A MITEL
PRODUCT
GUIDE

MiVoice Connect

Connect Client User Guide

Release 20.0 SP1

May 2025

Mitel
Powering connections

Notices

Trademarks

Contents

What's New in this Document 1

This section describes changes in this document due to new and changed functionality in Connect Client Release 20.0 SP1.

Table 1: Document Version 1.0

Feature/Enhancement	Update	Location
Added CloudLink authentication option in the log in page of Connect Client.	CloudLink authentication check box can be used to log in using CloudLink credentials.	Signing in to the Connect Client

Preface 2

This chapter contains the following sections:

- Objectives of this Book
- Conventions

This preface provides information about the objectives, organization, and conventions used in the User Guide.

2.1 Objectives of this Book

This guide explains how to install, configure, administer, and maintain the Connect client.

2.2 Conventions

This guide uses the following advisory notices:

This information is extra, or supplementary.

The following typographical marking conventions are used in this document.

Table 2: Conventions used in the document

Marking	Meaning
Bold	Names of interface objects, such as buttons and menus.
Blue	Cross references with hyperlinks. Click the blue text to go to the indicated section. **Note**: Table of Contents entries are also links, but they are not shown in blue.

Installing the Connect Client 3

This chapter contains the following sections:

This chapter provides information about how to install Connect Client.

3.1 Overview

The Connect Client presents a single interface to manage business communications using a **desk phone**, computer, or mobile phone. With support for Microsoft Windows, macOS, and Collaboration for Web, Connect Client simplifies your day-to-day communications and streamlines your work.

3.1.1 Operating System, Supported Servers, Browsers, and Environments

For information about the latest operating system and the servers, browsers, and environments supported in MiVoice Connect, see the latest *MiVoice Connect Release Notes* located at https://www.mitel.com/document-center/business-phone-systems/mivoice-connect/mivoice-connect-platform.

3.2 Anti-Virus Folders Exclusions

On your computer, you must exclude the below folders and sub-folders from the anti-virus software before installing Connect Client.

Connect Client

```
<Drive>:\Users\%User%\AppData\Local\Mitel
```

```
<Drive>:\Users\%User%\AppData\Roaming\Mitel
```

```
<Drive>:\Program Files (x86)\Mitel
```

```
<Drive>:\Program Files (x86)\Mitel Presenter
```

3.3 Before you Proceed with the Installation

If a server failover is needed for Connect Client, it must be enabled by following these steps:

1. Create two or more servers and add them under one site.
2. Map one fully qualified domain name (FQDN) to each of these servers in the DNS servers.
3. Log in to Connect Client using the FQDN.

Note:
VBScript must be enabled on Windows in order to install the Connect client normally.

Note:
While installing or upgrading Connect Client, if you see **SMS Agent Host** in the **Files in Use** window, then select either of the following options and click **OK** before you proceed with the installation or upgrade:

- **Automatically close and attempt to restart the applications**
- **Do not close applications. (A reboot will be required.)**

Note:
When you launch Connect client, if you see the `en-US-9-0.bdic` file on the desktop, do either of the following:

- Change the language of the operating system. For more information, see Selecting Preferred Language on page 24.
- Ignore the file.

3.4 Installing Connect Client on Windows OS

> **Note**:
> If you have installed the ST Communicator on your computer, the Connect Client installer will uninstall ST Communicator before installing Connect Client.

1. Open the email notification from your Connect administrator that describes how to install Connect Client, and click the link to install the client.
2. On the **License Agreement** page, select **I accept the terms in the license agreement**, and click **Next**.
3. Click **Next** to install the client in the default folder, or click **Change** to change the destination folder and continue.
4. On the **Ready to Install the Program** page, click **Install**.
5. On the **InstallShield Wizard** page, click **Finish**.
6. On the **Start** menu, click the **Connect** icon to launch the client.

3.5 Installing Connect Client on macOS

To install Connect Client on macOS, do the following:

1. Open the email notification from your Connect administrator that describes how to install Connect Client, and click the link to install the client.
2. Double-click the installation file.
3. In the Connect screen, drag the **Connect** icon into the **Applications** folder and double-click the icon to launch the client.

If you are unable to launch Connect Client, try clearing the local cache files. These files will be re-created on the next launch of the application. To clear the local cache, follow these steps:

> **Note**:
> If you are the facing screen-sharing issue in mac for UCB meeting, remove the Presenter from the **Screen Recording Permission** list in **the Mac-Privacy** settings.

1. Uninstall Connect Client.
2. Open a new **Finder** window by clicking the **Finder** icon.
3. From the **Go** menu, navigate to **Go to Folder** or press **Command+ Shift** + **G** to open the **Go to Folder** dialog box.
4. In the **Go to Folder** dialog box, enter **~/Library/Application Support/Google/Chrome/Default**.
5. Click **Go**.
6. In the window that opens, take a backup (as a precaution) of the files in `~/Library/Application Support/Google/Chrome/Default`, then delete all files from that folder.
7. In the **Finder** window, navigate to `~/Library/Application Support/Mitel`, take a backup of the files and then delete the files.

8. Navigate to `~/Library/Caches/Mitel`, take a backup of the files and then delete the files as before.
9. Reinstall Connect Client. You will now be able to launch Connect Client on macOS.

3.6 Enabling TEL URL Support for Connect Client

Beginning with Release 19.3, Connect Client supports TEL URL .Customers can use Microsoft Teams Mitel assistant to establish a TEL URL call. If the Web browser contains phone numbers in TEL URL format, then clicking on that URL will allow you to make a call from Connect Client to that number or it will display the number on the **Quick Dialer Search** field of Connect Client.

After you install Connect Client on your system, do the following to enable TEL URL support for Connect Client on Windows:

1. On your desktop, go to **Settings** > **Default apps** and select **Choose default apps by protocol**.
2. In the page that opens, go to **TEL URL-TEL Protocol** and select **Mitel Connect** as default to enable TEL URL support for Connect Client.

