contact directory displays the newly added contact.

4.11.4 Making Contact from the Contact List

How to call a contact from your contact list or send him/her an e-mail:

1. Open the contact list (see Section 4.11.1, “Opening the Contact List”, on page 83).
2. Have the addresses of the contact with whom you want to communicate displayed in the contact list. If required, expand the contact entry by selecting the horizontal arrows before the associated group and the relevant contact entry.
3. Select the address via which you want to communicate with the contact from the available-addresses list.
4. Then click the **Dialing** button, if you have selected a phone number as address, or **Send** in case of an e-mail address.

   If you have selected a phone number for the subscriber, the desired connection will now be established.

   If you have selected an e-mail address for the subscriber, your e-mail application configured under Windows opens instead.
5. In case of an e-mail edit the automatically opened new e-mail message, which is already addressed to the desired contact.
6. In case of an e-mail send the edited e-mail message as usual.

4.11.5 Copying a Contact

How to copy a contact from your contact directory to a group of your contact list:

1. Open the contact list (see Section 4.11.1, “Opening the Contact List”, on page 83).
2. Open the contact directory (see Section 4.10.1, “Opening the Contact Directory”, on page 77).
3. In the contact directory select the contact with the mouse that you want to copy to a group of the contact list. Keep the left mouse button pressed.
4. Drag the selected contact with the left mouse button kept pressed from the contact directory to the contact list group in which you want to integrate the contact.

   The relevant contact list group displays the copied contact.

You have thus copied a contact with all contact data from your contact directory to a group of your contact list.

4.11.6 Displaying the Status Information of a Contact

NOTE:
If the online status of the presence profile is to be displayed for a contact, you need to previously activate this feature for the corresponding contact (cf. Section 4.13.3, “Activating the Presence Feature”, on page 98).

NOTE:
The option to display current status information can be restricted by access privileges in the XPR server (cf. Section 5.14.2, “Representation of Status Information”, on page 256).

Via the presence feature the contact list may display status information for contacts (cf. Section 3.4, “Presence Feature”, on page 36). In the contact list, status information is only displayed preceding the associated address entries by default. Beyond that, they may also appear before the superordinate contact entry.

How to display status information directly before the superordinate contact entry:

NOTE:
If you would like to show more pieces of status information in front of a contact, perform the following steps for each status that is to be shown.

---

1. Open the contact list (see Section 4.11.1, “Opening the Contact List”, on page 83).
2. Open the context menu for the contact that you want to prefix with the status information.
3. In the context menu select the **Display icons** entry.
4. Select the status you want to show from the list displayed.

   The selected status information (telephone status, online status or presence profile) precedes the relevant contact.

4.12 Basic Features of the Team Bar

IMPORTANT:
To use the contact team bar features, the *Contact directory and Contact list* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

A special type of the contact list representation is the team bar. It allows having your personal contacts available at all times at the upper or lower margin of the screen.

This section describes the most important team bar features.

These are:

For further information about this topic please refer to Section 5.14, “Contact List”, on page 251.

4.12.1 Individual Contact List Groups as Team Bar

How to create a team bar from a single group of your contact list:

1. Open the existing contact list (see Section 4.11.1, “Opening the Contact List”, on page 83).
2. Select the group of the contact list that is to be created as team bar. Keep the left mouse button pressed.
3. With the left mouse button kept pressed, drag the selected group from the contact list window.

   The group opens in an individual group window.
4. With the left mouse button kept pressed, drag the new group window to the top or bottom desktop margin.

   The group window automatically changes to a team bar and connects to the top or bottom desktop margin.

You have thus generated a team bar from a contact list group. All modifications that you perform in the contact list for the relevant group are from then on automatically copied to the team bar. The same applies vice versa.

4.12.2 Complete Contact List as Team Bar

How to represent the entire contact list as team bar:

With the left mouse button kept pressed, drag the contact list window to the top or bottom desktop margin. The contact list then automatically changes to a team bar and connects to the top or bottom desktop margin.

All modifications that you perform in the contact list for the associating group are from now on automatically copied to the team bar. The same applies vice versa.

To display a specific group in this representation, switch to the associating team bar tab.

4.12.3 Making Contact from the Team Bar

How to call a contact from the team bar or send him/her an e-mail:

1. Activate the context menu for the desired contact and select one of the available contact addresses.

   If you have selected a phone number for the subscriber, the desired connection will now be established.

   If you have selected an e-mail address for the subscriber, your e-mail application configured under Windows opens instead.

2. In case of an e-mail edit the automatically opened new e-mail message, which is already addressed to the desired contact.

3. In case of an e-mail send the edited e-mail message as usual.

4.12.4 Picking up a Call for a Subscriber

NOTE:
Accepting calls for other subscribers may be restricted to specific subscribers or completely deactivated by the XPR server administrator.

How to pick up a call that comes in for a subscriber of your team bar:

1. Select the status icon of the subscriber with the left mouse button.
2. In the opening menu select **Answer call from: <*Subscriber*>**.

   You are connected to the calling subscriber.

4.12.5 Closing the Team Bar

NOTE:
If the entire contact list is represented as team bar, it cannot be directly closed in this way. You first need to transform the team bar into its window representation again (cf. Section 4.12.6, “Converting a Team Bar into a Contact List Window”, on page 93).

How to close the open team bar of a single contact list group:

1. Open the context menu of the team bar in an empty space of the bar.
2. Select the **Close group...** menu option.

   The team bar disappears from the desktop.

4.12.6 Converting a Team Bar into a Contact List Window

To convert the team bar into the normal window representation, simply detach it from the screen margin. Proceed as follows:

1. Seize the team bar at the left margin |.
2. Keep the mouse button pressed and drag the team bar from the screen margin to the center of the screen.

You can now freely position the contact list respectively contact list group on the desktop.

4.12.7 Displaying the Status Information of a Contact

NOTE:
If the online status of the presence profile is to be displayed for a contact, you need to previously activate this feature for the corresponding contact (cf. Section 4.13.3, “Activating the Presence Feature”, on page 98).

NOTE:
The option to display current status information can be restricted by access privileges in the XPR server (cf. Section 5.14.2, “Representation of Status Information”, on page 256).

Via the presence feature the contact list may display status information for contacts (cf. Section 3.4, “Presence Feature”, on page 36). Such status information is in the team bar merely displayed in the context menus of the single contacts. Beyond that, they may also appear before the superordinate contact entry.

Proceed as follows to display status information directly in front of the corresponding contact entry:

NOTE:
If you would like to show more pieces of status information in front of a contact, perform the following steps for each status that is to be shown.

---

1. In the team bar, open the context menu for the contact that you want to prefix with the status information.
2. In the context menu select the **Display icons** entry.
3. Select the status you want to show from the list displayed.

   The selected status information (telephone status, online status or presence profile) precedes the relevant contact.

4.13 Basic Features of the Presence Feature

NOTE:
The unrestricted use of the optiClient presence feature requires various administrative conditions be fulfilled (cf. Section 5.16, “Presence Feature”, on page 277).

NOTE:
If the online status of the presence profile is to be displayed for a contact, you need to previously activate this feature for the corresponding contact (cf. Section 4.13.3, “Activating the Presence Feature”, on page 98).

NOTE:
The option to display current status information can be restricted by access privileges in the XPR server (cf. Section 5.16.7.3, “Administration of Access Rights”, on page 294).

The presence feature enables you to obtain the following information about the user:

- the telephone status
- the online status
- the presence profile

Furthermore, you can configure your own, individual presence profile and make it visible for other users. Thus it is possible for other users to e.g. recognize whether you are logged on at the XPR server, whether your telephone is free, whether you are having a break, whether you are on holiday or on a business trip.

This section describes the most important features of the presence feature.

These are:

- Configuring your current Presence Profile from page 96
- Add Information to Presence Profile from page 97
- Activating the Presence Feature from page 98
- Configuration of your personal Presence Profile from page 99
- Controlling the individual Presence Information from page 100
- Displaying Status Information from page 102.

You find further information on this topic under:

- Section 5.14.2, “Representation of Status Information”, on page 256
- Section 5.16, “Presence Feature”, on page 277.

4.13.1 Configuring your current Presence Profile

Via the presence profile of the presence feature you can display for other users whether you are e.g. taking a break, on holiday or on a business trip.

To set your current presence profile in optiClient, select the **Presence > My Presence information > <*presence profile*>** entry in the module menu.

Subsequently, your current presence profile will change to the selected setting.

The currently selected presence profile is highlighted in the menu status list.

4.13.2 Add Information to Presence Profile

You can add individual information to your current presence profile.

How to configure additional information for your current presence profile in optiClient:

1. In the module menu select **Presence > My Presence settings...**.

   The **Presence Settings** dialog opens.

2. Switch to the **Current profile** tab.

3. In the **Settings for the selected profile** section enter your individual information for the presence profile that is currently active.

IMPORTANT:
If you use optiClient as CTI client and have your telephone manually diverted at the terminal device, the **Divert business phone to** setting takes no effect.

---

4. Save and activate the entered information via the **OK** button.

IMPORTANT:
If you change to another presence profile after having saved the individual information, the information might be lost. If you want to keep individual information for a presence profile even after a change of profile, define it for the selected profile on the **My profiles** tab (cf. Section 4.13.4, “Configuration of your personal Presence Profile”, on page 99).

4.13.3 Activating the Presence Feature

Before it is possible to show the online status and the presence profile of a contact in the team bar and the contact list in optiClient, the presence information display must be activated for the corresponding contact.

NOTE:
In the team bar and contact list you can have a user's telephone status displayed. This requires the associated PBX to provide the corresponding status information and the XPR server administrator to grant you the privilege to view the telephone status of the relevant user.

How to activate the display of the online status and presence profile for a contact:

1. Select the contact for which you would like to show the online status or the presence profile in the contact directory, in the contact list or in the team bar.
2. Open the context menu of the relevant contact and select the **Edit contact** entry.

   The **Edit Contact** dialog opens.
3. Switch to the **Presence** tab.
4. Activate the **Display Presence information** option, so that you can later display the online status and the presence profile for the contact.
5. Save your new settings by clicking the **OK** button.

Now you can show the online status and the presence profile in the team bar and in the contact list for the relevant user. How to proceed is described in Section 4.12.7, “Displaying the Status Information of a Contact”, on page 93.

4.13.4 Configuration of your personal Presence Profile

By setting your current presence profile in optiClient, other users can be easily informed whether you are reachable at the moment and where. This way more efficient communication becomes possible.

Proceed as follows to create a personal presence profile. You can subsequently activate this profile.

1. In the module menu select **Presence > My Presence settings...**.

   The **Presence Settings** dialog opens.

2. Switch to the **My profiles** tab.
3. Press the **Add profile...** button.
4. Enter a name for the new profile in the **Profile name** field.
5. In the **Use icon** field select the icon that is to be displayed in the contact list and team bar, if this profile has been activated.
6. Confirm your settings by clicking the **OK** button.
7. On the **My profiles** tab you can enter additional information (**Comment, Private Comment** etc.).

   IMPORTANT:
   If you use optiClient as CTI client and have your telephone manually diverted at the terminal device, the **Divert business phone to** setting takes no effect.

8. Save your new settings by clicking the **OK** button.

Thus you have created a personal presence profile. From now on you can activate this profile like any other presence profile.

4.13.5 Controlling the individual Presence Information

By default, all XPR users can have their presence information displayed in the contact list or team bar. However, you can also adjust the authorization to display this information for all users or for defined user groups.

NOTE:
You can restrict the display of your telephone status only if the XPR server administrator has shared this feature.

Controlling the display for all users

How to control the display of your presence information for all users:

1. In the module menu select **Presence > My Presence settings...**.

   The **Presence Settings** dialog opens.

2. Change to the **Access rights** tab.
3. In the **Groups** field select the **Default Privileges** entry.
4. In the **Access rights** field select only the check boxes of the presence information that you would like to display to all other users. For example, the information **Comment, Online Status** and **Presence profile**.
5. Save your new settings by clicking the **OK** button.

Now you have restricted the display of your presence information for all users.

These new settings do not take effect for the relevant users until you have restarted your optiClient.

Controlling the display for selected users

How to control the display of your presence information for specific users:

1. In the module menu select **Presence > My Presence settings...**. Then the **Presence Settings** dialog opens.
2. Change to the **Access rights** tab.
3. Click the **Add group...** button.
4. In the **Group name** field enter a name for the new group.
5. Save your settings by clicking the **OK** button.
6. In the **Groups** field of the **Presence Settings** dialog, select the newly added group.
7. In the **Access rights** field select only the check boxes of the presence information that you would like to display to the users of the new group.
8. Select the **Add user...** button.
9. In the **Add users** dialog select the users whom you want to attribute the access rights defined in step 7.

> ***NOTE:***
> Via the `Ctrl` and `Alt key` you can select several users in the list at the same time.

10. Confirm your selection with **OK**.
11. If required, create additional groups with individually assigned access rights and users.
12. Complete the access right configuration via the **OK** button.

Now you have configured the display of your presence information for individual user groups.

4.13.6 Displaying Status Information

You can have the status information of other XPR users displayed individually in your contact list and team bar.

In order to show status information for a contact, the presence feature must first be activated for the relevant contact (cf. Section 4.13.3, “Activating the Presence Feature”, on page 98).

For more detailed information on the subsequent showing of other users' status information please refer to Section 4.12.7, “Displaying the Status Information of a Contact”, on page 93.

4.14 Basic Features of the Lotus Notes Integration

IMPORTANT:
For using the optiClient Lotus Notes integration, the *Lotus Notes Provider* must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

IMPORTANT:
For using the optiClient Lotus Notes integration, a Lotus Notes client must have been installed on the user computer.

With the Lotus Notes integration

- you can search Lotus Notes address books for contacts in optiClient
- you can initiate calls in the Lotus Notes client

Initiating calls is possible in particular from the following Lotus Notes elements:

- Address books in the Lotus Notes client
- E-mails in the Lotus Notes client

This section describes the most important features of the Lotus Notes integration.

These are:

For further information about this topic please refer to Section 5.28, “Telephoning with Lotus Notes Integration”, on page 317.

4.14.1 Searching a Lotus Notes Address Book

NOTE:
A Lotus Notes address book can only be searched if it has been configured in the Lotus Notes Provider.

Using the Lotus Notes integration you can look for a contact in a Lotus Notes address book. Proceed as follows:

1. Select in the module menu **Directories > Search <*address book name*>.**

   The dialog for searching the selected Lotus Notes address book opens.

2. If required, select the **Advanced >>** button to switch to the extended view of the dialog.

3. Define the search criterion. Make an entry in at least one of the available fields.

4. Select the **Search** button.

   NOTE:
   A contact can only be searched for on the basis of names and phone numbers.

   The hit list displays all Lotus Notes address book entries that fulfill the defined search criterion. Using the optiClient “drag & drop” feature you can now copy a hit to the optiClient contact list.

4.14.2 Calling a Lotus Notes Contact

NOTE:
You can only dial from within a Lotus Notes address book, if it has been configured in the Lotus Notes Provider.

With the help of the Lotus Notes integration you can initiate a call from within an address book.

Proceed as follows to dial form an address book:

1. In your Lotus Notes client change to the required address book.
2. In the Lotus Notes address book search for the contact to which you would like to initiate a call and select him/her.
3. Select the optiClient icon in the Lotus Notes client toolbar.
4. If the selected contact includes several phone numbers, a optiClient selection dialog opens. In this dialog mark the phone number that you would like to use for the connection setup.
5. Then select the **Call** button in the optiClient dialog to establish a connection to the selected phone number.

   optiClient sets up the connection and the corresponding call sign sounds.

   optiClient moves to the foreground of the desktop.

4.14.3 Calling the Originator of an E-mail

NOTE:
You can only dial from within a Lotus Notes client e-mail, if the relevant mail database has been configured in the Lotus Notes Provider.

To call the originator of an e-mail in Lotus Notes, select the required e-mail. Then continue with step **3** as described in Section 4.14.2, "Calling a Lotus Notes Contact", on page 105.

4.15 Font Size in optiClient

To operate optiClient trouble-free and represent a correct program interface, the font size of the user PC must be set to 96 DPI.

You configure this setting in the user PC's system settings under **Display Properties – Appearance** in the **Font size** field.

NOTE:
The description of the 96 DPI setting depends on the graphic card used.

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5 Reference

IMPORTANT:
Please read the optiClient administrator manual before modifying the optiClient configuration.

IMPORTANT:
If you change the optiClient configuration, such modifications will not be saved in the configuration files until optiClient has subsequently been shut down in a proper manner.
This applies in particular to: information about newly added, removed or modified contacts and information about newly added, removed or modified modules.

NOTE:
The scope of optiClient features as well as the function performance depend on the communication system at which optiClient is operated and on the optiClient modules configured on the user computer.

NOTE:
On the optiClient user interface you can open menus with the left or right mouse button in different places. In this manual we speak about a *menu* if you can open it with the left mouse button. Contrary to this, a context menu is opened with the right mouse button.

This chapter provides you with detailed reference information on the optiClient components.

It comprises the following sections:

General optiClient operation

Settings of the various optiClient components

Description of the optiClient main components

Description of the optiClient further components

Description of the optiClient connection to other systems

5.1 Starting and Stopping optiClient

IMPORTANT: This section provides information about the following topics:

5.1.1 optiClient Program Start

optiClient can be started in two manners:

- With a double-click on the optiClient shortcut icon, which was generated on the user-PC desktop during the program installation.
- By selecting **Start – Programs – Cycos – optiClient**.

optiClient always starts under the user ID used last. If a user password has been assigned for this ID, the user login dialog appears immediately after the program start. If there is no user password for this ID, optiClient starts without further login procedure.

To change the user ID then, you need to push the `shift key` at the program start. In this case the user login dialog is also displayed if no password has been defined for the last user.

NOTE:
The `shift` key may not be supported with a terminal server installation.

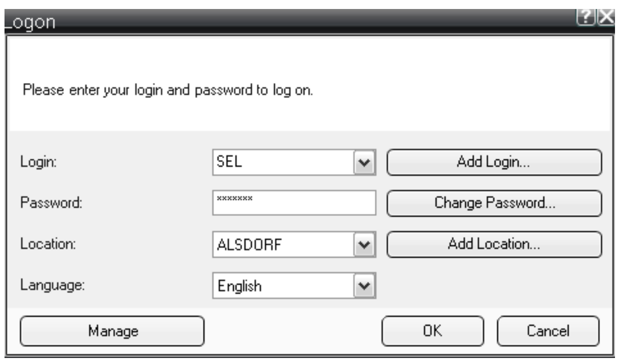
5.1.2 User Login

After the optiClient program start, the user login dialog opens (cf. Section 5.1.1, “optiClient Program Start”, on page 111).

5.1.2.1 Login Dialog

The Login dialog is differently represented depending on the program settings of optiClient performed. In the following you find explanations on all input fields and buttons, even if these may not be displayed on your login mask.

NOTE:
You find more information about configuring the login dialog under Section 5.4.2, “Settings for Starting the Program”, on page 140.



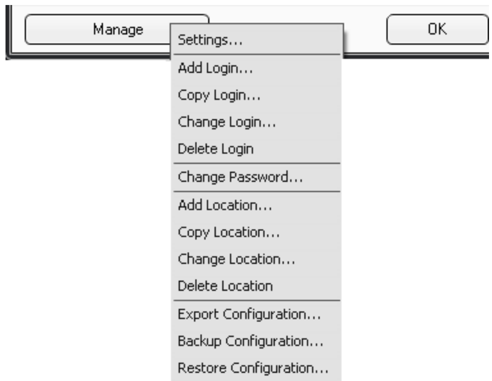
The elements in the login dialog have the following functions:

Login	Enter your **ID** in this field. Depending on the program settings you can select IDs already previously used for logging in from a list. If you do not have a user ID yet, select the **Add login** button to add a new ID (see below). More information about the user and location concept can be found in the optiClient administrator manual.
Password	Enter your **Password** in this field. If no password is assigned to your ID, leave this field empty for logging in.
Location	Select the location where you operate as a user from the list of available locations. If your location is not included in the list, select the **Add location** button to add a new location (see below).
Language	From the list of available languages select the one to be used for the optiClient display. optiClient currently supports the following languages: • German • English • French • Brazilian • Italian • Dutch • Portuguese • Russian • Spanish • Turkish.
LIN	The LIN (Local Identification Number) serves for determining the location of a optiClient (for example, on the basis of building numbers or a coordinates recognition). Depending on the optiClient settings, specifying this information can be mandatory. **Note:** The LIN field is only displayed if the communication system used supports LIN usage and the optiClient settings provide for a corresponding entry.
Add login …	Select this button to add a new user ID to the optiClient settings. In the dialog that will then follow you are prompted to enter a new ID, a password and its confirmation.

Change Password…	Select this button to change the password for the user ID selected in the **Login** field. In the dialog that will then follow you are prompted to enter a new password and its confirmation. **Attention:** To change an existing password, the password of the specified user login valid up to now must be entered in the **Password** field. **Attention:** If you use optiClient via a terminal server, you **always** have to assign a password for the login at optiClient. If you fail to do so, you may not be able to access the login dialog during the start of the program. In this case you can neither change your login settings, nor the settings that may only be changed from within the login dialog.
Add location …	Select this button to add a new location to the optiClient settings. More information about the user and location concept can be found in the optiClient administrator manual.
Manage	Opens the menu for administering the optiClient settings. You find more detailed information about the settings dialog in optiClient administrator manual.
OK	Completes the login process and saves possibly performed modifications of the optiClient settings. Subsequently, the optiClient main bar with the associated components opens.
Cancel	Cancels logging in and the optiClient start.

5.1.2.2 The *Manage* Menu

To open the **Manage** menu, click the **Manage** button in the login dialog. The menu contains the following options:



The **Manage** menu options have the following functions:

Settings …

Opens the dialog for configuring the optiClient settings. Settings modifications performed from within the login dialog already take effect with the current optiClient start.

Attention:
When a user logs in for the first time, various user-individual settings must be defined. Among these are e.g. the connection to the communication system and the user identification. Without these settings optiClient cannot be used.
You will find details on the single settings in this chapter.

Add Login …

Opens a dialog for adding a new login to the optiClient settings. In this dialog you are prompted to enter a new login, a password and its confirmation.

Copy Login …

Opens a dialog for adding a new login to the optiClient settings. In this dialog you are prompted to enter a new login, a password and its confirmation.
The settings valid for the copied login are taken for the new login.

Change Login…

Opens a dialog for changing the login and the password of the user login specified. In this dialog you are prompted to enter a new login, a new password and its confirmation.

Attention:
To change an existing login, the password of the specified user login valid up to now must be entered in the **Password** field.

Delete Login

Deletes the login in the optiClient configuration that is entered in the **Login** field.

Change Password…	Opens a dialog for changing the password of the user login specified. In this dialog you are prompted to enter a new password and its confirmation. **Attention:** To change an existing password, the password of the specified user login valid up to now must be entered in the **Password** field. **Attention:** If you use optiClient via a terminal server, you **always** have to assign a password for the login at optiClient. If you fail to do so, you may not be able to access the login dialog during the start of the program. In this case you can neither change your login settings, nor the settings that may only be changed from within the login dialog.
Add Location …	Opens a dialog for adding a new location to the optiClient settings. More information about the user and location concept can be found in the optiClient administrator manual.
Copy Location…	Opens a dialog for adding a new location to the optiClient settings. The settings valid for the copied location are taken for the new location. More information about the user and location concept can be found in the optiClient administrator manual.
Change Location…	Opens a dialog for changing a location's settings. More information about the user and location concept can be found in the optiClient administrator manual.
Delete Location	Deletes the location in the optiClient configuration that is entered in the **Location** field.
Export Configuration …	Exports selected information of the optiClient configuration. You find more information about exporting the optiClient configuration in the optiClient administrator manual.
Backup Configuration …	Saves a backup copy of the optiClient configuration for the logged-in user. You find detailed information about saving the optiClient configuration in the optiClient administrator manual.
Restore Configuration …	Loads a backup copy of the optiClient configuration for the logged-in user. You find detailed information about saving the optiClient configuration in the optiClient administrator manual.

5.1.3 Ending optiClient

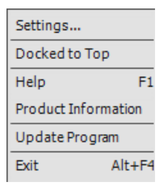
If a connection is still active, the optiClient program settings determine that:

- optiClient cannot be closed
- an appropriate advisory appears and the program is terminated at the same time as all active connections
- optiClient and all active connections are closed without any further messages.

For more information about configuring the desired behavior, see Section 5.4.3, “Settings for Ending the Program”, on page 144.

optiClient can be shut down in the following ways:

- By selecting the **Close** icon in the optiClient main bar.
- By selecting **Exit** from the optiClient menu.



- By the key combination **Alt+F4**.

5.2 optiClient Main Bar

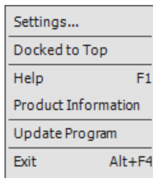
The main bar is the central element in the optiClient user interface and can be customized to suit your individual needs.

The main bar may contain the following elements:

The optiClient Menu	from page 120
The Audio Icons and Volume Controls	from page 122
Forwarding Menu	from page 124
Telephony Menu and the Telephony Icons	from page 126
MyPhone	from page 127
Speed Dialer	from page 128
Fault Signaling	from page 132
Module Menu	from page 129.

5.2.1 The optiClient Menu

The main bar provides the optiClient menu. To open it, click with the right mouse button any free area in the main bar.



The optiClient menu offers the following menu options:

- **Settings**
  Opens the optiClient settings dialog.

NOTE:
If there is an active connection, this menu option cannot be selected.

- **anchored above**
  Fixes the main bar to the top screen margin.

NOTE:
In a terminal server environment, the main bar cannot be docked to the screen margin.

- **Help**
  Opens the optiClient online help.

- **Product information**
  Displays the general optiClient program information.

- **Update program**
  Checks the availability of an updated optiClient program version and installs it if required.
  You will find detailed information on automatic program updating in Section 5.4.6, “Settings for Program Update”, on page 148.

  NOTE:
  If there is an active connection, this menu option cannot be selected.

- **Exit**
  Closes optiClient.

5.2.2 The Audio Icons and Volume Controls

NOTE:
Some audio icons and the volume controls are only displayed if you use optiClient at an SIP communication system.

These audio icons depend on the available hardware of the user PC and on the settings and enable a fast and effective operation of the associated features:

NOTE:
The headset icon and the headset volume control are only available if a optiPoint handset with headset extension is used and this audio device was configured in the active audio scheme. See Section 5.34.1.17, “Audio Schemes”, on page 388.

Icon	Function
	**Lift receiver** • In case of a connection request, for example an incoming call: – Accept the call and thus establish the connection. • In a state of rest: – Activate the available audio equipment.
	**Disconnecting a call** • With an active connection: – Finish the call. • In the optiClient telephone system menu: – Finish browsing, return to idle state.
	**Microphone on/off** • With an active connection: – Switch audio device muting on or off. **Is only displayed in case of an SIP connection.**
	**Loudspeaker on/off** • With an active connection or in idle state: – Switch loudspeakers on or off. **Is only displayed in case of an SIP connection.**

Table 2 The Audio Icons and Volume Regulators

Icon	Function
	**Headset on/off** • With an active connection or in idle state: – Switch to headset or switch headset muting on. **Is only displayed in case of an SIP connection.**
	**Volume control** By moving the ruler to the right (louder) or to the left (softer), the volume of the following components is set: • **Ring tone**, when optiClient is in idle state or a connection request is received. • **Loudspeaker**, when a connection is in progress and a loudspeaker is active. • **Handset**, when a connection is active, a call is being conducted via a handset, and the loudspeaker is not turned on. • **Headset**, when a connection is active, a call is being conducted via the headset, and the loudspeaker is not turned on. **Is only displayed in case of an SIP connection.**
	**Volume menu** For setting the volume of **Ring tone, loudspeaker, handset** and **headset** independent from the connection state. The menu opens with a click on the volume icon . **Is only displayed in case of an SIP connection.**

Table 2 The Audio Icons and Volume Regulators

5.2.3 Forwarding Menu

In order to forward connection requests you can define a call forwarding in optiClient for various types of forwarding and then enable or disable the feature as needed. The forwarding menu and its context menu control and administer the possible forwardings and their settings.

IMPORTANT:
Activated forwardings still take effect after optiClient was shut down.

The connected communication system determines which forwarding types are available in the forwarding menu.

If optiClient is connected to an XPR server, the selectable forwarding types are defined by the device features that have been configured in the XPR server CTI APL for the PBX used.

You find further information about this in the documentation of the communication system used and the *Server Administration* manual.

With the connection to a XPR server, forwardings that are configured, activated or deactivated at the desk telephone are also represented in their current state in the forwarding menu.

The forwarding menu opens via the icon.

NOTE:
Forwardings already active are displayed highlighted in the forwarding menu. Forwardings set but not available any more are faded gray.

The following options are available in the forwarding menu:

- ***<List of possible forwardings>***
  Selecting a forwarding from the forwarding list
  - activates a previously inactive forwarding and
  - deactivates a previously active forwarding.
- **Add …**
  Opens the **Add forwarding** dialog, in which the settings for a new forwarding can be defined.

  - **Type**
    Defines the type of the new forwarding
  - **Destination**
    Defines the phone number to which a call is forwarded
  - **Optional text**
    Specifies a text that describes the relevant forwarding. This text is displayed in the forwarding menu for selection
- **Change …**
  Opens the **Change forwarding** dialog for the forwarding selected in the forwarding menu. In this dialog you can edit the settings for the relevant forwarding (cf. **Add...**).
- **Delete**
  Deletes the forwarding selected in the forwarding menu.

5.2.4 Telephony Menu and the Telephony Icons

NOTE:
The telephony menu and the telephony icons are only displayed if you use optiClient at an SIP communication system.

The communication system connected to optiClient principally defines which telephony functions are available. In optiClient, the available functions can be used for direct activation in the telephony menu.

Functions often used can be additionally incorporated on the main bar in the form of individual icons.

The telephony functions are controlled and administered via the telephony menu and its context menu. The communication system used determines which features are offered in the telephony menu for selection.

5.2.4.1 Telephony Menu

The telephony menu opens via the  icon.

NOTE:
Telephony functions already active are displayed highlighted in the telephony menu.

Selecting a telephony function from the telephony menu list

- activates a previously inactive function and
- deactivates a previously active function.

Functions not available are shaded gray.

NOTE:
A function can be activated or deactivated faster if an icon exists for it in the main bar.

Depending on the function type, you may have to specify additional information to execute the function (e.g. enter the code for the *Code key* function).

5.2.4.2 Telephony Menu Context Menu

To open the telephony menu context menu, click the telephony menu with the right mousebutton.

The following options are available in the context menu:

- **Display function in the main bar …**
  Defines an individual icon for the selected telephony function in the main bar. Via this icon the relevant function can then be activated or deactivated outside the telephony menu.

NOTE:
Currently inactive functions can be placed on the main bar as well.

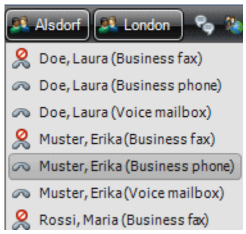
5.2.5 MyPhone

MyPhone enables easy control of the individual telephone when optiClient is connected to an XPR server.

You find a detailed description of the MyPhone elements in Section 5.15, “MyPhone”, on page 271.

5.2.6 Speed Dialer

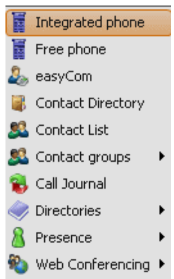
You can conveniently get in touch with a contact from the contact list using the speed dialer button-menus.



Click on the button of the desired contact list group. Subsequently, a list with all contacts of the respective group opens. When you select a list entry, you automatically establish a connection to the associated phone number.

5.2.7 Module Menu

The optiClient module menu contains all menu options and functions provided by the installed modules. You can open it with the module menu icon in the main bar.



The range of the optiClient module menu and the sequence of the menu entries depend on the individual setup and configuration of optiClient. GUI modules already open are flagged in the module menu.

In the module menu the following functions are available:

- **Call journal**

NOTE:
The call journal is only available when optiClient is used at an XPR server.

  Opens the call journal that displays the XPR server journal information or exports the journal's contents to a file.
  You find detailed information about the call journal in Section 5.11, “Call Journal”, on page 231.

- **Presence**
  Offers access to the settings of the optiClient presence feature. Furthermore, you can control Instant Messaging under this menu option.
  You find detailed information about the presence function in Section 5.16, “Presence Feature”, on page 277.
  You find detailed information about instant messaging in Section 5.19, “Instant Messaging”, on page 305.

- **easyCom**
  Opens the window of the easyCom communication circle.
  You find detailed information about the easyCom communication circle in Section 5.10, “easyCom Communication Circle”, on page 221.

- **Free phone**

  Opens the optiClient telephone as freely positionable window. In this window the display as well as the key pad is represented.
  You find detailed information about the free phone in Section 5.8, “optiClient Telephone”, on page 213.

- **Integrated phone**
  Opens the optiClient telephone the display of which is integrated in the main bar. After a click in the display the associated keypad unfolds (cf. Section 5.5.11, “optiClient-Telephone Settings”, on page 165).
  You find detailed information about the integrated phone in Section 5.8, “optiClient Telephone”, on page 213.

- **Webbrowser > <*Internet page*>**
  Opens a new Webbrowser window in which you can only load the individually configured Internet pages.
  You find detailed information about the Webbrowser in Section 5.17, “Web Browser”, on page 299.

- **Contact list**
  Opens the contact list in which the contacts are displayed according to a user-individual grouping.
  You find detailed information about the contact list in Section 5.14, “Contact List”, on page 251.

- **Contact groups > <*Group*>**
  Opens the selected group of the contact list.
  You find detailed information about the contact list in Section 5.14, “Contact List”, on page 251**.**

- **Contact directory**
  Opens the contact directory with all individual contacts of the optiClient user.
  You find detailed information about the contact directory in Section 5.13, “Contact Directory”, on page 245.

- **Directories > Search <*directory*>**
  Provides access to the directory search.

- **Web conferencing**
  Provides access to the web conference control.
  You find detailed information about web conferences in Section 5.18, “Web Conferencing”, on page 301.

5.2.8 Fault Signaling

The intelligent optiClient fault signaling immediately indicates problems that occur during the application operation via a main bar icon.

optiClient fault signaling is activated in the following scenarios:

- Connection problems
- Sound card problem

The fault signaling also provides an error log. This log comprises a description of each fault that has occurred and also notes for a possible fault correction.

5.2.8.1 Fault Signaling

optiClient signalizes a fault by the module menu icon turning red – .

5.2.8.2 Retrieving the Fault Log

To open the fault log, click on the red module menu icon in the main bar and select the **Current error report** menu option. A dialog opens that contains the current fault descriptions and notes for possible corrections.

5.3 The *Settings* Dialog

The optiClient settings are edited in the **Settings** dialog. You reach this dialog via:

- The **Manage** button in the login dialog
(cf. Section 5.1.2.2, “The Manage Menu”, on page 115)
- The **Settings…** item in the optiClient menu
(cf. Section 5.2.1, “The optiClient Menu”, on page 120).

The following tables show an overview of the single optiClient modules settings and whether they can be edited via the login dialog and/or the optiClient menu.

NOTE:
The type and scope of the possible user settings depends on the modules installed and configured in optiClient.

Availability of the general settings

General settings (**x** available, **–** not available)	**via login**	**via the oC menu**
General Settings	x	x
Settings for Starting the Program	–	x
Settings for Ending the Program	x	–
Settings for the Representation in Task Bar and Info Area	x	–
Settings for the Connection Status Change	x	–
Settings for Program Update	x	–
Settings for Central Configuration	x	–

Table 3 Availability of the general Program Settings

Availability of the user interface modules settings

Settings for the user interface modules (**x** available, **–** not available)	**via login**	**via the oC menu**
Settings of the Call Journal		
– Filter	x	x
– Main Bar	x	x
– Appearance	x	x
– Miscellaneous	x	x
Presence Settings	x	–
easyCom Settings	x	x
Device State Settings	no settings	
Web Browser Settings	x	x
IPC Settings	no settings	
Settings for Contact Directory and Contact Lists	no settings	
MyPhone Settings	no settings	
Speed Dialer Settings	x	x
Sound Control Settings	no settings	
optiClient-Telephone Settings	x	x
Directories Settings	x	–
Web Conference Settings	x	–
Web-Workflows Settings	x	–

Table 4 Availability of the User Interface Module Settings

Availability of the provider modules settings

Settings for Provider Modules (**x** available, **–** not available)	**via login**	**via the oC menu**
Settings of the Server Call Journal Provider	–	x
Settings of the Server Connection Provider		
– Settings for the MSP Profile	x	–
– Normalization Settings/Phone Number Localization	x	–
Settings of the Server CTI Provider	–	x
Settings of the Server Presence Provider	no settings	
Settings for the HiPath Provider		
– Device	x	–
– Main Connection	x	–
– Main Network Access	x	–
– Fallback Connection	x	–
– Fallback Network Access	x	–
– Failover	x	–
– Audio Schemes	x	–
– Ring Tones	x	x
– Bandwith Reduction	x	–
– Port Restrictions	x	–
– Virtual Private Network (VPN)	x	–
– Quality of Service (QoS)	x	–
– Licensing	x	–
– Operation Settings	–	x
IPC Provider (DDE) Settings	no settings	
Settings of the IPC Provider (Named Pipes)	no settings	
Settings of the LDAP Directory Provider	x	–
Settings for the Lotus Notes Integration		
– Databases	x	–
– Authentication	x	–
Sendmail Provider Settings	no settings	
SIP Functional Provider Settings		
– System Services	x	–
– Connection	x	–
– Main Line	x	–
– Additional Lines	x	–
– Line Parameters	x	–

Table 5 Availability of the Provider Module Settings

Settings for Provider Modules (**x** available, **–** not available)	**via login**	**via the oC menu**
– Stations (DSS)	x	–
– Registrar	x	–
– Proxy	x	–
– Outbound Domain	x	–
– Fallback System	x	–
– Network Access	x	–
– Address Conversion	x	–
– Additional Functions	x	–
– System Functions	x	–
– Codes	x	–
– Sounds	x	–
– Audio Schemes	x	–
– Video Schemes	x	–
– Bandwidth	x	–
– Port Restrictions	x	–
– Quality of Service (QoS)	x	–
– Licensing	x	–
Stimulus Provider Settings		
– General Settings	x	–
– Display	x	x
Settings of the Web Conferencing Provider	no settings	
SQLite Provider Settings	x	–
Settings of the Web Service Directory Provider	x	–

Table 5 Availability of the Provider Module Settings

Availability of the manager modules settings

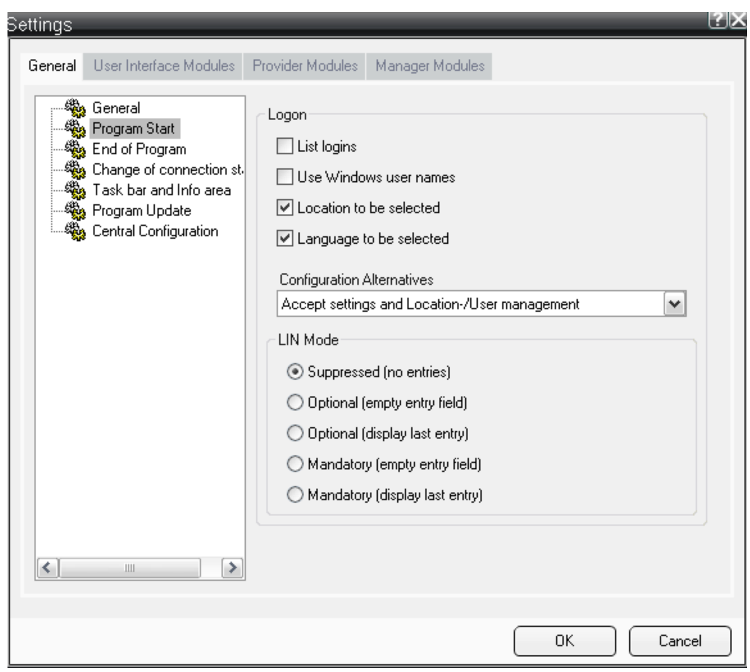
Settings for Manager Modules (**x** available, **–** not available)	via login	via the oC menu
Directory Manager Settings	–	x
Event Manager Settings	x	x
Settings of the Quick Dialer Manager	x	–
Notifier Manager Settings	x	–
Screensaver Manager Settings	x	–

Table 6 Availability of the Manager Module Settings

Navigating in the *Settings* dialog

On the single tabs of the **Settings** dialog you can edit the general program settings (**General**) and the settings of the **User Interface Modules**, **Provider Modules** and **Manager Modules**.

The section on the left hand side displays in a tree structure the modules available on a tab and their possible settings. On the right you find the parameters assigned to the selected setting.



5.4 General Program Settings

NOTE:
General information on navigating within the **Settings** dialog can be found in Section 5.3, “The Settings Dialog”, on page 133.

In the Settings dialog you can perform general program settings for the divisions:

5.4.1 General Settings

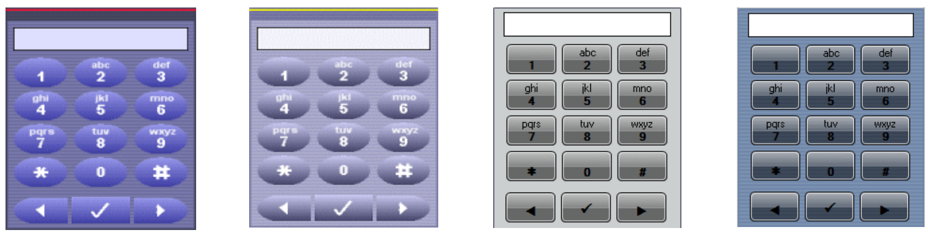
You can select one of the default color schemes in the general settings to give the optiClient interface an individual color layout.

To set the color scheme select on the tab **General: General**.

In the **Color scheme** field select the setting that you want to use for representing your optiClient user interface. After you have selected a color scheme the optiClient user interface immediately adopts the new color.

The following color schemes are available:

Blue Ocean London Sky Blue Dark Gray

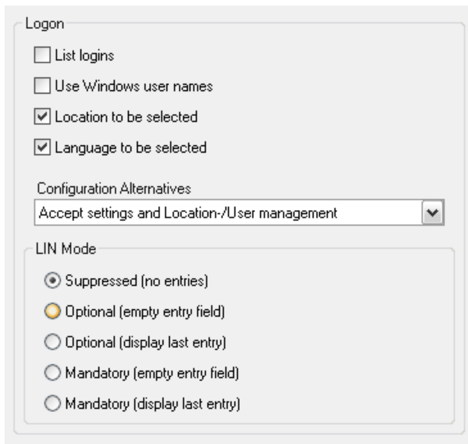


The selected color scheme affects all optiClient components inclusive the optiClient screensaver.