To enable default calling app on Mac:

1. Open FaceTime on Mac.
2. Go to **Preferences** > **Settings**.
3. In the page that opens, in the **Default for calls** field, select **Mitel Connect** to enable default calling on Mac.

3.7 Upgrading Connect Client

When a new version of Connect Client is available, you see two kinds of upgrade notifications after you sign in. For more information about signing into Connect Client, see Signing in to the Connect Client

- **Recommended Upgrade**—You can either install or skip the recommended upgrades. However, upgrade is recommended if Connect Client is two or more versions behind the latest version. Click **Upgrade** in the upgrade notification area to get the latest version of Connect Client, or click **Later** to upgrade at a later time.
- **Required Upgrade**—You cannot access the application without these upgrades. You must upgrade the application or exit if you choose not to upgrade.

Click **Upgrade** in the upgrade notification to get the latest version of Connect Client, or click **Exit**.

If the upgrade fails, you will receive an error notification. Click **Exit** in the error notification area to exit.

3.8 Features of Admin Installer

The following table lists the features of admin installer.

Table 3: Features of admin installer

Features	Admin Installer
Installation/Upgrade permission	Admin privilege is required to install or upgrade.
Terminal Server/VDI Environment support	Supported on Terminal Server/VDI environments.
GPO Push	GPO Push to be done at the system level.
Supported upgrade version	Upgrade is supported from admin versions earlier than 213.100.5057.
Outlook contact card	Message and Call Feature are supported in Outlook 20 16 contact card.
Installation/Access level	Admin client is installed at the system level; therefore, other users on the same machine can see/access Con nect Client.
UCB Add-in	UCB add-in is included as part of the installer package. **Note**: The UCB add-in will work only if you log in to Connect Client using the **Use Windows Credentials** option.

3.9 Differences Between the Old and New Connect Client Interface

The new Connect Client interface has a different appearance than the earlier interface. The following figures show both the interfaces.

- The new Connect Client UI is updated to support the Chromium update.

Figure 1: Old Connect Client UI

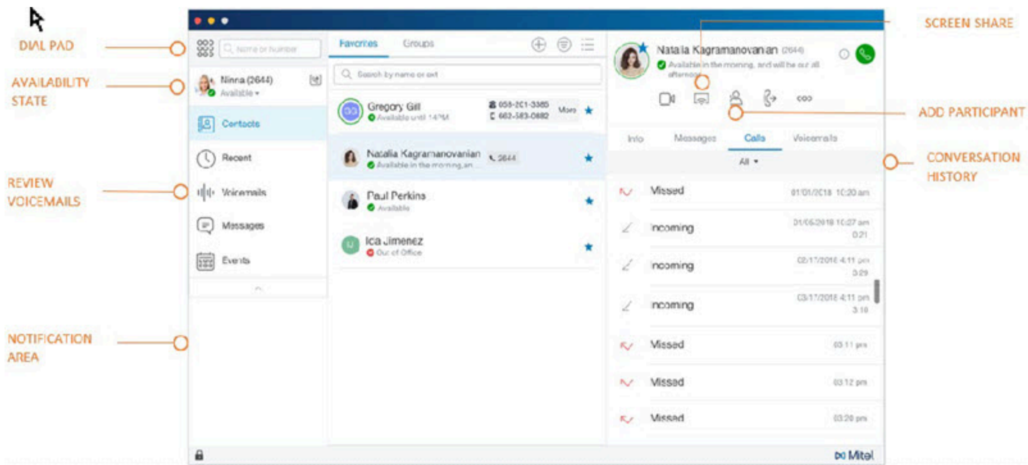
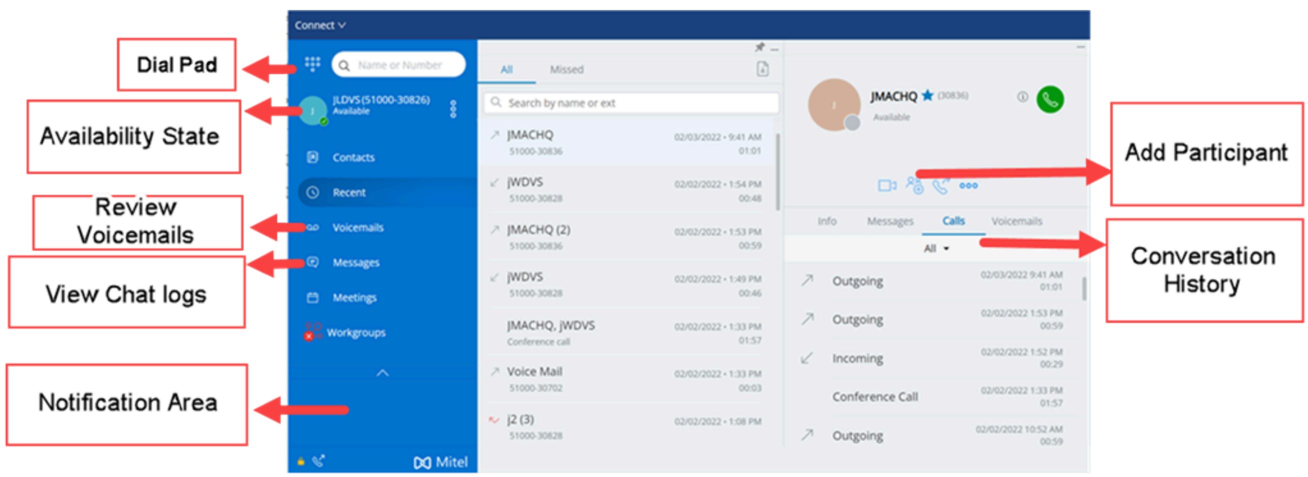


Figure 2: New Connect Client UI



- The images of the icons used in this document have been updated to match those of the new interface.
- In the new interface, the Contact Upload Add-in will not be visible in the plug-in section; instead it will run as a back-end process from Connect Client.

Note:
The Contact Upload add-in will work only if you log in to Connect Client using the **Use Windows Credentials** option.

The following table lists the features and applications that are included in Connect Client 19.2 and previous versions and 19.3 and later versions:

Table 4: Features available in Old and new Connect Client UI

Connect Client Featu re	Description	Available in 19.2 and Earlier Versions	Available19.3 and La ter Versions
Adding shortcuts to the Connect Client toolbar	From the client toolbar, you can add shortcuts for operations that you prefer or use often.	Yes	Yes
Selecting a preferred language	You can select the language for your desk phone and the Connect Client interface.	Yes	Yes
Setting a sound notification	You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or a new or an existing conversation.	Yes	Yes
Connect Client logs	Connect Client creates a log file each time you log in. The logs are used to he lp Technical Support with debugging problems that may arise during the opera tion.	Yes	Yes
Sharing data with Mitel	Connect Client sends user interaction data anonymously to Mitel. The data is analyzed by Technical Support for enhancing the Connect Client application.	Yes	Yes
Managing contacts	Connect Client enables you to organize and manage your contacts and contact groups.	Yes	Yes

Connect Client Featu re	Description	Available in 19.2 and Earlier Versions	Available19.3 and La ter Versions
Understanding availability states	You can check or verify the availability status of a contact on Connect Client before communicating with that contact.	Yes	Yes
Changing availability state	Connect Client automatically updates your availability state when you use the system, but you can select a predefined availability state or configure a custom availability state.	Yes	Yes
Allowing a Contact to manage your availability state	You can configure a contact to manage your availability state on Connect Client.	Yes	Yes
Managing phones	Connect Client allows you to manage your desk phone, softphone, and external phones.	Yes	Yes
Making a voice call	This feature allows you to make a call either from the quick dialer search bar or from the system directory.	Yes	Yes
Answering a voice call	Connect Client displays a call notification on the dashboard for every incoming call.	Yes	Yes
Exporting call data	Users can export the call history details and the associated call notes by using the ‘Export Call Data’ feature.	Yes	Yes

Connect Client Feature	Description	Available in 19.2 and Earlier Versions	Available19.3 and Later Versions
Answering call from call stack of a contact	You can answer incoming calls, parked calls, and calls on hold from a contact's call stack.	Yes	Yes
Viewing call interaction history with a contact	You can view the call history with the selected contact that is displayed in the third pane.	Yes	Yes
Transferring a call	Connect Client allows you to do the following types of call transfer: Transfer, Consult, Park, Intercom, Whisper, and Voicemail.	Yes	Yes
Making a conference call	Connect Client allows you to set up a conference call using either blind conference call or consultative conference call.	Yes	Yes
Managing call notes and viewing routing slips	Call Note allows you and the other members on the call to add, view, and edit notes for an incoming call, a call that is on hold, and an active call. Routing Slips displays the history and call routing details of the call.	Yes	Yes
Making a video call	Connect Client allows you make a video call to a contact. To make a video call, the Primary Extension must be assigned to your softphone.	Yes	Yes

Connect Client Featu re	Description	Available in 19.2 and Earlier Versions	Available19.3 and La ter Versions
Managing voicemail	Callers can leave a voicemail message if a call is not answered. The voicemail message is delivered to your assigned desk phone, Connect Client, and your email inbox.	Yes	Yes
Routing calls	Using Availability Routing and Power Routing, you can route incoming calls to your predefined external phones.	Yes	Yes
Customizing your call option settings	Connect Client allows you customize your call option settings.	Yes	Yes
Sending a message	You can send messages to individuals, multiple users, and groups.	Yes	Yes
Viewing direct conversation history with a contact	Connect Client allows you to view the direct conversation history with a contact.	Yes	Yes
Scheduling a meeting with a contact group	Connect Client allows you to schedule a meeting with a contact group.	Yes	Yes
Managing message notifications	You can receive a system notification for messages by enabling messaging notification in Connect Client.	Yes	Yes

Connect Client Featu re	Description	Available in 19.2 and Earlier Versions	Available19.3 and La ter Versions
Managing conferences	Connect Client allows you to create and manage Connect conferences.	Yes	Yes
Cross-Launch MiTeam Meetings	You can cross-launch MiTeam Meetings from the Connect Client screen.	Yes	Yes
Scheduling a video conference	You can schedule a video conference by creating a new event in Connect Client.	Yes	Yes
Editing a video conference invite	You can edit an existing video conference invite from Microsoft Outlook.	Yes	Yes
Canceling a Video Conference	If a meeting is no longer required, you can cancel the meeting from Microsoft Outlook.Canceling a meeting removes the invite from your Outlook calendar and sends a notification to all the meeting attendees.	Yes	Yes
Viewing video conferences	If you have integrated Connect Client with Microsoft Exchange, your conferences are displayed in Connect Client.	Yes	Yes
Joining a video conference	You can join a video conference either from the notification, Meetings tab, or Outlook.	Yes	Yes

Connect Client Featu re	Description	Available in 19.2 and Earlier Versions	Available19.3 and La ter Versions
Sharing the screen	You can share your screen with the video conference participants. While you are sharing, participants can view your entire computer screen and all your actions on the computer, until you stop the sharing.	Yes	Yes
Setting a sound notification	You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or a new or an existing conversation.	Yes	Yes
Managing history	You can view the history of your interactions for all your contacts at once or for only a specific contact.	Yes	Yes
Managing workgroups	You can manage workgroups using Connect Client. Agents and supervisors can see the **Workgroups** tab on the Connect Client dashboard if they belong to any workgroup. The **Workgroups** tab displays the active workgroup calls for a user, and the current workgroup state.	Yes	Yes
Setting queue monitor alert threshold	You can specify the queue monitor alert thresholds and call arrive in queue notification.	Yes	Yes