5.4.2 Settings for Starting the Program

NOTE:
You can only edit the program start settings with a started optiClient. Then select the **Settings…** entry from the optiClient menu.

To edit the settings for the optiClient program start, select on the tab **General: Program Start**.



You can define the following settings for the optiClient program start:

- **List logins**
  Select this option if you want the **Login** field in the Logon window to feature a list of the last user logins registered.

  Since this option simplifies the login entry, we recommend to use it if different user logins are used at optiClient. When this option is disabled, the **Login** field is just an input field.

- **Use Windows user names**
  Select this option if your optiClient user name is identical to your Windows user name and you want to use this name. The name of the Windows user logged on is then entered by default as user-ID in the logon mask. If this option is not selected, the login of the last user logged in appears by default in the logon mask.

- **Location to be selected**
  If you select this option, an additional field for selecting a location will appear in the logon mask. If this option is not selected, there are no location-specific administration features available in the Logon dialog.

  Activate this setting, for example, if you want to use the same user ID at different locations. Location-specific parameters are therefore considered during logon.

  NOTE:
  Location-specific information is always necessary for user logon. Consequently, the **Location** field may only be hidden in the logon mask if only **one** location is used. The field cannot be masked out unless this location is entered the first time a user logs on.

- **Language to be selected**
  If you select this option, an additional field for selecting the mask language will appear in the Logon mask.

  Select this setting, for example, if staff members with different native languages operate optiClient on one PC.

- **Configuration alternatives**
  Use this setting to define the configuration alternatives available to a user when logging on to optiClient.

  The following options are available:

  – **Accept settings and Location-/User management**
    The management features appear in the Logon dialog when you click **Manage**:

    - Settings
    - Add/copy/delete/change login
    - Change password
    - Add/copy/delete/change location
      (if the **Location to be selected** option (see above) is active)

  – **only accept settings**
    After a click on **Manage** the logon dialog only features the entries:

    - Settings
    - Change password

  – **Hide settings and Location-/User management**
    After a click on **Manage** the logon dialog only features the entry:

    - Change password

- **LIN mode**

NOTE:
These settings can only be configured if the communication system used supports Local Identification Number usage.

NOTE:
If no password has been stored for a user, optiClient is started directly without a login dialog. If you want to see the login dialog in any case, but do not wish to assign a password, you may optionally select the LIN option **(empty entry field)** here. The login dialog will then appear on starting the program.

This option controls how a LIN (Local Identification Number) is entered in the logon mask. The LIN serves for locally assigning the optiClient user to buildings, building part numbers etc. This can be useful e.g. for localizing in the event of emergency calls.

You can choose from the following options:

– **Suppressed (no entries)**
The LIN field is omitted from the logon mask.

– **Optional (empty entry field)**
The LIN field appears blank in the logon mask and may remain blank for logon.

– **Optional (display last entry)**
The LIN field appears in the logon mask and is allocated with the LIN used at the last login. The field may remain blank for logon.

– **Mandatory (empty entry field)**
The LIN field appears blank in the logon mask and must be filled out for logon.

– **Mandatory (display last entry)**
The LIN field appears in the logon mask and is allocated with the LIN used at the last login. The field must be filled in at login.

5.4.3 Settings for Ending the Program

NOTE:
To edit the program end settings in the settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

NOTE:
Such settings are only used for connections controlled by optiClient itself. They do not apply for connections that a connected XPR server controls.

To edit the settings for the optiClient shutdown, select on the tab **General: End of Program**.

You can define the following settings for the optiClient program end:

- **Prevention on active connections**
  This option prevents the optiClient shutdown as long as a connection is still active.
- **Warning on active connections**
  If a connection is still active at the optiClient shutdown, a corresponding warning appears. If optiClient is shut down just the same, the connection still active will be closed automatically.
- **Also possible with active connections**
  If a connection is still active at the optiClient termination, optiClient closes it without further warning.

5.4.4 Settings for the Representation in Task Bar and Info Area

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NOTE:
To edit the task bar and info area representation in the settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

To edit the settings for the optiClient icon in the task bar and info area, select on the tab **General: Task bar and info area**

Depending on the current main bar display mode you can set whether an icon appears in the info area respectively task manager for optiClient.

For the info area display the following options are available:

- **Docked main bar**
  A display in the info area appears when the main bar is permanently docked at the top of the screen.
- **Normal main bar**
  A display in the info area appears when the main bar can be freely positioned and is not minimized.
- **Minimized main bar**
  A display in the info area appears when the main bar is minimized.

For the display in the task bar and task manager the following options are available:

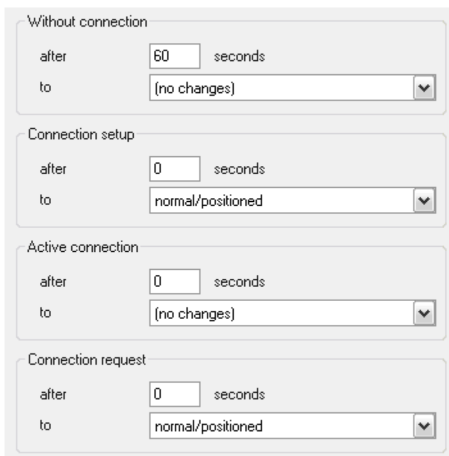
- **Docked main bar**
  A display in the task manager appears when the main bar is permanently docked at the top of the screen.
- **Minimized main bar**
  A display in the task manager appears when the main bar is minimized.

5.4.5 Settings for the Connection Status Change

NOTE:
To edit the settings for changing the connection status you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

Depending on the optiClient representation in normal operation it can be useful to modify the representation with a connection status change. If the main bar is e.g. minimized in connection-free status, it can be automatically moved into the foreground again with incoming or outgoing calls.

To edit the optiClient representation for the case of a connection status change, select on the tab **General: Change of connection status**.



You can define the optiClient representation for each connection status you switch to.

The following connection statuses exist:

- **Without connection**
  Connection-free status (no connection request, no connection setup, no active connection).
- **Connection setup**
  You set up a connection to another station, for example, a call connection by dialing a phone number.
- **Active connection**
  An active connection exists, e.g. in the format of a telephone call.
- **Connection request**
  You are alerted to an incoming connection, e.g. an incoming call.

If the connection status changes after a optiClient start, you can determine an individual representation behavior of optiClient for each newly occurring status. The representation may switch to the following types of behavior:

- **(no changes)**
  The current display is not modified.
- **normal/positioned**
  The main bar is displayed in the state that was valid before minimizing (either normal or positioned). optiClient is therefore always visible on the desktop again.
- **minimized/hidden**
  The main bar is minimized or hidden. The main bar is hidden if you did not select an icon display in the settings for the info area (cf. Section 5.4.4, “Settings for the Representation in Task Bar and Info Area”, on page 145).

By entering a waiting time in the **to** field you determine how many seconds should pass after the respective connection status change until the defined representation is switched to. This setting ensures that optiClient is automatically minimized/hidden again within a certain period after a connection has ended.

Example: Connection request after 0 seconds to normal/positioned
In case of a new connection request, optiClient changes without delay (**0** seconds) from its current representation to the normal respectively positioned display (**normal/positioned**). If optiClient is already in this representation, no change will occur.

5.4.6 Settings for Program Update

IMPORTANT:
During the optiClient setup, different registry values are automatically created and allocated with default entries. When upgrading optiClient, the entries of such registry values are reset to their default values. That means that individual modifications to these registry values are lost after an upgrade.

NOTE:
To edit the program update settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

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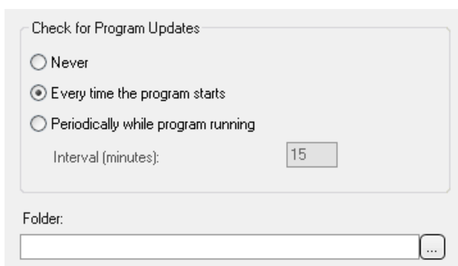
optiClient supports the automatic update of the program version installed on the user computer.

To edit the settings for the automatic optiClient program update, select on the tab **General: Program Update**.



You can use the following options for configuring the automatic program update:

- **No verification**
  Program updates are not verified.
- **Verification on program start**
  When you start optiClient, a defined storage location is checked for containing a more recent optiClient program version. The relevant storage location is specified in the **Directory** field.
- **Permanent verification**
  While optiClient is running, a defined storage location is checked for a more recent optiClient program version in fixed intervals. The interval is specified in the **Interval** field, the relevant storage location in the **Directory** field (see below).
- **Interval**
  Defines the interval in which a more recent optiClient program version is searched for after activation of the permanent verification. The time interval is specified in minutes.
- **Folder**
  Defines the storage location that is searched for a more recent optiClient program version. Specify the relevant directory either directly or via the **...** icon.

Section 5.25, “Automatic Program Update”, on page 314 describes how to proceed when a program update is found.

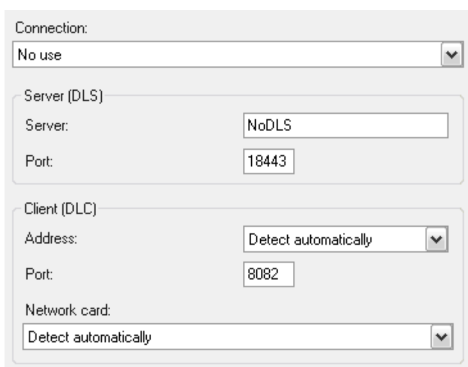
5.4.7 Settings for Central Configuration

NOTE:
Central configuration via DLS is currently not supported.

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

To edit the settings for the optiClient central configuration, select on the tab **General: Central configuration**.

NOTE:
If the use of a central configuration has already been defined during the optiClient installation, these settings are already allocated accordingly.



Configuring the central configuration requires the following settings:

- **Connection**
  Specifies in which way the central configuration is used.

  The following options are available:

  – **No use**
    The central configuration is not used.

  – **Complete use**
    The central configuration is used to full extent.

  – **Only for encryption**
    The central configuration is exclusively used for encoding the voice signaling.

- **Server (DLS) Server**
  Specifies the IP address of the DLS server used.

- **Server (DLS) Port**
  Specifies the port numbers used for central access to the DLS server. The port default setting is *18443*.

- **Client (DLC) Address**
  Specifies the DLS client IP address.

  The following options are available:

  – **Specify automatically**

  – ***<List of IP addresses>***
    Lists all IP addresses that have been configured on the user computer.

  – **<***Manual user entry***>**

- **Client (DLC) Port**
  Specifies the port numbers via which the local user computer replies to DLS server requests.

- **Client (DLC) Network card**
  Defines the network card, via which the communication with the DLS server takes place.

  The following options are available:

  – **Specify automatically**

  – ***<List of network card IDs>***
    Lists all network card IDs that are configured on the user computer. Network cards that are no longer available in the user computer appear in this selection in round brackets ().

5.5 Settings for User Interface Modules

In the Settings dialog you can edit the following user interface module divisions:

5.5.1 Settings of the Call Journal

NOTE:
The call journal is only available via optiClient connected to an XPR server.

The call journal is used with a connection of optiClient to an XPR server. It displays all XPR journal entries for the relevant optiClient user.

To edit the call journal settings, select on the tab **User Interface Modules: Call Journal**.

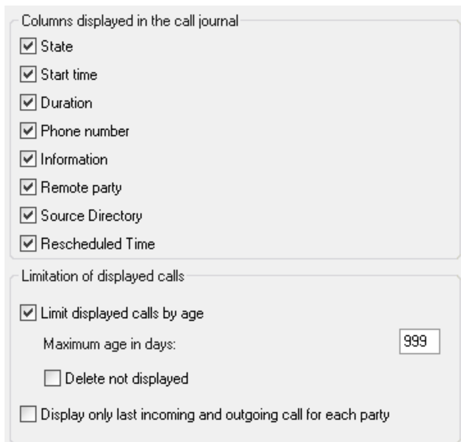
You can edit settings for the following areas:

- Filter
- Main Bar
- Appearance
- Miscellaneous.

5.5.1.1 Filter

The XPR server journal provides various call-related information on each journal entry. The display of this information in the optiClient call journal can be restricted via corresponding filters.

To edit the settings for the call journal filters, select on the tab **User Interface Modules: Call Journal – Filter**.



You can use the following options for configuring the call journal filters:

- **State**
  Defines whether the respective call category is displayed in the call journal.
- **Start time**
  Defines whether the respective start time of the calls is displayed in the call journal.
- **Duration**
  Defines whether the respective duration of the calls is displayed in the call journal.
- **Phone number**
  Defines whether the respective phone number of the conversational partner is displayed in the call journal.

- **Information**
  Defines whether additional XPR journal texts are displayed in the call journal.
- **Remote party**
  Defines whether a name is displayed in the call journal that associates the information in the **Phone number** field. The **Remote party** column in the call journal also contains a phone number if an associated name cannot be found.
- **Source directory**
  Specifies whether the source directories are displayed for the phone number resolution of the call journal
- **Limit displayed calls by age**
  Defines that journal entries older than specified in the **Maximum age in days** field are not displayed in the call journal.
- **Maximum age in days**
  Defines the age specification for the option **Limit displayed calls by age.**
- **Delete not displayed**
  When this option is active, all journal entries the calls of which are older than specified under **Maximum age in days** are automatically deleted.
- **Display only last incoming and outgoing call for each party**
  In the call journal it is possible to display only the last entry of the four main call-categories (*Incoming – not reached*, *Incoming – connected*, *Outgoing – not reached* and *Outgoing – connected*) for each subscriber. This setting improves clarity in the call journal.

NOTE:
The setting of this option can also be modified directly in the call journal window via the  icon.

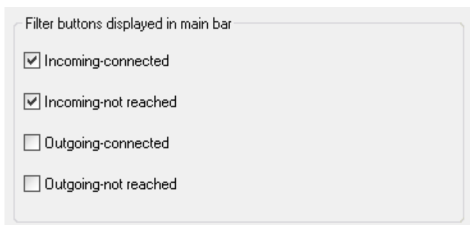
5.5.1.2 Main Bar

You can integrate icons in the optiClient main bar that allow fast opening the call journal with specific call categories. These icons display the category symbol and also the number of entries contained in the respective category.

The number displayed results

- from the number of new journal entries since you last opened the call journal.
- from the **Limit displayed calls by age** setting (cf. Section 5.5.1.1, “Filter”, on page 154).

To edit the settings for the category icons in the main bar, select on the tab **User Interface Modules: Call Journal – Main bar**.



NOTE:
You do not have to activate the associated icon in the main bar for each category in order to access all call categories. As soon as you have opened the call journal window via any category icon, you can activate the display of each call category.

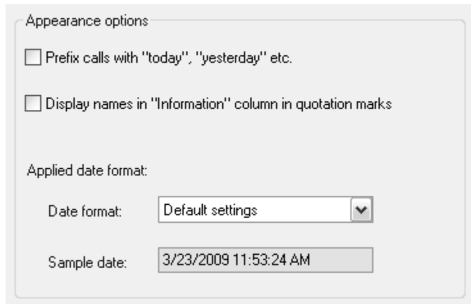
The following call categories or category combinations can be selected for display in the main bar:

- **Incoming – connected**
  Displays all incoming calls that were connected.
- **Incoming – not reached**
  Displays all incoming calls that were not connected.
- **Outgoing – connected**
  Displays all outgoing calls that were connected.
- **Outgoing – not reached**
  Displays all outgoing calls that were not connected.

5.5.1.3 Appearance

The entry display in the call journal can be customized.

To edit the settings for the call journal representation options, select on the tab **User Interface Modules: Call Journal – Appearance**.



You can use the following options for configuring the call journal representation:

- **Prefix calls with “today”, “yesterday” etc.**
  Defines whether the date specifications of the current and past day in the **Start time** journal column are replaced with “today” or “yesterday”. If this option is active, the names of the relevant weekdays are used for the other date specifications of the current week.

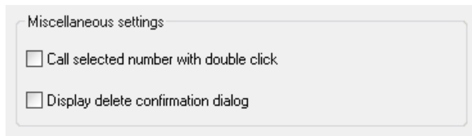
- **Display names in “Information” column in quotation marks**
  Defines whether the names of conversational partners are displayed in the **Information** journal column in quotes (“).

- **Date format**
  Defines in which format dates are specified in the call journal.

- **Sample date**
  Displays an example of a date representation according to setting defined under **Date format**.

5.5.1.4 Miscellaneous

To edit the call journal miscellaneous settings, select on the tab **User Interface Modules: Call Journal – Miscellaneous**.



You can use the following options for configuring the miscellaneous call journal settings:

- **Call selected number with double click**
  Defines that after the double click on a journal entry a connection is established to the associated phone number.
- **Display delete confirmation dialog**
  Defines whether a checkback dialog is displayed before the actual journal entry deletion.

5.5.2 Presence Settings

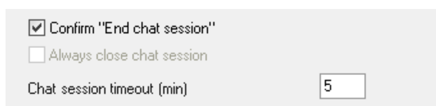
NOTE:
To edit the presence feature settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

The presence provides the interface representation for the presence feature. This representation comprises the display of telephone states, connection states and presence profiles.

No settings are necessary in the user interface module.

In addition, this module enables the representation of the instant-messaging feature.

To edit the settings for the instant-messaging feature, select on the tab **User Interface Modules: Presence – Instant Messaging**.



You can use the following options for configuring the instant-messaging feature:

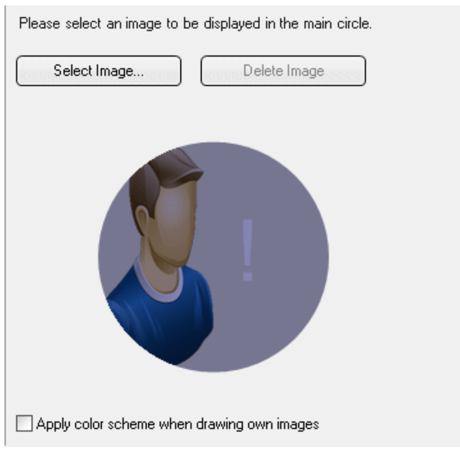
- **Confirm "End chat session"**
  Specifies that ending a chat must be actively confirmed by the user.
  Activating this option disables the **Always close chat session** setting
- **Always close chat session**
  Specifies how optiClient closes a chat session.
  If this option is active, a chat session is closed without previous user prompt.
  If this option is disabled, a chat session is not immediately closed but after a configurable period (cf. **Chat session timeout**).
  This setting takes no effect when the **Confirm "End chat session"** option is active. When this option is active, the **Chat session timeout** option is not displayed.
- **Chat session timeout**
  Specifies after which period a chat session is closed when the **Always close chat session** option is not active.
  This option is not displayed when the **Always close chat session** option is active.

5.5.3 easyCom Settings

With the easyCom communication circle you can use another module for controlling telephony features. Basis is an intuitive graphic user interface, which you can customize.

The easyCom communication circle uses as background image the profile of a head. This image can be set individually.

To configure an individual background image for the easyCom communication circle, select on the tab **User Interface Modules: easyCom – Image**.



You can use the following options for configuring the background image:

- **Select Image...**
  Opens a browser window for integrating an individual background image.
- **Delete Image**
  Deletes the integration of an individual background image and returns to the default background (circle with profile of head).
- **Apply color scheme when drawing own images**
  Activate this feature to select a color for the individual background image that matches the current optiClient color scheme (cf. Section 5.4.1, “General Settings”, on page 139).
  If this option is inactive, the integrated image is displayed unchanged.

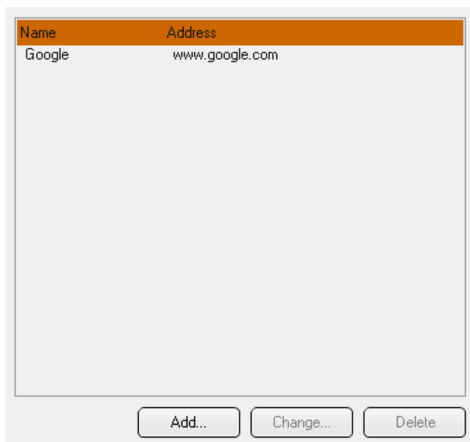
5.5.4 Device State Settings

This module is required for the telephony and forwarding menu in the optiClient main bar. This module does not require any settings. Consequently, no setting parameters are offered.

5.5.5 Web Browser Settings

In the Web Browser window you can quickly invoke Internet pages often used without having to leave optiClient. The selectable Internet addresses are configured in the web browser settings and then offered for selection in the module menu.

To configure the Internet pages for the web browser, select on the tab **User Interface Modules: Web Browser – Internet pages**.



Configured Internet pages are displayed in tabular format.

You can use the following options for configuring the web browser:

- **Add**
  Opens the **Add Entry** dialog for configuring a new Internet page that can be invoked in the module menu.

  – **Name**
    Defines the name under which the Internet page is offered in the module menu for selection. With representing this page the name is displayed in the caption bar of the browser window.

  – **Address**
    Defines the Internet address under which the page can be loaded.

- **Change**
  Opens the **Change Entry** dialog to modify the settings of the Internet page selected in the list (cf. **Add**).

- **Delete**
  Deletes the entry selected in the list.

5.5.6 IPC Settings

The IPC interface module provides a selection dialog for phone numbers. This dialog is used for a Lotus Notes or Outlook integration, if more than one phone number is transferred to optiClient by these applications.

The IPC interface module does not require any settings.

5.5.7 Settings for Contact Directory and Contact Lists

The interface module contact directory and contact list realizes the interface representation for the two respective optiClient components.

The contact directory and the contact lists do not require any settings.

5.5.8 MyPhone Settings

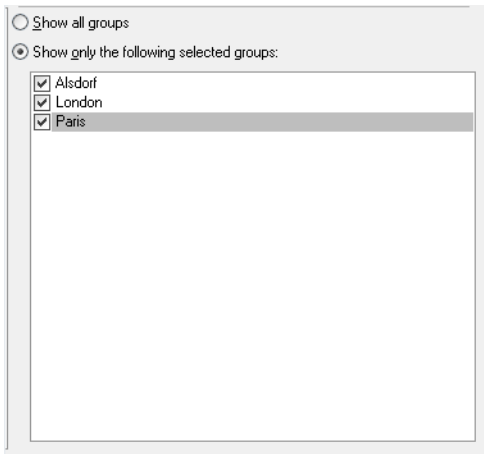
The personal phone module provides additional control elements for your own telephone in the main bar.

The personal phone module does not require any settings.

5.5.9 Speed Dialer Settings

You can conveniently get in touch with a contact from the contact list using the speed dialer button-menus.

To configure the speed dialer settings, select on the tab **User Interface Modules: Speed Dialer**.



For the speed dialer you can configure which groups of your contact list will be displayed as buttons in the main bar.

The following options and settings are available for this purpose:

- **Show all groups**
  Inserts a button in the main bar for each group of your contact list.

- **Show only following selected groups**
  Inserts a button in the main bar only for selected groups of your contact list. Simply select the groups for which you want to have a button in the main bar from the group list.

5.5.10 Sound Control Settings

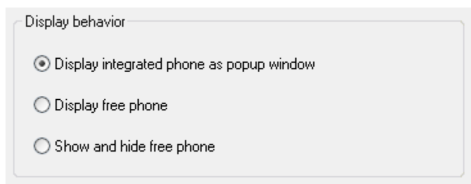
The audio control controls the audio hardware of the user PC, when optiClient is used as softphone.

No settings are necessary for the audio control in the user interface module.

5.5.11 optiClient-Telephone Settings

The telephone module controls the integrated and freely positionable optiClient telephone.

To configure the telephone settings, select on the tab **User Interface Modules: Phone – Integrated phone**.



The integrated telephone display is part of the main bar. The associating keypad is in normal state invisible but can be displayed if required.

To set the display behavior with a click on the main bar display you can use the following options:

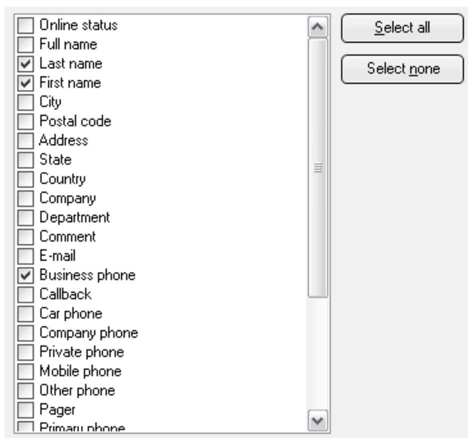
- **Display integrated phone as popup window**
  With a click in the display the keypad will appear under the display as popup window and is thus available for entries. The popup window containing the keys disappears as soon as you click another window.
- **Display free phone**
  With a click in the display the free phone opens. If the free phone is already open, you switch to this window.
- **Show and hide free phone**
  With a click in the display the free phone opens. If the free phone is already open, it is now closed.

5.5.12 Directories Settings

NOTE:
To edit the directory settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

The Directories user interface module realizes the user interface for external directories integrated in optiClient – for example for the XPR user directory. Thus you can search external directories for contact information from within optiClient.

To edit the directories settings, select on the tab **User Interface Modules: Directories**.



You can use the following options for setting the directories:

- ***<Columns>***
  Displays all directory fields that can be displayed in the directories with their contents. The display of the respective directory fields can be activated or deactivated via the check boxes.

  NOTE:
  The **Last name** field is always active.

  These settings also determine which fields are offered for the advanced search in the directories. The advanced search in the directories may at the most be based on the following fields, though.

  – Full name
  – First name
  – Last name
  – Business phone
  – Fax
  – Mobile phone

  NOTE:
  Search criteria entered for other fields will not influence the search result.

- **Select all**
  Selects all directory fields in the list for display.
- **Select none**
  Deactivates the display of all listed directory fields. Merely the **Last name** field always remains active.

5.5.13 Web Conference Settings

The *Web Conferencing* user interface module provides the interface elements required for web conferences.

To configure the web conference settings, select on the tab **User Interface Modules: Web Conferencing – Miscellaneous**.

You can use the **Show Web Conferencing button in main bar** option to display the web conference button in the main bar.

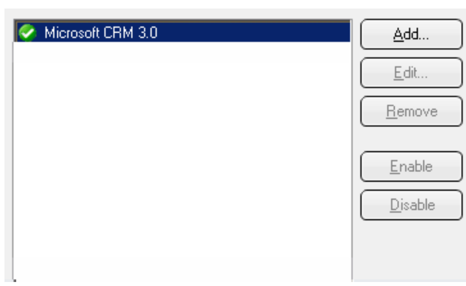
5.5.14 Web-Workflows Settings

IMPORTANT:
So that the Web Workflow user interface module can be used in optiClient, a corresponding license is required in the connected XPR server. You can obtain more detailed information on this from your sales partner.

NOTE:
To edit the web workflows settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

The Web Workflow user interface module enables you to invoke optiClient web applications and to display them in integrated web workflow windows. You can individually specify which web application will be invoked and when, and whether the associated web workflow window is to open automatically.

To edit the web workflow settings, select on the tab **User Interface Modules: Web Workflow – Configuration**.

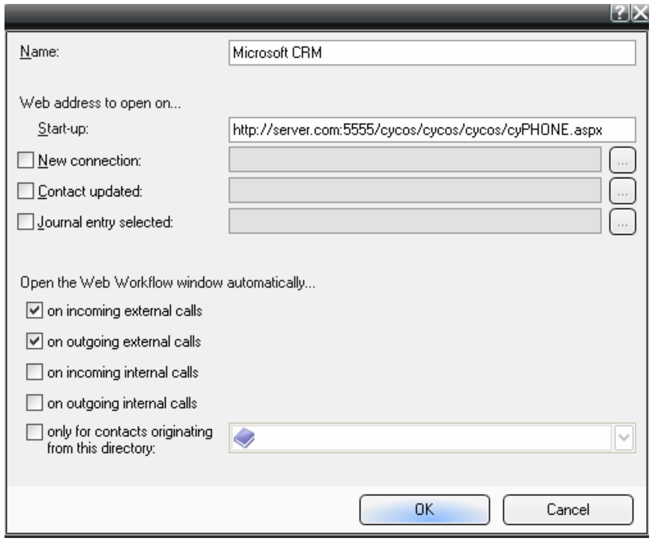


The following options are available:

- ***<Workflow list>***
  Displays a list of all web workflows integrated in the optiClient configuration**.**
- **Add**
  Opens the configuration dialog to add a new web workflow to the optiClient configuration.
  When you click on in the button, a menu opens via which you can select a preconfiguration for the integration of Microsoft Dynamics CRM.
- **Edit**
  Opens the configuration dialog for the web workflow selected in the workflow list.
- **Remove**
  Removes the web workflow from the optiClient configuration selected in the workflow list.
- **Enable**
  Activates the web workflow selected in the workflow list.
- **Disable**
  Deactivates the web workflow selected in the workflow list.

Configuration dialog

In the configuration dialog you perform the settings for a web workflow.



The following options are available:

- **Name**
  Defines the name under which the web workflow is administered in optiClient.
- **Web address to open on…**
  - **Start-up**
    Defines the URL of the web application to be invoked at the optiClient start. The web application will not be displayed in optiClient until the associated web workflow window is open.
  - **New connection:**
    Activates the invocation of a web application as soon as a new telephone connection has been established in optiClient .
    Define in the associated text field the URL of the web application to be opened when the condition is met.

- **Contact updated:**
  Activates the invocation of a web application when the contact information for the connected subscriber is updated by a directory query (cf. Section 5.7.1, “Directory Manager Settings”, on page 196). If no contact update is performed for a connection, this setting does not take any effect.
  Define in the associated text field the URL of the web application to be opened when the condition is met.
- **Journal entry selected:**
  Activates the invocation of a web application as soon as a journal entry is newly selected in the call journal.
  Define in the associated text field the URL of the web application to be opened when the condition is met.

• **Open the Web Workflow window automatically…**

Defines the conditions that must be met for the associated web workflow window to open automatically.

Possible conditions are:

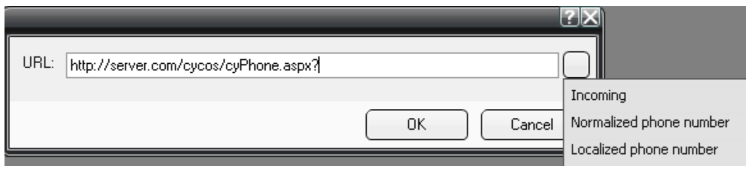
- **on incoming external calls**
- **on outgoing external calls**
- **on incoming internal calls**
- **on outgoing internal calls**
- **only for contacts originating from this directory.**

Transferring parameters with a URL

For the following options under **Web address to open on…**optiClient can transfer contact information to the web application with the URL:

- New connection
- Contact updated
- Journal entry selected.

To configure the transfer of contact information for one of these options, select the respectively associated icon **…**. This opens the following entry dialog:



You can enter the URL to be invoked in the text field. Furthermore, you can open a parameter menu via the menu icon. This parameter menu shows all parameters that you can insert.

NOTE:
Which variables are displayed in the variable menu depends on the option for which you enter the URL.

The following tables describe for each condition the available parameters:

Variables of the **New connection:** option.

Denominator	Parameter	Information
`Incoming`	`conn_incoming`	Defines whether the direction of the new connection is incoming or outgoing: `true` : incoming connection `false` : outgoing connection
`Normalized number`	`conn_norm`	Normalized number e.g. +492404901100
`Localized Number`	`conn_local`	Localized Number e.g. 002404901100

Table 7 URL Parameters for a Web Workflow (New connection)

Parameters of the **Contact updated:** option.

Denominator	Parameter	Information
Contact's first name	firstname	First name of the conversational partner, if the contact could be resolved based on the phone number and the information is available
Contact's last name	lastname	Last name of the conversational partner, if the contact could be resolved based on the phone number and the information is available
Contact's company	company	Company of the conversational partner, if the contact could be resolved based on the phone number and the information is available
Contact's location	city	Location of the conversational partner, if the contact could be resolved based on the phone number and the information is available
Contact's external ID	extid	Defines the ID of the directory from which the contact information originate
Contact's external source	extsrc	Defines the system in which the directory is managed from which the contact information originate (e.g. Lotus Notes)
Incoming	conn_incoming	Defines whether the direction of the new connection is incoming or outgoing: true : incoming connection false : Outgoing connection
Normalized number	conn_norm	Normalized number e.g. +492404901100
Localized Number	conn_local	Localized Number e.g. 002404901100

Table 8 URL Parameters for a Web Workflow (Contact updated)

Parameters of the **Journal entry selected:** option

Denominator	Parameter	Information
`Contact's` first `name`	`firstname`	First name of the conversational partner, if the contact could be resolved based on the phone number and the information is available
`Contact's` last `name`	lastname	Last name of the conversational partner, if the contact could be resolved based on the phone number and the information is available
`Contact's` company	company	Company of the conversational partner, if the contact could be resolved based on the phone number and the information is available
Contact's location	city	Location of the conversational partner, if the contact could be resolved based on the phone number and the information is available
Contact's external ID	extid	Defines the ID of the directory from which the contact information originate
Contact's external source	extsrc	Defines the system in which the directory is managed from which the contact information originate (e.g. Lotus Notes)
`Incoming`	`conn_incoming`	Defines whether the direction of the new connection is incoming or outgoing: `true` : incoming connection `false` : Outgoing connection
`Normalized number`	`conn_norm`	Normalized number e.g. +492404901100
`Localized Number`	`conn_local`	Localized Number e.g. 002404901100
Start time	j_starttime	Time at which the associated call was accepted
Call duration	j_duration	Duration of the associated call

Table 9 URL Parameters for a Web Workflow (Journal entry selected)

5.6 Settings for Provider Modules

In optiClient a module is called provider module that enables optiClient to communicate with a connected communication system. Such communication systems provide optiClient with individual media services.

Possible media services are e.g.:

- Telephony services
- Sending e-mails
- Telephone control and monitoring

Special settings must be performed to ensure smooth access to the communication system and associated communication services. The type and scope of these settings depend on the communication system.

In the Settings dialog you can edit the following provider module divisions:

Settings for the Server Call Journal Provider	from page 175
Server CTI Provider Settings	from page 176
Server Connection Provider Settings	from page 177
Server Directory Provider Settings	from page 177
Server IPC Provider Settings	from page 177
Settings of the Server Presence Provider	from page 178
HiPath Provider Settings	from page 178
IPC Provider (DDE) Settings	from page 178
Settings of the IPC Provider (Named Pipes)	from page 178
Settings of the LDAP Directory Provider	from page 179
Settings of the Lotus Notes Provider	from page 185
Sendmail Provider Settings	from page 186
Settings of the SIP Functional Provider	from page 186
Settings of the Web Conferencing Provider	from page 186
SQLite Provider Settings	from page 187.
Settings of the Web Service Directory Provider	from page 190.

5.6.1 Settings for the Server Call Journal Provider

If optiClient is operated at an XPR server, the XPR server journal can be accessed in optiClient. The Server Call Journal Provider must be configured for this purpose.

For a more detailed description of the associated provider settings, please refer to Section 5.33.7, “Settings of the Server Call Journal Provider”, on page 357.

5.6.2 Server CTI Provider Settings

NOTE:
So that an XPR user can log on to the XPR server via the CTI provider, the **CTI Journal** option must be active for the user in the XPR user database.

Using CTI features with optiClient via a connected XPR server requires the Server CTI Provider.

For a more detailed description of the associated provider settings, please refer to Section 5.33.3, “Settings of the Server CTI Provider”, on page 355.

5.6.3 Server Connection Provider Settings

Connecting optiClient to an XPR server requires the Server Connection Provider. This provider handles the complete information exchange between optiClient and the XPR server.

For a more detailed description of the associated provider settings, please refer to Section 5.33.2, “Settings of the Server Connection Provider”, on page 352.

5.6.4 Server Directory Provider Settings

If optiClient is operated at an XPR server, the XPR user database can be accessed in optiClient for contact search. The Server Directory Provider must be configured for this purpose.

The Server Directory Provider does not require any settings.

5.6.5 Server IPC Provider Settings

If optiClient is operated in a Lotus Notes environment, it is possible to integrate the dialing feature of optiClient into the existing environment (Lotus Notes integration). The Server IPC Provider is used for the communication between optiClient and Lotus Notes.

The Server IPC Provider does not require any settings.

5.6.6 Settings of the Server Presence Provider

If optiClient is operated at an XPR server, statuses can be displayed in optiClient for single addresses. The Server Presence Provider is used for this purpose.

The Server Directory Provider does not require any settings.

5.6.7 HiPath Provider Settings

Connecting the optiClient to a HiPath 3000 or HiPath 4000 requires the HiPath Provider. This provider handles the complete information exchange between optiClient and the HiPath system.

For a more detailed description of the associated provider settings, please refer to Section 5.35, “Telephoning at a HiPath 3000/4000”, on page 397.

5.6.8 IPC Provider (DDE) Settings

optiClient provides a DDE server service. To activate this service, the IPC Provider (DDE) must be activated.

No settings are required for the IPC Provider (DDE).

5.6.9 Settings of the IPC Provider (Named Pipes)

The IPC Provider (Named Pipes) is required for a optiClient Lotus Notes integration. It enables the corresponding communication between optiClient and the Lotus Notes client.

No settings exist for the IPC Provider (Named Pipes).

5.6.10 Settings of the LDAP Directory Provider

NOTE:
To edit the directory settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

NOTE:
The LDAP Directory Provider does not provide a contact search.

The LDAP Directory Provider enables connecting optiClient to external LDAP directories. Such a connection is used for phone number resolution.

The folders that optiClient is to use for its phone number resolution must have been previously configured in the LDAP Directory Provider. Select on the tab **Provider Modules: LDAP Directory Provider – LDAP Directories**

You can use the following elements for configuring the LDAP directories:

- ***<Directory list>***
  Displays a list of all LDAP directories already configured in the LDAP Directory Provider.
- **Add**
  Opens the **LDAP-Server Configuration** dialog for entering the directory parameters.
- **Test**
  This button starts a connection test using the data you have entered. A notification window will display whether the connection attempt has been successful or failed.
- **Edit**
  Opens the **LDAP server configuration** dialog for the LDAP directory selected in the directory list. The settings configured for the directory can be modified here.
- **Remove**
  Removes the LDAP directory you have selected in the directory list from the LDAP Directory Provider configuration.

General Directory Settings

On this tab you define the basic settings for the directory management within optiClient and for accessing the LDAP directory.

- **Name**
  Enter the name here, under which the LDAP directory is administered in optiClient.
- **Server**
  Defines the host name of the LDAP server on which the LDAP directory is available. It is also possible not to enter the host name but the IP address of the LDAP server.
- **Port**
  Defines the port number under which the LDAP server is accessed. Here, the default value is *389*.
- **Search base**
  If only a part of the LDAP directory is to be made available, an LDAP Base DN can be defined here.
  For more detailed information on the search base of an LDAP directory, please refer to optiClient administrator manual.

- **Server requires authentication**
  This option activates the optiClient authentication for LDAP directory access. If you have selected this option, you can make entries in the following fields: **User account** and **Password**.

- **User account**
  Defines the login for accessing the LDAP server.

- **Password**
  Defines a password as far as it is required for access under the specified login.

- **Exact match for phone numbers**
  Specifies the manner in which phone numbers are searched for in case of an LDAP directory search.
  When this option is active, only those phone numbers will be found that exactly match the specified search criterion.

  Example:
  If the search criterion is *+492404901100*, only database entries will be delivered that match the specified phone number exactly in the given format; a database entry of the format *+49 (2404) 901-100* would not be found.

  When this option is disabled, special characters in phone numbers of database entries are ignored. In the above example also the phone number *+49 (2404) 901-100* would come up as hit.

- **Search for prefixes**
  With this option being active, the search terms of every LDAP search are internally prefixed with the wildcard character *.

  Example: In the LDAP directory, the term **Doe** is searched for under **Full Name**.

  Depending on the **Search for prefixes** setting, the following example entries are found or not found:

LDAP entry	Search for prefixes active	Search for prefixes inactive
Doe, John	✓	✓
Doenut, John	✓	✓
John Doe	✓	
John Doenut	✓	

Mapping directory settings

On this tab you specify how optiClient maps the structure of the LDAP directory to the individual, internal data structure. Therefore you assign the corresponding LDAP attributes of the right hand column to the optiClient criteria.

The assignment of optiClient criteria to the LDAP attributes influences:

- How users need to search the LDAP directory
- How contact information found via the LDAP directory is displayed in the optiClient.

You find detailed information on this in the optiClient administrator manual.

Call number directory settings

On this tab you define the LDAP attribute that optiClient uses for resolving a phone number in a name. The specified attribute must consequently contain the phone number of the respective contact.

NOTE:
So that the phone number resolution can be duly performed via an LDAP directory, the phone numbers must be contained in the specified attribute in normalized format.
Example: 492404901100

5.6.11 Settings of the Lotus Notes Provider

The Lotus Notes Provider makes the optiClient connection available to a Lotus Notes client.

With it

- you can search Lotus Notes address books for contacts in optiClient
- You can initiate calls in the Lotus Notes client
- optiClient can resolve phone numbers and names on the basis of Lotus Notes address books

You find the detailed description of the features and settings of the Lotus Notes Provider in Section 5.28.2, “Settings for the Lotus Notes Integration”, on page 320.

5.6.12 Sendmail Provider Settings

Direct e-mail transmission to a contact from optiClient requires the Sendmail Provider. This provider starts the e-mail application configured on the user computer and transfers the mail address of the contact as recipient address for a new e-mail.

Direct transmission of an e-mail to a optiClient contact requires

- a standard mail client installed on the user computer.
- the Sendmail Provider having been added to the provider modules (default settings)
- a mail address deposited for the relevant contact and selectable for direct transmission.

No settings are required for the Sendmail Provider.

5.6.13 Settings of the SIP Functional Provider

The SIP Functional Provider is required for connecting an SIP-compatible PBX (for example OpenScape Voice) to optiClient.

For a more detailed description of the associated provider settings, please refer to Section 5.34.1, “SIP Functional Provider Settings”, on page 364.

5.6.14 Settings of the Web Conferencing Provider

The Web Conferencing Provider is required for exchanging web conference information with the connected XPR server in an optiClient XPR environment.

The Web Conferencing Provider does not require any settings.

5.6.15 SQLite Provider Settings

NOTE:
To edit the SQLite Provider settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

NOTE:
The SQLite Provider currently enables the connection of Outlook directories and Sametime contact lists to optiClient.

NOTE: So that the SQLite Provider can access Outlook directories or the Sametime contact list, first the respective client and then optiClient must be started after the optiClient installation.

The SQLite Provider enables optiClient to be connected to external directories via an SQLite database. You find a detailed description of this connection concept in the optiClient administrator manual.

The connection of a directory via the SQLite Provider realizes the following features:

- Searching external directories for contacts
- Resolving phone numbers in optiClient based on external directories

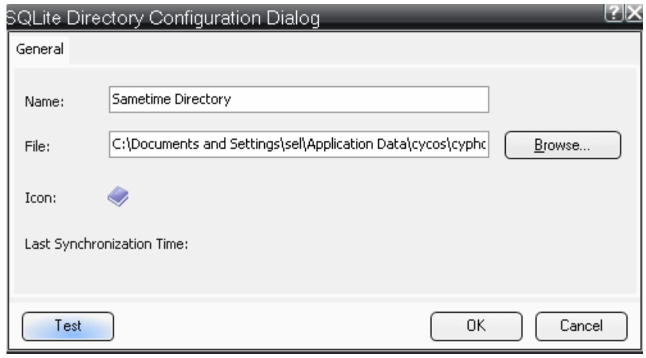
To edit the settings for SQLite directories, select on the tab **Provider Modules: SQLite Provider > SQLite Directories**

For configuring SQLite directories the following elements are available:

- ***<Directory list>***
  Shows a list of all SQLite directories integrated in the optiClient configuration**.**
- **Add**
  Opens the configuration dialog to add a new SQLite directory to the optiClient configuration.
  When you click on ▼ in the button, a menu opens via which you can select preconfigurations for the supported connections.
- **Edit**
  Opens the configuration dialog for the SQLite directory selected in the directory list.
- **Remove**
  Removes the SQLite directory selected in the directory list from the optiClient configuration.
- **Enable**
  Activates the SQLite directory selected in the directory list.
- **Disable**
  Deactivates the SQLite directory selected in the directory list.

Configuration dialog

In the configuration dialog you perform the settings for an SQLite directory.



The following options are available:

- **Name**
  Defines the name under which the SQLite directory is administered in optiClient.
- **File**
  Specifies the file name of the SQLite database to be used for the SQLite directory
- **Test**
  Starts a test to check the connection to the SQLite database.

5.6.16 Settings of the Web Service Directory Provider

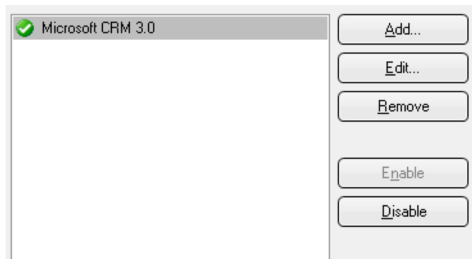
IMPORTANT:
So that the Web Service Directory Provider can be used in optiClient, a corresponding license is required in the connected XPR server. You can obtain more detailed information on this from your sales partner.

IMPORTANT:
optiClient retrieves data from a web service directory mostly via Internet connections. This retrieval may take some time if a large amount of data is read out of web service directories, or the Internet connection provides only relatively little transmission bandwidth.
Consequently, phone number resolution in optiClient may occur somewhat delayed, or an inadequately dimensioned Internet connection may temporarily be overloaded.

NOTE:
To edit the web service directories settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

The Web Service Directory Provider enables optiClient to be connected via web services to external directories.

The folders that optiClient is to use for its phone number resolution must have been previously configured in the Web Service Directory Provider. To this, select on the tab **Provider Modules: Web Service Directory Provider – WS-Directories**.

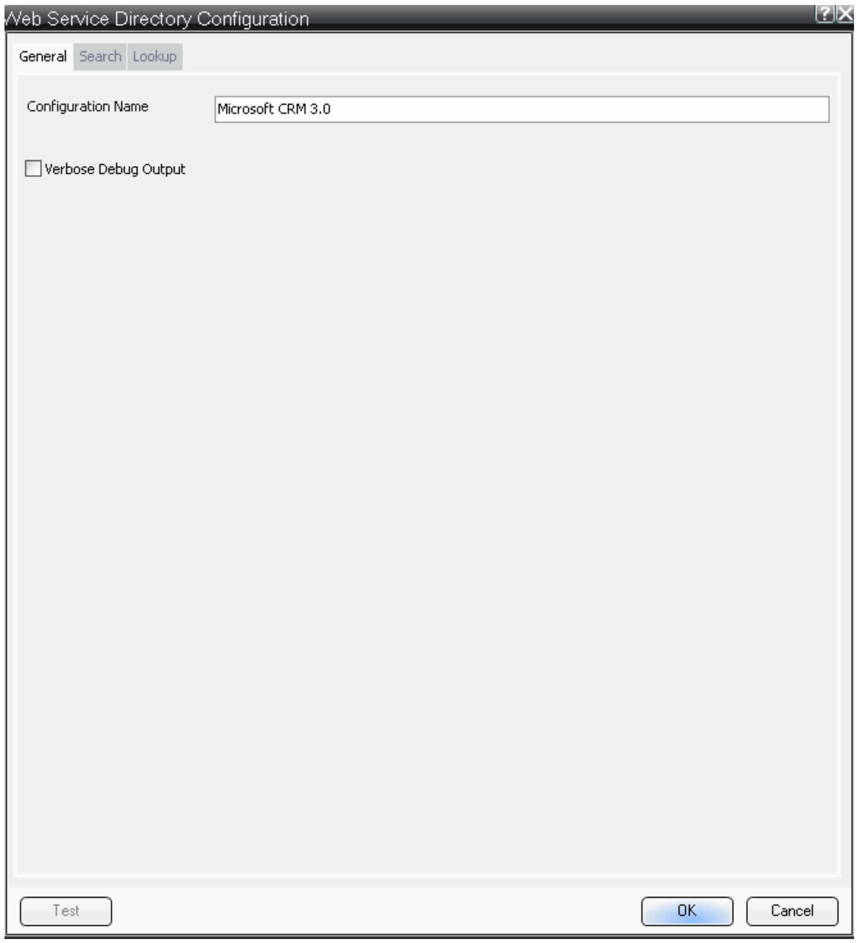


You can use the following elements for configuring the web service directories:

- ***<Directory list>***
  Shows a list of all web service directories integrated in the optiClient configuration**.**
- **Add**
  Opens the configuration dialog to add a new web service directory to the optiClient configuration.
  When you click on ▼ in the button, a menu opens via which you can select a preconfiguration for the integration of Microsoft Dynamics CRM.
- **Edit**
  Opens the configuration dialog for the web service directory selected in the directory list.
- **Remove**
  Removes the web service directory selected in the directory list from the optiClient configuration.
- **Enable**
  Activates the web service directory selected in the directory list.
- **Disable**
  Deactivates the web service directory selected in the directory list.

5.6.16.1 *General* Directory Settings

On this tab you specify the basic settings for the directory management within optiClient.



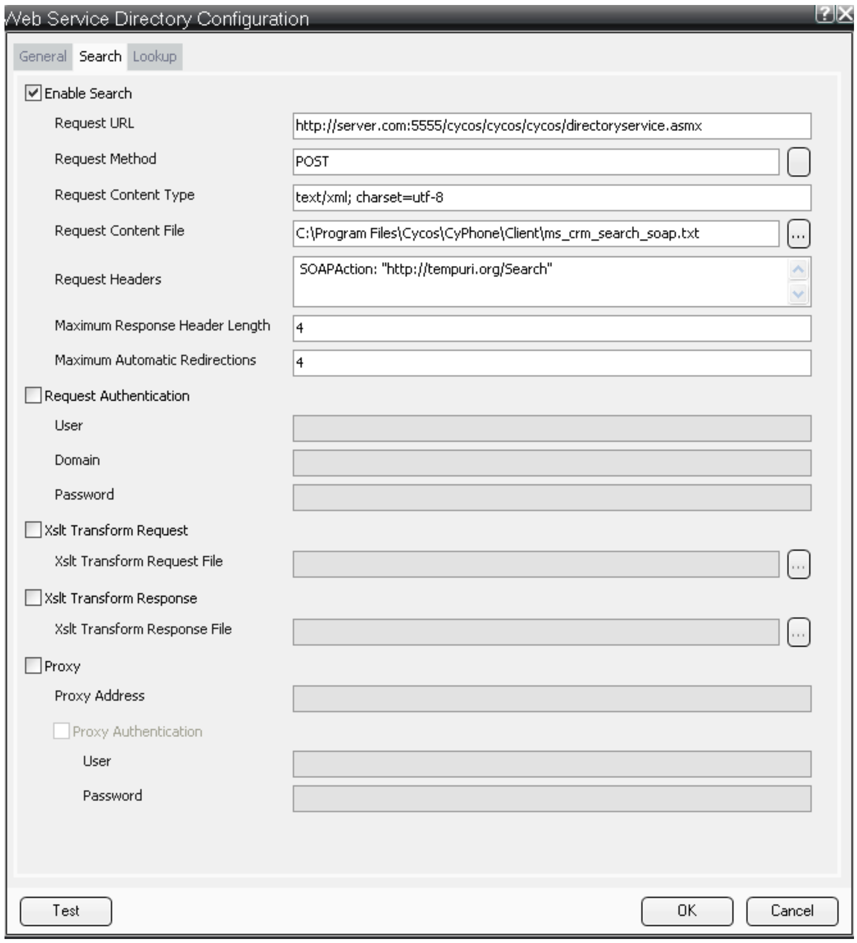
- **Configuration Name**
  Specifies the name under which the web service directory is managed in optiClient.
- **Verbose Debug Output**
  Activates the debug outputs of the Web Service Directory Provider for the trace monitor BSTrcMon.

IMPORTANT:
Tracing the debug outputs of the Web Service Directory Provider demands significant computing power from the user PC.
Therefore, only activate this option if you really need the debug outputs for the error search.

- **Test**
  Is not active on this tab.

5.6.16.2 Directory Settings *Search*

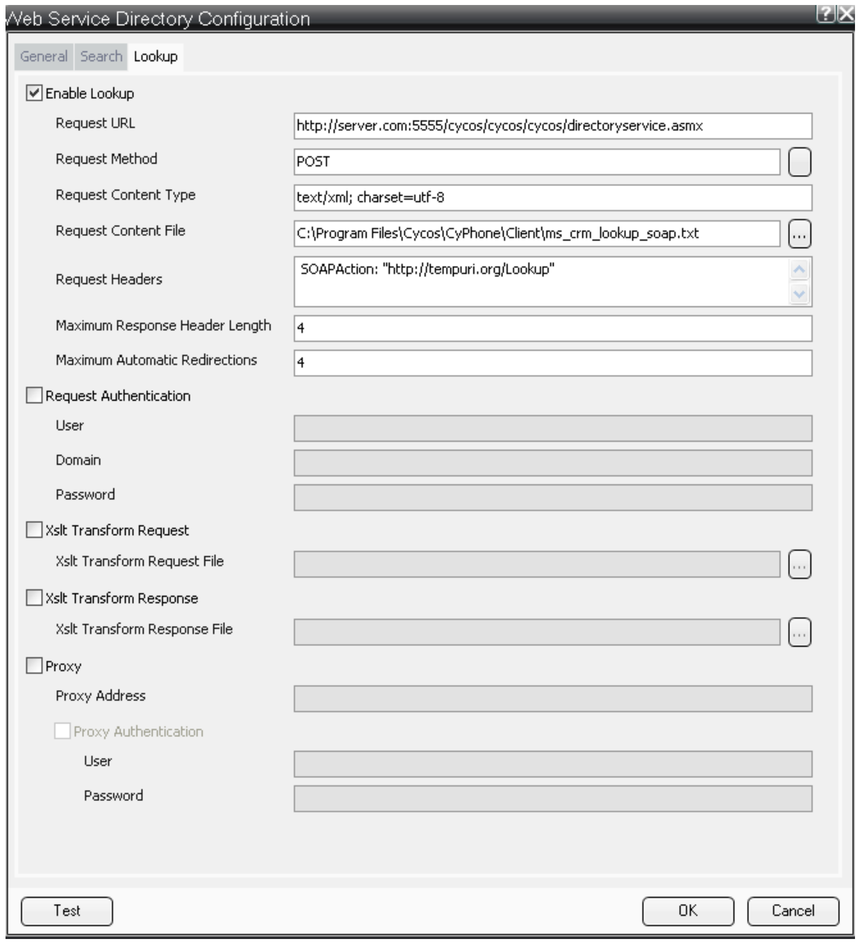
On this tab you specify the settings required to search for contacts with optiClient in the relevant web service directory.



You find an example of configuring a web service directory in the *OpenScape Xpressions optiClient and MS Dynamics 3.0* manual.

5.6.16.3 Directory Settings *Lookup*

On this tab you specify the settings required for resolving phone numbers in optiClient via the relevant web service directory.



You find an example of configuring a web service directory in the *OpenScape Xpressions optiClient and MS Dynamics 3.0* manual.

5.7 Settings for Manager Modules

Manager modules act invisibly in the background. They take on general control functions within optiClient.

In the Settings dialog you can edit the following manager module divisions:

Directory Manager Settings	from page 196
Event Manager Settings	from page 199
Settings of the Quick Dialer Manager	from page 207
Notifier Manager Settings	from page 209
Screensaver Manager Settings	from page 210.

5.7.1 Directory Manager Settings

NOTE:
You can only edit the Directory Manager settings with a started optiClient. Then select the **Settings…** entry from the optiClient menu.

In optiClient, several directories can be set up for phone number resolution. The Directory Manager controls the priority with which optiClient treats the information of these directories.

To dissolve a phone number into a name it will be sent to all available directories at the same time. The priority of the respective directory in the Directory Manager determines which of the contact information that might be returned will be finally displayed in optiClient. The directory at the first position in the directory list of the Directory Manager is the one with the highest priority, the last directory is the one with the lowest priority.

Example:
An LDAP and an Outlook directory are set up in optiClient. The optiClient contact folder does not include any contact data. The folders are arranged in the directory list of the Directory Manager as follows:

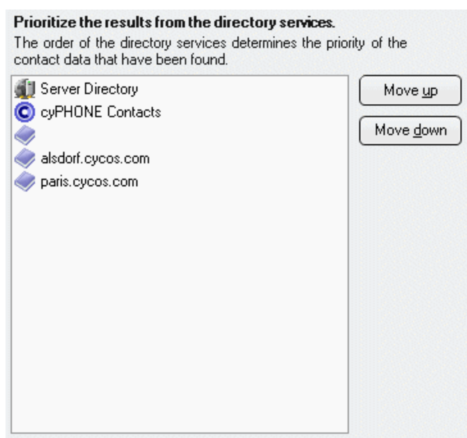
- LDAP directory
- optiClient contacts

Thus the priority of the LDAP directory is higher than the one of the Outlook directory.

optiClient sends the phone number for searching the corresponding name to all directories at the same time. If the LDAP directory is the first to return a name for the respective phone number, they will be displayed in optiClient and are kept.

On the other hand, if the Outlook directory is the first to return a name, it will be displayed at first, even if the priority of the Outlook directory is lower. If the LDAP directory then returns a name as well, the information previously displayed in optiClient will be updated with the LDAP directory information.

To configure the settings for the directory manager, select on the tab **Manager Modules: Directory Manager – Service prioritization**.



The directory list displays all directories available in optiClient for phone number resolution. The position of a directory in the list is the measure for the priority the information of the respective directory is treated with.

The following directories may figure in the directory list:

- The optiClient contact directory
- LDAP directories that have been configured via the LDAP Directory Provider
- Lotus Notes directories that have been configured via the Lotus Notes Provider

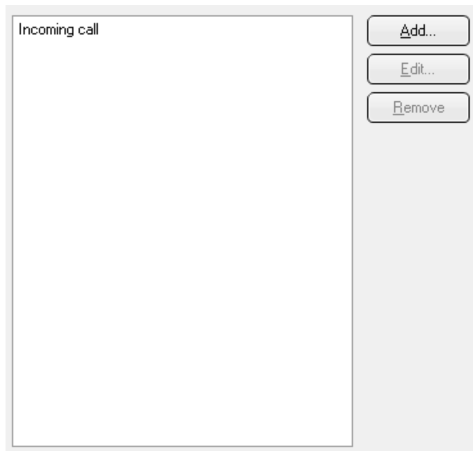
You can adjust the priorities for the respective directory information individually via the **Move Up** and **Move Down** buttons.

- **Move Up**
  Moves the selected directory entry up one position. The priority of the respective directory is increased.
- **Move Down**
  Moves the selected directory entry down one position. The priority of the respective directory is lowered.

5.7.2 Event Manager Settings

The Event Manager controls the features of the DDE server, which is provided by optiClient. This DDE client is used to transfer DDE commands and information to other programs from within optiClient.

To configure the Event Manager settings, select on the tab **Manager Modules: Event Manager – Event definitions**.



For the Event Manager you can use the following options:

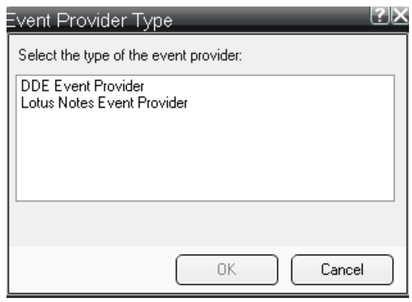
- ***<List of event definitions>***
  Lists all event definitions configured in the Event Manager.
- **Edit …**
  Opens the dialog **Edit Event Provider**. In this dialog you can edit the settings for the event definition that you have selected in the event definition list. Cf. option **Add.**
- **Remove**
  Removes the selected event definition from the event definition list.

- **Add …**
  Opens the **Event Provider Type** dialog. In this dialog you can define the settings for a new event definition.

  An event definition is based on so-called event providers. The DDE client of optiClient uses the following event provider:

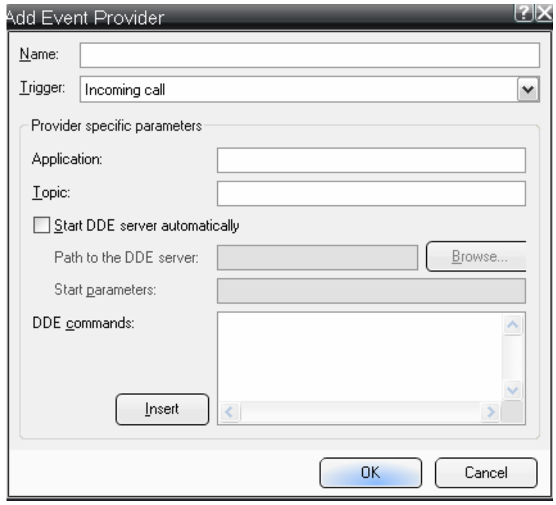
  – DDE event provider

  – Lotus Notes event provider.

  The following configuration of an event definition depends on the event provider you use.

5.7.2.1 Configuring a DDE Event Provider



To define a DDE Event Provider you need to perform the following settings:

- **Name**
  Defines the name under which optiClient administers the relevant event definition.
- **Trigger**
  Defines the event for which the DDE Client is to execute the relevant event definition.

  The following options are available:

  – **Incoming call**
    The event definition is executed when a new call arrives at optiClient.

  – **Contact info change for incoming call**
    The event definition is executed when the contact information of an incoming call is updated by a phone number resolution.

- **State change of incoming call**
  The event definition is executed when the status of an incoming call changes. For example, when the optiClient user sets the call to status *hold* to initiate a consultation.
- **Termination of incoming call**
  The event definition is executed when an incoming call is terminated.
- **Outgoing call**
  The event definition is executed when a new call is initiated in optiClient.
- **Contact info change for outgoing call**
  The event definition is executed when the contact information of an outgoing call is updated by a phone number resolution.
- **State change of outgoing call**
  The event definition is executed when the status of an outgoing call changes. For example, when the optiClient user sets the call to status *hold* to initiate a consultation.
- **Termination of outgoing call**
  The event definition is executed when an outgoing call is terminated.

- **Application**
  Defines the name of the DDE server to which the DDE client is to send information.
- **Topic**
  Defines the topic for which information is to be transmitted.
- **Start DDE server automatically**
  Upon executing an event definition, optiClient can automatically start the application of the associated DDE server. Activate this option if you want optiClient to perform this start automatically.
- **Path to DDE server**
  Defines the executable file inclusive path to be invoked when the option **Start DDE server automatically** is active.

NOTE:
This field is only available when the option **Start DDE server automatically** is active.

- **Start-up Parameters**
  If individual parameters need to be transferred at the automatic application start, enter such parameters here.

  NOTE:
  This field is only available when the option **Start DDE server automatically** is active.

- **DDE commands**
  Defines the DDE commands to be transferred to the DDE server upon the execution of the event definition.
  You find a list of all information that the optiClient DDE client can transfer to a DDE server in the optiClient administrator manual.
- **Insert**
  This button supports you in writing the DDE command.
  With a click on **Insert** you open a menu that contains wildcards for all information that the optiClient DDE Client can transfer to a DDE server. Select a wildcard from the menu to insert it in the current cursor position in the **DDE commands** field.
  You find a list of all information that the optiClient DDE client can transfer to a DDE server in the optiClient administrator manual.

5.7.2.2 Configuring a Lotus Notes Event Provider

Under Lotus Notes, many database actions can be automated by so-called agents. Such agents are components of a Lotus Notes database and consist of a script file the commands of which may influence the content and structure of the associated database.

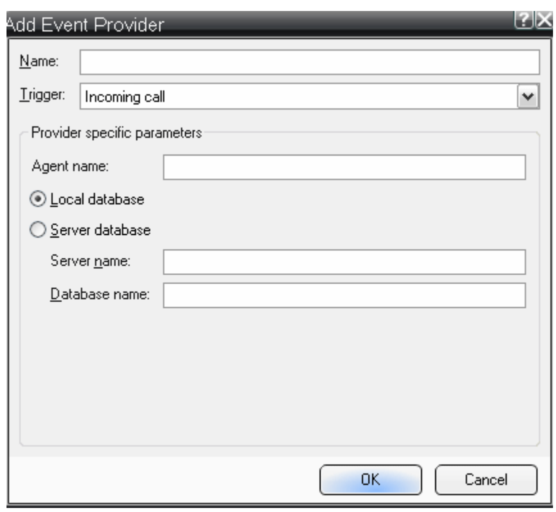
The optiClient DDE client can execute actions in a Lotus Notes database by starting a Lotus Notes agent in the database. In doing so it transfers information to Lotus Notes, which is stored in the profile document *cyPhoneProfile* of the database. The agent can access this document at runtime to process the contained information.

For each user an individual profile document is created and used. So that an agent accesses the respectively correct profile document in this environment, the user name of the relevant Lotus Notes user is deployed for unique identification. When accessing a profile document, the agent must thus always specify the relevant user name.

Example:

```
@GetProfileField("cyPhoneProfile";
"<field name>";@UserName)
```

You find a list of all information that the optiClient DDE client transfers to Lotus Notes in the optiClient administrator manual.



To define a Lotus Notes Event Provider you need to perform the following settings:

- **Name**
  Defines the name under which optiClient administers the relevant event definition.

- **Trigger**
  Defines the event for which the DDE Client is to execute the relevant event definition.

  The following options are available:

  – **Incoming call**
    The event definition is executed when a new call arrives at optiClient.

  – **Contact info change for incoming call**
    The event definition is executed when the contact information of an incoming call is updated by a phone number resolution.

  – **State change of incoming call**
    The event definition is executed when the status of an incoming call changes. For example, when the optiClient user sets the call to status *hold* to initiate a consultation.

  – **Termination of incoming call**
    The event definition is executed when an incoming call is terminated.

  – **Outgoing call**
    The event definition is executed when a new call is initiated in optiClient.

  – **Contact info change for outgoing call**
    The event definition is executed when the contact information of an outgoing call is updated by a phone number resolution.

  – **State change of outgoing call**
    The event definition is executed when the status of an outgoing call changes. For example, when the optiClient user sets the call to status *hold* to initiate a consultation.

  – **Termination of outgoing call**
    The event definition is executed when an outgoing call is terminated.

- **Agent name**
  This field defines the name of the agent that is executed under Lotus Notes at performing the event definition.

- **Local database**
  Select this option to send information to a local database at performing the event definition.

- **Server database**
  Select this option to send information to a server database at performing the event definition.
- **Server name**
  Defines the name of the Lotus Notes server on which the desired server database is available.

NOTE:
This field is only evaluated when the **Server database** option has been selected.

- **Database name**
  Defines the name under which the desired database is available on the Lotus Notes server or on the user computer.

5.7.3 Settings of the Quick Dialer Manager

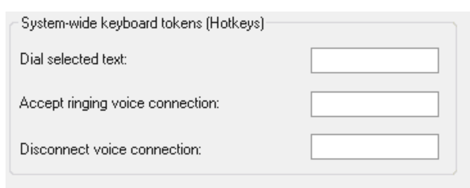
IMPORTANT:
The key combinations configured as hotkeys for the Quick Dialer Manager must not be used by any other user computer application that is active at the same time.

IMPORTANT:
If optiClient is used in a terminal server environment, the following applies:
To use the hotkeys configured in the Quick Dialer Manager, optiClient must be executed in the foreground; optiClient must thus be in the focus of the local computer.

NOTE:
To edit the Quick Dialer Manager settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

In optiClient, unique hotkeys can be defined for specific features in the entire system. Defining these hotkeys can be useful, for example, if you use your keyboard intensively and prefer to use individual keys for these features.

To configure the settings for the quick dialer manager, select on the tab **Manager Modules: Quick Dialer Manager – Hotkey assignment**



The following optiClient features can be operated, if desired, via the Quick Dialer Manager with the help of hotkeys:

- Accepting connection requests
- Closing established connections

The following keys or key combinations may be used as hotkeys:

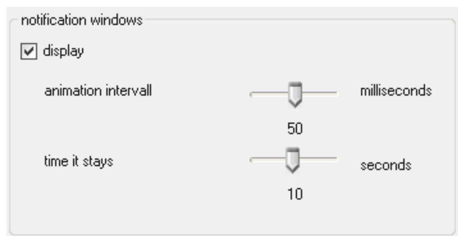
- The function keys `F2` to `F11`
- The function keys `F2` to `F11` in combination with the `shift` or `control` key
- All alphanumeric keys
- All alphanumeric keys in combination with the `Ctrl key`
- The `Esc key` in combination with the `Ctrl key`

5.7.4 Notifier Manager Settings

NOTE:
To edit the Notifier Manager settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

The Notifier Manager controls a notification window that opens at the bottom right screen margin of the user PC and displays contact information about the communication partner when a call or instant message comes in.

To configure the Notifier Manager settings, select on the tab **Manager Modules: Notifier Manager – Notifier options**.



For the Notifier Manager you can use the following options:

- **display**
  Activate this option to enable the display of the notification window in optiClient
- **animation interval**
  With this slider you set how quickly the notification window opens on the desktop of the user PC. The number you see under the slider indicates the value in milliseconds.
- **time it stays**
  With this slider you set how long the notification window is displayed on the desktop of the user PC. The number you see under the slider indicates the value in seconds.

5.7.5 Screensaver Manager Settings

NOTE:
The optiClient screen saver is not available for the operating system Windows Server 2003.

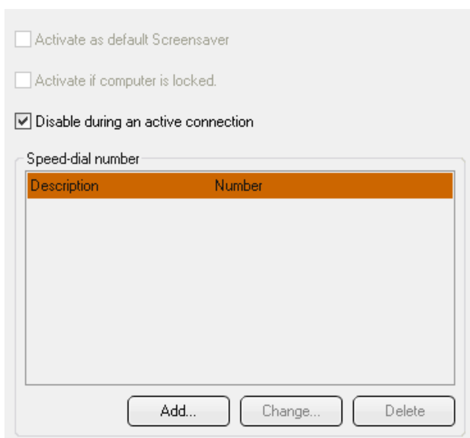
NOTE:
The optiClient screensaver can only be activated on the user PC when optiClient has also been started.

---

optiClient comes with its own screensaver, which can be activated as the default screensaver for Windows. If the screensaver is active, the following actions can be performed without interrupting the screensaver:

- Incoming calls can be accepted and terminated
- An individually defined speed dialing can be selected

To configure the settings for the screensaver manager, select on the tab **Manager Modules: Screensaver Manager – Settings**.



You can use the following options for configuring the optiClient screensaver:

- **Activate as default Screensaver**
  Defines whether the optiClient screensaver is used as default screensaver under Windows.

  NOTE:
  In order to use the special features of the optiClient screensaver, it must be activated via this option. Selecting the screensaver in the Windows display properties does not activate these specific features.

  NOTE:
  This option cannot be selected if configuring an individual screensaver on the user computer is not permitted.

- **Activate if computer is locked**
  Defines whether the optiClient screensaver becomes active after the user PC has been locked. If this option is selected, the optiClient screensaver will be started 10 seconds after locking the PC.

  NOTE:
  This option cannot be selected if configuring an individual screensaver on the user computer is not permitted.

- **Disable during an active connection**
  Defines whether the screensaver stays active during a call.
- **Speed-dial number**
  Defines in a list all phone numbers that can be dialed without interrupting the active optiClient screensaver.
  - **Add**
    Opens an entry dialog for configuring a new speed-dial number.
  - **Change**
    Opens an entry dialog to modify the speed-dial number selected in the phone number list.
  - **Delete**
    Deletes the speed-dial number selected in the phone number list.

5.8 optiClient Telephone

IMPORTANT:
To use the optiClient telephone features, the *Telephone* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

In optiClient the telephone is the standard user interface for making phone calls.

It can be used in the following two general representations:

- **Free phone**
  The free phone is opened in an individual module window. It can thus be arbitrarily positioned on the desktop of the user PC.

- **Integrated phone**
  The integrated phone display is fixedly integrated in the main bar. Therefore it can only be moved and positioned on the user PC desktop in combination with the main bar.
  A click on the main bar telephone display is sufficient to open the keypad of the integrated telephone.

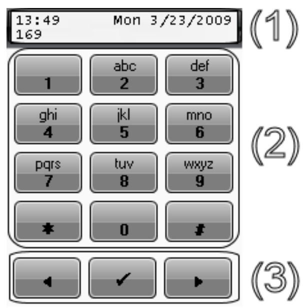
Free phone representation

Integrated phone representation

The optiClient telephone can be opened via the **Integrated phone** or **Free phone** entry in the main bar module menu.

The optiClient telephone has the following user elements:

- Telephone display
- Keypad
- Dialog keys.



1. Telephone display
2. Keypad
3. Dialog keys

Telephone display

NOTE:
The connected communication system determines which type of information is shown in which way in the telephone display.

In normal mode, the telephone display shows the idle menu from which you can set up or receive call connections.

Apart from the date and time, the two-line display shows the own telephone number and the designation of the connected communication system. The integrated telephone display is always double-spaced. Depending on the communication system used and on the configuration of the telephone type, the display may be four-spaced.

Keypad

The dialing keypad has the numerical keys `0` to `9` inclusive a letter label as well as the keys `*` and `#`.

Depending on the entry mode, normal or special characters can be entered via the numerical keys. The numerical key must be pressed as often as needed until the desired character appears in the display.

Dialog keys

The three dialog keys are used to scroll forward and backward, as well as to confirm features and in the service menu. Cf. Section 5.8, “Telephone display”, on page 215.

Functions keys

If optiClient is used via the HiPath Provider at a HiPath 3000 or HiPath 4000, the telephone displays four feature keys. Via these feature keys you can control the following optiClient telephone features:

- Service menu
- Redial
- Microphone
- Speaker.

The features of these keys correspond to those of a HiPath desk telephone.

Display options

For the optiClient telephone representation applies:

- The free and integrated phone can be opened simultaneously
- In the idle state of the integrated phone, only the display is opened on the main bar. The key pad of the telephone is not visible until you click on a free spot in the display.
- The display options of the free and integrated phone may differ. For example, you can only show the integrated-phone display on the main bar, while freely positioning the free phone with the keypad, dialog and function keys anywhere on the desktop.
- With a click on a free spot in the telephone a context menu opens in which you can individually activate or deactivate the display of the operating elements.

Options for the free phone

Options for the integrated phone

You can activate or deactivate the display of the integrated telephone via the **Integrated phone** entry in the module menu of the main bar.

5.9 Extended Keypad

If optiClient is used via the HiPath Provider at a HiPath 3000 or HiPath 4000, the extended keypad is available in optiClient. It contains freely programmable feature keys that you can allocate with phone numbers or telephony features frequently dialed respectively used.

You can open the extended keypad via the **Extended keypad** entry in the main bar module menu.

The extended keypad may contain several key columns. You can specify the number of columns under **Device** in the HiPath Provider settings (cf. Section 5.35.1.1, “Device”, on page 399).

If the extended keypad includes several columns, they can be unfolded or shut as required. The or icon at the top margin of the respective key column is used for this purpose.

After the installation of optiClient some keys may already be allocated with default features of the HiPath 3000/4000 used.

The phone or key module type configured in the HiPath Provider determines whether Electronic Key Labeling (EKL) is available for the keys. If EKL is available, all keys that are or will be programed with a feature are automatically labeled with a feature text, which is defined in the HiPath system for this purpose. In this case you cannot label the keys in optiClient individually anymore.

If a telephone or key module type is selected without EKL for the optiClient telephone, keys can be individually allocated with features and manually labeled.

You find further information about EKL in Section 5.35.1.1, “Device”, on page 399.

Allocating function keys

NOTE:
If a telephone respectively key module type is configured with EKL for the optiClient telephone, keys cannot be individually allocated with features or labeled anymore.

The keys of the extended keypad are allocated with a phone number of feature via the **service menu** feature key of the optiClient telephone. The communication system used defines which allocations are permitted.

To allocated a feature key in optiClient, proceed exactly as you do with a HiPath desk telephone.

5.9.1 Context Menu of the extended Keypad

NOTE:
If a telephone respectively key module type is configured with EKL for the optiClient telephone, keys cannot be individually allocated with features or labeled anymore.

Via the context menu of the extended keypad you can allocate the keys with individual features and label them.

You can use the following options for allocating and labeling feature keys:

- **Change Caption...**
  Opens a dialog for specifying the desired label of the selected key.
- **Accept caption from display**
  Enables copying a key label from the current optiClient telephone display. Two options are available:
  - **Accept caption from display**
    Copies the phone number currently shown in the telephone display as key label
  - `Shift` key + **Accept caption from display**
    Copies the name currently shown in the telephone display as key label.

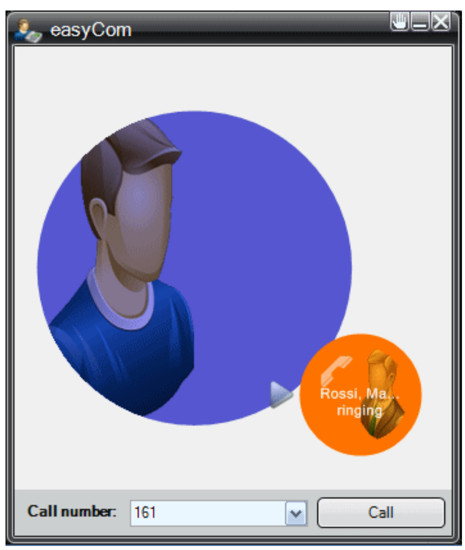
5.10 easyCom Communication Circle

IMPORTANT:
To use the easyCom communication circle features, the *easyCom* interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

The easyCom communication circle offers an alternative interface to the optiClient telephone for using telephony functions. Connections and connection states are represented here via an intuitive and convenient interface using graphic elements.

The optiClient user is placed at the center of the communication circle and communicates with his or her environment. The communication partners are represented by smaller circles, which are placed at various positions, depending on the communication status. Even complex telephony functions such as consultation or conference switches can be easily and conveniently used.

The easyCom communication circle can always be opened via the **easyCom** entry in the module menu of the main bar.



5.10.1 Elements of the easyCom Communication Circle

The easyCom communication circle enables the operation of telephony functions based on an intuitive user interface. For this user-friendly representation the following operating elements are used:

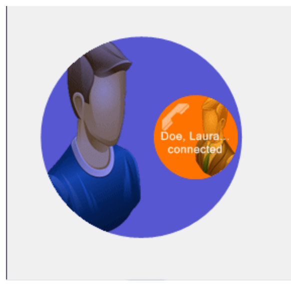
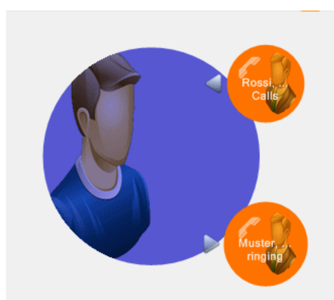
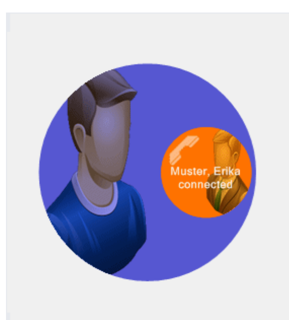
Appearance	Meaning
	The large central circle symbolizes the *individual phone number*. The picture used for this circle features the profile of a head by default. You can define an individual picture for this purpose as well (cf. Section 5.5.3, “easyCom Settings”, on page 160). *Other phone numbers* are always represented by individual, smaller connection circles. Depending on the connection status, these connection circles may flash or also offer further suitable icons in an additional ring. If the connection partner is known, the full name appears in the connection circle instead of the phone number.
	Connection circles with *connection requests* are shown outside the central circle. An assigned arrow signals the communication direction (call category) of the call: • Arrow pointing towards the central circle – coming connection request • Arrow pointing from the central circle – going connection request To simulate a ringtone during the connection request, the associating connection circles flash.
	easyCom positions the connection circles of an *established connection* at the margin of or within the central circle.

Table 10 Elements of the easyCom Communication Circle

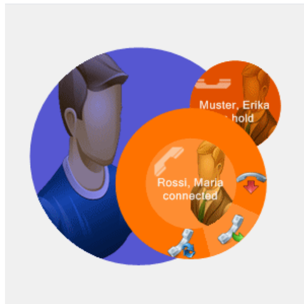
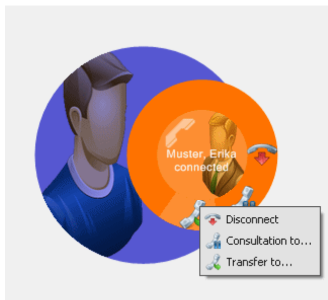
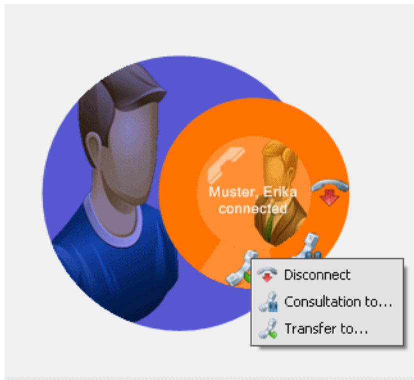
Appearance	Meaning
	When you position the mouse over a connection circle, an additional ring appears around this circle. In this ring such *telephony functions* are displayed for selection that are possible according to the current connection status. The single functions are represented by means of individual icons (cf. Section 5.10.2, “Function Icons of easyCom and their Meaning”, on page 224).
	When opening the context menu of a connection circle, easyCom offers the *telephony functions* as menu entries that are possible according to the current connection status. The function-individual icons are displayed here as well.
	In the lower portion of the easyCom window you find the **Call number** field. You can enter in there a phone number to be dialed or select an already dialed phone number from the available list for redialing. The actual connection request is initiated with the **Call** button.

Table 10 Elements of the easyCom Communication Circle

You will find detailed information about establishing the easyCom communication circle in Section 5.5.3, “easyCom Settings”, on page 160.

5.10.2 Function Icons of easyCom and their Meaning

When you move the cursor over a connection circle, easyCom shows the available telephony functions for that connection in an additional ring with a connection circle menu. The current connection status and the functions of the communication system used decide which features are made available.



The following icons are used for the single telephony functions:

Icon	Meaning
	Accept a connection request (*pick up*)
	Drop connection or connection request (*hang up*).
	Initiate call on hold/initiate consultation call/park
	Toggle
	Initiate a conference
	Expand a conference
	Delete remote party from conference
	Transfer to .../transfer
	Callback request

Table 11 Icons of the easyCom Communication Circle

The same functions can also be selected in the connection circle context menu. In there you find the above icons next to the menu entries.

Detailed information about configuring the icon style is given in Section 5.5.3, “easyCom Settings”, on page 160.

5.10.3 Operating the easyCom Communication Circle

This section shortly describes the operation of the single telephony functions in the easyCom communication circle. You will find a more detailed description of the most important functions in Section 4.5, “Basic Features of easyCom”, on page 61.

5.10.3.1 Setting up a Connection

You can establish a connection in the easyCom communication circle in the following ways:

- Enter the destination phone number in the **Call number** field and select **Call**.
- Using the Drag & Drop technique: drag a destination phone number from a directory or the contact list into the easyCom window and drop it there.

5.10.3.2 Canceling a Call

You can cancel a call the easyCom communication circle in the following ways:

- Position the mouse pointer on the relevant connection circle and select the **disconnect** icon in the appearing connection circle menu.
- Select the **Disconnect** entry in the context menu of the relevant connection circle.
- Select the **disconnect call** icon in the optiClient main bar.

5.10.3.3 Accepting a Connection Request

You can accept an incoming connection request in the easyCom communication circle in the following ways:

- Position the mouse pointer on the incoming connection circle and select the **accept the call** icon in the appearing connection circle menu.
- Position the mouse pointer on the incoming connection circle and select the **Accept the call** entry in the connection circle context menu.
- Drag the incoming connection circle into the central circle.

5.10.3.4 Closing the Connection

You can establish a connection in the easyCom communication circle in the following ways:

- Position the mouse pointer on the relevant connection circle and select the **disconnect** icon in the appearing connection circle menu.
- Position the mouse pointer on the relevant connection circle and select the **Disconnect** entry in the connection circle context menu.
- Drag the incoming connection circle into the central circle by Drag & Drop.

5.10.3.5 Redial

How to redial the phone number last dialed:

- Select the **Call** button.

How to redial a phone number previously dialed:

- Select the desired phone number in the **Call number** field and click **Call**.

5.10.3.6 Holding / initiating a Consultation Call

You can initiate a consultation call in the easyCom communication circle in the following ways:

- Position the mouse pointer on the connection circle of the call to be held and select the **on hold** icon in the appearing connection circle menu.
- Select the **On hold** entry in the context menu of the relevant connection circle.

5.10.3.7 Initiating a Conference

You can initiate a conference in the easyCom communication circle in the following ways:

- Establish a connection to subscriber 1. Initiate a consultation call to subscriber 2. Position the mouse pointer on the connection circle of subscriber 2 and select the **set up conference** icon in the appearing **connection circle menu**.
- Establish a connection to subscriber 1. Initiate a consultation call to subscriber 2. Position the mouse pointer on the connection circle of subscriber 2 and select the **Set up Conference** entry in the connection circle **context menu**.

5.10.3.8 Forwarding/transferring a Connection

In the easyCom communication circle you have the following options to forward a call to another subscriber without previous consultation:

- Enter the destination phone number in the **Call number** field. Position the mouse pointer on the connection circle of the established connection and select the **transfer** icon in the appearing connection circle menu.
- Enter the destination phone number in the **Call number** field. Position the mouse pointer on the connection circle of the established connection and select the **Transfer** entry in the connection circle context menu.