Connect Client Feature	Description	Available in 19.2 and Earlier Versions	Available19.3 and Later Versions
Managing the emergency location	You can add and manage the emergency location in the Connect Client softphone. As a Connect Client user, you can now add, edit, and verify your emergency location information in the **Emergency Location** page of Connect Client.	Yes	Yes
Managing the callback number	Connect Client allows you to manage the callback number for emergency calls.	Yes	Yes
Operator features	Connect Client allows you to enable, and access operator specific features such as Drag and drop, Drag and hover, Call stack orientation, and so on.	Yes	Yes

Using Connect Client 4

This chapter contains the following sections:

- Signing in from the Connect Client Login Interface
- Navigating through the Connect Client Interface
- Adding Shortcuts to the Client Toolbar
- Selecting Preferred Language
- Setting a Sound Notification
- Connect Client Logs
- Sharing Data with Mitel
- Delegating the User

This chapter provides information about how to use Connect Client.

4.1 Signing in from the Connect Client Login Interface

To sign in from the Connect Client login interface, follow these steps:

1. Open Connect Client.
2. Enter your Mitel user name, which usually defaults to your business email address.

> **Note**:
> If your Connect Client and Microsoft Exchange email addresses are the same, sign in using your email address to integrate Connect Client with Microsoft Exchange. For more information, see Integrating the Connect client with Microsoft Exchange on page 91.

3. Enter your Mitel password.
4. To save your credentials, select the **Remember me** check box.

> **Note**:
> This option remembers the password only if you exit the application, and not log out. If you log out you must re-enter the password to sign in.

5. Click **Login** to sign in to Connect Client.

To sign out from Connect Client, click either the three vertical dots or the **<username>** on the dashboard, and click **Logout**.

Depending on how your system is configured, you might need to enter your credentials manually instead of using the **Use Windows Credentials** check box.

> **Note**:
> To resolve the double login issue, both HQ and UCB certs must be installed on the Connect client system. Proceed as follows:

1. Exit the connect client.
2. Log into the UCB. In the UCB under `/cf/certs`, the newly generated files are displayed:
   a. `ucb_server.csr`
   b. `ucb_ssl_cert.crt`
   c. `ucb_ca_cert.crt`
   d. `ucb_server.key`
3. Copy the entire `/cf/certs` directory from the UCB to the client machine using an application like WinSCP or similar application.
4. Copy the HQs **C:\Shoreline Data\keystore\certs** folder to the client machine.
5. Install the following certificates on the client machine by double-clicking on the certificate file.Navigate to **Local Machine** > **Trusted Root Certification Authorities** and click **Install**.
   a. `ucb_ssl_cert.crt`
   b. `ucb_ca_cert.crt`

   If it is Self Signed certificates on the HQ. Install the following Certificates.

   a. <HQ_FQDN>.crt
   b. `hq_ca.crt`
6. Restart the client machine.
7. Login into Connect Client.

4.1.1 Opening Connect Client Automatically

You can enable Connect Client to open automatically when you start the computer.

1. On the dashboard, click either the three vertical dots or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Account**.
3. On the second pane, click **Login.**
4. Select **Automatically launch Mitel Connect when starting the computer**.

4.1.2 Changing the Password

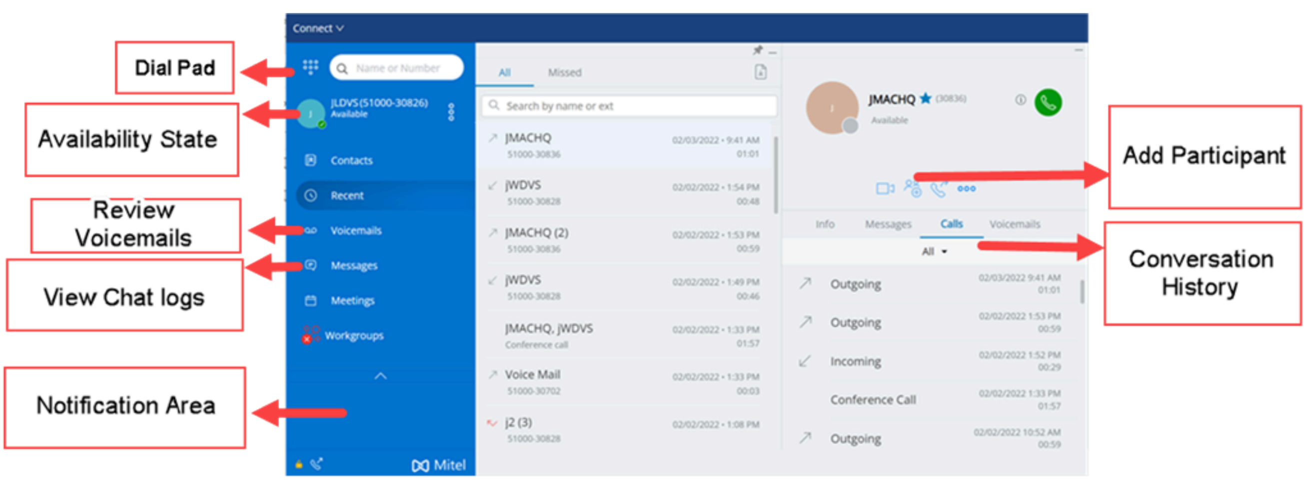
Note:
If your password is expired, the password expiry notification appears when you sign in. To change the expired password, enter the new password in **New password** and **Retype password** fields, then click **Save & Login**.

1. On the dashboard, click either the three vertical dots or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Account**.
3. On the second pane, click **Login.**
4. To change your password, after you sign in to Connect Client, do either of the following:
   - From the Connect Client login interface, enter the following in the **Account** > **Login** screen and click **Change Password**:
     - **Old password**
     - **New password**
     - **Confirm New password**

4.2 Navigating through the Connect Client Interface

The Connect Client interface dashboard comprises three panes as shown in Connect Client Interface.

Figure 3: Connect Client Interface



- **Connect menu bar**—Use the **Connect** drop-down menu on the client menu bar to do the following:
  - View information about Connect Client (Version, Copyright, Privacy Policy, and End-User License Agreement).
  - Check for updates.
  - Open the **Settings** page (for Windows) or **Preferences** page (for macOS).
  - Show or edit the toolbar.
  - Set Connect Client to be on top while navigating through other applications. For macOS, this option is available in the **Windows** tab on the Mac menu bar.
  - Access the user guide and training videos. For macOS, this option is available in the **Help** tab on the Mac menu bar.
  - Send log files to the Mitel Support. For macOS, this option is available in the **Help** tab on the Mac menu bar.
  - Exit Connect Client.
- **Dial Pad**—Use the dial pad to dial a phone number.
- **Quick Dialer Search Bar**—Use the quick dialer search bar to search for a name, number, an email address, or company name.
- **Dashboard**—Dashboard is the default and the main navigation pane:
  - **<username>**—Use the **<username>** tab to view or edit your profile information. If Connect Client is integrated with Microsoft Exchange, your active directory picture associated with the Outlook is imported. For more information about integrating Connect Client with Microsoft Exchange, see Integrating the Connect client with Microsoft Exchange on page 91.

    > **Note**:
    > LinkedIn is no longer integrated with Connect Client.

  - **Contacts**—Use the **Contacts** tab to view your contacts, add a new contact, create groups, and add contacts to the **Favorites** or Groups list.
  - **Recent**— Use the **Recent** tab to view the list of your incoming calls ( ), outgoing calls ( ), and missed calls ( ). It displays the calls in chronological order, with the most recent ones at the top.

    The date, time, and the call duration are displayed for all incoming and outgoing calls. For the current day's calls, the time and call duration are displayed. For the previous day's calls, the word

"Yesterday" is displayed along with the time and call duration. For earlier calls, the date, time, and the call duration are displayed.

The consecutive calls made or received from the same number are grouped together, and the number of calls are displayed next to the contact name. The badge on the **Recent** tab indicates the number of missed calls.

Click the user's name or extension number to view the contact card in the third pane.

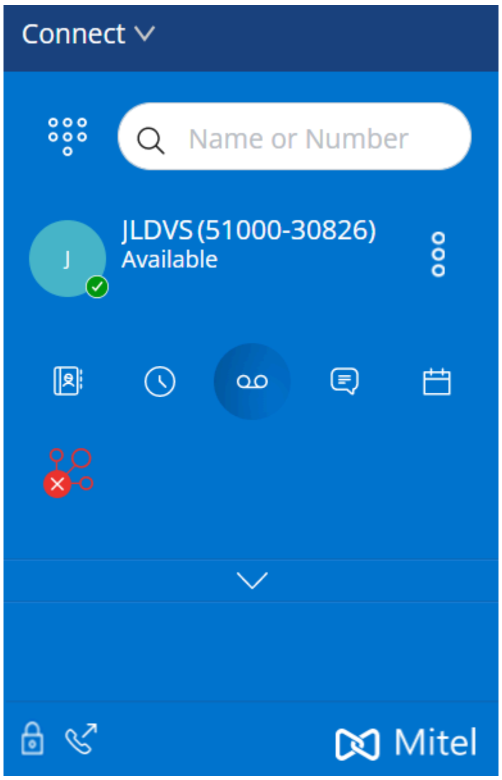
- **Voicemails**—Use the **Voicemails** tab to view your new, saved, and deleted voicemails. The badge on the **Voicemails** tab indicates the number of unplayedvoicemail messages.
- **Messages**—Use the **Messages** tab to view your chat logs. Click the **Messages** Tab to open the conversation details in the third pane. The badge on the **Messages** tab indicates the number of unread messages.
- **Meetings**—Use the **Meetings** tab to view your past and upcoming calendar appointments.

  To view your Outlook appointments, synchronize Connect Client with Microsoft Exchange. For more information about synchronizing with Office 365, see Integrating the Connect client with Microsoft Exchange on page 91.
- **Events**—Use the **Events** tab to view your past and upcoming calendar appointments. To view your Outlook appointments, synchronize Connect Client with Microsoft Exchange.
- **Workgroups**—Use the **Workgroups** tab to view active workgroup calls for a user and the current workgroup state of the user. To view information about workgroups, you must be a member of a workgroup and have the appropriate license type.

Note:
The Workgroup feature is available only for MiVoice Connect users.

You can expand or collapse the dashboard view by clicking the up/down arrow icons. In collapsed view, you can mouse hover on each icon to view the tool tip.

Figure 4: Dashboard Collapsed View



—This icon, when displayed in white, indicates that the connection to the Connect server is secure, and the client is sending encrypted data. When this icon is displayed in yellow, it indicates that the connection is not secure, and the client is sending either encrypted or unencrypted data. Hover over the icon to view the tool tip.

- **Second Pane**—The second pane displays information based on what you select on the dashboard. You can resize the second pane manually as required. This setting is retained on the machine you logged in to if you:
  - Close and reopen the second pane
  - Open the third pane
  - Log out of and then log in to Connect Client

Note:
If the same user logs in to Connect Client from another machine, the second pane opens with the default settings and all other settings are lost.

- **Third Pane**—The third pane displays information based on what you select on the second pane. For example, if you click a contact on the second pane, the third pane displays the contact card. From the contact card, you can access the conversation, calls, and voicemail history along with the information of the contact.
  - **Contact Card**—View and manage the selected contact.
    - **Info**—View the details of the selected contact.
    - **Messages**—View the conversation history of the selected contact and type your messages to the contact.
    - **Calls**—View the call history of the selected contact.
    - **Voicemails** —View the voicemail history of the selected contact. Click the minimize button at the top-right corner of a pane to close the pane.