In the easyCom communication circle you have the following options to put subscriber 1 through to subscriber 2 after consulting on the latter one:

- Position the mouse pointer on one of the two connection circles and select the **transfer** icon in the appearing connection circle menu.
- Position the mouse pointer on one of the two connection circles and select the **Transfer** entry in the connection circle's context menu.

5.10.3.9 Forwarding Connection Requests

In the easyCom communication circle you have the following options to forward a connection request to another subscriber:

- Enter the destination phone number in the **Call number** field. Position the mouse pointer on the connection circle of the established connection and select the **transfer to** icon in the appearing connection circle menu.
- Enter the destination phone number in the **Call number** field. Position the mouse pointer on the connection circle of the established connection and select the **Transfer to** entry in the connection circle context menu.

5.11 Call Journal

IMPORTANT:
To use the call journal features, optiClient must be operated at an XPR server. Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
To use the call journal features, the *Call Journal* user interface module and the *Server Call Journal Provider* must have been added to the optiClient configuration.
You find further requirements for using these modules in the optiClient administrator manual.

NOTE:
If you use optiClient at an XPR server with an Alcatel-Twin-Device, a call may be logged with two journal entries. You can avoid this generation of two entries by configuring the XPR server Mail APL accordingly.

An XPR server logs all calls managed by a PBX connected to the server in a CTI journal. If optiClient is connected to the XPR server in such an environment, optiClient may access the contents of the journal via the Server Call Journal Provider. The information obtained in this way is displayed in the optiClient call journal.

This server-based type of logging is also active when optiClient has not been started on the user PC.

The call journal supports the following call categories:

Call category	Icon	Description
Incoming – not reached		Displays all incoming but unaccepted calls.
Incoming – connected		Displays all incoming and accepted calls.
Outgoing – not reached		Displays all outgoing calls that the called party did not accept.
Outgoing – connected		Displays all outgoing calls that the called party accepted.

Table 12 Call Categories of the Call Journal

For each of these call categories an individual icon can be displayed in the optiClient main bar. Next to the actual category icon this bar also displays the number of newly logged calls. In this way you are quickly informed of how many calls of the various categories have been newly logged.

NOTE:
After opening the call journal, the number of newly logged calls on all icons is reset to zero.

With a mouse-click on the respective icon the call journal with all entries of the selected call category opens.

The different call category icons are always available in the call journal window. Use them to select the categories to be displayed in the window. Different call categories can also be displayed simultaneously.

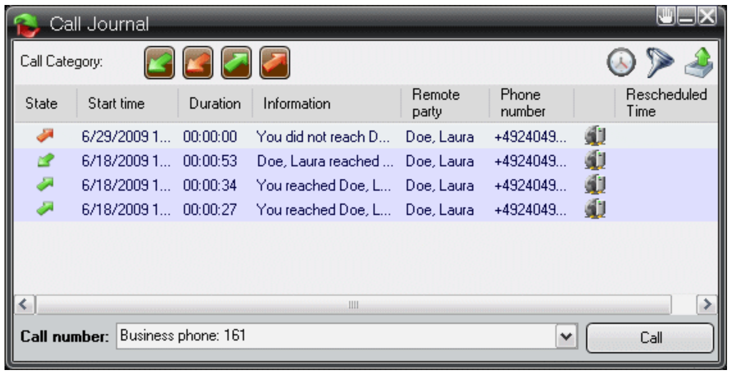
How to open the call journal:

- Via the **Call Journal – Display** entry in the main bar module menu
  In this case the call journal opens with the call categories that were active when the journal was closed the last time.
- Via a category icon of the main bar call journal
  In this case the call journal only displays the journal entries that belong to the category of the category icon used.

Example:
You open the call journal via the icon in the main bar. Accordingly, your call journal will immediately display all incoming entries that you did not accept. Furthermore, the corresponding button is highlighted in the call journal.
If you would like to additionally display all incoming calls that you accepted, simply push the icon.

Further information on the call journal settings is provided in Section 5.5.1, "Settings of the Call Journal", on page 153.

5.11.1 Journal List and Operating Elements of the Call Journal



For operating the call journal the following elements are available in the journal window:

- **Call category**
  The call category icons define which journal entries are listed in the journal window. If an icon is active, the entries of the associating category is displayed in the journal window. Different call categories can also be displayed simultaneously.

- **Rescheduled Call**
  The icon lets you define a period for an entry in the call journal after which you are reminded to repeat this call. See Section 5.11.3, “Setting a Reminder Time for a rescheduled Call”, on page 240.

- **Display only last incoming and outgoing call for each party**
  In the call journal it is possible to display only the last entry of the four main call-categories (*Incoming – not reached*, *Incoming – connected*, *Outgoing – not reached* and *Outgoing – connected*) for each subscriber. This setting improves clarity in the call journal.
  You can activate or deactivate this option via the icon.

- **Export…**
  The icon lets you export the entries of the call journal as list to a text file. The single journal data of a journal entry are separated from each other by commas (CSV).

- ***<Journal list>***
  The journal list contains all entries of the specified call categories. For each journal entry the following information can be displayed:

  NOTE:
  Which journal columns or journal entries are displayed in the journal window depends on the call journal settings (cf. Section 5.5.1, “Settings of the Call Journal”, on page 153).

  – **State**
  Defines the category of the respective call. The arrow symbols correspond to those on the category icons.

  – **Start time**
  Defines the time at which the relevant call was received or made.

  – **Duration**
  Defines the duration of the respective call. With unsuccessful calls the duration is zero.

  If such a name resolution is not possible, this column contains the phone number of the subscriber as well (see **Phone number**).

  – **Phone number**
  Defines the phone number of the subscriber who was called or who called.

  NOTE: You can configure the XPR server Mail APL in a way that in case of outbound connections the phone number that was actually dialed is always displayed .

  – **Information**
  Displays additional XPR server call information.

  – **Remote party**
  Defines the name of the subscriber that was called or who called. This name is determined by a directory search on the basis of the subscriber number. All directories are then searched that have been implemented in optiClient for phone number resolution.

  If no subscriber name can be determined, the corresponding phone number is displayed.

  NOTE: You can configure the XPR server Mail APL in a way that in case of outbound connections the name / phone number of the subscriber who was actually called is always displayed.

– **Source directory**
Icons in the untitled **Source directory** column indicate whether optiClient was able to resolve the originator number of the relevant journal entry via one of the available directories. The type of the displayed icon indicates which of the existing directories optiClient has used for the phone number resolution.

The icons displayed in the icon column have the following significances:

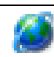
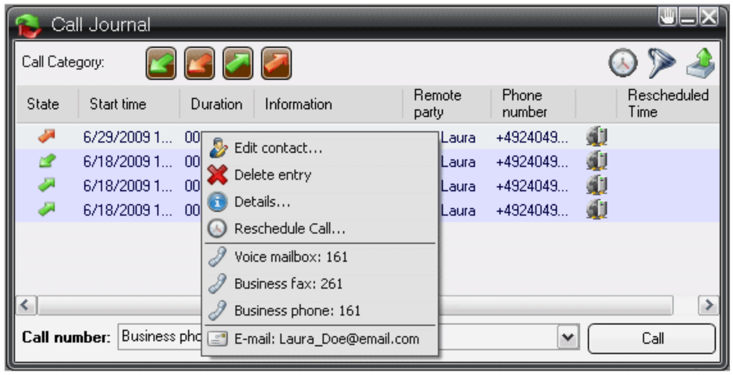
Icon	Description
	The originator number could not be resolved.
	The originator number was resolved via a contact in the XPR server directory.
	The originator number was resolved via a contact in a Lotus Notes directory.
	The originator number was resolved via a contact in an LDAP directory.
	The originator number was resolved via a contact in the Sametime directory.
	The originator number was resolved via a contact in a web service directory.

Table 13 Icons of the Source Directory in the Call Journal

– **Remote party**
Defines the name of the subscriber that was called or who called. This name is determined by a directory search on the basis of the subscriber number. All directories are then searched that have been implemented in optiClient for phone number resolution.

– **Rescheduled Time**
If you have set a period for a journal entry after which you are reminded to repeat this call, this column displays the set time.

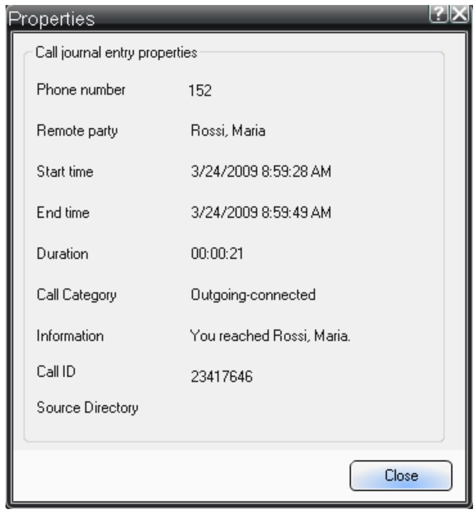
5.11.2 The Call Journal Context Menu



For operating the call journal the following options can be available in the journal list context menu:

- ***<Phone number>***
  Dials the phone number of the subscriber assigned to the journal entry.
- **Delete entry**
  Deletes the selected journal entry from the call journal and from the XPR server CTI journal.
- **Delete selected entries**
  Removes several selected journal entries from the call journal and from the XPR server CTI journal.

- **Details**
  Opens a window with the information about the selected journal entries. This window displays all of the above call information independently from the journal columns displayed.



- **Rescheduled Call**
  Opens a dialog in which you can set or modify a period for a selected journal entry after which you are reminded to repeat this call.

- **Add contact…**
  Enables the definition of a new contact in the contact directory on the basis of the information of a selected journal entry.
  After selecting this menu option the contact directory entry dialog opens. In this dialog you can enter all contact information for the contact to be newly defined and save this information.

NOTE:
This menu entry is only available if the phone number of the selected journal entry is not associated with a contact in the optiClient contact directory.

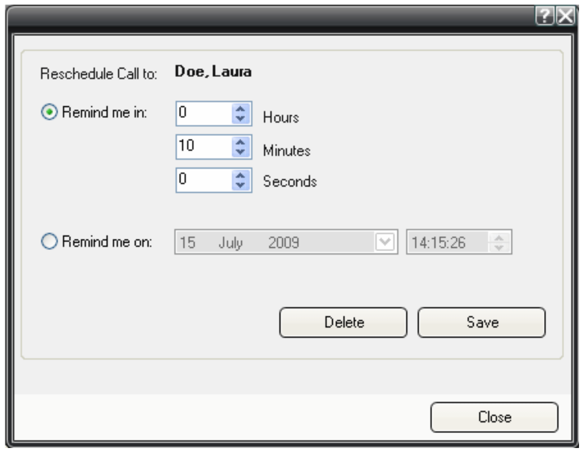
- **Edit contact...**
  If a contact of the contact directory can be assigned to the selected journal entry, the associating contact information can be edited in the contact directory. The assignment of journal entry and contact is based on the phone number information.
  After selecting this menu option, the entry dialog of the contact directory opens with the contact information found. These can then be edited and saved again.

NOTE:
This menu entry is only available if the phone number of the selected journal entry is associated with a contact in the optiClient contact directory.

5.11.3 Setting a Reminder Time for a rescheduled Call

The icon lets you set a reminder time for a call in the journal that you want to repeat.

The configuration dialog for the reminder time has the following settings:



- **Reschedule Call to**
  Displays the contact name and the contact number for the relevant rescheduled call
- **Remind me in**
  Defines the reminder time based on a period
- **Remind me on**
  Defines the reminder time based on a point in time
- **Delete**
  Deletes the reminder for the relevant journal entry
- **Save**
  Saves the reminder time for the relevant journal entry
- **Close**
  Closes the dialog without copying performed modifications

5.12 Server Directory

IMPORTANT:
For using the server directory features, optiClient must be operated at an XPR server.
Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

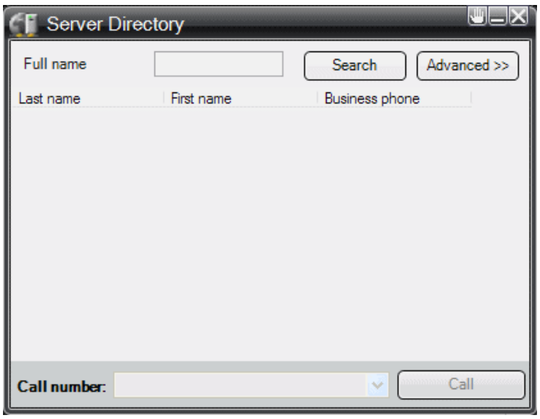
IMPORTANT:
For using the server directory features, the *Directories* user interface module and the *Server Directory Provider* must have been added to the optiClient configuration.
You find further requirements for using these modules in the optiClient administrator manual.

In an XPR server environment the contact information of all XPR users is administered in an XPR server user directory. If optiClient is connected to the XPR server in such an environment, optiClient can access the content of this directory via the Server Directory Provider and look for contact information.

Persons that were found during a search in the server directory can subsequently be contacted by means of a connection established via one of the available addresses.

You can open the window for searching the server directory via the **Directories – Search Server Directory ...** entry in the main bar module menu.

Simple directory representation



Advanced directory representation

You can use the following elements for operating the server directory:

- ***<Search criterion>***
  Determines the contacts searched for in the server directory. Possible search criteria are for example **Full name, First name, Last name**.
  Which search criteria are displayed depends on
  - whether the simple or advanced representation is active in the directory dialog
  - which settings are configured for the user interface module Directories (cf. Section 5.5.12, “Directories Settings”, on page 166)

- **Search**
  Starts the search in the server directory.
- **Extended>>**
  Switches to the extended directory dialog representation.
  Is only displayed in the simple representation.
- **Normal**
  Switches to the normal directory dialog representation.
  Is only displayed in the advanced representation.
- ***<Hit list>***
  Displays all server directory contacts that fulfill the search criterion specified. The type of information displayed about the found hits is configured in the Directories user interface module (cf. Section 5.5.12, “Directories Settings”, on page 166).
- **Call number**
  When you select a contact in the hit list, one of the associating phone numbers appears in this field.
  If several phone numbers are available for the selected contact, the preferred number can be chosen via the list belonging to this text field.
- **Call**
  Establishes a connection to the phone number specified.

5.12.1 Server Directory Context Menu

You can use the following context menu options for operating the server directory:

- ***<Address list>***
  Displays all addresses of the currently selected contact.
  If one of the displayed addresses is selected, contact will be made via the relevant address. In case of a selected phone number optiClient will attempt to establish a phone connection. After selecting an e-mail address the user computer's e-mail client opens.

  Direct transmission of an e-mail to a optiClient contact requires

  – a standard mail client (e.g., Outlook) installed on the user computer.

  – the Sendmail Provider having been added to the provider modules (default settings)

  – a mail address deposited for the relevant contact and selectable for direct transmission.

5.12.2 Synchronizing Contacts

If you copy contacts from the server directory to another optiClientdirectory, you can manually update the associated contact information with the information of the XPR user directory.

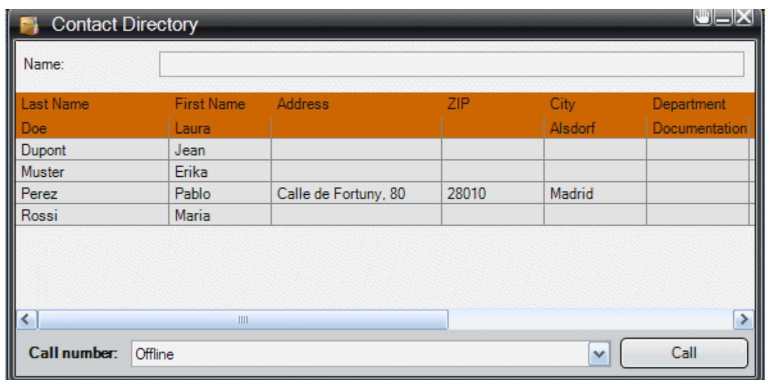
Select the entry **Directories – Contact Synchronization for Server Directory …** in the main bar module menu.

5.13 Contact Directory

IMPORTANT:
To use the contact directory features, the *Contact directory and Contact list* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

The contact directory is the general optiClient directory. It is used to administer individual contact information in the form of a simple list.

You can open the contact directory via the **Contact directory** entry in the main bar module menu.



You can use the following elements for operating the contact directory:

- **Name**
  Serves for finding an entry in the contact directory.
  While you enter a name, optiClient will start a search run for the directory entry that matches the specified string most.

  NOTE:
  When entering names it is sufficient to enter the first, uniquely identifying letter of the name.

  NOTE:
  Even if the contact directory does not include the name you look for, the most matching hit is always indicated during the search.

- ***<Directory list>***
  Displays all entries of the contact directory.

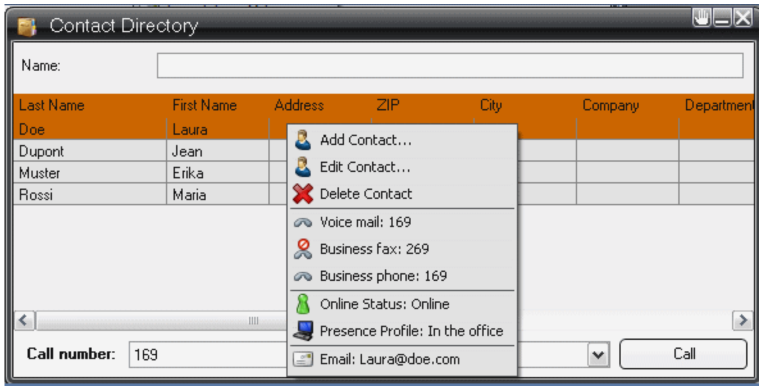
In the bottom section of the contact list window exists an additional combo box with button. Their descriptions vary with the address type you select in the combo box. They read:

- Combo box: **Call number**
  Button: **Call**
  if you have selected a phone number in the contact list window
- Combo box: **E-mail**
  Button: **Send**
  if you have selected an e-mail address in the contact list window
- Combo box: **Online Status**
  Button: **Start chat**
  if you have selected an online status in the contact list window
- Combo box: **Presence Profile**
  Button: **Start chat**
  if you have selected a presence status in the contact list window
- Combo box: **Web conference**
  Button: **Start conference**
  if you have selected a web conference entry in the contact list window.

If you select the button, optiClient will start making contact to the selected contact address.

- In case of a selected phone number optiClient will attempt to establish a phone connection.
- In case of a selected online or presence status optiClient will attempt to start a chat
- If you select a web conference entry, optiClient will apptempt to start a web conference
- After you have selected an e-mail address the user computer's e-mail client opens.
  Direct transmission of an e-mail to a optiClient contact requires
    - a standard mail client (e.g., Outlook) installed on the user computer
    - the Sendmail Provider having been added to the provider modules (default settings)
    - a mail address deposited for the relevant contact and usable for direct transmission.

The Contact Directory Context Menu



You can use the following context menu options for operating the contact directory:

- **Add contact...**
  Adds a new contact to the contact directory. The **Add Contact** dialog opens in which the new contact information can be entered.

  For detailed information about the **Add Contact** dialog please refer to Section 5.14.5, “Add New Contact”, on page 267.

- **Edit contact...**
  Opens the **Edit Contact** dialog. In this dialog you can modify the information belonging to the selected contact (cf. **Add contact**).

- **Delete contact**
  Removes the currently selected contact from the contact list. Before the contact is actually removed you will be prompted to confirm the deletion.

NOTE:
Deleting a contact from the contact directory also removes the relevant contact from the contact list in case he/she is contained therein.

- ***<Address list>***
  Displays all addresses of the currently selected contact. If one of the displayed addresses is selected, contact will be made via the relevant address.
  - In case of a selected phone number optiClient will attempt to establish a phone connection.
  - In case of a selected online or presence status optiClient will attempt to start a chat
  - If you select a web conference entry, optiClient will apptempt to start a web conference
  - After you have selected an e-mail address the user computer's e-mail client opens.
    Direct transmission of an e-mail to a optiClient contact requires
    - a standard mail client (e.g., Outlook) installed on the user computer
    - the Sendmail Provider having been added to the provider modules (default settings)
    - a mail address deposited for the relevant contact and usable for direct transmission.

5.14 Contact List

IMPORTANT:
To use the contact list features, the *Contact directory and Contact list* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

In the various optiClient directories, contact entries always appear in alphabetic order. In your day-to-day work, however, it may be more appropriate to group contacts by task, by project or by another category. You can do this with the optiClient contact list.

The contact list can be opened via the **Contact list** entry in the module menu of the main bar.

NOTE:
It is possible to open a single contact list group via the menu option **Contact groups > <*Group*>** of the module menu.

5.14.1 Display Options

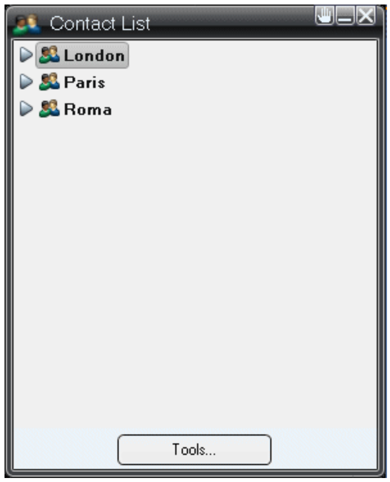
The contact list representation can largely be adapted to the user's individual requirements. The following representation modes are available:

- Total view
- Group view
- Team bar

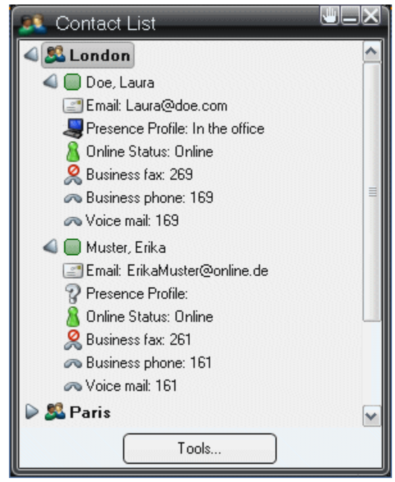
5.14.1.1 Total View

The total view consists of one window that contains all created groups and contacts of the contact list. Groups and contacts can be individually displayed in normal or extended view so that even large amounts of information can always be clearly seen in this representation mode.

Normal contact-list-view



Extended contact-list-view



While the normal view of a group only displays the group name, the extended view also shows the contacts contained in the group. In the same way the associating addresses and status entries can be displayed for individual contacts.

Arrow icons that precede the respective group or contact are used to toggle between normal and extended view.

The associated entry is displayed in normal view. When the icon is selected, the entry switches to extended view.

The associated entry is displayed in extended view. When the icon is selected, the entry switches to normal view.

Each address and each status entry of a contact is preceded by the respective status symbol. You can individually set the display of status information for the respective superordinate contact. See also Section 5.14.2, “Representation of Status Information”, on page 256.

If you select in the total view a contact address, an additional button appears in the bottom section of the contact list window. Its description varies with the type of the selected address and reads:

- **Call**
  if you have selected a phone number in the contact list window
- **Send**
  if you have selected an e-mail address in the contact list window

- **Start chat**
  if you have selected an online or presence status in the contact list window
- **Start conference**
  if you have selected a web conference entry in the contact list window.

If you select this button, optiClient will start making contact to the selected contact address.

- In case of a selected phone number optiClient will attempt to establish a phone connection.
- In case of a selected online or presence status optiClient will attempt to start a chat
- If you select a web conference entry, optiClient will apptempt to start a web conference
- After you have selected an e-mail address the user computer's e-mail client opens.
  Direct transmission of an e-mail to a optiClient contact requires
    - a standard mail client (e.g., Outlook) installed on the user computer.
    - the Sendmail Provider having been added to the provider modules (default settings)
    - a mail address deposited for the relevant contact and usable for direct transmission.

5.14.1.2 Group View

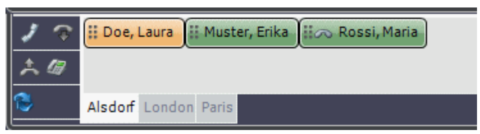
As alternative to the total view each contact list group can also be displayed in an individual window. In this view as well it is possible to expand the single addresses of selected contacts.

If you select a contact address in the group view, the additional button **Call, Send** respectively **Start chat** (cf. Section 5.14.1.1, “Total View”, on page 252) will appear in the bottom section of the contact list window as well.

5.14.1.3 Representation as Team Bar

NOTE:
The team bar is not supported in a Terminal Server environment.
In this case the contact list must not be docked at the screen margin.

The third representation mode is the team bar. It is used to display the entire contact list or only single groups as bar at the top or bottom screen margin. In the first case you can toggle between the different groups of the list by selecting the associating tab.



The background color of a contact defines his/her total status. This total status results from various status information (telephone status, online status, presence profile) of the contact.

Each contact in the team bar can additionally be prefixed by the respective individual status information. See also Section 5.14.2, “Representation of Status Information”, on page 256 respectively Section 5.16, “Presence Feature”, on page 277.

The left hand side of the team bar contains the personal phone control elements. They serve for easily controlling the individual telephone when optiClient is connected to an XPR server. You find a detailed description of the personal phone elements in Section 5.15, “MyPhone”, on page 271.

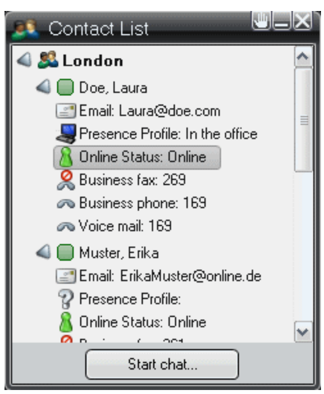
5.14.2 Representation of Status Information

If optiClient is used as CTI client at an XPR server, information about the telephone status, the login status and the presence profile of a user can be displayed in the contact list and in the team bar.

So that the display and definition of such status information can be used in optiClient without restriction,

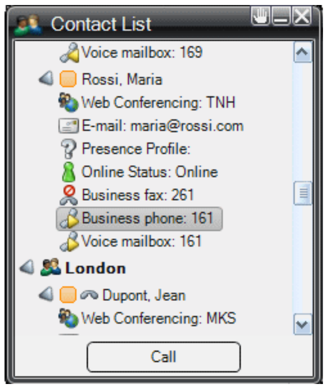
- optiClient must be used as CTI client at an XPR server
- the CTI APL must be installed in the XPR server.
- the Presence APL must have been installed in the XPR server
- the use of status information must have been released in the XPR server.
- users must not have configured individually restricted access privileges for the status information display (cf. Section 5.16.7.3, “Administration of Access Rights”, on page 294).
- the Server Presence Provider must be added to the optiClient configuration
- status information for the respective phone numbers must be provided by the PBX.

By default, the individual status information in the contact list is displayed in front of the respective entry in the address list only.

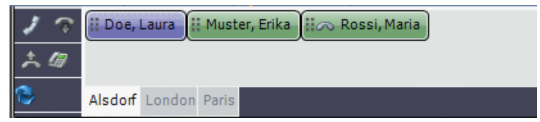


Furthermore, the individual status information in the contact list and team bar can also prefix the superordinate contact entry. The required status information for the relevant contact entry must be displayed for this purpose.

Displayed status information in the contact list



Displayed status information in the team bar



The information is displayed in the contact list and team bar via the **Display icons** menu option in the context menu of the relevant contact. Cf. Section 5.14.3, “Context Menu of the Contact List”, on page 258.

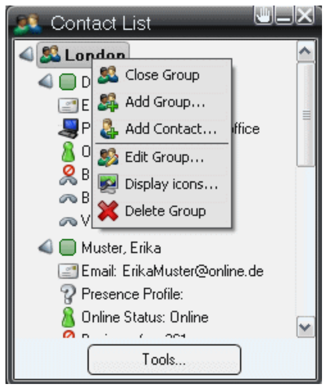
Beyond that, the total status combines all status information. It is displayed as colored square that precedes each contact in a list or serves as background color for contacts that appear as button – e.g. in the team bar.

Which total statuses, telephone, online and general presence statuses are supported by optiClient and which icons are assigned to these statuses is described in Section 5.16, “Presence Feature”, on page 277.

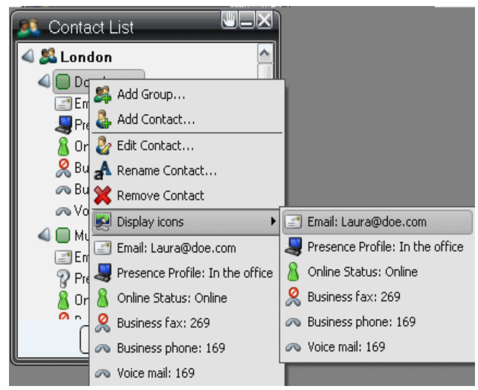
5.14.3 Context Menu of the Contact List

Several menus enable user-friendly administration of contact information in optiClient. The contact list provides the following menus in this context.

Context menu for a group



Context menu for a contact



The following options to administer the content of the contact list or team bar and to control the representation mode are available in the context menus of the contact list:

- **Add group...**
  Adds a new group to the contact list in the total view. The **Add group** dialog opens in which only a new group name must be entered.

NOTE:
This option is only available in the team bar if the entire contact list is represented as team bar.

- **Edit group …**
  Opens the **Edit group** dialog in which the selected group can be renamed.

NOTE:
This option is only available in the team bar if the entire contact list is represented as team bar.

- **Add Contact...**
  Adds a new contact to the selected group. The **Add Contact** dialog opens in which the new contact information can be entered.

  NOTE:
  A new contact list entry automatically generates a corresponding entry in the contact directory (also called the contact folder). The contact list is thus always a subset of the contact directory.

  For detailed information about the **Add Contact** dialog please refer to Section 5.14.5, “Add New Contact”, on page 267.

- **Edit contact …**
  Opens the **Edit Contact** dialog. In this dialog you can modify the information belonging to the selected contact (cf. **Add contact**).

- **Remove contact**
  Removes the currently selected contact from the contact list.
  Before you actually remove a contact you will be asked whether this deletion is to apply for the contact list only or also for the contact directory, in which case a contact is removed from optiClient completely.

- **Display icons** for a **contact** in the contact list
  Controls the display of status information of the currently selected contact in the associated contact entry.
  The sub menu lists all status information of an existing contact. After a list entry has been selected, it is displayed in the form of a symbol in front of the corresponding contact entry. This symbol represents the current status of the corresponding entry. If an already selected list entry is picked once more, its status will be removed from the superordinate contact entry again.

- **Display icons** for a **group** in the contact list
  Controls the display of status information for all contacts of the selected group.
  When you select this entry, a configuration dialog opens. In this dialog you can select the icons that you want to have displayed for the contacts of the relevant group.

- ***<Address list>***
  Displays all available addresses of the currently selected contact. If one of these entries is selected, contact will be made via the relevant address.
  - In case of a selected phone number optiClient will attempt to establish a phone connection.
  - In case of a selected presence status optiClient will attempt to start a chat
  - After you have selected an e-mail address the user computer's e-mail client opens.
    Direct transmission of an e-mail to a optiClient contact requires
    - a standard mail client (e.g., Outlook) installed on the user computer
    - the Sendmail Provider having been added to the provider modules (default settings)
    - a mail address deposited for the relevant contact and usable for direct transmission.
- **Open group...**
  Opens the selected group in an individual window or team bar.
  The format in which it is displayed depends on the representation in which it was opened the last time. If it is opened for the first time it appears in an individual window.
- **Close group...**
  If a group has been opened in an individual window or team bar, it can be closed again in the contact list main window with selecting this menu option.

5.14.4 Team Bar Menus

Several menus enable user-friendly administration of contact information in optiClient. The team bar provides the following menus in this context.

5.14.4.1 Context Menu of the Team Bar

Via the context menu of the team bar, groups and contacts can be administered. The content of the menu depends on whether only one single group or all groups of the contact list are displayed as team bar.

The context menu opens in a free section of the team bar and provides the following options:

- **Open Group**
  Opens the group that has been selected in the team bar in a new window
- **Close Group**
  If a single group has been opened as team bar, it can be closed by selecting this menu option

- **Add Group...**
  Adds a new group to the team bar and thus also to the contact list. The **Add group** dialog opens in which only a new group name must be entered.
- **Add Contact...**
  Adds a new contact to the selected group. The **Add Contact** dialog opens in which the new contact information can be entered.

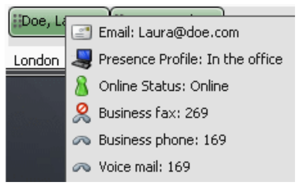
  NOTE:
  The new contact is also automatically created in the contact directory.

  For detailed information about the **Add Contact** dialog please refer to Section 5.14.5, “Add New Contact”, on page 267.
- **Edit Group**
  Opens the **Edit Group** dialog. Here you can change the name of the selected group.
- **Display icons**
  Controls the display of status information for all contacts of the selected group.
  When you select this entry, a configuration dialog opens. In this dialog you can select the icons that you want to have displayed for the contacts of the relevant group.
- **Delete Group**
  Deletes the activated group from the team bar and thus also from the contact list. A subsequent request prevents the involuntary execution of this command.

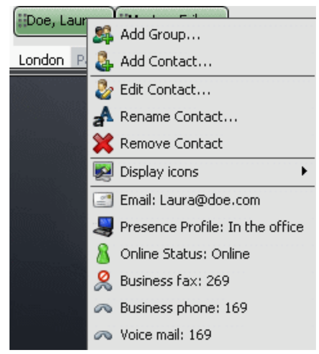
5.14.4.2 Menus of the Contacts

It is possible to open two menus via each contact to administer the team bar content.

Menu



Context menu



The menu of a contact contains a list of all statuses that are available but not displayed for the associated contact in the contact list. After the selection of an entry, the associated status icon is displayed in the team bar for the relevant contact.

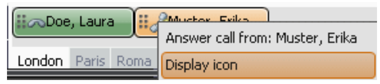
The context menu of a contact provides entries for the administration of the groups and contacts. For a description of the single menu entries please refer to Section 5.14.3, “Context Menu of the Contact List”, on page 258.

5.14.4.3 Menu of the Telephone Status

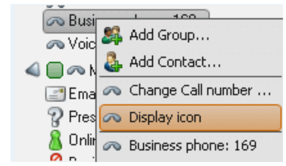
It is possible to open several menus via the symbols of the address states (telephone status).

Menu in idle state

… for incoming call



Context menu



The address status menus provide the following options:

- ***<Address of the relevant status icon>***
  Selecting this menu option directly establishes a connection to the relevant address.
- **Display icon**
  This menu option shows respectively hides the relevant address status in/ from the team bar.
- **Answer call from: *<Subscriber>***
  > When a call comes in for a subscriber of the contact list, it can be accepted via this option.

NOTE:
Accepting calls for other subscribers may be restricted to specific subscribers or completely deactivated by the XPR server administrator.

- **Add Group...**
  Adds a new group to the team bar and thus also to the contact list. The **Add group** dialog opens in which only a new group name must be entered.
- **Add Contact...**
  Adds a new contact to the selected group. The **Add Contact** dialog opens in which the new contact information can be entered.

NOTE:
The new contact is also automatically created in the contact directory.

- **Call number change …** or **Email change …**
  If this menu option is selected, the **Call number** or **Email** dialog under **Edit Contact** opens. It is possible to change the phone number or the e-mail address of the corresponding contact here.

5.14.4.4 Online Status and Presence Profile Menus

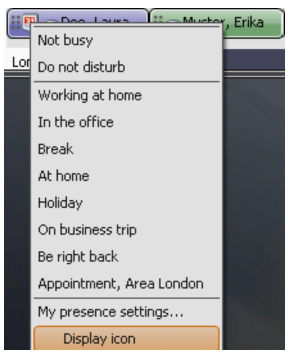
The presence function can be controlled and administered in two different ways:

- via the module menu
- via the team bar menus

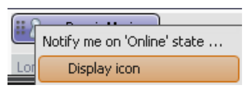
You find detailed information about how to operate the presence function via the module menu in Section 5.16.6, “Controlling the Presence Feature”, on page 288. At this point we will therefore only consider the operation via the menus of the team bar.

Several menus can be opened via the icons of the login status and presence profiles. Partly it is differentiated whether a menu is opened via a symbol of its own state or the symbol of another state.

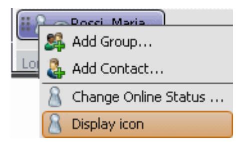
Menu, own symbol



Menu, foreign symbol



Context menu



The online status and presence profile menus provide the following options:

- **My presence settings …**
  This menu option is only provided on the symbols of your own contact entry. It opens the dialog to configure your own presence settings.
  For a detailed description of the presence settings please refer to Section 5.16, “Presence Feature”, on page 277.

- ***<List of presence profiles>***
  Lists all available optiClient presence profiles. If one of the entries is selected, your own presence profile changes to the respective state.

- **Change Presence Profile** respectively **Change Online Status**
  Open the configuration dialog for the relevant contact.

- **Do not disturb**
  This entry activates respectively deactivates the associated online status.

- **Display icon**
  This menu option displays respectively hides the selected icon for the presence profile or for the online status. Which of the two options is displayed depends on whether the menu is opened via the icon for the presence profile or for the online status.

- **Notify me on state "Online" …**

  IMPORTANT:
  A Text-to-Speech-Engine must be installed in the XPR server so that the notification function can be used via a telephone. The languages to be installed for the engine must be precisely those with which users log in at optiClient.

  This menu option is only displayed if the relevant user is not logged in at the XPR server – thus in the user's online status *Offline*.
  If this entry is selected, the **Online Notification** dialog opens. In this dialog you configure that you will be notified when the respective user logs on at the XPR server – i.e. his/her presence state changes to *Online*.
  For a more detailed description of the **Online Notification** dialog please refer to Section 5.16.7.5, “Change-of-Status Notification”, on page 298.

- **Add Group...**
  Adds a new group to the team bar and thus also to the contact list. The **Add Group** dialog opens in which only a new group name must be entered.

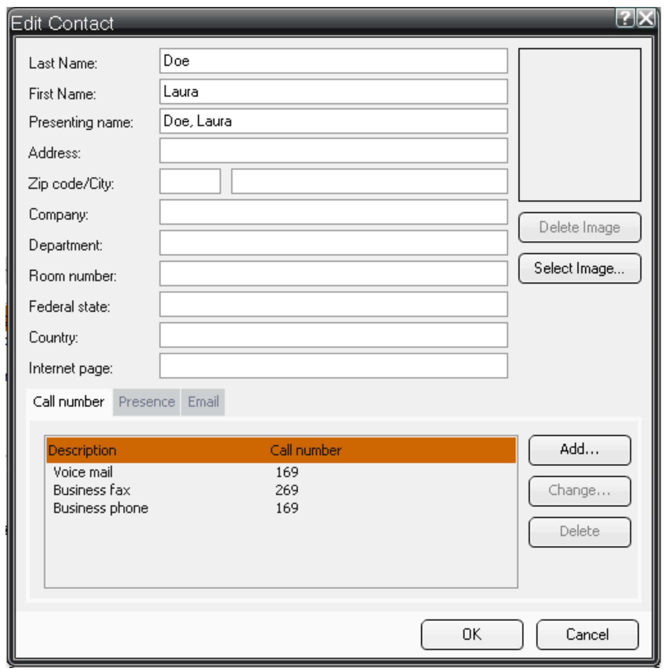
- **Add Contact...**
  Adds a new contact to the selected group. The **Add Contact** dialog opens in which the new contact information can be entered.

  NOTE:
  The new contact is also automatically created in the contact directory.

5.14.5 Add New Contact

NOTE:
A new contact list entry automatically generates a corresponding entry in the contact directory (also called the contact folder). The contact list is thus always a subset of the contact directories.

The **Add Contact...** and **Edit Contact...** context menu options open a dialog in which you can add information on a new contact or modify data of an existing one.

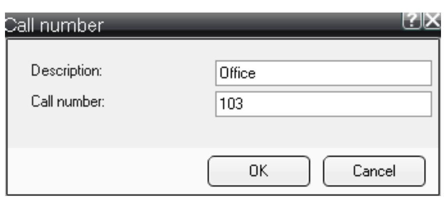


You can use the following options for entering contact information:

- **Name**
- **First name**
- **Address**
- **ZIP code/Location**
- **Company**
- **Department**
- **Room Number**
- **State**
- **Country**
- **Internet Page**
- **Select Image...**
  Opens a browser window to integrate an image for the relevant contact.
- **Delete Image**
  Deletes the image that has previously been integrated for the relevant contact.
- **Add**
  Opens an address dialog in which a new e-mail address, phone number or SIP address can be added for the relevant contact.
  Which type of address is added depends on whether the **Email, Call number** or **SIP-Address** tab is active.

NOTE:
The **SIP-Address** tab is only displayed if you use optiClient as SIP softphone.

Entering a phone number



Entering an e-mail address

NOTE:
A new address generates automatically a corresponding entry in the contact directory. The contact list is thus always a subset of the contact directories.

- **Description**
  Defines a short description of the associating address. It serves for clarity if several addresses of the same type are defined.
- **Email**
  Defines an e-mail address for the relevant contact.

NOTE: When you enter an e-mail address, its format will be verified.

- **Call number**
  Defines a phone number for the relevant contact.

NOTE:
The phone number may be entered in an arbitrary format.
The entry will subsequently internally be converted into a normalized format and saved. In optiClient the number will, however, always be displayed in the entry format.

- **Edit**
  Opens an address dialog in which an existing e-mail address or phone number can be edited for the relevant contact (cf. **Add**).
  Which type of address is edited depends on whether the **Email** tab or **Call number** tab is active.
- **Delete**
  Removes the relevant e-mail address or phone number. Before the contact is actually removed you will be prompted to confirm the deletion.
  Which type of address is edited depends on whether the **Email** tab or **Call number** tab is active.

The Presence tab

On the **Presence** tab you specify whether the presence information should be displayed in the contact list or team bar for the relevant user.

5.15 MyPhone

IMPORTANT:
For using the MyPhone features, optiClient must be operated at an XPR server. Cf. Section 5.33, "Telephoning at an XPR Server", on page 351.

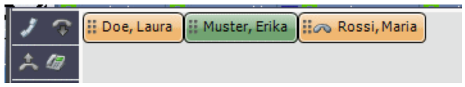
IMPORTANT:
For using the MyPhone features, the *Contact directory and contact lists* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

NOTE:
If MyPhone is to be displayed in the optiClient main bar as well, the *Personal Phone* user interface module must have been added to the optiClient configuration.

NOTE:
Which telephony functions can be activated in MyPhone depends on the communication system used as well as on the current optiClient communication status.

MyPhone serves for simple control of the individual telephone when optiClient is operated on an XPR server. To this, it provides the most important telephony functions in the form of a menu or as buttons.

MyPhone is only displayed in the team bar by default.



Beyond that, it can also be displayed in the optiClient main bar. This requires the activation of the Personal Phone user interface module though.

5.15.1 MyPhone Representation

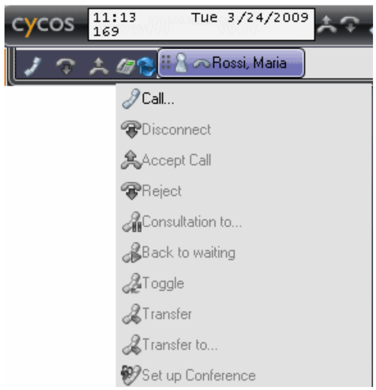
MyPhone provides the following elements to control the individual telephone.

Icon	Meaning
	Diverts a new call to a subscriber to be dialed.
	Accepts an inbound connection request.
	Rejects an inbound connection request.
	Finishes the active call.
	Sets the active call to on-hold and initiates a consultation call to a subscriber to be dialed.
	Returns to a held call.
	Toggles between the active and a held call.
	Transfers the active connection to a subscriber to be dialed.
	Transfers the active connection to the subscriber who was placed into hold last.
	Initiates a conference.
	The function menu provides the available telephony functions in the form of a menu. The associated button can be displayed or hidden in the main bar via the context menu of the single menu entries.
	Provides a call list that contains the last 10 callers and callees. By selecting one of these entries, a connection to the associated subscriber is set up in a simple way. If the associated call list is empty, this element is not displayed.

Table 14 Icons for MyPhone

5.15.2 The MyPhone Function Menu

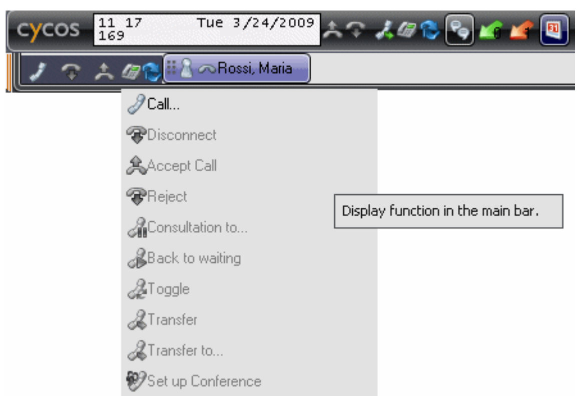
The MyPhone function menu provides the most important available telephony functions. Which of these can be activated in the personal telephone depends on the communication system used as well as on the current communication status of optiClient.



Telephony functions not supported owing to the current optiClient communication status appear in the menu in gray and cannot be activated. The same applies to such functions that are not supported by the connected communication system.

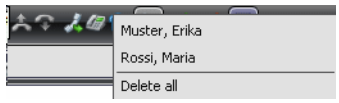
The function menu context menu

Via the function menu context menu you can display or hide individual buttons for the single telephony functions in the MyPhone interface.



5.15.3 The MyPhone Call List

The call list contains entries of the last 10 callers and callees. By selecting one of these entries, a connection to the associated subscriber is set up in a simple way.



The call list provides the following elements

- **<Contact list>**
  Displays the last 20 callers and callees. By selecting one of these entries, a connection to the relevant subscriber is set up.

- **Delete all**
  Removes all entries from the call list.

5.16 Presence Feature

IMPORTANT:
For using the presence feature, optiClient must be operated at an XPR server. Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
For using the presence feature, the *Presence* user interface module and the *Server Presence Provider* must have been added to the optiClient configuration. You find further requirements for using these modules in the optiClient administrator manual.

The presence feature enables you to obtain the following information about a user:

- the telephone status,
- the Online status
- the presence profile

Furthermore, you can configure your own, individual presence profile and make it visible for other users. Thus it is possible for other users to e.g. recognize whether you are logged on at the XPR server, whether your telephone is free, whether you are having a break, whether you are on holiday or on a business trip.

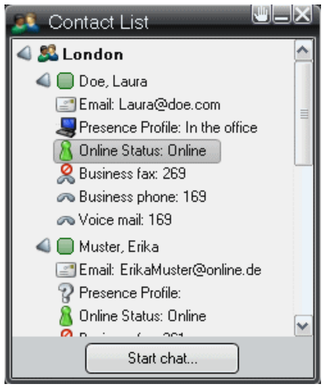
So that you can use the presence function in optiClient to display and define status information without restrictions,

- optiClient must be used as CTI client at an XPR server
- the CTI APL must be installed in the XPR server.
- the Presence APL must have been installed in the XPR server
- users must not have configured individually restricted access privileges for the status information display (cf. Section 5.16.7.3, “Administration of Access Rights”, on page 294).
- the use of status information must have been released in the XPR server.
- the PBX must provide the corresponding status information for the phone numbers.

The presence function can be controlled via the **Presence** entry in the main bar module menu

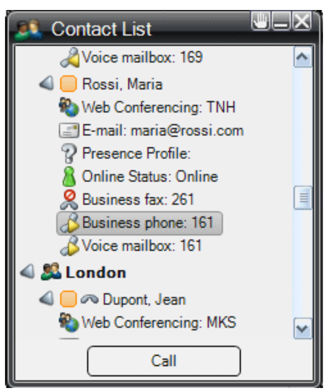
5.16.1 Appearance of Presence Information

The diverse presence information (telephone status, online status, presence profile) are in the contact list exclusively displayed before the associated address list entry by default.

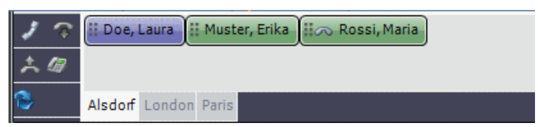


Furthermore, the information can also be displayed in the contact list and team bar before the superordinate contact entry. The required status information for the relevant contact entry must be displayed for this purpose.

Telephone status/entire status in the contact list



Telephone status/entire status in the team bar



The information is displayed in the contact list and team bar via the **Display icons** menu option in the context menu of the relevant contact. Cf. Section 5.14.3, “Context Menu of the Contact List”, on page 258.

Beyond that, the entire status combines all presence information. It is displayed as colored square that precedes each contact in a list or serves as background color for contacts that appear as button – e.g. in the team bar.

5.16.2 Telephone Status

The telephone status represents the current status of a user's telephone. If the telephone is e.g. currently busy with an incoming call, the corresponding symbol  is displayed in the contact list or team bar.

The following table includes a summary of all telephone statuses used by the presence function.

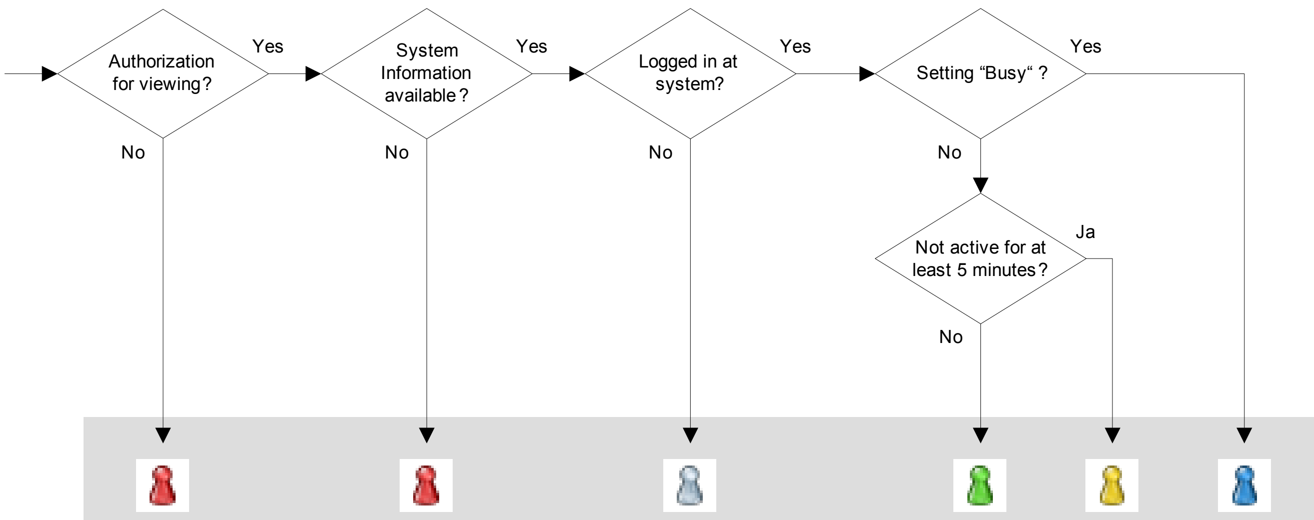
Icon	Meaning
	The associated subscriber is currently available.
	The associated subscriber is setting up a connection but it is not established yet.
	The associated subscriber is being called. No connection has yet been established though.
	The associated subscriber is currently calling.
	The associated subscriber is currently being called.
	The associated subscriber is currently participating in a conference.
	The associated subscriber is currently being held by another subscriber.
	The associated subscriber is currently holding another subscriber.
	The associated subscriber has just finished calling but not yet hung up the receiver.
	The associated subscriber is currently unavailable for technical reasons or his/her status is unknown.
	Wildcard for the unavailable status of an e-mail address. **Note:** E-mail address statuses are not supported by optiClient.

Table 15 Telephone Status Icons

5.16.3 Online Status

The online status displays whether the respective user is logged in at the XPR server used. If he/she is logged on, the system differentiates between different statuses that represent his/her current activity and his/her disposition to be disturbed.

The following diagram gives an overview of how a user login status is created.



Corresponding representations of the login state

Before the login status of a user is displayed at all, the XPR server checks whether an authorization to display the online status exists. If this authorization does not exist, the corresponding icon  is displayed in the contact list or team bar. If the authorization to display the status exists, the corresponding status is displayed according to the scheme depicted above.

The authorization to display the online status can be restricted via the access privileges of the presence function (cf. Section 5.16.7.3, “Administration of Access Rights”, on page 294).

The following table includes a summary of all online statuses used by the presence function.

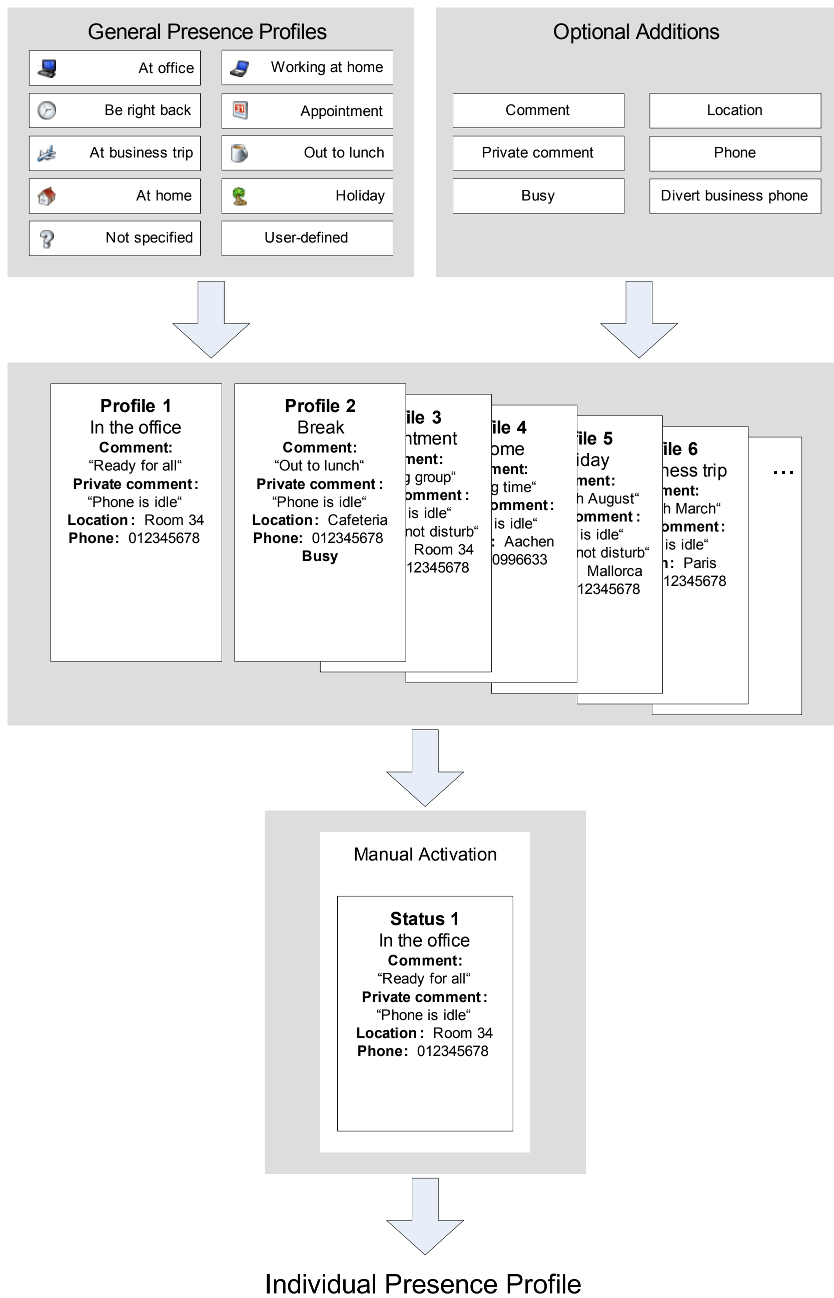
Icon	Meaning
	There is no privilege to show status information for this user or the associated XPR server has not started.
	The user is not logged in at the system (offline).
	The respective user has logged in at the system (online).
	The respective user has logged in at the system (online). The *Do not disturb* online status is active.
	The respective user has logged in at the system (online). The system has not recognized any user activity for at least five minutes.
	The respective user has logged in at the system (online). The system has not recognized any user activity for at least five minutes. Furthermore, the *Do not disturb* online status is active.

Table 16 Online Status Icons

5.16.4 Presence Profile

The presence profile provides information that refers to the presence of the respective user at his/her work place. It is not controlled by the XPR server but by the respective user and is individually defined and activated.

The following illustration shows how information of a presence profile can be composed and how its information display is activated in the system.



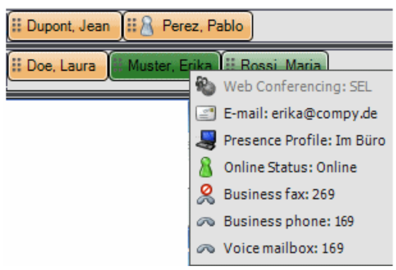
A general presence profile serves as the basis for an individual presence profile. This can be a profile that

- exists already by default in optiClient (e.g. the *Appointment* profile) or
- that has been defined by the user himself.

Such a presence profile can optionally be supplemented with individual information concerning e.g. the reachability.

A presence profile is manually activated by the respective user. The thus activated presence profile can then be displayed in the contact list or team bar. As with the online status, a corresponding authorization to display the status must exist in the XPR server.

While the general presence profile of a user becomes immediately visible in the contact list or team bar via the corresponding profile icon (e.g.), the individual information becomes only visible if you place the mouse on the corresponding profile icon.



The following table shows a summary of all general presence profiles that the presence function provides by default.

Icon	Meaning
	The user works in his/her office work place.
	The user works in his/her home office.
	The user is currently not at his/her work place, but will be back soon.
	The user has an appointment.
	The user is on a business trip.
	The user is taking a break.
	The user is at home.
	The user is on holiday.
	No information on the user's presence is available.

Table 17 Work Status Icons

5.16.5 Entire Status

The entire status combines the individual presence information online status, telephone status, agent status and presence profile. It is displayed as colored square that precedes each contact in a list or serves as background color for contacts that appear as button – e.g. in the team bar.

The individual presence information can be additionally displayed if desired.

Priority	Entire status	Color representation
1	Offline	
2	Do not disturb	
3	Busy	
4	Restricted availability	
5	Online	
6	No information	

Table 18 Entire-Status Overview

The color of the entire status results from the individual presence information. The following dependencies apply:

Dependency on the online status

Online status	Entire status
Offline	Restricted availability
Online busy	Do not disturb
Offline busy	Do not disturb
All other statuses	Online

Table 19 Online Status-Entire Status

Dependency on the presence profile

Presence profile	Entire status
• Working at home	Restricted availability
• On business trip	Restricted availability
• Be right back	Busy
• In the office	Online
• Break	Busy
• Appointment	Busy
• Holiday	Offline
• At home	Offline

Table 20 Presence Profile-Entire Status

Dependency on the telephone status

Telephone status	Entire status
• Outgoing call without connection	Restricted availability
• Incoming call without connection	Restricted availability
• Free	Online
• All other statuses	Busy

Table 21 Telephone Status-Entire Status

Dependency on the agent status

Agent work mode	Entire status
• Logged in	Restricted availability
• User-defined agent status	Do not disturb
• Ready	Online
• Wrap up	Busy
• Logged off	Offline
• Break	Do not disturb
• Unknown status	Offline

Table 22 Agent Status-Entire Status

If the individual status displays result in differing entire statuses, the entire status with the highest priority is displayed.

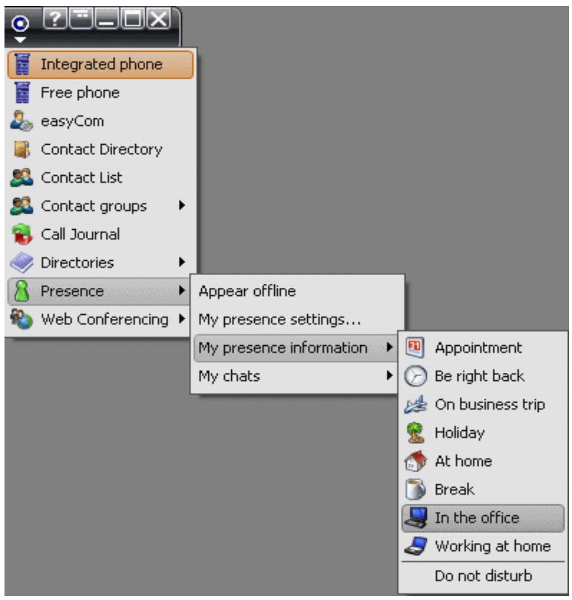
Example:
A user has the online status *Online* (entire status: *Online*) and the telephone status *Outgoing call without connection* (entire status: *Restricted availability*). Since the entire status **Restricted availability** has a higher priority (4) than the entire status **Online** (5), optiClient displays the entire status **Restricted availability**.

5.16.6 Controlling the Presence Feature

You can manage and control the settings of your own presence in two ways:

- Via the menus of the contact respectively teambar
- Via the module menu

You find detailed information about how to operate the presence feature via the contact list or team bar in Section 5.14, “Contact List”, on page 251. At this point we will therefore only consider the operation via the module menu.



The operation of the presence function is available under the **Presence** entry in the module menu. The following options are available:

- **Appear offline**
  Your online status *Offline* is displayed for all users. In this case you will remain logged on at the XPR server via the Server Connection Provider.

- **My Presence settings**
  Opens the dialog in which you can edit the presence settings. For a more detailed description of this dialog please refer to Section 5.16.7, “Presence Function Settings”, on page 290.
- **My Presence information**
  Opens a menu in which the following profile or status information can be activated. Only one profile or status can be active in each case.
  - Presence profile *Appointment*
  - Presence profile *Be right back*
  - Presence profile *On business trip*
  - Presence profile *Holiday*
  - Presence profile *At home*
  - Presence profile *Out to lunch*
  - Presence profile *In the office*
  - Presence profile *Working at home*
  - Online status *Do not disturb*.

If a profile or status entry is activated, it is displayed as marked in the menu.

5.16.7 Presence Function Settings

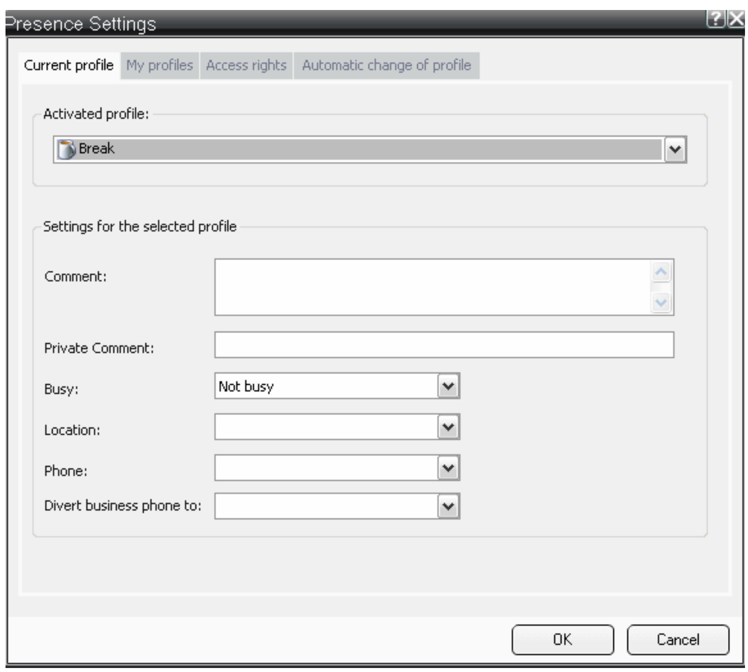
You can adjust the optiClient presence function to your personal needs. Use the **Presence Settings** dialog of the presence function for this purpose.

The Presence Settings dialog can be opened via the **Presence – My Presence settings** entry in the module menu of the main bar.

5.16.7.1 Settings of the Current Presence Profile

On the **Current profile** tab of the presence settings you can customize and activate your currently active presence profile.

IMPORTANT:
If you switch to another presence profile after saving the information, the information in the *Settings for the selected profile* section get lost.
If you want to keep individual information for a presence profile even after a change of profile, define them for the selected profile on the **My profiles** tab.



You can use the following options for the configuration of your current presence profile:

- **Activated profile**
  The presence profile that you select in this field will be activated for you after you have clicked **OK**.
- **Comment**
  You can enter an individual comment in this field that supplements the display of the activated profile.
- **Private Comment**
  You can enter a second individual comment in this field that supplements the display of the activated profile. This can be released in the access rights independent of the entry in the **Comment** field. Thus it is possible to display additional profile information in hierarchized form for other users.
- **Busy, Location, Phone**
  In these fields you can make individual entries concerning your busy status, location and reachability via telephone. These entries supplement the display of the activated profile.
- **Divert business phone to**
  When you specify a phone number in this field, optiClient automatically sets up a call diversion to this number as soon as the associated profile is activated.

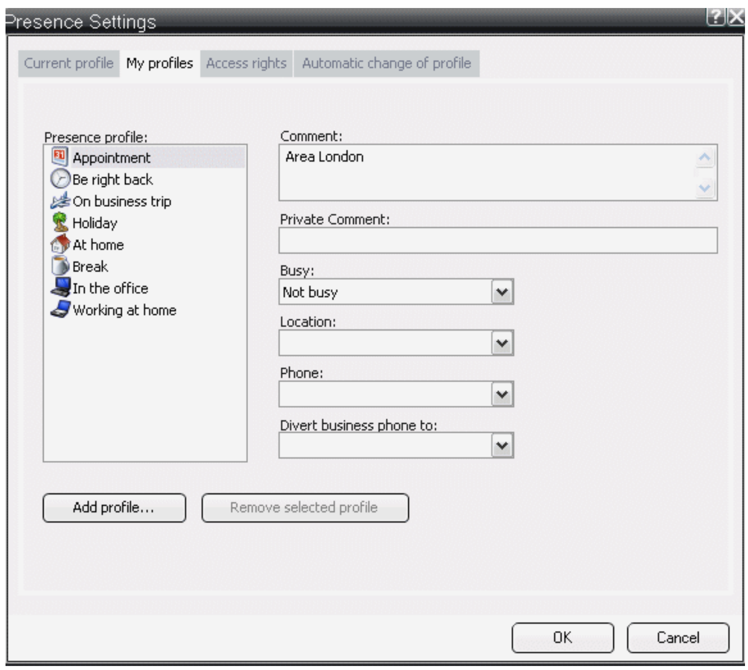
IMPORTANT:
If you use optiClient as CTI client and have your telehone manually diverted at the terminal device, the **Divert business phone to** setting takes no effect.

NOTE:
This feature is only supported if the PBX used supports call diversions.

5.16.7.2 Definition of Presence Profiles

You can store individual additional information for existing presence profiles on the **My profiles** tab of the presence settings. Furthermore, it is possible to create individual presence profiles.

NOTE:
The settings you make here do not immediately change your current presence profile. Changes at your active presence profile will only become active after a change of profile.
If you want to modify your current presence profile and display these modifications without changing the profile, perform the alterations on the **Current profile** tab.



The following settings are available for the definition of presence profiles:

- ***<Profile list>***
  Lists all configured presence profiles.
- **Comment, Private Comment, Busy, Location, Phone, Divert business phone to**
  cf. Section 5.16.7.1, “Settings of the Current Presence Profile”, on page 290.

IMPORTANT:
If you use optiClient as CTI client and have your telehone manually diverted at the terminal device, the **Divert business phone to** setting takes no effect.

- **Add profile …**
  Opens the **New presence profile** dialog, in which you can define a new user-specific presence profile.

  The following settings are available for the creation of a new user-specific presence profile:

  – **Profile name**
    Defines the name of the new profile.

  – **Use icon**
    Defines the icon to be used for the new profile. The icon you have selected here is displayed in the contact list or in the team bar if this presence profile is activated.

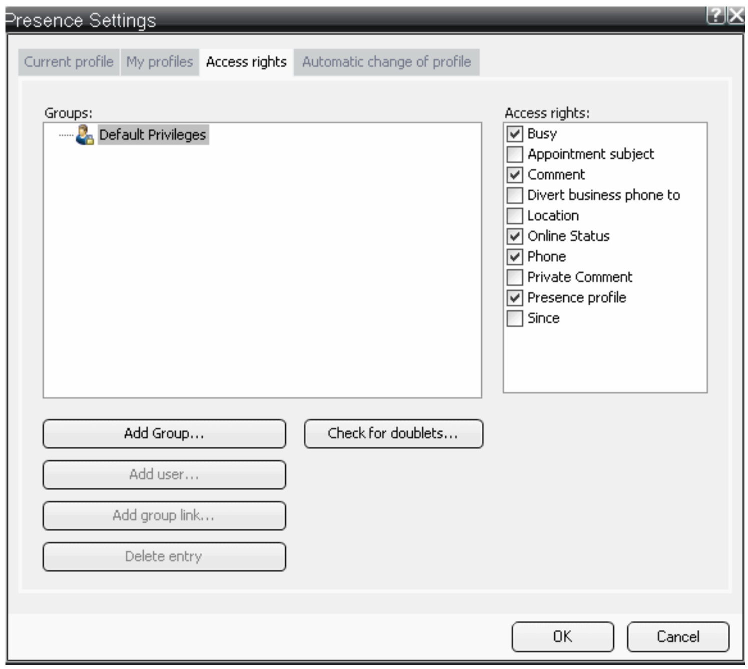
- **Remove selected profile**
  Deletes the presence profile that is marked in the list of profiles.

NOTE:
It is not possible to remove default presence profiles provided by optiClient.

5.16.7.3 Administration of Access Rights

You can add individual information to each presence profile. In doing so you can share the view of this information with all users or groups.

Example:
Select the presence profile *Appointment* for appointments with clients. In the **Comment** field enter the client the profile is about. You could maybe enter the confidential topic the appointment is about in the **Private Comment** field.
You can now provide the information on the client for the colleagues in your team via the access rights (**Comment**). Moreover, you could enable your supervisor to view confidential information on the project (**Private Comment**).



The following settings are available for the definition of presence profiles:

- ***<Group representation>***
  Access rights are defined on group-basis. The group representation gives a clear overview of the defined groups, the sub groups and users.
  Access rights configured under **Default Privileges** are valid for the users that have not been added to a group.

- **Access rights**
  Defines the access rights for the group that has been selected in the group representation. An access right that has been configured that way is valid for **all** defined presence profiles. Consequently, it is not possible to configure different access rights for the *Appointment* profile than for the *Holiday* profile.

  The display of the following information can be released or limited for the users of a group:

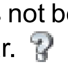
  – **Busy**
    If the associated check box has been selected, the users of the selected group can see whether you are in the *Do not disturb* status.

  – **Subject and location of appointment**
    If the associated check box has been selected, the users of the selected group can see your calendar data.

  – **Comment**
    If the associated check box has been selected, the users of the selected group can see the information that you may have entered in the **Comment** field.

  – **Divert business phone to**
    If the associated check box has been selected, the users of the selected group can see which phone number you have diverted your business phone to.

  – **Location**
    If the associated check box has been selected, the users of the selected group can see the information that you may have entered in the **Location** field.

  – **Online Status**
    If the associated check box has been selected, the users of the selected group can see your online status in the contact list or team bar. If the check box has not been selected, only the icon is displayed in the contact list or team bar. 

– **Phone**
If the associated checkbox has been selected, the users of the selected group can see the information that you may have entered in the **Phone** field.
Furthermore, this option controls whether the users of the selected group can see their telephone status.

NOTE:
You can restrict the display of your telephone status only if the XPR server administrator has shared this feature.

– **Private Comment**
If the associated check box has been selected, the users of the selected group can see the information that you may have entered in the **Private Comment** field.

– **Presence profile**
If the associated check box has been selected, the users of the selected group can see your presence profile in the contact list or team bar. If the check box has not been selected, only the icon is displayed in the contact list or team bar. 

– **Since**
If the corresponding check box has been selected, the users of the selected group can see since when you have been in the respectively active presence profile.

- **Add group …**
Creates a new group to which you can subsequently assign users, other groups and individual access rights.

- **Add user …**
Adds a new user to the selected group via the **Add users** dialog.

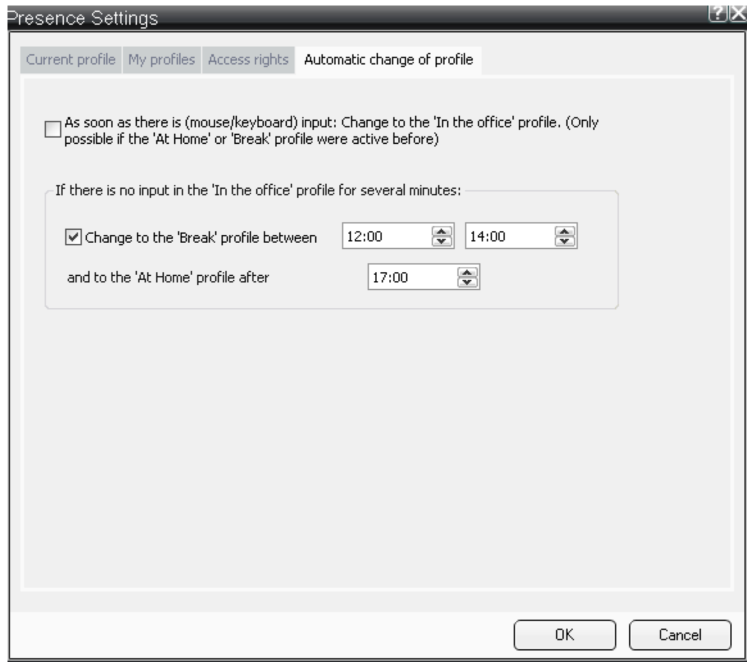
- **Add group link …**
Adds an already created group to the selected group via the **Add group link** dialog. It is possible to realize nested access rights this way.

- **Delete entry**
Deletes the selected user or the selected group.

- **Check for doublets …**
Checks the defined group/user configuration for users to whom access rights have been assigned in different places.
You can check via this feature whether different access rights have been assigned to a user.

5.16.7.4 Automatic Profile Change

The optiClient presence function enables the automation of fast recurring presence profiles changes.



The following options are available for this automation:

IMPORTANT:
So that these options can take effect, optiClient must have been started.

- **Automatic change to the *In the office* profile, if the profile *At Home* or *Break* was activated before**
  XIf this option is active, optiClient will automatically switch to the *XIn the office* profile, if the *Break* or *At Home* profile was previously active.

  Furthermore, the *In the office* profile will automatically be switched to if optiClient registers mouse or keyboard activity on the user PC. This requires optiClient having previously automatically set the *Break* respectively *At Home* profile (see the following option **Change to the *Break* profile between …).**

- **Change to the *Break* profile between <…> <…> and to the *At Home* profile after <…>** If optiClient does not notice any activity at the user computer for a longer period, the presence profiles *Break* and *At Home* will be automatically activated according to the times you have defined.

5.16.7.5 Change-of-Status Notification

IMPORTANT:
A Text-to-Speech-Engine must be installed in the XPR server so that the notification function can be used via a telephone. The languages to be installed for the engine must be precisely those with which users log in at optiClient.

If desired, the presence function can notify you about a user's online status changing from *Offline* to *Online*.

To configure this function, open the menu for the respective contact with the left mouse button in the team bar. Here select the entry **Notify me on the status 'Online'**.

The following settings are available for notifications:

- **Notify me on the status 'Online' of the contact <*Name*> on**
  Defines a phone number under which you will be notified if the respective contact changes to the online status *Online*.
- **By notification window**
  If this option is activated, optiClient uses the notification window of the Notifier Manager to inform you about the new online status *Online* of the respective user.

  IMPORTANT:
  The Notifier Manager must be added to the optiClient configuration so that this function can work properly.

5.17 Web Browser

IMPORTANT:
To use the web browser features, the *Web Browser* user interface module must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

In the Web Browser window you can open previously defined Internet pages. Using standard functions you can also navigate in the browser history. The optiClient web browser thus enables you to access specific, frequently used Internet pages without having to leave optiClient.

You can open the web browser via the **Web Browser > *<desired Internet page>*** entry in the module menu of the main bar. Only those Internet pages will be displayed in the module menu that have been configured for the web browser.

The name that you have assigned to the Internet page when defining it is displayed in the caption bar of the browser window.

- **Back**
  Makes the browser move one step backward in the page history.
- **Forward**
  Makes the browser move one step forward in the page history.
- **Cancel**
  Stops the current Internet page load process.
- **Update**
  Reloads the currently displayed Internet page.

You find further information on configuring the web browser in Section 5.5.5, “Web Browser Settings”, on page 161.

5.18 Web Conferencing

IMPORTANT:
XPR For using web conferencing, optiClient must be operated at an XPR server. Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
For using web conferencing, the optiClient
configuration must have been furnished with the interface modules *Web Conferencing* and *Presence* and with the provider modules *Web Conferencing Provider* and *Server Presence Provider*.
You find further requirements for using these modules in the optiClient administrator manual.

In a web conference, subscribers can reciprocally access the PC desktop of the communication partner. Beyond that, web conferences enable mutually viewing and editing documents or files.

Besides the standard communication between two subscribers it is also possible that more than two subscribers collaborate in a web conference.

A maximum of one web conference can be started in optiClient.

Requirements for using web conferences in optiClient:

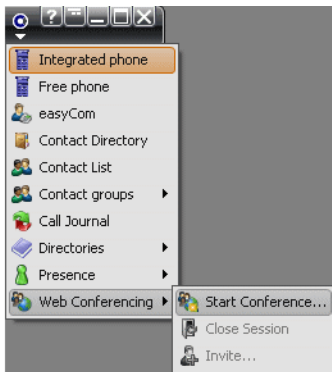
- optiClient must be used at an XPR server
- the Con APL must have been installed in the XPR server
- the Presence APL must have been installed in the XPR server
- the web conference server must have been installed in the XPR server.

5.18.1 Controlling Web Conferences

In optiClient you can manage and control web conferences in two ways:

- Via the menus of the contact respectively teambar
- Via the module menu

You find detailed information of how to operate web conferences via the contact list or team bar in Section 5.14, “Contact List”, on page 251. At this point we will therefore only consider the operation via the module menu.



Web conferences are available in the module menu under the **Web Conferencing** feature. The following options are available:

- **Start Conference…**
  Starts a new web conference on the web conference server of the XPR server.
  You can then use the **Invite** entry to invite single conference members from the optiClient contacts. The **Session Information** option lets you send all required access information to the desired conference members.
  The module menu displays this option only if you have not previously started a web conference.

- **Session Information**
  Opens the **Web Conferences** dialog, which displays the following access information of the started web conference:
  - Conference ID
  - Password
  - URL for downloading the web conference client for non-optiClient users.

  The module menu displays this option only if you have previously started a web conference.

  In the **Web Conferencing** dialog the **Session…** button is available. Via this button you can reach the following features:
  - **Invite**
    Opens a contact list that you can use to invite an optiClient contact for the started web conference
  - **Copy to Clipboard**
    Copies the displayed access information of the started web conference to the clipboard. This enables you to copy the information for manually distributing it among conference members.
  - **Send as EMail**
    Starts the e-mail client of the user PC and opens a new e-mail with the displayed access information of the started web conference. After you have furnished the e-mail with the desired e-mail addresses, you can distribute the information by e-mail.
    To use this function
    - a standard mail client (e.g., Outlook) must have been installed on the user computer
    - the Sendmail Provider must have been added to the provider modules
  - **End conference**
    Ends the started web conference
- **Invite**
  Opens a contact list that you can use to invite an optiClient contact for the started web conference
  This option can only be selected in the module menu if you have previously started a web conference.

5.18.2 Controlling the Web Conference Client

You find a detailed description of how to control a web conference in the *OpenScape Web Collaboration* user manuals. *OpenScape Xpressions* uses this product in the *OpenScape Web Collaboration Embedded* configuration.

5.19 Instant Messaging

IMPORTANT:
For sending and receiving instant messages, optiClient must be operated at an XPR server.
Cf. Section 5.33, “Telephoning at an XPR Server”, on page 351.

IMPORTANT:
For sending and receiving instant messages, the *Presence* user interface module and the *Server Presence Provider* must have been added to the optiClient configuration.
You find further requirements for using these modules in the optiClient administrator manual.

Via instant messages you can fast and discretely contact other optiClient users on text basis. The addressed users must be logged in with their optiClient at the same XPR server like you with your optiClient.

Instant messages are exchanged in the scope of chats in which at least two subscribers take part.

5.19.1 Controlling Chats

You can manage and control chats in three ways:

- Via the menus of the contact respectively teambar
- Via the module menu
- Via the icon on the main bar

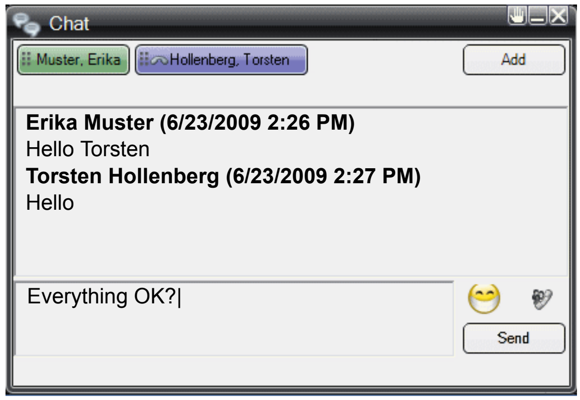
You find detailed information about how to operate the instant-messaging feature via the contact list or team bar in Section 5.14, “Contact List”, on page 251. At this point we will therefore only consider the operation via the module menu.

The instant messaging feature is available in the module menu under the **Presence > My chats** entry. The following options are available:

- **New chat**
  Opens the chat window in which you can start a new chat
- ***<List of existing chats>***
  Displays all chats that you currently conduct. If you select a chat from the list, optiClient puts the associated chat window in the foreground on the user PC.

5.19.2 Chat Window Features

In the optiClient chat window you send and receive instant messages. Furthermore, you administer in this dialog which subscribers take part in the relevant chat.



The chat window features the following display and operating elements:

- ***<Subscriber list>***
  Displays all participants of the relevant chat.
  The subscribers are displayed in a form that resembles the team bar representation and also allows a similar operation
- **Add**
  Opens a dialog via which you can add new participants to the chat
- ***<Text field of the messaging process>***
  Displays all instant messages that you have sent and received in the relevant chat.
  You cannot enter text in this field
- ***<Text field for entering Messages>***
  In this field you enter your instant messages that you want to send to all participating subscribers
- **Insert emoticon** ( )
  Opens a selection of emoticons that you can insert in the current position of the cursor in the message entry field.
- **Insert contact information** ( )
  While you conduct a phone call, this icon lets you insert all available contact information of the relevant conversation partner in the message entry field. This icon is only available during active phone calls.
- **Send**
  Sends the content of the message entry window to all subscribers participating in the chat.

5.20 The Notification Window

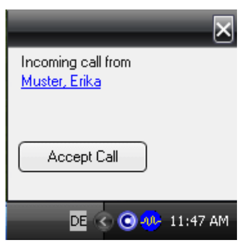
The notification window opens at the bottom right screen margin when calls and instant messages come in and displays information about the inbound connection request.

Besides information about the inbound connection request the notification window also features a button. Its description varies with the type of the inbound connection request and reads:

- **Accept the call**
  if a phone call comes in
- **Start chat**
  if your optiClient receives a new instant message.

When you click on this button optiClient reacts as follows:

- In case of an incoming phone call optiClient accepts the call
- In case of an incoming instant message optiClient opens the chat window for an existing chat respectively a new chat window for a new chat request.



The notification window always opens in the foreground. In this way you are always immediately alerted to new calls and instant messages, even if the optiClient main bar is in the background.

5.21 Operating optiClient with the PC Keyboard

When you operate optiClient with the PC keyboard, the following key combinations apply:

System-wide keys (with every cursor/mouse position) (Cf. Section 5.7.3, “Settings of the Quick Dialer Manager”, on page 207)	
Initiating a phone connection via selected text	Key configurable
Accepting a connection request	Key configurable
Closing the connection	Key configurable

Table 23 System-wide Key Allocations (Quick Dialer Manager)

IMPORTANT:
The hotkey that has been configured for the Quick Dialer must not be used by another application of the user computer that is active at the same time.

IMPORTANT:
If the Quick Dialer is used in a terminal server environment, the following applies: optiClient as well as the application in which the phone number to be dialed is selected must have been published by the terminal server. optiClient of a terminal server cannot dial a phone number selected in a locally executed application.

Cursor/mouse in the optiClient telephone or on the main bar	
Browsing between features	Cursor control keys `left` and `right`
Confirm feature	`Entry key`
Return to the system menu's idle state	`Esc key` (corresponds to )
Dial directly from the clipboard, with conversion of the characters to be dialed determined by the network access. The trunk code is not added.	`Shift key` + `entry key`
Dial directly from the clipboard, with conversion of the characters to be dialed determined by the network access. The trunk code is added.	`Control key` + `v`

Table 24 System-wide Key Allocations (Telephone, Main Bar)

NOTE:
If optiClient is used in a terminal server environment, the following applies:
To dial from the clipboard, optiClient as well as the application from which the

phone number to be dialed has been copied, must have been published by the terminal server. In a terminal server environment optiClient cannot dial a phone number copied from a locally executed application.