Note:
The third pane is closed automatically if you click any item on the dashboard. However, if there is any active session on going, that session is not lost and can be viewed on the Dashboard.

Note:
The badge on the Connect Client icon on your computer task bar indicates the total number of missed calls and voicemail messages not yet played. The Connect Clienticon glows (windows)/bounces (MAC) when you have new missed calls, messages, or voicemails.

4.2.1 Pinning Tabs for Quick Access

You can pin a tab to the dashboard for quick access. The pinned tab remains open in the second pane with the dashboard. While navigating through the other tabs, you can view the pinned tab in the second pane after you close the open tabs. You can pin only one tab to the dashboard.

To pin a tab to the dashboard:

1. On the dashboard, select the tab.
2. Click  icon. To unpin the tab, click  icon.

4.2.2 Connect Client Location

You can set the Connect Client to be always on top when navigating through other applications.

For Windows:

1. On the client menu bar, click the **Connect** drop-down list.
2. Select **Always On Top.**

For macOS:

1. On the Mac menu bar, click **Window**.
2. Select **Always On Top.**

4.3 Adding Shortcuts to the Client Toolbar

From the client toolbar, you can add shortcuts for operations that you prefer or use often. The configured buttons function as shortcuts to access operations that require more actions to access unless added as shortcuts. You can use these shortcut buttons to perform a one-click operation for monitoring a call, starting a voice recording, opening the agent queue monitor, activating the softphone, or any other option defined by your organization.

To enable this feature, your administrator must first configure the **Client Toolbars** programmable buttons in Connect Director for each user.

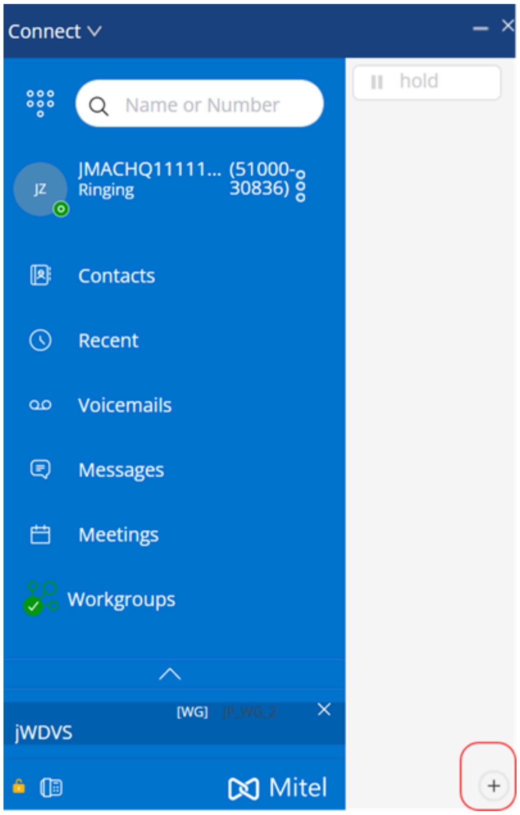
The list of configured shortcuts is displayed in a client window. To view or hide the client toolbar from the Connect Client, click the **Connect** drop-down menu on the client menu bar and toggle **Show Toolbar**.

To select which shortcut buttons are displayed in your client toolbar:

1. Click the icon at the bottom right of the toolbar panel.
2. Select the buttons to add to the toolbar panel.

Note:
You can add up to 140 buttons to the client toolbar.

Figure 5: Client Toolbar



Note:
If you are using an earlier version (19.2 or an earlier version) and have toolbars added in the Connect Client UI, then after you upgrade Connect Client to 19.3 or a later versions, you must manually enable the toolbar in Connect Client by following these steps:

1. Click the + icon at the bottom right of the toolbar panel.
2. In the **Select buttons to display in your toolbar** page that opens, select the buttons to add to the toolbar panel.
3. Click the ✕ icon.

You can drag and drop to re-order the buttons. The keyboard shortcuts to the first 10 buttons are auto-assigned based on your order on the client toolbar. For macOS, use **CMD**+**0**-**CMD**+**9**, and for Windows, use **ALT**+**0**-**ALT**+**9** as keyboard shortcuts. You can hover the mouse over the buttons to view the tool tip. For a **Monitor Extension** button, you can also view the availability state of the extension that you are monitoring.

4.4 Selecting Preferred Language

You can select the language for your desk phone and the Connect Client interface.

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Language**.

> **Note**:
> If you have an operating system in Spanish, French, German, or Simplified Chinese, Connect Client uses the same language of the operating system. For other languages,Connect Client uses English as the default language. The Mitel collaboration for Web page always uses the same language as that of the operating system, regardless of the language selected in preferences.

3. From the **Deskphone & voicemail menus** drop-down list, select the preferred language for your desk phone.
4. From the **I want to use this application in** drop-down list, select the language for the Connect Client interface.

You must exit and restart the client for the change to take effect.

4.5 Setting a Sound Notification

You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or to identify a new or an existing conversation.

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Notifications**.
3. Click **Sounds**.
4. In the **Audio Alerts** field, select **ON**.
5. In the **For event** field, click the drop-down list on the right, and select any of the following:
   - **New voicemail**
   - **call from an internal number**
   - **call from an external number**
   - **new IM message initiating a new conversation**
   - **new IM message initiating an existing conversation**
   - **monitored call**
   - **shared line call**
6. Select **Play alert.**

> **Note**:
> You must select the **No audio alert** option to play the audio in a traditional ring cycle.

7. Under **Sound**, click the drop-down list on the right and select the preferred sound from the list.

Note:
Other than the default list of sounds, you can also add (and remove) new `.wav` files.