In all optiClient windows you can directly dial using the numerical keys and set up a connection respectively browse the service menu using the cursor control keys. The digits dialed or the service menu entries are shown on the telephone's display. Direct dialing is not possible, however, if the cursor is currently in an entry field.

NOTE:
Direct dialing/scrolling through the service menu with the PC keyboard is not possible in the web browser window.

You will find further information on the key operation settings in Section 5.7.3, "Settings of the Quick Dialer Manager", on page 207.

5.22 Dialing Aids

If in another program a phone number is noted to which a connection is to be established in optiClient, you can use the following dial aids:

5.22.1 Dialing with Copy & Paste

NOTE:
If optiClient is used in a terminal server environment, the following applies:
To dial from the clipboard, optiClient as well as the application from which the phone number to be dialed has been copied, must have been published by the terminal server. In a terminal server environment optiClient cannot dial a phone number copied from a locally executed application.

How to initiate a call via copying a phone number:

1. Select the phone number in the foreign program and copy it to the clipboard with the key combination `Ctrl` + `C` or with the menu features provided by the system.
2. Switch to optiClient. Paste the phone number from the clipboard in the telephone display in the following way:
   - Without trunk code: `Shift key` + `entry key`
   - With trunk code: `Control key` + `V`.

The phone number appears in the display, and the connection is set up directly.

5.22.2 Dialing with Drag & Drop

How to initiate a call via “dragging“ a phone number:

1. Select the phone number in the foreign program.
2. Drag the selected number with the mouse into the optiClient telephone display and release the mousebutton.

The phone number appears in the display, and the connection is set up directly.

5.23 Vanity Dialing

When you dial a phone number, optiClient processes not only digits but also letters. optiClient assigns the following digits to selected letters. Whether these letters are upper or lower case is irrelevant here:

Letters	Assigned digit	Letters	Assigned digit
A–C	2	M–O	6
D–F	3	P–S	7
G–I	4	T–V	8
J–L	5	W–Z	9

optiClient supports vanity dialing for all types of dialing a phone number.

5.24 optiClient Screensaver

NOTE:
The optiClient screen saver is not available for the operating system Windows Server 2003.

NOTE:
The optiClient screensaver can only be activated on the user PC when optiClient has also been started.

optiClient comes with a screen saver, which can be activated as the default screensaver for your PC. In this state the following features are available without having to deactivate the active screensaver:

- You can dial a configured speed-dial number.
- You can directly answer and finish an incoming call.

Depending on the optiClient connection status, the following elements are displayed in the active screen saver:

- **Dial**
  If speed-dial numbers have been configured for the screen saver, you can click on **Dial** to open a menu for selecting the phone number to be dialed.

  NOTE:
  optiClient must have been started so that a connection to the speed-dial number can be established

- **Accept call**
  If a call arrives via optiClient and the screensaver is active, the **Accept call** button appears. With this button you can directly accept the call without deactivating the screensaver.
- **Disconnect call**
  Terminates a call conducted while the screensaver is active
- **Close Screensaver**
  Deactivates the screensaver
- **optiClientis started** or **optiClient is not started**
  Defines the optiClient activity status. If optiClient is inactive, you cannot accept incoming calls or establish a connection with the speed-dial number.

You find further information about the optiClient screen saver in Section 5.7.5, “Screensaver Manager Settings”, on page 210.

5.25 Automatic Program Update

IMPORTANT:
During the optiClient setup, different registry values are automatically created and allocated with default entries. When upgrading optiClient, the entries of such registry values are reset to their default values. That means that individual modifications to these registry values are lost after an upgrade.

There are two options to automatically update an installed optiClient version:

- You configure an automatic search feature that searches a defined memory location for optiClient updates in specific intervals.

  An advisory appears if the automatic search feature finds a new program version. In this case, you have three options:

  – You can install the program update immediately

  – You do not install the program update. When you log in next time, an updated program version is searched for again.

  – You do not install the program update. Program update is deactivated.

- You start a manual search for updates by selecting the **Update program** entry in the optiClient menu.

  A new program version found in the course of a manual search is installed following a confirmation prompt.

NOTE:
Only a Windows user with local administration rights can install an update version.

You define the storage location for new program versions and for automatic updating in the program update settings (Section 5.4.6, “Settings for Program Update”, on page 148).

5.26 Online Help

optiClient has an integrated online help. This help is always available in the started optiClient.

- The general online help can be opened via the Help option in the optiClient menu, via the F1 key or via the help icon in the main bar.
- The dialog-sensitive online help can be opened via the help icon of the relevant optiClient dialog or window.

5.27 Program Information

In the program information you find among other things information about the current optiClient program version and about copy rights. You can access this information via the **Product information** menu option from the main bar context menu.

5.28 Telephoning with Lotus Notes Integration

IMPORTANT:
For using the optiClient Lotus Notes integration, the *Lotus Notes Provider* must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

IMPORTANT:
For using the optiClient Lotus Notes integration, a Lotus Notes client must have been installed on the user computer.

IMPORTANT:
The Lotus Notes integration requires adjustments under Lotus Notes. Such adjustments are described in the *OpenScape Xpressions Lotus Notes Gateway* manual.

This section provides information on the following topics:

- Lotus Notes Integration Concept from page 318
- Settings for the Lotus Notes Integration from page 320.

5.28.1 Lotus Notes Integration Concept

The Lotus Notes integration adds the optiClient features to your Lotus Notes client. This enables you - as Lotus Notes user - to use the optiClient features in your usual environment.

By way of the Lotus Notes integration

- you can search Lotus Notes address books for contacts in optiClient
- You can initiate calls in the Lotus Notes client
- optiClient can resolve phone numbers and names on the basis of Lotus Notes address books

Let's have a look at these features in detail.

5.28.1.1 Searching Lotus Notes Address Books for Contacts

If you have Lotus Notes address books configured in the Lotus Notes provider, you can search such address books for contacts. This search option is available to you in the module menu under **Directories – <Search*Lotus Notes Address book*>** .

5.28.1.2 Initiating a Call in the Lotus Notes Client

If optiClient is integrated in your Lotus Notes client, you can initiate calls from within several Lotus Notes elements. Therefore the phone number information of the respectively selected Lotus Notes element is transferred to optiClient. Afterwards, a connection to the respective phone number is established in optiClient.

A call can be initiated from the following Lotus Notes elements:

- a contact from a private or global Lotus Notes address book
  In this case all phone number information included in the selected contact are transferred to optiClient. If several phone numbers are available, you need to dial one of these phone numbers to establish a connection.
- An e-mail

To initiate a call in the Lotus Notes client, select the desired Lotus Notes element. For the actual call initiation you have the following options only:

- The **Dial** entry in the Lotus Notes **Actions** menu
- The optiClient icon in the Lotus Notes client toolbar

NOTE:
The **Dial** menu entry and the optiClient icon in the toolbar are always displayed in the Lotus Notes client. They work, though, exclusively in such Lotus Notes databases configured in the Lotus Notes provider.

As soon as you have initiated the desired call, the optiClient user interface is put in the foreground. Here you can control the connection as usual.

5.28.1.3 Phone Number and Name Resolution via Lotus Notes Address Books

With the Lotus Notes integration, optiClient can also resolve phone numbers and names on the basis of Lotus Notes address books.

optiClient resolves phone numbers and names in the background. The following Lotus Notes address books are supported at this:

- Private Lotus Notes address books
- Global Lotus Notes address books

5.28.2 Settings for the Lotus Notes Integration

To edit the Lotus Notes integration settings, select on the tab **Provider Modules: Lotus Notes Provider**

NOTE:
Configuring the Lotus Notes provider requires various Lotus Notes-specific details. You can obtain such specifications from the administrator of your Lotus Notes system.

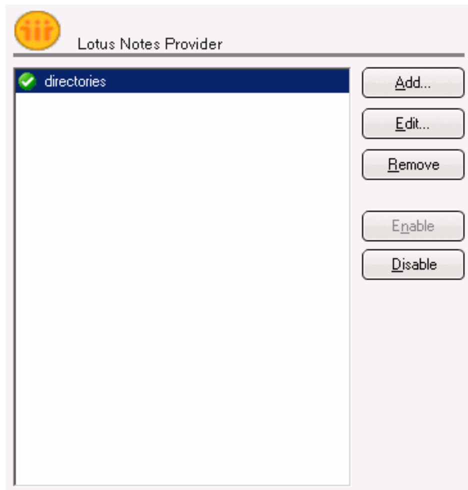
You can edit settings for the following areas:

- Databases
- Authentication.

5.28.2.1 Databases

To integrate Lotus Notes you need to perform settings in the Lotus Notes provider. There you specify the Lotus Notes databases you would like to use for the Lotus Notes integration.

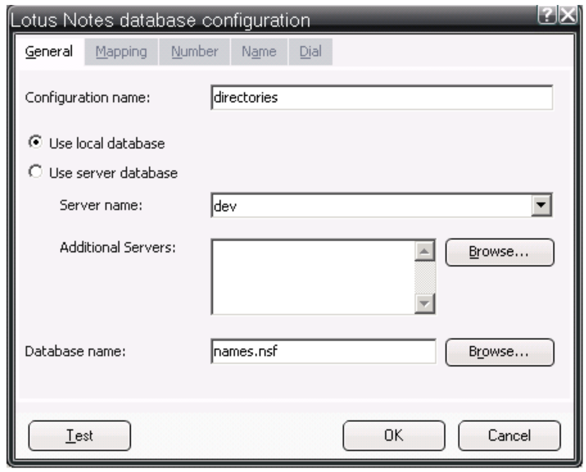
To indicate such Lotus Notes databases, select in the **Settings** dialog under the tab **Provider Modules: Lotus Notes Provider – Databases**.



For specifying the Lotus Notes databases, the following options are available:

- ***<Database list>***
  Lists all databases configured in the Lotus Notes Provider.
- **Edit …**
  Opens the **Lotus Notes database configuration** dialog (see **Add**). In this dialog you can edit settings for the database that you have selected in the database list.
- **Remove**
  Deletes the selected Lotus Notes database from the database list.
- **Enable**
  Activates the Lotus Notes database that is selected in the database list
- **Disable**
  Deactivates the Lotus Notes database that is selected in the database list

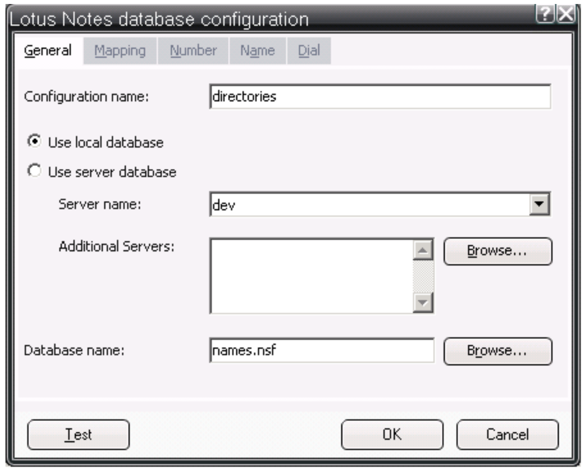
- **Add ...**
  Opens the **Lotus Notes database configuration** dialog. Here you can specify the settings for a Lotus Notes database to be used in the Lotus Notes provider.

  The settings are divided among the following tabs:

  - **General settings**
  - **Assignment**
  - **Phone number**
  - **Name**
  - **Dialing.**

General settings



The general settings of a Lotus Notes database comprise:

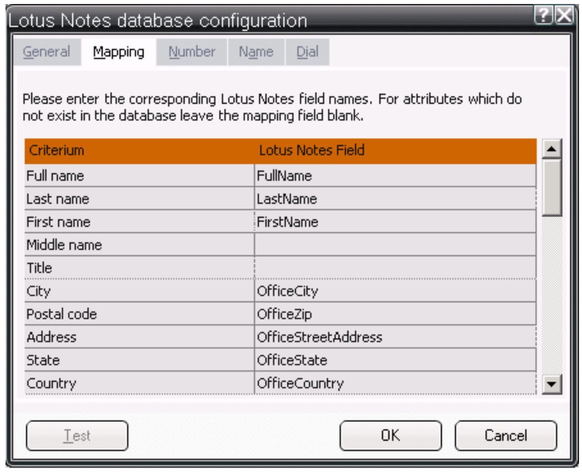
- **Configuration name**
  Defines the name under which optiClient manages the relevant database entry in the database list. This name is independent from the database name under Lotus Notes.
- **Use local database**
  Select this option to configure a local database for the Lotus Notes integration.
- **Use server database**
  Select this option to configure a server database for the Lotus Notes integration.

- **Server name**
  Defines the name of the Lotus Domino server on which the desired server database is available. The field provides a list to select an available server. If you want to configure a server name that is not contained in the list, you can directly enter it in the text field.

NOTE:
This field is only evaluated when the **Use server database** option has been selected.

- **Additional Server**
  If the desired database is also provided by other Lotus Domino servers, you can specify such servers here. This setting may be useful, for example, for a Lotus Notes cluster.
- **Database name**
  Defines the name under which the desired database is available on the server or on the user computer.
  If you do not know the name of the database, you can open a search dialog via the associated **Browse…** button. In this dialog you can then look for available databases.
- **Test**
  Starts the check as to whether a connection to the defined database can be established.

Assignment



So that the information of a Lotus Notes database can be correctly processed by optiClient, the attributes of the Lotus Notes database must be assigned to the corresponding directory fields (criteria) of optiClient. You perform this assignment on the **Mapping** tab.

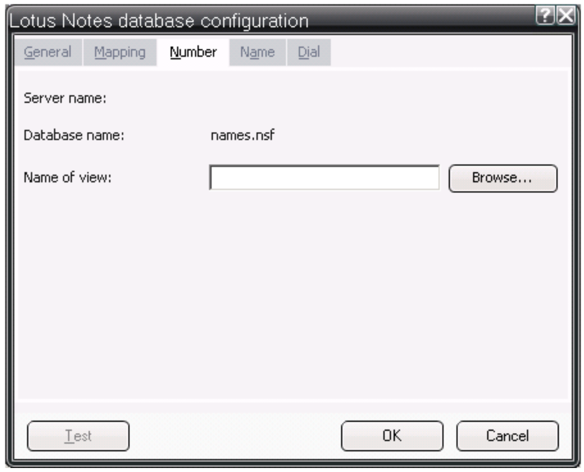
If a new database is created, the preset assignment corresponds to the default assignment.

- **Criterion**
  Displays the criteria available in optiClient.
- **Lotus Notes Field**
  In this column you can assign the Lotus Notes database attributes to the different optiClient criteria.

NOTE:
In the **Lotus Notes Field** column you can also define more complex links between database fields. This is useful, for example, when the phone numbers in a database are divided among several database fields.

- **Test**
  Starts the check as to whether the attributes specified in the mapping exist in the documents of the defined database.
  For this purpose, optiClient searches the defined database and checks the first Lotus Notes document found therein that is based on the view displayed in the test dialog and on the form probably specified. If the specified attributes are contained in this document, the test is successfully terminated. If the mapping holds attributes that do not exist in the checked document, the test points to this discrepancy. Such a message is not necessarily a hint at an error though, since optiClient always only checks the first document found.

Phone number



The **Call number** tab contains settings for the resolution of phone numbers into names via the relevant database:

- **Server name**
  Displays the server name that you have defined on the **General** tab. No server name is displayed here when a local database is configured.

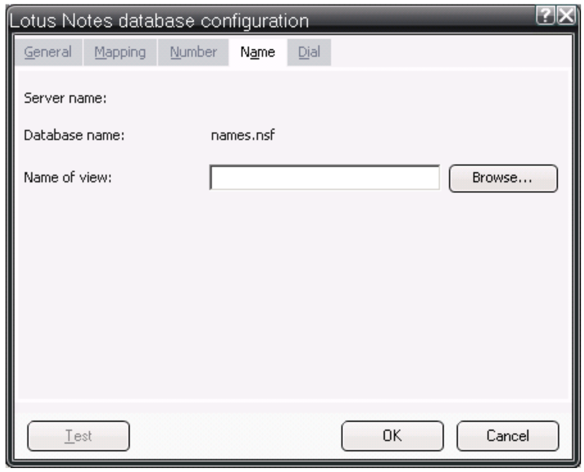
- **Database name**
  Displays the database name that you have defined on the **General** tab.

- **View name**
  Defines the view used by optiClient for accessing the relevant database if a phone number is to be resolved into a name. If you do e.g. not know the name of the desired view, you can open a search dialog via the associated **Browse…** button. In this dialog you can then look for available views. Default selection is the `($CyUsers)` view, but this view must previously have been added manually to the selected address book.

  NOTE:
  If you want to enter the view's name into the text field via keyboard, you need to use the view's alias.

- **Test**
  Starts the check as to whether the specified view exists in the defined database.

Name



The **Name** tab contains settings for searching the relevant databases for contacts and for resolving names into phone numbers:

- **Server name**
  Displays the server name that you have defined on the **General** tab. No server name is displayed here when a local database is configured.

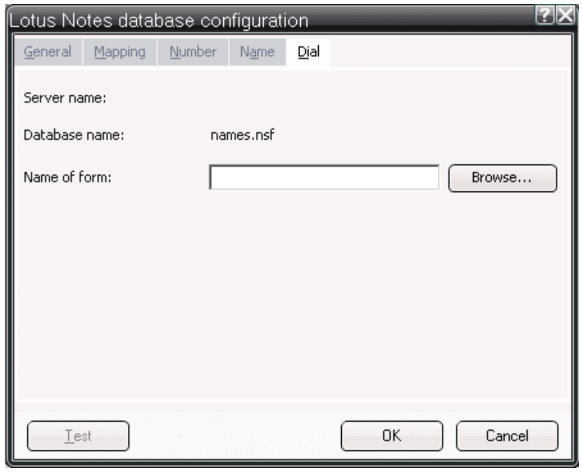
- **Database name**
  Displays the database name that you have defined on the **General** tab.

- **View name**
  Defines the view used by optiClient for accessing the relevant database, when you look for a contact or a name is to be resolved into a phone number. If you do e.g. not know the name of the desired view, you can open a search dialog via the associated **Browse…** button. In this dialog you can then look for available views.
  Standard is here the `($Users)` view, which Lotus Notes already provides by default.

> ***NOTE:***
> If you want to enter the view's name into the text field via keyboard, you need to use the view's alias.

- **Test**
  Starts the check as to whether the specified view exists in the defined database.

Dialing



The **Dialing** tab contains settings for dialing from within a database:

- **Server name**
  Displays the server name that you have defined on the **General** tab. No server name is displayed here when a local database is configured.

- **Database name**
  Displays the database name that you have defined on the **General** tab.

- **Form name**
  This name serves for finding the correct assignment of database fields in optiClient for a database under Lotus Notes.

  NOTE:
  If you initiate a call from a Lotus Notes database, the configuration of the Lotus Notes integration is searched for a database that has the same form name as the database from which you are dialing. If such a database exists in the configuration, the associated assignment of the database fields is used for finding the dial information in the database. If there is no database configured in the Lotus Notes integration with the form sought-after, the dial process fails.

  If you do not know the name of the desired form, you can open a search dialog via the associated **Browse…** button. In this dialog you can then look for available views.

  IMPORTANT:
  If you want to enter the form's name into the text field via keyboard, you need to use the form's alias.

  – Address book forms

  - For a database based on the *pernames.ntf* template, select the `Contact` form. In most cases, this applies to local address books.
  - For a database based on the *pubnames.ntf* template, select the `Person` form. In most cases, this applies to server address books.

– Forms for mail database
Each e-mail displayed in your Lotus Notes client is based on a defined form. If you want to dial with optiClient from an e-mail of your Lotus Notes client, you need to specify this form when configuring the relevant Lotus Notes mail database in the Lotus Notes provider.
Since different e-mails in a mail database may be based on different forms, you may have to specify several forms for a mail database to be able to select from all e-mails. For this purpose, you need to create several database entries and configure one of the required forms for each of these entries.

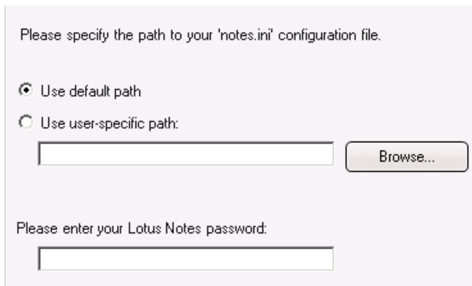
Example:
In your mail database are standard e-mails based on the default form `Memo`. Furthermore, the mail database contains journal mails of the XPR server. Such journal mails are based on the `CyMemo` form.
So that you can dial on the basis of the standard e-mails as well as on the basis of the journal mails, you need to configure two database entries with the same mail database but different entries in the **Database name** field in the Lotus Notes provider. For one of these entries you configure the form `Memo`, for the other one the form `CyMemo`.

- **Test**
Starts the check as to whether the specified form exists in the defined database.

5.28.2.2 Authentication

The communication between optiClient and Lotus Notes client requires the storage location of the `notes.ini` configuration file and the password for accessing the Lotus Domino server.

To perform such settings, select in the **Settings** dialog under the tab **Provider-Module: Lotus Notes Provider – Authentication**



For the definition of a storage location, the following options are available:

- **Use default path**
  If this option is activated, optiClient expects the `notes.ini` configuration file to be stored in its default directory.
  If the `notes.ini` file is not stored in the default directory, the individual directory path must be specified under the **Use user-specific path** option.

- **Use user-specific path**
  If the `notes.ini` file is not stored in the default directory, the individual path under which the configuration file is stored must be specified here.

- **Please enter your Lotus Notes password**
  Enter here your Lotus Notes password for accessing the Lotus Domino server.

5.29 Telephoning with Outlook Integration

IMPORTANT:
For using the optiClient Outlook integration, the *SQLite Provider* must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

IMPORTANT:
For using the optiClient Outlook integration, an Outlook client must have been installed on the user computer.

IMPORTANT:
The Outlook integration of optiClient must not be used in combination with the Microsoft Outlook Add-In CryptoEx Outlook Version 3.0.

This section provides information on the following topics:

5.29.1 Outlook Integration Concept

The Outlook integration adds optiClient features to your Outlook client. This enables you - as Outlook user - to use the optiClient features in your usual environment.

With the extensions of the Outlook integration in your Outlook client:

- you can search Outlook contact information for contacts in optiClient
- you can initiate a call in the Outlook client
- optiClient can resolve phone numbers and contact names on the basis of your Outlook address books.

Let's have a look at these features in detail.

5.29.1.1 Searching Outlook Contact Information for Contacts

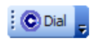
To access the information in Outlook contact folders, optiClient uses the SQLite Provider.

The SQLite Provider is installed along with the Outlook integration. In this process it is automatically preconfigured for accessing the information in Outlook contact folders. The module menu enables you to look for Outlook contact information under **Directories – <Search *Outlook Directory*>**.

5.29.1.2 Dialing from the Outlook Client

If optiClient is integrated in your Outlook client, you can initiate calls from different Outlook elements. Therefore the phone number information of the respectively selected Outlook element is transferred to optiClient. Afterwards, a connection to the respective phone number is established in optiClient.

After the installation you see the icon for *OpenScape Xpressions optiClient* in the Outlook toolbar.



Via this button you can:

- Invoke the application *OpenScape Xpressions optiClient*.
  This allows using the CTI client with all its features.
- Initiate a phone call via any journal entry in Outlook.
  In detail:
  - Return call to the originator of any message.
  - Call to any contact entered in Outlook.

  Simply select the corresponding journal entry and click on the icon for *OpenScape Xpressions optiClient*. The call is immediately initiated.

A call can be initiated from the following Outlook elements:

- a local or public contact folder
  In this case all phone number information included in the selected contact are transferred to optiClient. If several phone numbers are available, you have to dial one of these phone numbers to automatically establish a connection in optiClient.
  If no phone number information is available for the selected contact, the connection setup for the selected Outlook element fails.
- an e-mail
  In this case the Outlook client browses all available Outlook address books for the originator name of the respective e-mail. Phone numbers that can be assigned to the originator this way are then transferred to optiClient. If this transfer includes several phone numbers, you have to dial one of these phone numbers to automatically establish a connection.
  If Outlook cannot find any phone number information for the originator of the selected e-mail, the e-mail's originator name is transferred to optiClient. If optiClient can resolve this name, the connection is automatically established on the basis of the phone number thus determined. Otherwise the connection setup for the selected Outlook element fails.
  If the e-mail is an XPR server journal mail, a connection is established to the phone number contained in the journal mail as originator number.

- a task
  You can compare the establishment of a call from within a task with the process described under e-mail (see above)
- an appointment
  You can compare the establishment of a call from within an appointment with the process described under e-mail (see above)

To initiate a call in the Outlook client, select the desired Outlook element in the main window or open the relevant Outlook element. Then push the **Dial** button in the Outlook-integration toolbar of the Outlook client. This brings the optiClient interface to the front. Here you can control the connection as usual.

NOTE:
If you cannot see the toolbar with the **Dial** button in the Outlook client, add the **CTI Toolbar** to the Outlook client toolbar.

The toolbar with the **Dial** button is inserted by the Outlook integration in the following Outlook windows:

- The Outlook client main program window
- The window of an opened contact
- The window of an opened e-mail

  NOTE:
  The **Dial** button is under Outlook 2003 also displayed in the window of a newly created mail. It does not serve a purpose at this point.

- The window of an opened task
- The window of an opened appointment.

5.29.1.3 Phone Number Resolution via Outlook Address Books

NOTE:
To resolve a phone number via the Outlook Extensions, the Outlook client must have been started on the user PC.

The Outlook integration also enables phone number and contact name resolution in optiClient on the basis of Outlook address books. To this, optiClient supports the phone number and name resolution on the basis of the following address books:

- Private Outlook address book
- Global Outlook address books

IMPORTANT:
Each optiClient user may access a total of 5 public Outlook address books for resolving phone numbers and names. Each of these address books may contain a maximum of 1000 contact entries.
This access limitation must be implemented via appropriate read privileges in the relevant Exchange configuration.

IMPORTANT:
If the phone number and name resolution via global address books is active, optiClient accesses the local SQLight database, which contains information about Outlook contacts. This access may take some time, especially in case of large databases.
Consequently, phone number and name resolution in optiClient may be protracted.

5.29.2 Settings for the Outlook Integration

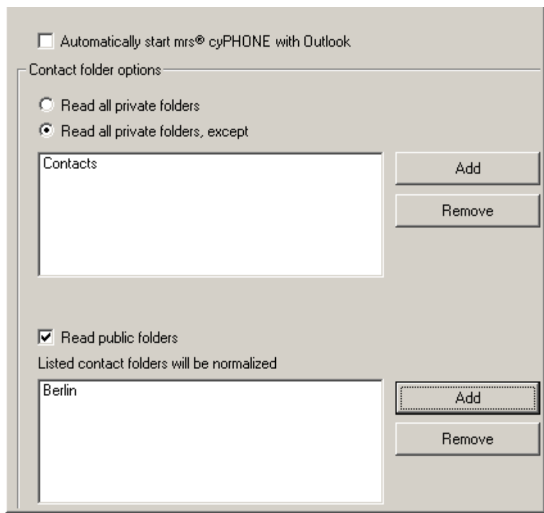
The Outlook integration settings can be divided into two areas:

- Settings in the Outlook Client
- Settings for the SQLite Provider.

Let's have a look at the settings in detail.

5.29.2.1 Settings in the Outlook Client

In the Outlook client settings you define which Outlook contact information is to be accessed in optiClient. To edit the Outlook client settings, select in the client's main menu **Tools > Options > XPR optiClient.**



The following options are available for the Outlook client settings:

- **Automatically start XPR optiClient with Outlook**
  When this option is active, optiClient starts automatically with the Outlook client
- **Read all private folders**
  When this option is active, the contact data of all private Outlook contact folders of the relevant user are read and copied to SQLite database of optiClient. In optiClient the relevant user can then access all contact data stored in all of his/her contact folders.
- **Read all private folders, except**
  When this option is active, the contact data of selected private Outlook contact folders of the relevant user are read and copied to SQLite database of optiClient. In optiClient the relevant user can then access the contact data

of the relevant contact folders.
The **Add** and **Remove** buttons let you define the desired private Outlook contact folders

- **Read public folders**
  When this option is active, the contact data of selected public Outlook contact folders are copied to the SQLite database of optiClient. In optiClient the relevant user can then access the contact data of the relevant contact folders.
  The **Add** and **Remove** buttons let you define the desired public Outlook contact folders

---

NOTE:
Livelink folders are ignored by the Outlook integration by default. This setting can be changed via the registry value **NoIgnoreLivelinkFolder**.

5.29.2.2 Settings for the SQLite Provider

To access the information in Outlook contact folders, optiClient uses the SQLite Provider. It is automatically installed with the Outlook integration and preconfigured for accessing the information in Outlook contact folders.

NOTE:
So that the SQLite Provider can access Outlook contact folders, the Outlook client and then optiClient must be started after the optiClient installation.

5.30 Telephoning with Sametime Integration

IMPORTANT:
For using the optiClient Sametime integration, the *SQLite Provider* must have been added to the optiClient configuration.
You find further requirements for using this module in the optiClient administrator manual.

IMPORTANT:
For using the optiClient Sametime integration, a Sametime client must have been installed and started on the user computer.

This section provides information on the following topics:

5.30.1 Sametime Integration Concept

The Sametime integration adds optiClient features to your Sametime client. This enables you - as Sametime user - to use the optiClient features in your usual environment.

With the extensions of the Sametime integration in your Sametime client:

- you can search the information of the Sametime contact list for contacts in optiClient
- you can initiate a call in the Sametime client
- optiClient can resolve phone numbers and contact names on the basis of your Sametime contact list.

Let's have a look at these features in detail.

5.30.1.1 Searching the Sametime Contact List for Contacts

To access the information in the Sametime contact list, optiClient uses the SQLite Provider.

The SQLite Provider is installed along with the Sametime integration. In this process it is automatically preconfigured for accessing the information in the Sametime contact list. The module menu enables you to look for Sametime contact information under **Directories – <Search *Sametime Directory*>**.

5.30.1.2 Dialing from the Sametime Client

If optiClient is integrated in your Sametime client, you can initiate calls from the Sametime contact list. Therefore the phone number information of the respectively selected contact is transferred to optiClient. Afterwards, a connection to the respective phone number is established in optiClient.

To initiate a call in the Sametime client, select the desired contact in the Sametime contact list. Then push the **Dial** button in the Sametime integration toolbar of the Sametime client. This brings the optiClient interface to the front. Here you can control the connection as usual.

5.30.1.3 Phone Number Resolution via the Sametime Contact List

The Sametime integration also enables optiClient to resolve phone numbers and contact names on the basis of the Sametime contact list.

5.30.2 Settings for the Sametime Integration

To access the information in the Sametime contact list, optiClient uses the SQLite Provider. It is automatically installed with the Sametime integration and preconfigured for accessing the information in the Sametime contact list.

NOTE:
So that the SQLite Provider can access the Sametime contact list, the Sametime client and then optiClient must be started after the optiClient installation.

5.31 *OpenScape Click-to-Dial Browser Plug-in*

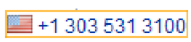
The *OpenScape Click-to-Dial Browser Plug-in* is a program that allows dialing a phone number from your web browser.

5.31.1 General Considerations

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

- *Internet Explorer* integration
  provides the call functionality in *Microsoft Internet Explorer*.
- *Mozilla Firefox* integration
  enables calling by mouseclick from your *Mozilla Firefox* web browser.

5.31.2 Operation

After the *optiClient Click-to-Dial Browser Plug-in* setup, phone numbers are converted into a new HTML structure, which consists of the following elements


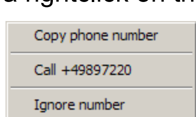
- an icon that represents the flag of the country the country code of which has been identified (country flag icon)
- a phone number represented as hyperlink, which is dialed by mouseclick.

5.31.2.1 Initiating a Call

Click on the phone number represented as link in the website.

- If you have configured the correct URL for the *Web Client* during the plug-in installation, the connection to the *Web Client* is set up.
- If optiClient is installed on the system and started, it is used to initiate the call.

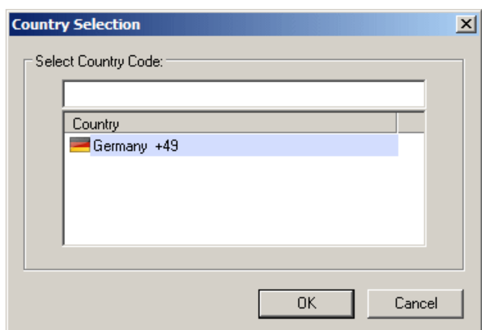
5.31.2.2 The Context Menu

You reach the context menu of the *OpenScape Click-to-Dial Browser Plug-in* with a rightclick on the country flag icon. It contains the following options:


- **Copy phone number**
  This feature copies the linked phone number to the clipboard.
- **Call <*phone number*>**
  This feature initiates the connection setup with the linked phone number.
- **Ignore number**
  This feature adds the linked phone number to the black list of phone numbers.

NOTE: The context menu of the *OpenScape Click-to-Dial Browser Plug-in* for the *Internet Explorer* contains also the web browser default features: **Undo**, **Cut**, **Copy**, **Paste**, **Delete**, **Select All** in addition to the above ones.

5.31.2.3 The Country Selection Dialog



You open this dialog with a click on the country flag icon that precedes the phone number represented as link on the website. To configure another country, click in the entry field and enter the first letter of the desired country. A list of all countries the names of which begin with the entered letter is displayed. Select the desired country and click on **OK**. The country icon is updated according to the modification.

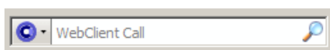
5.31.2.4 Call Entry in the Web Browser Search Engine List

By way of the call entry **Web Client Call** (*Mozilla Firefox*) in the web browser's search engine list, the *OpenScape Click-to-Dial browser plug-in* enables using your web browser as normal telephone, i.e. you can call any phone number from your web browser any time.

NOTE: *Microsoft Internet Explorer 6.0* does not support this functionality. In case of *Microsoft Internet Explorer 8.0* and *Mozilla Firefox* the call entry is also automatically added to the context menu of a selected phone number as option - **Search with Web Client Call <*phone number*>**.

NOTE: You find the web browser search engine list in the web browser's top right area.

Representation of the call entry



Mozilla Firefox   Microsoft Internet Explorer 8.0

You only need to enter the number to be called in the **Web Client Call** field and push the **return key** (**enter**). The desired connection is set up via the *OpenScape Web Client*.

NOTE: Using this feature requires the correct configuration of the *OpenScape Web Client* host URL during the plug-in installation. This option is otherwise not installed or displayed in the web browser's search engine.

5.32 Telephoning with an MS-CRM Integration

NOTE:
The installation of the MS-CRM integration is detailed in the XPR manual *optiClient & MS Dynamics CRM*.

IMPORTANT:
So that the MS-CRM integration can be used in optiClient, a corresponding license is required in the connected XPR server. You can obtain more detailed information on this from your sales partner.

This section provides information on the following topics:

5.32.1 Features of the MS-CRM Integration

The MS-CRM integration incorporates optiClient in a Microsoft Dynamics CRM system (MS-CRM system).

It provides the user with the following features:

- Dialing from the MS-CRM Interface
- MS-CRM Workflow
- Entity Search in MS-CRM
- Phone Number Resolution via MS-CRM.

5.32.2 Dialing from the MS-CRM Interface

With the MS-CRM integration, optiClient users may set up telephone connections from within their MS-CRM interface. The user establishes such a telephone connection via a dial button, which is offered in the following windows of the MS-CRM interface.

- Contact lists
- Account lists
- Opened contacts
- Opened accounts
- Opened call activities
- Opened addresses
- Opened campaigns.

When the user enables the dial button, the database fields that may contain phone numbers are evaluated for the selected entity[1]. All phone numbers determined in this way are then transferred to optiClient.

The phone connection is immediately set up after the phone number transfer if only one phone number is sent to optiClient. If several phone numbers are transferred to optiClient at the same time, the user may first see all available phone numbers in a selection dialog. In this case, the phone connection is not established until the user has selected the number to which optiClient is to set up the connection.

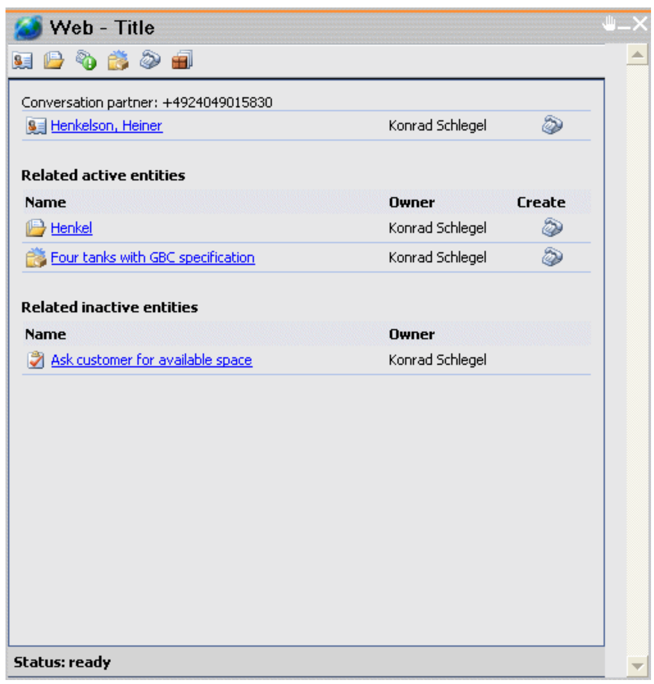
1. In a CRM system the term entity describes a data object to be uniquely determined and to which information is assigned. For example, a contact or an account.

5.32.3 MS-CRM Workflow

NOTE:
The MS-CRM workflow is always represented in optiClient in the language in which the MS-CRM server is installed.

NOTE:
To display the MS-CRM workflow in optiClient, the Internet Explorer must be present on the user PC.

The MS-CRM workflow shows a compilation of different MS-CRM context information assigned to a phone connection in optiClient. Such context information comprises, for example, contacts or accounts.



The representation of MS-CRM information is divided into the following sections:

- Conversation partner
- Related active entities
- Related inactive entities

If you select the  icon next to the displayed MS-CRM information, the mask for a new phone call in Microsoft Dynamics CRM opens. The fields in this mask are already allocated with call-related information.

The MS-CRM workflow provides in the toolbar the following additional features:

Icon	Meaning
	Creates a new contact.
	Creates a new account.
	Creates a new lead.
	Creates a new selling opportunity.
	Creates a new phone call.
	Creates a new request.

Table 25 Icons in the MS-CRM Workflow Toolbar

You find continuative information about these features in the producer documentation for Microsoft Dynamics CRM.

5.32.4 Entity Search in MS-CRM

With the MS-CRM integration optiClient users can look for entities in the MS-CRM server information. Found entities can be copied to the contact directory respectively contact list of optiClient.

NOTE:
The entity search is exclusively performed via the customer data of the MS-CRM server. Data of MS-CRM users are not considered for the entity search.

5.32.5 Phone Number Resolution via MS-CRM

With MS CRM integration, optiClient can resolve phone numbers in names based on the dataset of the MS CRM server; for example, when a new call arrives in optiClient. This requires at least one entity to be available in the MS-CRM server that the MS-CRM integration can assign to the phone number to be resolved.

The MS-CRM integration uses a fuzzy search algorithm for the phone number resolution. This search algorithm ensures that entities can be found for a phone number even if an individual extension of a phone connection does not exist in the data of the MS-CRM server, but the associated central connection with the extension 0.

The search algorithm will consecutively cut off single digits of the phone number searched for as long as the search is without success, and attach digit 0 to the shortened phone number. Subsequently, the search for this modified phone number starts anew.

Example:
A call with phone number +49 2404 901-123 arrives in optiClient. The phone number is to be resolved via the MS-CRM integration.
The dataset of the MS-CRM server does not include an entity that contains the phone number to be resolved. There is solely an entity with the phone number +49 2404 901-0 – the associated central connection. This entity is to be found in the scope of phone number resolution for the incoming call.

The fuzzy search algorithm operates as follows:

1. The search algorithm looks for the original phone number **+49 2404 901-123.** This phone number is not available in the dataset of the MS-CRM server. Consequently, the search fails.
2. The search algorithm cuts off the last digit of the phone number and replaces it with 0.
3. The search algorithm now looks for the phone number **+49 2404 901-120.** This phone number is not available in the dataset of the MS-CRM server either. The search fails again.
4. The search algorithm cuts off another digit of the phone number and replaces all cut digits with a 0 altogether.
5. The search algorithm now looks for the phone number **+49 2404 901-10.** This phone number is not available in the dataset of the MS-CRM server either. The search fails again.
6. The search algorithm cuts off another digit of the phone number and replaces all cut digits with a 0 altogether.
7. The search algorithm now looks for the phone number **+49 2404 901-0.** This phone number is available in the dataset of the MS-CRM server. The phone number resolution delivers the desired entity.

NOTE: The installation of the MS-CRM integration is described in the *OpenScape Xpressions optiClient and MS Dynamics* manual.

5.33 Telephoning at an XPR Server

This section provides information on the following topics:

5.33.1 Requirements in the XPR Server

To use optiClient on an XPR server,

- the XPR server must be fully operable
- the PBX must be connected to the XPR server via a CTI connection. This requires the CTI APL being installed and correctly configured in the XPR server.
- a functional TCP/IP connection must exist between the XPR server TCP APL and optiClient.

Beyond that, please note:

- If you want to use the presence feature in optiClient, the Presence APL must have been installed on the XPR server.
- If you want to stage web conferences in optiClient, the Presence APL, the Con APL and the web conference server must have been installed on the XPR server.
- If you want to use instant messaging in optiClient, the Presence APL must be installed in the XPR server.

5.33.2 Settings of the Server Connection Provider

NOTE: To be able to connect optiClient successfully to the XPR server, a user profile for logging in at the XPR server must be configured in the MSP of the user PC.

The Server Connection Provider enables the basic connection of optiClient to an XPR server. For this purpose it uses the MRS Service Provider (MSP), which is automatically installed on the user PC during the optiClient installation.

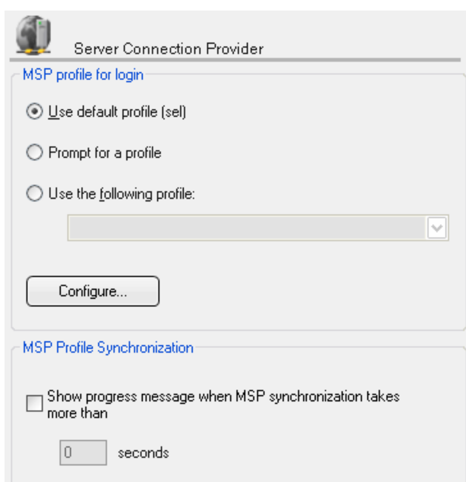
To determine the Server Connection Provider settings, select on the tab **Provider Modules: Server Connection Provider**

You can configure the following settings for the Stimulus Provider:

- Settings for the MSP Profile
- Normalization Settings/Phone Number Localization

5.33.2.1 Settings for the MSP Profile

For determining the MSP profile settings, select in the **Settings** dialog on the tab **Provider Modules: Server Connection Provider – MSP Profile**.



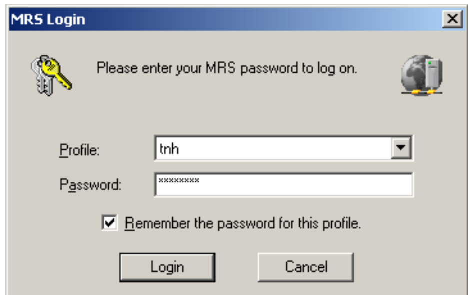
For setting the MSP profile the following options are available:

- **Use default profile (<*profile name*>)**
  Defines that for connecting the XPR server the default profile defined in the MSP is used. During the optiClient start you will then not be prompted to specify another profile for establishing a connection to the XPR server[1].

---

1. The MSP login dialog may open for querying the profile password.

- **Prompt for a profile**
Defines that the MSP profile to be used is queried at connecting the XPR server. In the course of the connection establishment the user is prompted to specify the profile and the associated password in the following form.



  – **Profile**
  Defines the MSP profile used by the Server Connection Provider for logging in at the XPR server

  – **Password**
  Enter here your password to log in at the XPR server

  – **Remember the password for this profile**
  If this option is activated, the **Password** field is automatically allocated with the password last used at the following XPR server logins

  – **Login**
  Starts logging in with the profile and password specified

- **Use the following profile**
Defines an MSP profile used for connecting the XPR server. During the optiClient start you will then not be prompted to specify another profile for establishing a connection to the XPR server[1].

- **Configure…**
Opens the MSP configuration dialog. There you can create a new MSP profile or edit an existing one.

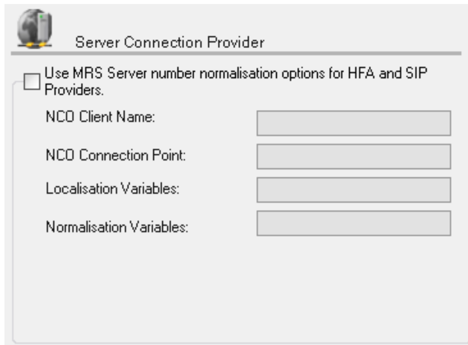
- **Show progress message when MSP synchronization takes more than <xx> seconds**
If synchronization with the XPR server during the program start takes longer than specified, a window opens that displays the synchronization progress.

For more detailed information about the MSP, please refer to the *Server Administration* manual.

1. The MSP login dialog may open for querying the profile password.

5.33.2.2 Normalization Settings/Phone Number Localization

To configure the NCO-based normalization/localization of phone numbers, select in the **Settings** dialog on the tab **Provider Modules: Server Connection Provider – Number Normalization**



For setting the phone number normalization the following options are available:

- **NCO Client Name**
  Defines the NCO client that optiClient uses for normalizing phone numbers in the NCO framework of the XPR server. The value **CtiApl** is configured here by default.

- **NCO Connection Point**
  Defines the NCO connection point that optiClient uses for normalizing phone numbers in the NCO framework of the XPR server.

- **Localisation Variables**
  Defines the variables that optiClient transfers to the NCO framework of the XPR server for localization. Configured is here by default:
  AddExternalPrefix=true;UseTypeInternational=false;UseTypeInternationalForInternal=false

- **Normalisation Variables**
  Defines the variables that optiClient transfers to the NCO framework of the XPR server for normalization. Configured is here by default:
  CallingNumberNoExtPrefix=false

5.33.3 Settings of the Server CTI Provider

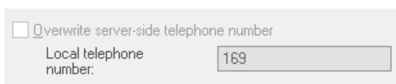
IMPORTANT:
The Server Connection Provider must be installed as well so that the Server CTI Provider function can be used.

IMPORTANT:
So that an XPR user can log on to the XPR server via the CTI provider, the **CTI Journal** option must be active for the user in the XPR user database.

The Server CTI Provider enables the CTI connection between optiClient and the XPR server. Consequently, you can operate your desktop device also using the different optiClient components (contact list, easyCom communication circle etc.).

Settings for the CTI Options

To configure the CTI options for the Server CTI Provider, select in the **Settings** dialog on the tab **Provider Modules: Server CTI Provider – CTI Options**.



The Server CTI Provider settings comprise the following options:

- **Override server-side telephone number**
  Defines whether the telephone number configured in the XPR server should not be used for the logged-in user.

  NOTE:
  To configure this setting, the logged-in user must have the **Supervisor** or **Advanced USER** privilege in the XPR server

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- **Local telephone number**
  Defines the deviating phone number if the **Override server-side telephone number** option has been activated.

5.33.4 Settings of the Server Directory Provider

IMPORTANT:
In order to use the Server Directory Provider function, the Server Connection Provider must be installed as well.

The Server Directory Provider enables integrating the XPR user database as directory in optiClient. In this way user information can be accessed in optiClient that is centrally maintained in the XPR server.

The Server Directory Provider does not require any settings.

5.33.5 Settings of the Server Presence Provider

IMPORTANT:
The Server Connection Provider must be installed as well so that the Server Presence Provider function can be used,.

If optiClient is operated at an XPR server, statuses can be displayed in optiClient for single addresses. The Server Presence Provider is used for this purpose.

The Server Directory Provider does not require any settings.

5.33.6 Settings of the IPC Provider (Named Pipes)

IMPORTANT:
The Server Connection Provider must be installed as well so that the IPC Provider function can be used,.

If optiClient is used with a Lotus Notes, Outlook of Sametime integration, it is possible to integrate the dialing function of optiClient into the respectively existing client environment. The IPC Provider (Named Pipes) is used for the communication between optiClient and the respective client.

The IPC Provider (Named Pipes) does not require any settings.

5.33.7 Settings of the Server Call Journal Provider

IMPORTANT:
In order to use the Server Call Journal Provider function, the Server Connection Provider must be installed as well.

NOTE:
You can only edit the Call Journal Provider settings with a started optiClient. Then select the **Settings …** entry from the optiClient menu.

The Server Call Journal Provider enables connecting the call journal to the XPR server. You can thus transmit the XPR server journal information to the call journal.

The Server Call Journal Provider is also to be used to control which journal mails are created by the XPR server. This requires the XPR server to be connected to an Exchange or Domino server.

Settings for journal mails

In the Server Call Journal Provider you can determine for which call types the XPR server used is to create journal mails. This requires the XPR server to be connected to an Exchange or Domino server.

The defined settings are transferred to the XPR server and control its behavior in this way.

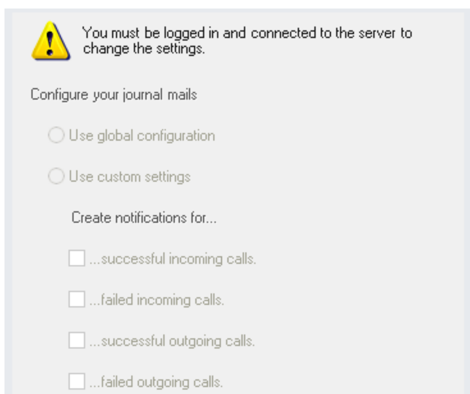
To change journal mail settings the administrator needs to share respectively activate the CTI notification settings for configuration in the following place:

- **XPR server at an Exchange server**
  in the global CTI settings of the Exchange APL and/or in user settings of the Active Directory (extended CTI settings on the **XPR Settings** tab).
  Cf. the *OpenScape Xpressions – Microsoft Exchange Gateway* manual.

- **XPR server at a Domino server**
  in the user-individual person document of the Domino server.
  Cf. the *OpenScape Xpressions – Lotus Notes Gateway* manual.

NOTE: The journal mails sent by the XPR server to an Outlook or Lotus Notes client are stored in the inbox of the respective client. Automatic journal mail sorting is not supported by optiClient.
If required, a user can configure such a sorting by means of the Outlook or Lotus Notes e-mail filters.

To configure the desired notifications, select in the **Settings** dialog on the tab **Provider Modules: Server Call Journal Provider – Journal mails**.



The Call Journal Provider settings comprise the following options:

- **Use global configuration**
  If this option is activated, the existing XPR server settings are used for the creation of journal mails.

- **Use custom settings**
  If this option is activated, journal mails can be created for the following individual call types:

  – Successful incoming calls

  – Failed incoming calls

  – Successful outgoing calls

  – Failed outgoing calls

5.33.8 Stimulus Provider Settings

The Stimulus Provider is always required with connecting an XPR server. It is used to control the indications in the optiClient telephone display.

To determine the license server settings select on the tab **Provider Modules: Stimulus Provider**

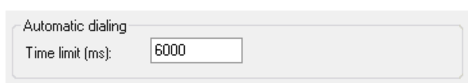
You can configure the following settings for the Stimulus Provider:

- General Settings
- Display

5.33.8.1 General Settings

NOTE:
To edit the general settings in the settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

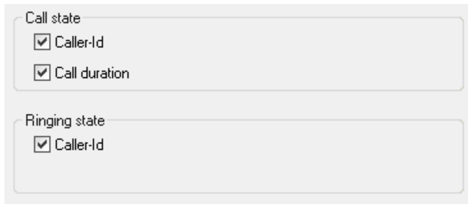
To configure the general Stimulus Provider settings, select on the tab **Provider Modules: Stimulus Provider – General**



After a waiting period optiClient can automatically initiate the connection setup after you have entered a phone number in the easyCom or telephone. You specify this waiting period in the **Time limit** field. Enter value **0** to deactivate the automatic connection setup.

5.33.8.2 Display

To configure the representation of information in the display, select on the tab **Provider Modules: Stimulus Provider – Display**.



- **Caller-Id** (Call state)
  Defines whether the respective caller-ID appears in the telephone display during active connections
- **Call duration**
  Defines whether the current call duration is shown in the telephone display during active connections
- **Caller-Id** (Ringing state)
  Defines whether the caller-ID appears in the telephone display at connection requests.

5.33.9 XPR Server Telephony Features

When optiClient is connected to an XPR server, the available telephony functions are defaulted by the CTI Provider. Which telephony functions are provided depends on the following availabilities and settings:

- The telephony functions supported by the PBX used
- The device features configured in the XPR server CTI APL for the PBX used.

NOTE:
If you use optiClient at an XPR server to control the Twin-Device of an Alcatel PBX, the following applies:
optiClient always only accesses that of the two telephones that is entered as primary device in the XPR database field PHONE for the relevant XPR user.

You find continuative information about telephony features at an XPR server in the documentation for the communication system used and in the *OpenScape Xpressions Server Administration* manual.

5.33.10 XPR Server Forwarding Menu

When optiClient is connected to an XPR server, the forwarding types offered in the forwarding menu are defaulted by the CTI Provider. Which forwarding types are provided depends on the following availabilities and settings:

- The forwarding types supported by the PBX used
- The forwarding types configured in the XPR server CTI APL for the PBX used.

For further information on this, please refer to the documentation of the communication system used and to the *OpenScape Xpressions Server Administration* manual.

If forwardings are configured, activated or deactivated at the desktop telephone, the XPR server CTI APL automatically transfers this information to the optiClient CTI Provider. Consequently, those forwardings will also be displayed in the optiClient forwarding menu in their current state.

5.34 Telephoning at an SIP Communication System

IMPORTANT:
If optiClient is to be used as SIP-based softphone, you need to have the corresponding SIP licenses, which are administered in a license server (HLM server) . Your sales partner will provide further information.

IMPORTANT:
If optiClient is to communicate as SIP softphone via a VPN connection, the QoS packet planner **must not** be installed under the Windows operating system.

IMPORTANT:
optiClient must not be used as SIP softphone in a terminal server environment

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This section contains information on the following topics:

- SIP Functional Provider Settings
- Settings for the Stimulus Provider
- Telephony Features (SIP).

5.34.1 SIP Functional Provider Settings

NOTE:
To edit the SIP Functional Provider settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

In the SIP Functional Provider you perform settings to use optiClient as softphone at an SIP communication system.

To edit the SIP Functional Provider settings select on the tab **Provider Modules: SIP Functional Provider**.

You can configure the following settings for the SIP Functional Provider:

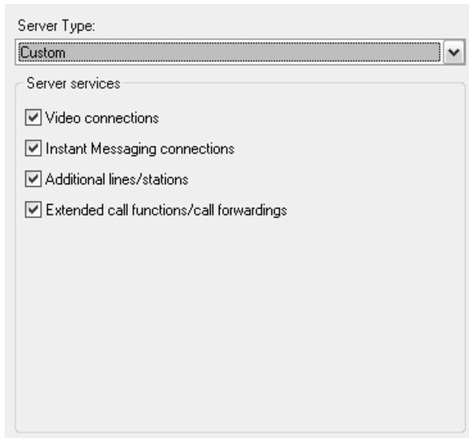
- System Services
- Connection
- Main Line
- Additional Lines
- Line Parameters
- Stations (DSS)
- Registrar
- Proxy

- Outbound Domain
- Fallback System
- Network Access
- Address Conversion
- Additional Functions
- System Functions
- Codes
- Sounds
- Audio Schemes
- Video Schemes
- Bandwidth
- Port Restrictions
- Quality of Service (QoS)
- Licensing.

NOTE:
To edit the settings for the SIP Functional Provider in the settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

5.34.1.1 System Services

To set the server type optiClient is connected to, select on the tab **Provider Modules: SIP Functional Provider – System services**.

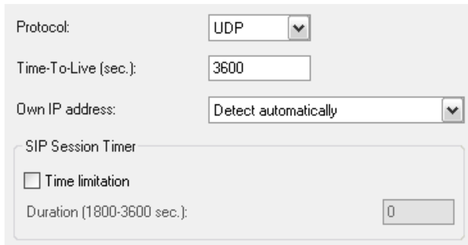


- When you select the server type you determine the number of supported features. The following options are available:
  - **HP8000/HQ4200 with Instant messaging**
    Select this server type when optiClient is connected to OpenScape Voice /HiQ4200 and configured as default subscriber with instant messaging support.
  - **HP8000/HQ4200 with Additional Lines/Stations**
    Select this server type when optiClient is connected to OpenScape Voice /HiQ4200 and configured as keyset.

- **HiPath 2000/3000/4000/5000**
  Select this server type when optiClient is connected to one of these servers.
- **Default without Video/Instant Messaging**
  Select this server type when optiClient is connected to any SIP server based on SIP protocol. The video and instant messaging functionality is not supported here.
- **Custom**
  If you select this server type you can individually activate the support of the following features of the connected communication system (if available there):
  - **Instant Messaging connections**
    Enables connections to exchange instant messages.
  - **Additional lines/stations**
    Provides the Lines module window.
  - **Extended call functions/call forwardings**
    Provides extended features and functionalities such as transfer.

5.34.1.2 Connection

To set the optiClient connections for the connected SIP communication system, select on the tab **Provider Modules: SIP Functional Provider – Connection**.

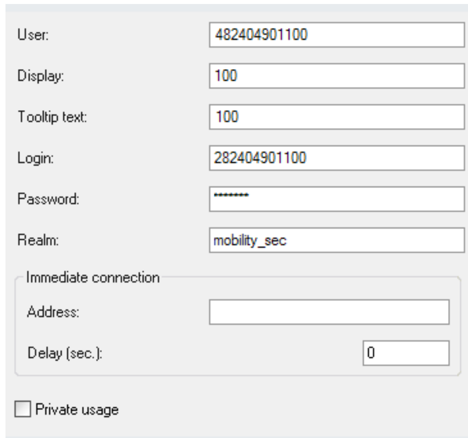


- In the **Protocol** field select the transport type of the transmission protocol. You can select **UDP**, **TCP** and **TLS**.
- **Time-To-Live (sec.)** defines a UDP-specific timer. This value should only be modified by a network administrator.
- For the IP connection of optiClient, the **Own IP address** must be known. If optiClient is connected to a network card to which a unique IP address has been assigned, select the setting **Specify automatically** here. If several IP addresses have been assigned to the network card or the registrar is not directly available (for example via ACME/Session Border Controller), all addressed will be listed and you can make a selection.
- Under **SIP Session Timer** you control with the **Time limitation** option whether active SIP connections are checked for validity by means of the heartbeat procedure. You specify the **Duration** of the timer in seconds, the values range between **1800** and **3600. 0** means that the timer is switched off.

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.3 Main Line

To set the parameters for the optiClient main line (primary line), select on the tab **Provider Modules: SIP Functional Provider – Main line**.



- Enter the individual unique phone number/user address of optiClient in the **User** field.
- Enter a long name in the **Display** field. This text will be shown in the display of the free respectively integrated phone in idle state and also transmitted as name information to your connection partners. Furthermore, this text will be used as description for the primary line in the line window respectively line menu.
- The **Tooltip text** appears when the mousepointer rests on the main connection line in the line window.
- Enter the **Login**. Also enter the **Password** and the **Realm** , if they are configured on the server. These specifications are required for registration at the server.
- An **Immediate connection** can be configured for the main line. The **Address** stored is selected after the **Delay (sec.)** set on line activation. With **0** in the **Delay (sec.)** field this immediate connection is set up without delay.
- With the **Private usage** option you declare the line private. In other words, when you use this line, other stations with a secondary line do not receive any status change messages on your phone number/user address.

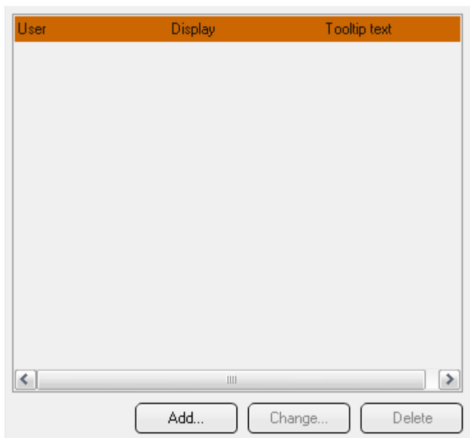
NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.4 Additional Lines

In optiClient you conduct your connections via lines. Each user has at least one line (main line) assigned to him/her and mainly used by him/her. If supported by the connected SIP communication system, users may deploy further configured lines or share them with other users.

Which lines are generally available is specified on the connected SIP communication system.

To define which additional lines are generally configured in optiClient for the user, select on the tab **Provider Modules: SIP Functional Provider – Additional lines**.



- The list displays the additional, already configured lines. You can add further lines, change settings or delete lines.
- To edit the settings of an existing line, select the relevant line and click on **Change**.
- To delete an existing line, select the relevant line and click on **Delete**.

- To configure a new line select **Add**.

  – Under **User** enter the phone number/user address of the SIP user.
  – Enter the individual unique phone number/user address of optiClient in the **User** field.
  – Enter a long name in the **Display** field. This text will be shown in the display of the free respectively integrated phone in idle state and also transmitted as name information to your connection partners. Furthermore, this text will be used as description for the primary line in the line window respectively line menu.
  – The tooltip text appears when the mousepointer rests on the connection line in the line window.

– Enter the **Login**. Also enter the **Password** and the **Realm** , if they are configured on the server. These specifications are required for registration at the server.

– An **Immediate connection** can be configured for the main line. The **Address** stored is selected after the **Delay (sec.)** set on line activation. With **0** in the **Delay (sec.)** field this immediate connection is set up without delay.

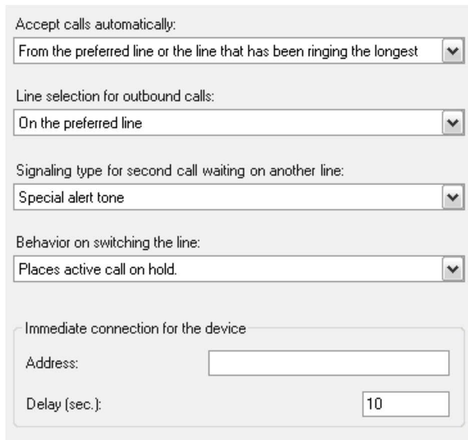
– With the **Private usage** option you declare this line private, i.e. when you deploy this line, other users with a secondary line will not receive status change messages on this phone number/user address.

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

The main line as well as all additional lines configured here are offered for usage in the main bar line menu. In contrast, in the line window you can only see and edit the lines that were selected for this purpose (cf. Device State Settings).

5.34.1.5 Line Parameters

To set general line parameters that are valid for all lines in optiClient, select on the tab **Provider Modules: SIP Functional Provider – Line parameters**.



- Under **Accept calls automatically** you specify the criteria according to which incoming connections can be accepted with the handset, the headset icon or the icon on which line. You can select from these settings:
  - **From the preferred line or the line that has been ringing the longest**
  - **From the line that has been ringing the longest**
  - **From the preferred line or the line that was called the longest**
  - **From the line that was called the longest**
  - **Only from the preferred line for incoming calls**

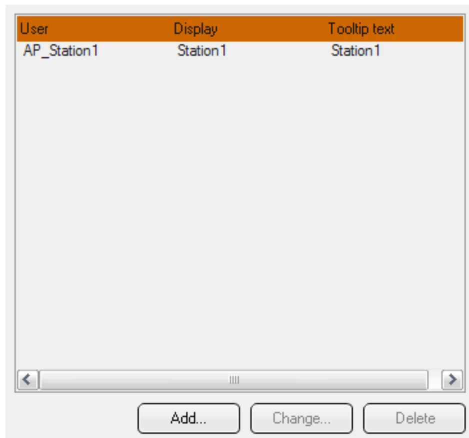
- Under **Line selection for outbound calls** you specify the criteria according to which outgoing connections are allocated with handset, the headset icon or the icon . You can select from these settings:
  - **On the preferred line**
  - **On the next free line**
    (lines always considered from first to last)
  - **On the last line used**
  - **No automatic line seizure**
- Under **Signaling type for second call waiting on another line** you specify whether and how the optiClient is to signal incoming connection requests when you already conduct an active connection and another connection request arrives on another line. You can choose from:
  - **Special alert tone**
  - **Normal alert tone**
  - **No Alert tone**
- Under **Behavior on switching the line** you specify what happens to an active connection in the optiClient if you accept another connection request:
  - **Places active call on hold**
  - **Ends (disconnects) the active call**
- Under **Immediate connection for the device** you specify the **Delay** in seconds after which an automatic connection is set up to the **Address** independently from the line-related settings for the immediate connection. **0** seconds means an immediate connection without delay.

  In case of configuring a device-specific and a line-specific immediate connection the values that have the lower delay will be considered.

5.34.1.6 Stations (DSS)

Which stations are generally available is specified on the connected SIP communication system.

To determine which stations of these are configured in optiClient for the user, select on the tab **Provider Modules: SIP Functional Provider – Stations (DSS)**.



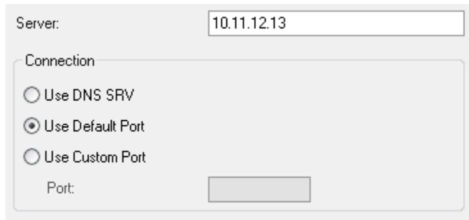
- The list displays the already configured stations. You can add further stations, change settings or delete stations.
- To edit the settings of an existing station, select the relevant station and click on **Change**.
- To delete an existing station, select the relevant station and click on **Delete**.

- To configure a new station select **Add**.
  - Under **User** enter the phone number/user address of the SIP user.
  - Enter a long name in the **Display** field. This text will be shown in the display of the free respectively integrated phone in idle state and also transmitted as name information to your connection partners. Furthermore, this text will be used as description for the primary line in the line window respectively line menu.
  - The **Tooltip text** appears when the mousepointer rests on a station entry.
  - Enter the **Login**. Also enter the **Realm** , if it is configured on the server. These specifications are required for registration at the server.
  - An **Immediate connection** can be configured for the main line. The **Address** stored is selected after the **Delay (sec.)** set on line activation. With **0** in the **Delay (sec.)** field this immediate connection is set up without delay.
  - With the **Private usage** option you declare the station private, i.e. when you deploy station, other users will not receive status change messages on your phone number/user address.

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.7 Registrar

To determine the SIP registrar server settings, select on the tab **Provider Modules: SIP Functional Provider – Registrar**.

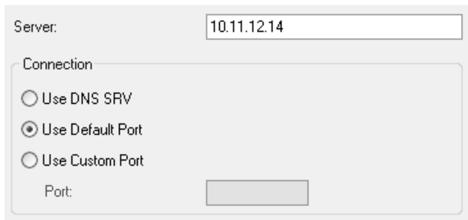


- Under **Server** enter the IP address or the server name of the registrar server.
- Under **Connection** specify the port number for the server connection:
  - If the **Use DNS SRV** option is active, the registrar settings are searched for via a DNS service. In this case enter the domain name of the registrar server under **Server**.
  - The **Use Default Port** option is preset for connecting the registrar server (depending on the transport type selected). If you select **Use Custom Port**, you need to enter the individual port number under **Port**.

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.8 Proxy

To determine the SIP proxy server settings, select on the tab **Provider Modules: SIP Functional Provider – Proxy**.

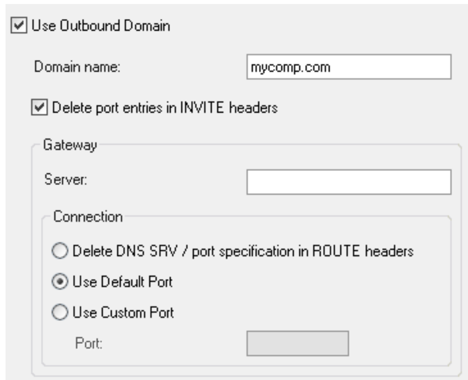


- Under **Server** enter the IP address or the server name of the proxy server.
- Under **Connection** specify the port number for the server connection:
  - If the **Use DNS SRV** option is active, the proxy settings are searched for via a DNS service. In this case enter the domain name of the proxy server under **Server**.
  - The **Use Default Port** option is preset for connecting the proxy server (depending on the transport type selected). If you select **Use Custom Port**, you need to enter the individual port number under **Port**.

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.9 Outbound Domain

To determine the settings for the outbound domain and SIP gateway server, select on the tab **Provider Modules: SIP Functional Provider – Outbound Domain**.



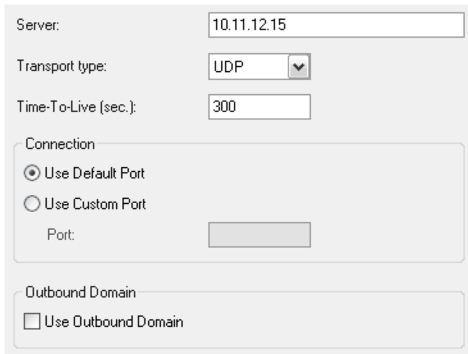
- Activate the **Use Outbound Domain** option, if you do not select complete SIP-URIs but want to conduct outbound calls. You can only enter data in the additional fields if this option is active. Enter the default domain name for outbound connections under **Domain name** (optional). With the **Delete port entries in INVITE headers** option you remove the ports from the INVITE headers for the domain name entered. This is required, for example, for ACME/Session Border Controller configurations.
- Enter the IP address or the name of the gateway server in the **Server** field under **Gateway**. Under **Connection** specify the port number for the server connection:
  - If the **Delete DNS SRV/port specification in ROUTE headers** option is active the gateway settings can be searched for via a DNS service. In this case enter the domain name of the gateway server under **Server**. Alternatively, the ports can be removed from the route header. This is required, for example, for ACME/Session Border Controller configurations. Enter the IP address of the gateway under **Server** for this purpose.
  - You can select the **Use Default Port** option for the connection to the gateway server (depending on the transport type), or choose **Use Custom Port**, in which case you need to specify the individual port number under **Port**.

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.10 Fallback System

If optiClient is being operated at an SIP communication system with a fallback system, then optiClient will be switched over automatically to the fallback communication system if the main communication system fails.

To determine the fallback system settings, select on the tab **Provider Modules: SIP Functional Provider – Fallback system**.



- Under **Server** enter the IP address or the server name of the fallback system.
- In the **Transport type** field select the transport type of the transmission protocol. You can select **UDP, TCP** and **TLS**.
- **Time-To-Live** is an SIP-specific time definition. Do not change the default value.
- Under **Connection** specify the port number for the server connection. You can select the **Use Default Port** option for the connection to the proxy server (depending on the transport type), or choose **Use Custom Port**, in which case you need to specify the individual port number under **Port**.
- Activate the **Use Outbound Domain** option under **Outbound Domain**, if you do not select complete SIP-URIs but want to conduct outbound calls. If this option is active, the configured outbound domain name is used for outbound connections (cf. Outbound Domain).

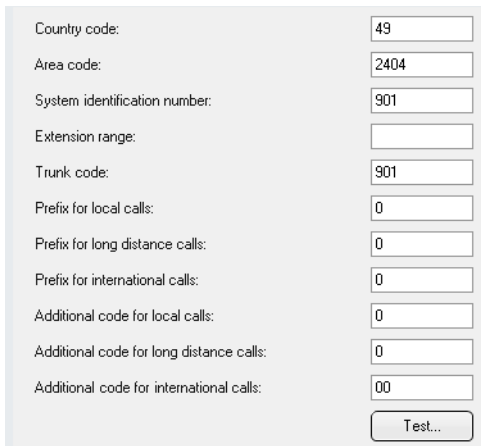
NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.11 Network Access

Phone number normalization in optiClient requires network access specifications. These specifications are taken from the optiClient directories for the direct connection establishment. If these settings are not configured properly, you may encounter problems when setting up connections.

You find more information about phone number normalization in the optiClient administrator manual.

To determine the network access settings, select on the tab **Provider Modules: SIP Functional Provider – Network access**.



- Under **Country code** enter the code for the country that hosts the communication system used.
  If the communication system is e.g. in Germany, specify *49* as country code.

- Under **Area code** enter the code for the area that hosts the communication system used. Do not specify the leading zero here.
  If the communication system is e.g. in Munich, specify *89* as area code.
- Under **System identification number** enter the phone number for the outside line of the communication system. This specification serves for identifying internal phone numbers in directories that only set up internal connections when selected.
- You can restrict the internal extensions of a larger extension range under **Extension range**.

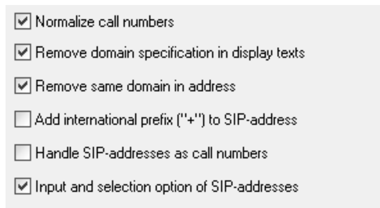
  Example:
  A four-digit extension range is used for a location. Of the possible extensions of this range only those are internal that begin with 1, 2 or 3, though.
  In such a case the usual optiClient phone number normalization would e.g. also consider the extension 5287 internal. An erroneous evaluation, since this extension does not begin with 1, 2 or 3.
  To evade this problem, enter the first digits of the extensions considered internal in square brackets in the **Extension range** field. In our example this is **[123]**.
- Under **Trunk code** enter the external prefix configured on the communication system used
- Under **Prefix for local calls, Prefix for long distance calls** and **Prefix for international calls** enter the respective code for the relevant type of call. These specifications are independent from the configuration on the communication system used and are determined by the network operator. The example shows the prefix numbers for network operators in Germany. Prefixes may differ for network operators in other countries.
- Under **Additional code for local calls, Additional code for long distance calls** and **Additional code for international calls** you enter further codes to be used as call-by-call codes. These specifications are independent from the configuration of the provider used.
- Via **Test** you can try individual examples to see how the configured settings influence the phone numbers that optiClient dials.

The sequence of the various codes is:

- Trunk code + Additional code + Prefix + Call number

5.34.1.12 Address Conversion

To determine the address conversion settings, select on the tab **Provider Modules: SIP Functional Provider – Address conversion**.

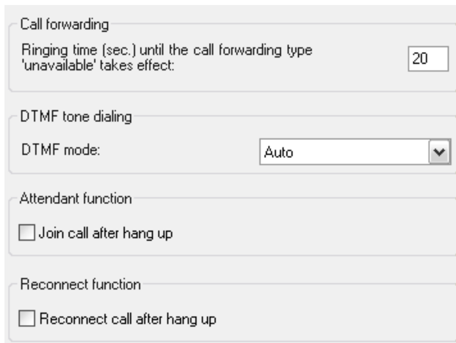


- Activate the **Normalize call numbers** option, if optiClient is to perform a phone number normalization considering the specifications from the network access settings (cf. Network Access).
- Activate the **Remove domain specifications in display texts** option to remove the domain port of an SIP-URI to be indicated, for example, showing the calling subscriber on the display.
- Activate the **Remove same domain in address** option to remove the domain port in the case of SIOP-URIs from the same/own registrar in addresses.

5.34.1.13 Additional Functions

IMPORTANT:
The offered additional functions may not be supported by every SIP communication system.

To determine special additional functions, select on the tab **Provider Modules: SIP Functional Provider – Additional functions**.

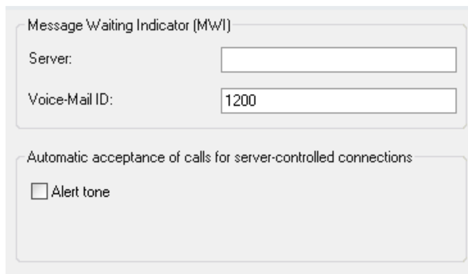


- Under **Call forwarding** you specify the **Ringing time (sec.) until the call forwarding type "not accessible" takes effect**.
- Under **DTMF mode** you can select the setting **Auto** or **Inband**. You can obtain more detailed specifications from the administrator of the connected communication system.
- Under **Attendant function** the **Join call after hang up** option controls the behavior of two active connections (conference) when you "hang up". If the option is active, the two connection partners are then joined together. In case of this option being disabled, both connections are closed.

5.34.1.14 System Functions

IMPORTANT:
The offered system functions may not be supported by every SIP communication system.

To determine the system function settings, select on the tab **Provider Modules: SIP Functional Provider – System functions**.



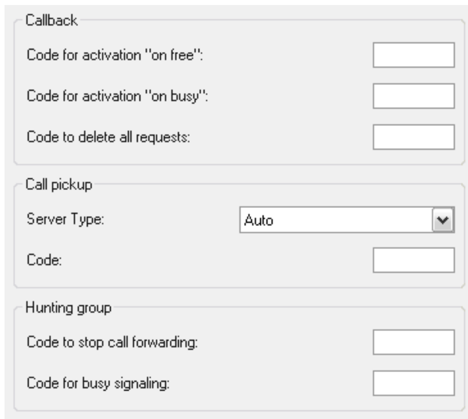
- Under **Message Waiting Indicator (MWI)** you enter the IP address for the MWI **Server** as well as for the **VoiceMail ID**.

  For the MWI notification to work you normally need to leave the **Server** field empty. Enter under **VoiceMail ID** the phone number for the callback access of the voicemail system. You can obtain the required specifications from the administrator of the connected communication system.

- optiClient can be directly controlled from the call manager. When you activate the **Alert tone** option under **Automatic acceptance of calls for server-controlled connections** , you will hear a signal tone as soon as optiClient automatically accepts such a call.

5.34.1.15 Codes

To determine the codes for different telephony features, select on the tab **Provider Modules: SIP Functional Provider – Codes**.



- You can specify the following codes for the **Callback** telephony feature:
  - **Code for activation "on free"**
  - **Code for activation "on busy"**
  - **Code to delete all requests**
- You can specify the following parameters for the **Call pickup** telephony feature:
  - **Server Type**
  - **Code**
- You can specify the following codes for the **Hunting group** telephony feature:
  - **Code to stop call forwarding**
  - **Code for busy signaling**

NOTE:
You can obtain the required specifications from the administrator of the SIP communication system.

5.34.1.16 Sounds

The tone signaling for ring tones, busy signals, etc., differ from one country to another.

To determine the tone settings, select on the tab **Provider Modules: SIP Functional Provider – Sounds**.

- In the **Tone scheme** combo box, select the country for which the default tones are to be used in optiClient. Besides the individual countries, you can also select the option **International Market**.
- With the **Music on hold** option activate/deactivate music on hold for held/consultation calls.
- If the option **Alert tone for calls on hold** is active, an acoustic signal reminds you about calls that are on hold, so that you are aware that a connection partner is waiting.

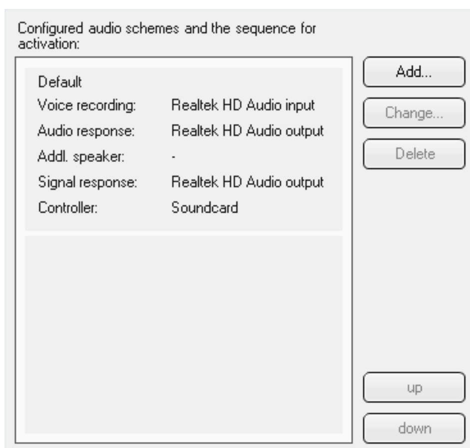
5.34.1.17 Audio Schemes

NOTE:
Various audio devices are supported for operation at optiClient. You find a list of such devices in the optiClient administrator manual.

For conducting calls at your workstation you need audio devices to hear signals (ring tones), to be able to talk or to be able to hear connection partners.

The hardware settings are compiled in audio schemes. You can add, modify or delete different video schemes. This simplifies administering different audio versions (for example, at different hardware) and selecting the respectively appropriate scheme for operation.

To determine the settings for audio schemes, select on the tab **Provider Modules: SIP Functional Provider – Audio schemes**.



Selecting an audio scheme

- To select an audio scheme for operation, pick the one you want from the audio schemes list.

Adding an audio scheme

- After a click on **Add** enter the **Description** of the audio scheme and specify the respective audio hardware for:
  - **Voice recording**
  - **Audio response**
  - **Additional speaker**
    If an additional speaker is selected here and this audio scheme is active, an individual icon for controlling the additional speaker appears in the main bar.

    NOTE:
    The hardware for the **additional speaker** must be different from the **audio response** hardware.

  - **Signal response** (ring tone)
  - **Controller**
    Additional features for controlling special hardware features

  Audio components of a scheme that are currently locally unavailable are represented in brackets. The entire audio scheme is then considered unavailable. The next available audio scheme may then be used.

Modifying or deleting an audio scheme

- After a click on **Change** you can edit the settings of the selected audio scheme and via **Delete** you can remove the selected audio scheme.

Sequence of the audio schemes

You can use the audio scheme sequence to influence the respective selection of the audio hardware. After the user log-in, optiClient checks the audio hardware specified in the audio schemes and processes the schemes one after the other from top to bottom. If all components set for a scheme are available and ready for operation, this scheme is used for operating optiClient.

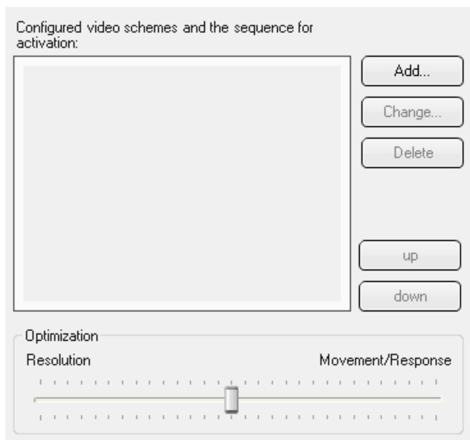
You can change the audio scheme sequence with the **up** and **down** buttons.

5.34.1.18 Video Schemes

NOTE: The video viewer has not been released for optiClient.

For sending video signals from your workstation you need video hardware – for example, a video camera. The settings for the video hardware used are compiled in video schemes. You can add, modify or delete different video schemes. In this way you can easily administer different video hardware and select the appropriate scheme for the desired operation.

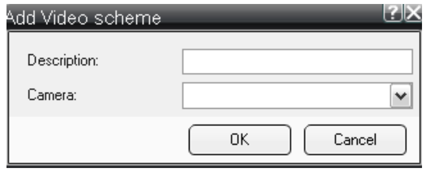
To determine the settings for video schemes, select on the tab **Provider Modules: SIP Functional Provider – Video schemes**.



Selecting a video scheme

- To select a video scheme for operation, pick the one you want from the video schemes list.

Adding a video scheme



- Enter the **Description** of the video scheme after a click on **Add**.
- In the **Camera** list field select the camera that is to take the picture for video connections of optiClient.
- After activation of this scheme an individual icon appears in the main bar for controlling video picture transmission.

  Video components of a scheme that are currently locally unavailable are represented in brackets. The entire video scheme is then considered unavailable. The next available video scheme may then be used.

Modifying or deleting a video scheme

- After a click on **Change** you can edit the settings for the selected video scheme. Click on **Delete** to remove the selected video scheme.

Sequence of the video schemes

You can use the video scheme sequence to influence the respective selection of the video hardware. After the user log-in, optiClient checks the video hardware specified in the video schemes and processes the schemes one after the other from top to bottom. If all components set for a scheme are available and ready for operation, this scheme is used for operating optiClient.

You can change the video scheme sequence with the **up** and **down** buttons.

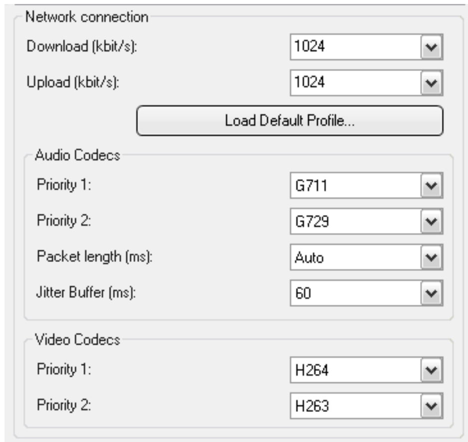
Optimizing the video connection

To optimize the video transmission you can use the slider to set a higher resolution or a higher image frequency. Each unit on the slider represents a video frame per second. Based on the slider position and the configured connection bandwidth, optiClient will then negotiate the optimum video codec with the connection partners.

5.34.1.19 Bandwidth

Defined compression algorithms are used for the audio and video communication between optiClient and the SIP communication system.

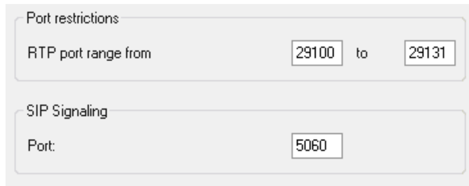
To determine the bandwidth and codecs settings, select on the tab **Provider Modules: SIP Functional Provider – Bandwidth**.