8. Click **Add New Sound** to add a new sound as a `.wav` file.

4.6 Connect Client Logs

The Connect Client creates a log file each time you log in. The logs are used to help Technical Support with debugging problems that may arise during the operation. You can send the log files to your Connect Administrator while opening a troubleshooting ticket.

To send the client log files:

- **For Windows:**
  1. On the Connect Menu Bar, click the **Connect** drop-down list.
  2. Select **Send Client Logs** and follow the instructions provided on the screen.
- **For macOS**:
  1. On the Mac menu bar, click the **Help** tab.
  2. Select **Send Client Logs** and follow the instructions provided on the screen.

4.6.1 Connect Collaboration web client logs from iOS device

The Connect Web Collaboration client creates a log file each time you log in from your iOS device. The logs provide data that helps Technical Support troubleshoot issues during the sessions. You can download the log file for a session using your iOS device and attach the file to a ticket.

Following are the steps to access and download the log files for a Connect Web Collaboration client session on your iOS device:

1. Launch the **Connect Web Collaboration client** in Safari on the iOS device.
2. Introduce yourself.
3. On the top left corner of the meeting title, tap and hold the meeting title for 2 seconds.

   A pop-up alert might appear depending on your phone setup stating, “This site is attempting to open a pop-up windows” message with **Allow** and **Block** options.
4. Select **Allow** to open a new page and access the logs from the session.
5. Select **Share**.
6. Select **Create PDF**.
7. Click **Done.**
8. Select **Save file to**.

9. Optional: You can attach the file to an email explaining the issue and send it to Mitel Technical Support at **ITsupport@mitel.com** or attach it to a ticket in the Mitel Global IT Support portal at https://itsupport.mitel.com.

Follow these steps if the popup dialog box does not populate:

1. Select the **Share** button.
2. Select **Create PDF**.
3. Click **Done**.
4. Select **Save file to desired location** to save the file to a preferred location, such as your local drive.
5. Attach the log to your IT ticket or email to Mitel IT support.

4.7 Sharing Data with Mitel

Connect Client sends user interaction data anonymously to Mitel. The data is analyzed by Technical Support for enhancing the Connect Client application.

> **Note**:
> All anonymous data is encrypted and cannot be traced back to the user.

To disable sending user interaction data to Mitel:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Account**.
3. Click **Access**.
4. Clear the **Yes, I want to help Mitel build better products! Send anonymous data to Mitel** option.

You must exit and restart Connect Client for the change to take effect.

4.8 Delegating the User

Selecting the users who are authorized to change another user's active availability state:

1. Launch Connect Director.
2. In the navigation pane, click **Administration** > **Users** > **Users**.
3. Select the user for whom you are authorizing other users to change the active availability state.

Note:
The General tab in the Details pane displays parameters for the selected user.

4. Click the **Membership** tab, and then click the **Delegation** sub-tab.
5. Do one of the following:
   - To add a user to the list of users authorized to change the availability state for the selected user, select the user to authorize in the **Available** list and click the right arrow button to move the user to the **Selected** list.
   - To remove a user from the list of users authorized to change the availability state for the selected user, select the user in the **Selected** list and click the left arrow button to move the user to the **Available** list.
6. When the delegation option is enabled, ensure to add the user to your favorites. Adding a user to favorites is mandatory for the delegation to work.

Managing Contacts 5

This chapter contains the following sections:

- Managing Contacts
- Managing Contact Groups

This chapter provides information about how to manage your contacts.

5.1 Managing Contacts

Connect Client enables you to organize and manage your contacts.

To view the system directory that shows all the contacts in your organization, click **Quick Dialer Search**. The contact names with special characters and numbers are displayed first, followed by names in the alphabetical order by the last name with alpha headers.

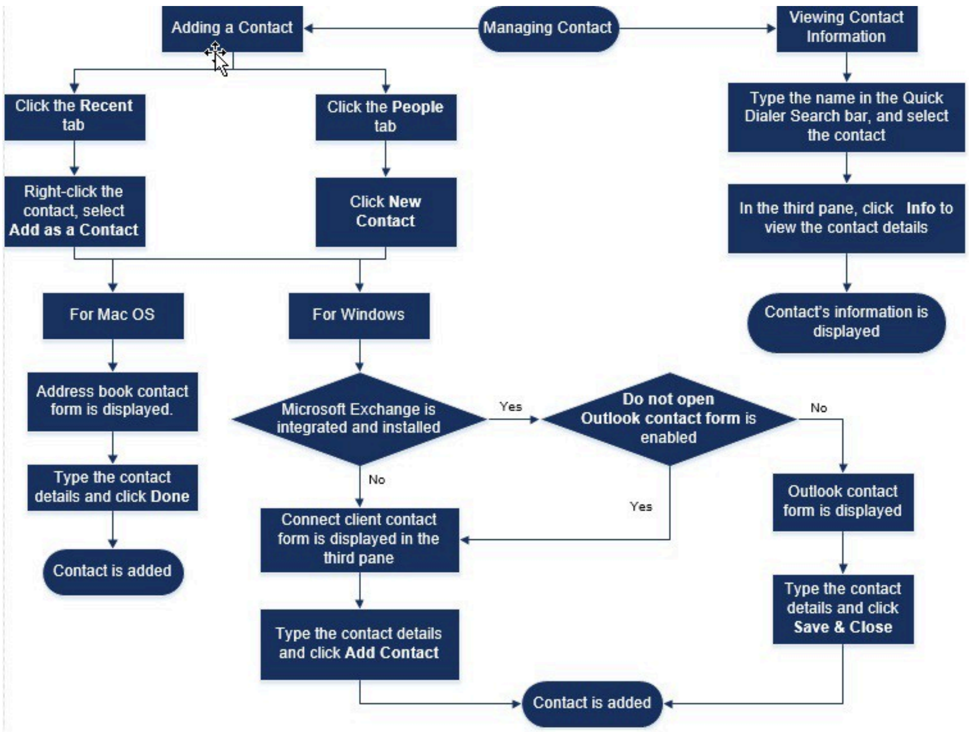
To find a contact, type any of the following in the **Quick Dialer Search** field:

- First Name
- Last Name
- Email address
- Company name
- Extension number
- Double token (single letter and double letter of the contact's name). For example, you can type P R or Pa Ro to search for Patrick Roberts.