- Under **Network connection** you select the speeds available in your facility for the **Download** respectively **Upload**. With the **Load Default Profile** button you open a window in which several profiles (tariffs) are listed. You can select your tariff/ profile there. The associated speeds for **Download** respectively **Upload** will then be allocated, but can subsequently be modified.
- In the **Priority 1** and **Priority 2** fields under **Audio Codecs** you specify the desired sequence of the codecs to be used for the voice connection. Under **Packet length** you select **Auto** or the desired setting in milliseconds.
- In the **Priority 1** and **Priority 2** fields under **Video Codecs** you specify the desired sequence of the codecs to be used for the video connection.
- Under **Jitter Buffer** you define the jitter buffer in milliseconds.

5.34.1.20 Port Restrictions

To determine the port restriction settings in firewall environments, select on the tab **Provider Modules: SIP Functional Provider – Port restrictions**.



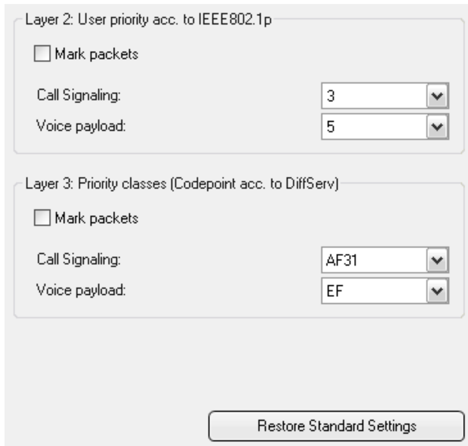
- The communication ports used for signaling and voice connections are defined by activating the option **RTP port range** from/to and SIP Signaling - **Port**.

NOTE:
If no voice transmission is possible after a successful login, verify that the RTP port range is configured from 1024 to 65353.

5.34.1.21 Quality of Service (QoS)

NOTE:
If optiClient is used on a user PC with Intel Centrino Duo processor, optiClient uses automatically the QoS support of the Intel Centrino Duo.

To determine the QoS (Quality of Service) settings, select on the tab **Provider-Module: SIP Functional Provider – Quality of Service**



- For each of the transmission layers **Layer 2: User Priority acc. to IEEE802.1p** and **Layer 3: Priority classes (Codepoint acc. to DiffServ)**, you can use the **Mark packets** option to specify whether optiClient classifies the data for the **Call signaling** and **Voice payload** traffic types with the values set above.
- Via the **Restore Standard Settings** button you restore the above default settings.

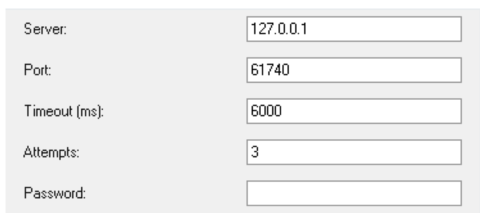
5.34.1.22 Licensing

NOTE:
The license server can be installed locally on a user PC or on another PC in the network.

NOTE:
If no license server is configured or optiClient cannot establish a connection to the license server, a corresponding note appears at the optiClient start.

At each program start optiClient checks the validity of the license used at the license server.

To determine the license server settings, select on the tab **Provider Modules: SIP Functional Provider – Licensing**.



- Under **Server**, enter the IP address of the PC on which the license server is installed. If the license server is installed locally on the user PC, enter the actual IP address of the associated LAN card or the IP address 127.0.0.1 (local host).
  If the license server is installed on a computer system in the network, enter the IP address of the relevant computer system.
- Under **Port**, enter the default port number for accessing the license server. It is *61740*.
- Enter the maximum time (in milliseconds) for the attempt to set up a connection to the license server in the **Timeout** field. Also define the number of **Attempts**.
- If an access **Password** was defined on the license server, enter that password here as well.

5.34.2 Settings for the Stimulus Provider

You find information about the Stimulus Provider settings in Section 5.33.8, “Stimulus Provider Settings”, on page 359.

5.34.3 Telephony Features (SIP)

The connected communication system basically determines the meaning of the features represented by the telephony icons, and what these features do. For more information, refer to the documentation supplied with the relevant communication system.

The functions in the easyCom communication circle basically operate in the same way as functions at a desktop phone and descriptions can therefore also be found in the appropriate analog telephone documentation supplied with the communication system.

5.35 Telephoning at a HiPath 3000/4000

IMPORTANT:
Using optiClient as softphone at a HiPath 3000/4000 requires the corresponding licenses, which are administered in a license server (HLM server) .
Your sales partner will provide further information.

This section contains information on the following topics:

- Settings for the HiPath Provider
- Telephony Features on a HiPath 4000
- Telephony Features on a HiPath 3000.

5.35.1 Settings for the HiPath Provider

In the HiPath Provider you perform settings to use optiClient as softphone at a HiPath 3000 or HiPath 4000.

To edit the HiPath Provider settings select on the tab **Provider Modules: HiPath Provider**.

You can configure the following settings for the HiPath Provider:

- Device
- Main Connection
- Main Network Access
- Fallback Connection
- Fallback Network Access
- Failover
- Audio Schemes
- Ring Tones
- Bandwith Reduction
- Port Restrictions
- Virtual Private Network (VPN)
- Quality of Service (QoS)
- Licensing
- Operation Settings.

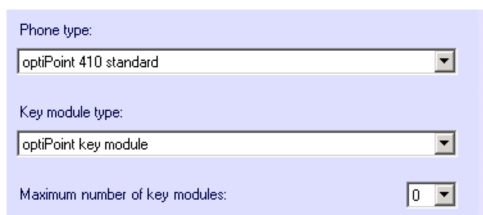
5.35.1.1 Device

NOTE:
To edit the device settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

If optiClient is connected to a communication system via the HiPath Provider, the representation of the optiClient telephone follows the look of existing HiPath desk telephones.

To display the optiClient telephone and the extended keypad, you can choose from various device types for phone and key module. The phone and key module type set for optiClient essentially corresponds to the display and layout of the corresponding desk devices. Key modules are represented in the extended keypad of optiClient as columns.

To set the desired device type, select on the tab **Provider Modules: HiPath Provider – Devices**.



- **Phone type** determines the following properties for the free and integrated phone of optiClient:
  - How many display lines are indicated in the free phone of optiClient (in the integrated phone of the main bar always 2 display lines are shown)
  - Whether Electronic Key Labeling (EKL) is available for the optiClient telephone.
  - How many feature keys are available in the free and integrated optiClient telephone
  - How many programmable feature keys are available in the extended optiClient keypad.

For the different telephone types the following properties apply:

Device	Display lines	EKL	Number of feature keys	Number of feature keys 1st column
• optiPoint 410 standard	2	No	4	8
• optiPoint 410 standard DA[1]	2	No	4	8
• optiPoint 410 advanced	4	No	4	15
• optiPoint 420 standard	2	Yes	5	7
• optiPoint 420 advanced	4	Yes	5	13

1 DA (Direct Access) is available with connections to HiPath 3000 only.
Like device type optiPoint 410 standard; supports systems with automatic direct access to an external line.

NOTE:
With some actions (e.g. in the service menu), all four lines of the freely positionable phone display are used for four-line representations. The integrated phone's display can only show two of these lines, however: the first line and the current line of the action being performed (marked line). To avoid misunderstandings and unwanted actions, we recommend using the free phone if a device type with four-line representation is selected.

The following applies for the automatic default / key allocation in optiClient:

- On starting up optiClient, the feature keys in the optiClient telephone (and possibly also in the extended keypad) are predefined with default features. Which features are preset here depends on the communication system used.
- For devices with EKL, all keys programmed with a feature are always labeled with the associated text by the connected communication system. Changing the function and thus the labeling (key caption) is only possible via the Service Menu prompts. This also applies if no feature but only a call phone is programmed on a key.
- For devices without EKL, the keys in the optiClient telephone are labeled with texts of the default features. You can change the features via the service menu navigation. You can modify the labeling (of all feature keys) as well as allocate the keys with a phone number directly in optiClient.

More details on your communication system's service menu prompts can be obtained from the administrator assigned to the communication system.

- **Key module type** determines the following properties for the key module in the optiClient telephone:
  - Whether Electronic Key Labeling (EKL) is available for the key module columns in the extended keypad.
  - How many programmable feature keys are available in the key module columns of the extended keypad in optiClient.

  For the different key module types the following properties apply:

Key module type	EKL	Number of keys from second column
• optiPoint 410 key module	No	16
• optiPoint 420 key module	Yes	13

- **Maximum number of key modules** specifies how many key module columns are displayed in the extended keypad at the most. Possible values are:
  - Minimum value 0:
    The extended keypad remains empty
  - Maximum value 4:
    Four key module columns are displayed in the extended keypad at the most.

NOTE:
How many key module columns are displayed in optiClient is not only determined by the maximum number of key modules setting. The selected device / key module as well as the configuration on the communication system (maximum number of simultaneously available / opened key modules on all users) also determine the representation in optiClient.

Key assignments

The following applies for the automatic default / key allocation in optiClient:

- On starting up optiClient, the feature keys in the optiClient telephone and partly in the extended keypad are predefined with default features. Which features are preset here depends on the communication system used.
- In case of devices without EKL, optiClient labels these keys with default texts that also depend on the communication system used.
  A key can be allocated with a feature or phone number via service menu prompts. The labeling can be modified as well (cf. Section 5.9.1, “Context Menu of the extended Keypad”, on page 218).
- In case of devices with EKL, all keys programmed with a feature are always automatically labeled with the associated text by the connected communication system. Changing the feature (and thus the labeling) is only possible via the service menu prompts. The allocation of a key with a phone number and the entry of the associated label are likewise also performed exclusively via the service menu.

More details on your communication system’s service menu prompts can be obtained from the administrator assigned to the communication system.

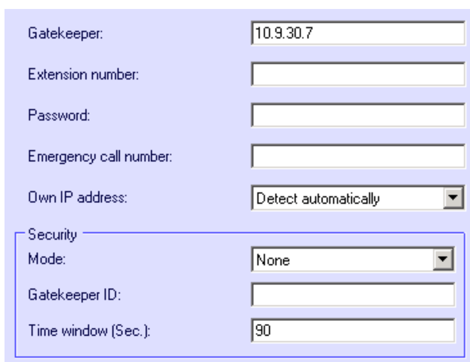
5.35.1.2 Main Connection

NOTE:
To edit the main connection settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

IMPORTANT:
You always need to perform the settings of the main connection. Without this parameter optiClient cannot be used at a HiPath 3000/4000.
If you use optiClient with a fallback system, you also need to configure the settings of the fallback connection for a smooth optiClient operation (Section 5.35.1.4, “Fallback Connection”, on page 409).

The main connection setting defines the connection properties between optiClient and the main communication system.

To configure the main connection settings, select on the tab **Provider Modules: HiPath Provider – Main connection**.



- Under **Type** you select the type of the main communication system with which you want to connect optiClient
- Under **Gatekeeper** you enter the IP address of the gatekeeper used by the deployed main communication system
- Under **Extension number** you enter the number of the extension under which you can be reached on the communication system used
- Under **Password** you enter the password configured for the specified extension number in the communication system used. The password can be obtained from the administrator of the communication system if required.
- Specifications under **Emergency call number** do currently not take any effect and will not be evaluated
- For the IP connection optiClient needs to know the **Own IP address**. If a sole IP address is assigned to the network card of the user PC, select the **Specify automatically** setting here. If multiple IP addresses have been assigned to the network card, all such addresses will be shown in the list box, and you can then select the one you want.

If required, the administrator of the communication system used will provide information about the following security settings.

- In the **Mode** list field you select the setting configured on the connected communication system as security mode
- Under **Gatekeeper ID** you enter the ID that is configured in the communication system used
- Under **Time window** you also specify the setting configured in the communication system used.

5.35.1.3 Main Network Access

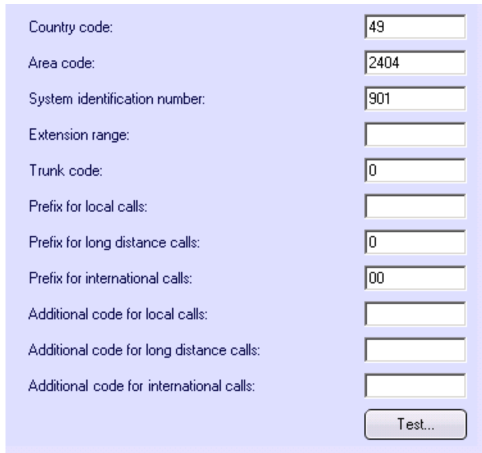
NOTE:
You can only edit the settings for the main network access after you have opened the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

IMPORTANT:
You always need to perform the settings of the main network access. Without this parameter optiClient cannot be used at a HiPath 3000/4000.
If you use optiClient with a fallback system, you also need to configure the settings of the fallback network access for a smooth optiClient operation (Section 5.35.1.5, “Fallback Network Access”, on page 410).

Phone number normalization in optiClient requires network access specifications. These specifications are taken from the optiClient directories for the direct connection establishment. If these settings are not configured properly, you may encounter problems when setting up connections.

You find more information about phone number normalization in the optiClient administrator manual.

To configure the location information for the main network access, select on the tab **Provider Modules: HiPath Provider – Main network access**.



- Under **Country code** enter the code for the country that hosts the communication system used.
  If the communication system is e.g. in Germany, specify *49* as country code.
- Under **Area code** enter the code for the area that hosts the communication system used. Do not specify the leading zero here.
  If the communication system is e.g. in Munich, specify *89* as area code.
- Under **System identification number** enter the phone number for the outside line of the communication system. This specification serves for identifying internal phone numbers in directories that only set up internal connections when selected.

- You can restrict the internal extensions of a larger extension range under **Extension range**.

  Example:
  A four-digit extension range is used for a location. Of the possible extensions of this range only those are internal that begin with 1, 2 or 3, though.
  In such a case the usual optiClient phone number normalization would e.g. also consider the extension 5287 internal. An erroneous evaluation, since this extension does not begin with 1, 2 or 3.
  To evade this problem, enter the first digits of the extensions considered internal in square brackets in the **Extension range** field. In our example this is **[123]**.

- Under **Trunk code** enter the external prefix configured on the communication system used.
- Under **Prefix for local calls, Prefix for long distance calls** and **Prefix for international calls** enter the respective code for the relevant type of call. These specifications are independent from the configuration on the communication system used and are determined by the network operator. The example shows the prefix numbers for network operators in Germany. Prefixes may differ for network operators in other countries.
- Under **Additional code for local calls, Additional code for long distance calls** and **Additional code for international calls** you enter further codes to be used as call-by-call codes. These specifications are independent from the configuration of the provider used.
- Via **Test** you can try individual examples to see how the configured settings influence the phone numbers that optiClient dials.

The sequence of the various codes is:

  – Trunk code + Additional code + Prefix + Call number

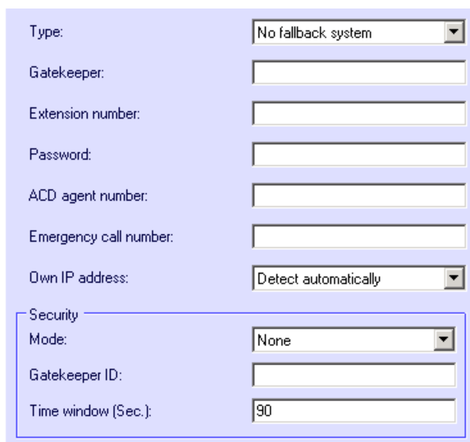
5.35.1.4 Fallback Connection

NOTE:
To edit the fallback connection settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

IMPORTANT:
You always need to perform the fallback connection settings if you operate optiClient with a fallback system.

If you use a fallback communication system, the settings of the fallback connection define the connection properties between optiClient and the fallback communication system.

To configure the fallback connection settings, select on the tab **Provider Modules: HiPath Provider – Fallback connection**.



- Under **Type** you select the type of fallback communication system with which you want to connect optiClient if the main communication system fails.

The other settings in this dialog correspond to those of the main connection (cf. Section 5.35.1.2, “Main Connection”, on page 404). They do not, however, refer to the main but to the fallback communication system.

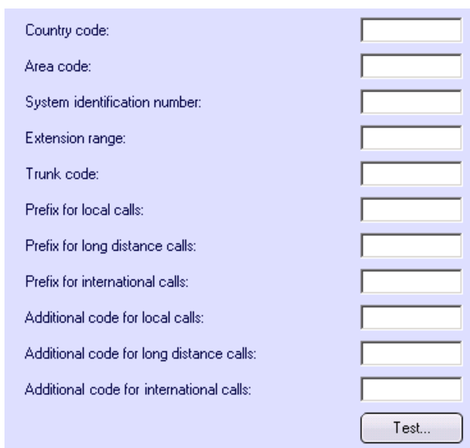
5.35.1.5 Fallback Network Access

NOTE:
You can only edit the settings for the fallback network access after you have opened the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

IMPORTANT:
You always need to perform the fallback network access settings if you operate optiClient with a fallback system.

The settings in this dialog correspond to those of the main network access (cf. Section 5.35.1.3, “Main Network Access”, on page 406). They do not, however, refer to the main but to the fallback network access.

To configure the location information for the fallback network access, select on the tab **Provider Modules: HiPath Provider – Fallback network access.**



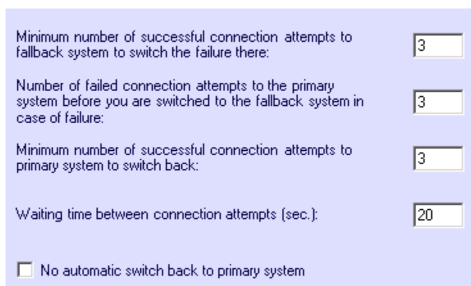
5.35.1.6 Failover

NOTE:
To edit the failover settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

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

You can specify different settings for the optiClient reconnection to the main communication system.

To configure the failover settings, select on the tab **Provider Modules: HiPath Provider – Failover**.



- Under **Minimum number of successful connection attempts to fallback system to switch the failure there** you specify after how many successful connection attempts the fallback system is to be considered operable. In case of an error optiClient will not switch to the fallback communication system until it is considered operable.

- Under **Number of failed connection attempts to the primary system before you are switched to the fallback system in case of failure** you specify after how many failed connection attempts optiClient will switch from the main to the fallback communication system.
- Under **Minimum number of successful connection attempts to primary system to switch back** you specify after how many successful connection attempts the main communication system is to be considered operable again. optiClient will not switch back to the main communication system until it is considered operable.
- Under **Waiting time between connection attempts** you specify in which intervals optiClient attempts to reach the main communication system again. The value entered here corresponds to seconds.
- With the **No automatic switch back to primary system** option you determine whether optiClient automatically switches back to the main communication system as soon as it is operable again. If this option is active, optiClient will not automatically switch back to the main communication system.

5.35.1.7 Audio Schemes

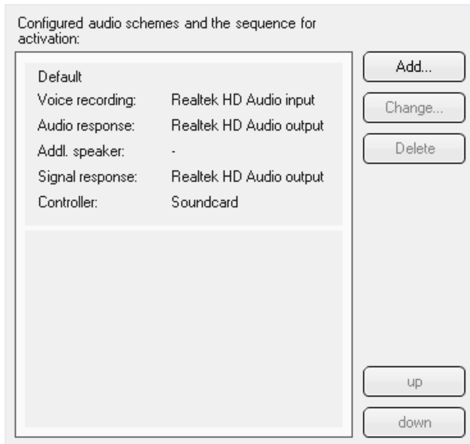
NOTE:
To edit the failover settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

NOTE:
Various audio devices are supported for operation at optiClient. You find a list of these devices in the optiClient administrator manual.

For conducting calls at your workstation you need audio devices to hear signals (ring tones), to be able to talk or to be able to hear connection partners.

The hardware settings are compiled in audio schemes. You can add, modify or delete different video schemes. This simplifies administering different audio versions (for example, at different hardware) and selecting the respectively appropriate scheme for operation.

To determine the settings for audio schemes, select on the tab **Provider Modules: HiPath Provider – Audio schemes**.



Selecting an audio scheme

- To select an audio scheme for operation, pick the one you want from the audio schemes list.

Adding an audio scheme

- After a click on **Add** enter the **Description** of the audio scheme and specify the respective audio hardware for:
  - **Voice recording**
  - **Audio response**
  - **Additional speaker**
    If an additional speaker is selected here and this audio scheme is active, an individual icon for controlling the additional speaker appears in the main bar.

NOTE:
The hardware for the **additional speaker** must be different from the **audio response** hardware.

- **Signal response** (ring tone)
- **Controller**
  Additional features for controlling special hardware features

Audio components of a scheme that are currently locally unavailable are represented in brackets. The entire audio scheme is then considered unavailable. The next available audio scheme may then be used.

Modifying or deleting an audio scheme

- After a click on **Change** you can edit the settings of the selected audio scheme and via **Delete** you can remove the selected audio scheme.

Sequence of the audio schemes

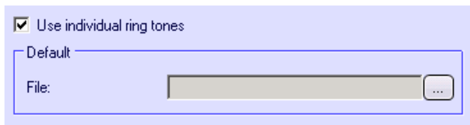
You can use the audio scheme sequence to influence the respective selection of the audio hardware. After the user log-in, optiClient checks the audio hardware specified in the audio schemes and processes the schemes one after the other from top to bottom. If all components set for a scheme are available and ready for operation, this scheme is used for operating optiClient.

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

5.35.1.8 Ring Tones

The HiPath 3000/4000 settings specify a default ring tone. In optiClient you can also determine a ring tone to signal inbound calls that differs from the defaulted one. You need to provide optiClient with this ring tone in the form of a WAV file that uses the PCM, 8Bit coding.

To configure an individual ring tone, select on the tab **Provider Modules: HiPath Provider – Ring tones**.



- Via the **Use individual ring tones** option you activate an individual ring tone. When you activate this option, optiClient uses the tone specified under **File** to signal incoming calls.
- Under **File** you select the WAV file that contains the ring tone you want to activate. With the browser button you can look for the desired WAV file.

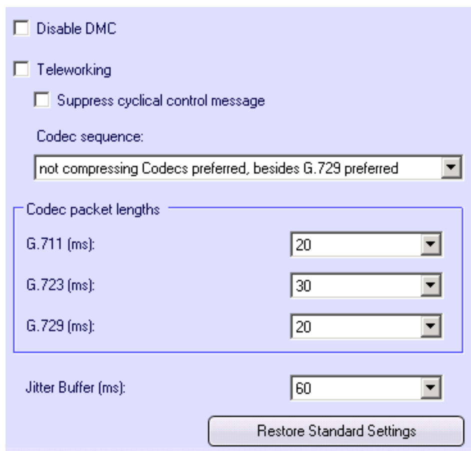
NOTE:
optiClient copies the content of the selected file. In this way the ring tone is still available even if the original WAV file is deleted.

5.35.1.9 Bandwith Reduction

NOTE:
To edit the bandwith reduction settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

To optimize the voice transmission quality and bandwidth requirement, you can adjust the optiClient transmission parameter to your network conditions.

To configure the transmission parameters, select on the tab **Provider Modules: HiPath Provider – Bandwidth reduction**.



- If optiClient is used at a HiPath 4000, voice packets are directly exchanged between the connection partners by default (Direct-Media-Connect – DMC). With the **Shut down DMC** option you can disable this behavior. The voice packets will then not be directly transmitted between the connection partners but via the HiPath 4000. This option can be activated e.g. if optiClient is used for teleworking.
- If you use optiClient for teleworking, activate the **Teleworking** option.

IMPORTANT:
If you use optiClient at a HiPath 3000, this option must be disabled. Otherwise the HiPath 3000 will not send any busy-lamp reports (BLF messages).[1]

- The **Suppress cyclical control message** option disables the periodical control messages that are exchanged between optiClient and the communication system by default.

1. BLF – busy-lamp field

Activate this option if you use optiClient for teleworking. This will reduce the amount of data exchanged between optiClient and the communication system and thus the bandwidth requirement on the data connection.

- optiClient uses defined compression algorithms (codecs) to transmit voice data. Under **Codec sequence** you can specify the codecs to be preferred for the transmission.

NOTE:
The displayed selection depends on whether or not the **Teleworking** option is active.

- Under **Codec packet length** you specify the sizes used by optiClient for the voice packets of the **G.711**, **G.723** and **G.729** codec. The specifications are made in milliseconds.
- With the **Jitter Buffer** setting you specify the size of the buffer for voice data. In this way you can optimize the voice transmission quality in optiClient. The specification is made in milliseconds.

  For this setting always applies:

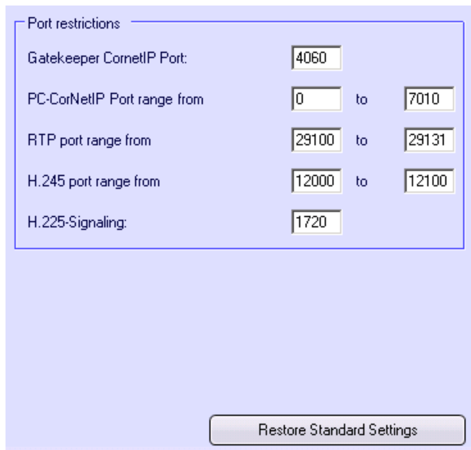
  – The better the network transmission behavior, the smaller the jitter buffer may be

  – The bigger the jitter buffer, the more the voice playback will be delayed
- With **Restore Standard Settings** you reset all configurations in this dialog to their respective default settings.

5.35.1.10 Port Restrictions

NOTE:
To edit the port restrictions settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

To configure the port restrictions, select on the tab **Provider Modules: HiPath Provider – Port restrictions**.



- Under **Gatekeeper CornetIP Port** you specify the TCP/IP port used by the gatekeeper of the communication system for the CorNetIP communication. This is port 4060 by default.

- Under **PC-CorNetIP Port area from** you specify the TCP/IP port range used on the user PC for the CorNetIP communication.
  This is the port range from 7000 to 7010 by default.
- Under **RTP port range from** you specify the TCP/IP port range used for the voice transmission.
  This is the port range from 29100 to 29131 by default.
- Under **H.245 port range from** you specify the TCP/IP port range used for H.245 signaling.
  This is the port range from 12000 to 12100 by default.
- Under **H.225-Signaling** you specify the TCP/IP port range used for H.225 signaling.
  This is port 1720 by default.

NOTE:
The Netmeeting application uses the same port for its H.225 signaling by default. If this results in a port conflict on the user PC, change this setting accordingly – e.g. to port 11720.

- With **Restore Standard Settings** you reset all configurations in this dialog to their respective default settings.

5.35.1.11 Virtual Private Network (VPN)

NOTE:
To edit the VPN settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

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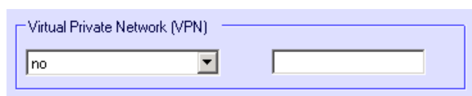
optiClient informs its active connection partners at specific times about the individual IP address – e.g. for correctly addressing the audio packets. For this purpose, optiClient needs to know the current IP address, respectively, how it can be determined. For: the relevant IP address depends on whether optiClient is operated in a normal network (LAN) or in a Virtual Private Network (VPN).

To configure the VPN settings, select on the tab **Provider Modules: HiPath Provider – VPN**.



- In the **Virtual Private Network (VPN)** dropdown list the following settings are offered:
  - **no**
    optiClient does not use VPN
  - **Automatic**
    optiClient uses VPN with the required IP address being determined automatically.
    Select this setting if the VPN client of the user PC does not provide a virtual network adapter.
  - **Manual**
    optiClient uses VPN with the IP address that you enter in the text entry field being taken as the required one.

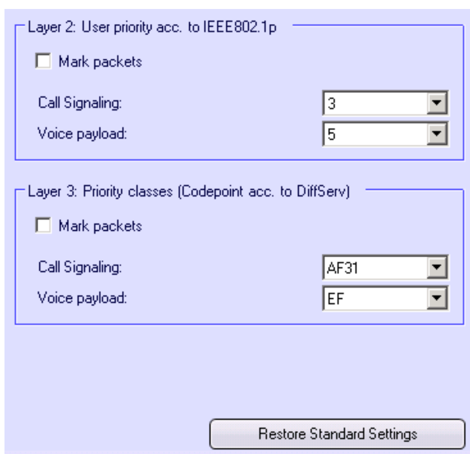
5.35.1.12 Quality of Service (QoS)

NOTE:
To edit the QoS settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

NOTE:
To activate modified QoS settings the user PC may have to be rebooted. In this case optiClient will prompt you to reboot the user PC.

NOTE:
If optiClient is used on a user PC with Intel Centrino Duo processor, optiClient uses automatically the QoS support of the Intel Centrino Duo.

To determine the QoS (Quality of Service) settings, select on the tab **Provider Modules: HiPath Provider – Quality of Service**



- For each of the transmission layers **Layer 2: User Priority acc. to IEEE802.1p** and **Layer 3: Priority classes (Codepoint acc. to DiffServ)**, you can use the **Mark packets** option to specify whether optiClient classifies the data for the **Call signaling** and **Voice payload** traffic types with the values set above.
- With **Restore Standard Settings** you reset all configurations in this dialog to their respective default settings.

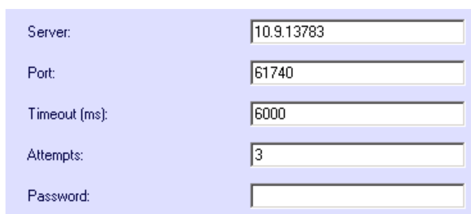
5.35.1.13 Licensing

NOTE:
To edit the licensing settings you need to open the **Settings** dialog during the program start. Select the **Manage** button on the user logon screen when booting optiClient.

At each optiClient start the availability of a valid license for the program will be checked. To this, optiClient connects at the start to the license server (HLM server), which may either be installed on the local user PC or centrally in the network.

If no license server is configured or optiClient cannot establish a connection to the license server, optiClient terminates the program start and displays a corresponding note.

To configure the settings for connecting the license server, select on the tab **Provider Modules: HiPath Provider – Licensing**.



- Under **Server**, enter the IP address of the PC on which the license server for optiClient is installed.
  If you have optiClient and the license server installed on the same user PC, enter here the IP address of the user PC or *localhost*. If the license server is installed on a different PC than optiClient, enter here the IP address of the relevant PC.
- Under **Port** enter the TCP/IP port number for accessing the license server. It reads *61740* by default.
- Under **Timeout** enter the period that optiClient is to wait for a reply after a connection request to the license server. The specification is made in milliseconds.
- Under **Attempts** you specify how many times optiClient shall try to connect to the license server.
- If a password is required to connect to the license server, specify it under **Password**.

5.35.1.14 Operation Settings

NOTE:
To display the **operation settings** in the **Settings** dialog you need to open the **Settings** dialog with a started optiClient. To this, select the **Settings …** entry from the optiClient menu.

IMPORTANT:
If you use a personal ring tone you cannot change its ringer pitch. Cf. Section 5.35.1.8, “Ring Tones”, on page 416.

If you use the default ring tones in optiClient, you can change their ringer pitch in optiClient.

To configure the ringer pitch of the ring tone, select on the tab **Provider Modules: HiPath Provider – Operation settings**.

Via **Change ring tone** you can modify the ringer pitch of the default ring tones. You hear the ring tone currently set. Via the **Next ring tone** and **Previous ring tone** buttons you can individually set the ringer pitch. You leave the setting with **Close**.
The selected setting is then immediately active.

5.35.2 Telephony Features on a HiPath 4000

The HiPath 4000 provides many telephony features. Operation and functionality of these features in optiClient corresponds to operating these features on a desk telephone. If required, you can obtain detailed information about all features from the respective device documentation accordingly.

This section contains information on the following topics:

- Available Telephony Icons (HiPath 4000)
- Basic and Advanced Features (HiPath 4000)
- Important Features at a Glance (HiPath 4000)
- Features of the Service Menu (HiPath 4000)
- Configuration of the HiPath 4000 (AMOs)

5.35.2.1 Available Telephony Icons (HiPath 4000)

The HiPath 4000 configuration decides which icons appear in the telephony menu.

5.35.2.2 Basic and Advanced Features (HiPath 4000)

You find a detailed description of the basic and advanced features in the operating instructions for the terminal device respectively key module that you configure in optiClient.

5.35.2.3 Important Features at a Glance (HiPath 4000)

Call

- n + p

or

- p + when the subscriber answers:
  n or speaker mode and open listening

Redial (saved call number)

`Save (Variant 1):`

- Connection exists:
  Redial

`Save (Variant 2):`

- Any call number:
  Service menu
  \+ Redial
  \+ **New entry?** ✓
  \+ p
  \+ **Save?** ✓

`Redial:`

- n + Redial

`Redial (last number dialed):`

- n + **Dial last number**

Switching between speaker mode and open listening during a call:

`From handset to speaker mode and open listening:`

- **Loudspeaker** press and hold down
  \+ t.

`From speaker mode/open listening to handset:`

- n

Information during a call (callback):

`Consultation:`

- **Consultation?** ✓
  \+ second station p

`Exit`

- **Exit and back?** ✓.

Alternating between two calls (toggle)

- ▶ **Toggle?** ✓.

Transferring a call

`With notification:`

- **Consultation?** ✓
  \+ p
  \+ signal call
  \+ t

`Without notification:`

- ▶ Initiate transfer? ✓
  + p
  + t.

Setting up a conference

- First call
  + ▶ Set up a conference? ✓
  + p
  + Conference? ✓
  + ▶ Expand a conference? ✓
  + p

Saving/activating variable call forwarding

- ▶ Variable forwarding? ✓
  + p (destination)
  + Save? ✓ .

Displaying the caller list

- Service menu
  + Destinations? ✓
  + ▶ Call list? ✓
  + Incoming calls? ✓ or ▶ Outgoing calls? ✓ .

Ending retrieval

- Service menu

Dialing a displayed call

- ▶ Release? ✓

Saving individual speed-dial numbers

- Service menu
  + Destinations? ✓
  + ▶ Speed dialing? ✓
  + p (0..9)
  + New entry? ✓
  + p (destination)
  + Save? ✓ .

Dialing with individual speed-dial numbers

- Service menu
  + ▶ Use speed dialing? ✓
  + p (0..9).

Deactivating / reactivating phone for calls

- Service menu
  + ▶ PIN and class of service? ✓
  + ▶ Change class of service? ✓
  + p (PIN)

Saving / changing a call number programmed on a key for repertory dialing

- Service menu
  +
  + New entry? ✓
  + p (destination)
  + Save? ✓

Saving timed reminder

- Service menu
  + ▶ Appointment? ✓
  + New appointment? ✓
  + p (time 3- or 4-digit)
  + Save? ✓

5.35.2.4 Features of the Service Menu (HiPath 4000)

You reach the HiPath 4000 features via the optiClient telephone service menu.

Proceed as follows:

1. Push the **Service menu** key.
2. Select the desired feature via the dialog keys < : >.

NOTE:
You can activate available features also via the associated service codes. If required, the administrator of the communication system used will provide information about these service codes.

5.35.2.5 Configuration of the HiPath 4000 (AMOs)

NOTE:
In the following we will describe the AMOs for a German HiPath 4000.

For each HiPath 4000 subscriber to use optiClient the following features must be programmed:

apiclass=tsx and gerkon=optiip+api

Configuring the optiClient subscriber at the STMI2 with TAPI

Display with:

`AB-SBCSU:`*<subscriber number >*`;`

Configuration by:

```
EINRICHTEN-SBCSU:TLNNU=<subscriber number>,ART=
OPTI,ANSCHL=IP2,GERKON=OPTIIP&API,APICLASS=TSX;"
```

Activate the DMC for the subscriber

```
AEND-SDAT:RNR,MERKMAL,DMCERL;
```

Furthermore, you need to perform the following settings

Change the AMO DIMSU (set the number of the STMIHFA2 hardware):

`EINRICHTEN-DIMSU:TYP=SYSTEM,STMIHFA2=`<number of the STMIHFA2>`;`

Activate system-wide DMC

```
AENDERN-DIAGS:PROCID=CC,KOMP=CP2,S08=AUS;
```

STMI2 settings:

```
EINR-BCSU:PER,1,1,103,"Q2316-X ",3,0,,NEIN,300,700,
300,A;
```

```
EINR-HFAB:MTYP=STMIHFA2,LTU=1,EBT=103,IPADR=
192.168.1.1,NETMASK=255.255.255.0,DEFRT=192.168.1.254;
```

Change APIMAX

```
AE-ZAND:TYP=CIT,APIMAX=XXXX;
```

Change WSPROT

```
einr-dimsu:typ=applikat,wsprot=xxx;
```

APIMAX=xxx (AMO ZAND) must be configured:

Display with "`AB-ZAND:TYP=CIT;`",

Change with "`AE-ZAND:TYP=CIT,APIMAX=xxx;`"

(xxx stands for the same number as WSPROT)

WSPROT=xxx . AMO DIMSU must be configured as follows:

Display with "`AB-DIMSU:TYP=ALL,PARAM=WSPROT;`",

Change with "`EINR-DIMSU:TYP=APPLIKAT,WSPROT=xxx;`"

(xxx stands for the number of optiClient subscribers (+subscribers with Callbridge at another optiPoint400/500/600))

Configuration for usage of the headset at the USB handset

To use the headset at the USB handset, the following parameter must be set for each phone number within the HiPath 4000:

```
KOPFSG=MITIND (sbcsu)
```

5.35.3 Telephony Features on a HiPath 3000

The HiPath 3000 provides many telephony features. Operation and functionality of these features in optiClient corresponds to operating these features on a desk telephone. If required, you can obtain detailed information about all features from the respective device documentation accordingly.

This section contains information on the following topics:

- Available Telephony Icons (HiPath 3000)
- Basic and Advanced Features (HiPath 3000)

5.35.3.1 Available Telephony Icons (HiPath 3000)

The HiPath 3000 configuration decides which icons appear in the telephony menu.

5.35.3.2 Basic and Advanced Features (HiPath 3000)

You find a detailed description of the basic and advanced features in the operating instructions for the terminal device respectively key module that you configure in optiClient.

Glossary

C

Central configuration

(also DLS/DLC **D**ep**l**oyment **S**ervice/**C**lient). **I**n case of a central configuration, application configuration data is stored in a central tool; applications can collect the parameters from there.

Chat

Chatting optiClient users exchange instant messages.

Codec

Artificial term composed of **Co**mpression and **Dec**ompression. A codec is a software- or hardware-related functional unit that changes audio or video signals according to defaulted processes in real time. Codecs work with different compression algorithms that influence the quality of images or tones as well as the continuity of the appearance and transmission.

Communication system

Offers communication services; in case of voice connections e.g. the network PBX.

Contact directory

In optiClient, every user has a contact directory in which he/she can enter and manage individual contact information. The user can set up a direct connection to the contacts in this directory. Contact information coming from other directories can be copied to the individual contact directory.

D

Dialog keys

Keys for navigating through the service menu, which is provided by the communication system in optiClient.

Directories

optiClient provides various directories. These directories are edited either centrally (e.g. LDAP directories) or locally (in other applications). **I**n optiClient, users can search for entries and display them as well as directly set up connections to single contacts.

Display

Element of the optiClient telephone, similar to the display of a terminal device (tabletop unit). Serves to dialogue with the connected communication system (browsing through functions, service menu)

DLS/DLC

Dep**l**oyment **S**ervice/**C**lient (also central configuration). In case of a central configuration, application configuration data is stored in a central tool. The applications can collect the parameters from there.

E

EKL

Electronic **K**ey **L**abeling describes the automatic labeling of a key programmed with a function on a device or in optiClient with the associated text by the connected communication system.

F

Functions keys

Freely programmable keys in the optiClient telephone (partly allocated by the communication system) and on the extended keypad.

G

Gatekeeper

A gatekeeper is a central control element in networks for routing signalling information and converting telephone numbers and IP addresses. Furthermore, the gatekeeper's task is the bandwidth management in the Quality of Service (QoS) scope.

I

Info area

Area on the task bar (usually on the right hand side) in which the minimized optiClient program icon can be stored.

Instant messaging (Chat)

Via instant messages you can fast and discretely contact other optiClient users on text basis. The addressed users must be logged in with their optiClient at the same XPR server like you with your optiClient.
Instant messages are exchanged in the scope of chats in which at least two subscribers take part.

IPC

Inter Process Communication. Defines a computer interface for exchanging information between different Windows applications.

K

Key module

Device extension that provides freely programmable function keys. In optiClient, key modules available to a user are displayed in the form of columns on the extended keypad and operated/handled according to the selected key module type.

Keypad

Component of the optiClient telephone that contains the (allocated) function keys, digit keys and dialog keys.

L

LDAP

LDAP (Lightweight Directory Access Protocol) is a TCP/IP-based access protocol for directories. It has been established in the internet and in intranets as default solution to access network directory services for databases, e-mails, storage areas and other resources.

LIN

Local Identification Number
The LIN serves for the local assignment of the optiClient – e.g. in the form of a building number or coordinates recognition.

M

Module

optiClient component that provides functions.

MSP
The MRS Service Provider realizes the TCP-based connection of an XPR client to the XPR server.

N

Name resolution
Describes the search for a phone number that is associated to a defined name.
If in optiClient e.g. a call is made by selecting a contact, the phone number that associates the relevant contact name must first be determined. This can be done among other things by searching an address book. This process is called name resolution.

Normalization
Describes the conversion of a phone number from an arbitrary representation format to a permanently defined default representation. A phone number is always normalized in the event that it is searched for or transferred to another system that expects a defined phone number format.

P

Phone number resolution
Describes the search for a name that is associated to a defined phone number.
If in optiClient e.g the phone number of an incoming call is displayed in the easyCom, the caller's name can be displayed after the resolution of this phone number.

Q

Quality of Service (QoS)
Quality-of-Service (QoS) is the overall term for all processes that influence the flow of data (audio data in this case) in LANs and WANs in a way that they arrive at the recipient's in a defined quality.

S

SIP (Session Initiation Protocol)
The SIP protocol is a signaling protocol that can establish, modify and finish sessions with two or more members. This protocol, based on HTTP, serves for transmitting real-time data via packet-supported networks. The SIP protocol can transmit interactive communication services inclusive voice via IP networks. SIP has an open, internet-based structure and enables features such as transmitting the caller's identity or caller forwarding in IP-based networks.

T

Task bar
Windows element that is positioned in the desktop's bottom section by default. It contains information about active applications and the notification area.

V

Virtual Private Network (VPN)
The Virtual Private Network (VPN) is generally a closed, logical network, which is established for a specific user group. A VPN always uses the publicly accessible transmission networks, where the connections are provided by a public carrier. In practical terms, the user creates his/her own private network via these transmission paths. Security mechanisms such as the identification and authentication of the network subscribers ensure that unauthorized persons cannot access the VPN.

W

Web conference

In a web conference, subscribers can reciprocally access the PC desktop of the communication partner. Beyond that, web conferences enable mutually viewing and editing documents or files.
Besides the standard communication between two subscribers it is also possible that more than two subscribers collaborate in a web conference.

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