Note:
User's **First Name** should be less then 8 characters or the **Extension Number** length should be less then 11 characters. Combination of the **First Name** and the **Extension Number** length must be less then 21 characters.The overlapping issue occurs If the total length exceeds 21 characters.

Managing Contacts describes the process of adding a contact and viewing the contact's information.

Figure 6: Managing Contacts



5.1.1 Adding a Contact on macOS

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact.**
   - Click the **Contacts** tab and click + at the top right corner of the second pane, and then select **Add Contact.**

     The address book contact form is displayed.

> **Note**:
> The address book opens only if you have enabled Connect Client in **System Preferences** on your Mac.

2. In the **New Contact** page that opens, enter the contact details in the required fields.
3. Click **Done**.

You can add an external number to your contact list from the contact card:

1. Type the external number in the **Search** field. The contact card opens in the third pane.
2. Click ⊕ on the Avatar in the third pane.

5.1.2 Adding a Contact on Windows

You can add a new contact using the Microsoft Outlook contact form and the Connect Client contact form.

Note:

You can add a new contact through Outlook contact form only if:

- Your Connect administrator has configured the Microsoft Exchange account on the Connect Director.
- Microsoft Outlook is installed on your computer.

To add contact using the Microsoft Outlook contact form:

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact.**
   - Click the **Contacts** tab and click at the top right corner of the second pane, and then select **Add Contact.**

   An Untitled Outlook Contact form is displayed.
2. Enter the contact details in the required fields.
3. Click **Create**

Note:

If you have installed the Microsoft Outlook on your computer, the Outlook contact form opens by default when adding a new contact. However, you can set the Connect client to open the Connect contact form instead of Outlook contact form.

To open the Connect contact form instead of Outlook contact form when adding a contact:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Outlook**.
3. In the page that opens, under **Contacts**, select the **Do not open Outlook when adding contact to Connect** option.

To add a new contact using the Connect contact form:

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact.**
   - Click the **Contacts** tab and click at the top right corner of the second pane, and then select **Add Contact**. The Connect contact form opens in the third pane.
2. In the **New Contact** page that opens, enter the contact details in the required fields.
3. Click **Create**.

5.1.3 Adding an External Contact on Windows

You can add an external contact to your contact list from Connect Client:

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact.**
   - Click the **Contacts** tab and click at the top right corner of the second pane, and then select **Add Contact**. The Connect contact form opens in the third pane.
2. Enter the contact details in the required fields.
3. Click **Create**.

Note:

You cannot add any external number using Microsoft Outlook contact form.

5.1.4 Viewing Information of a Contact

1. In the **Quick Dialer Search** bar, type the contact name or extension number and select the contact.
   - By default, the system directory search results are displayed.
   - If you have enabled the **Enable searching for contacts in my exchange public contact folders** option, you can view the search results from **Direct Matches** and **Exchange Public Matches.**
     - By default, the Connect Client displays the search results from **Direct Matches.**
     - To search for a contact from your Exchange Public folders, click **Exchange Public Matches.** From the drop-down list, select the folder, and the contact.

       The Contact card opens on the third pane.

Note:
For more information about the **Enable searching for contacts in my exchange public contact folders** option, see To enable searching for the contact from the Exchange Public Contact folders:

2. On the Contact card, click **Info** to view the contact's details.

   To see the company name, department name, and phone number of a contact:

   - From the **Quick Dialer Search** bar:

     a. Right-click the contact on the second pane.
     b. Select the **Show Company Name**, **Show Department Name**, and **Show Phone Number** options to view or hide the contact information.

   - From **Favorites** and **Groups**:

     a. On the second pane, click .
     b. Select the **Company Name Department Name**, and **Phone Number** options to view or hide the contact information.

The phone numbers of the contact are displayed in the order; Extension ( ), Business or Work ( ), Mobile ( ), and Home ( ). If a contact has configured all the four phone numbers on Connect Client, by default, the first two phone numbers in the order are displayed in the second pane.

To view all the phone numbers, click **More**. The Contact card opens on the third pane. **Click** Info where all the phone numbers and email IDs of the contact are displayed.

Note:
The **More** option is displayed only if the contact has configured more than two phone numbers.

5.1.5 Importing the Contact Folders

For macOS, you can import the contact folders from the Mac address book into the Connect client. If the Microsoft Outlook is installed on your computer, the Mac address book synchronizes with the Microsoft Outlook or Office 365 contact folders.

Note:
You must enable the Connect Client in the **System Preferences** on your Mac to import the contacts from the Mac address book.

To import the contact folders from the Mac address book:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Preferences** and then click **Contacts/Outlook**.
3. Select the **Sync my Mac Contacts** option.
4. Click **+Show contact folders** and select the folders that you want to import into Connect Client.

For Windows, if you have integrated Connect Client with Microsoft Exchange, you can import the contact folders from Microsoft Outlook or Office 365 into Connect Client. For information about importing the contact folders from Microsoft Outlook or Office 365 into Connect Client, see Synchronizing Connect Client with Microsoft Outlook or Office 365 Contact Folders on page 94.

5.1.6 Editing an External Contact

To edit an external contact, follow these steps:

1. In the **Quick Dialer Search** field, type the contact name or the number.
2. From the search results, click the contact name that you want to edit.
3. The contact card opens in the third pane, click **Info** on the contact card.
4. Click **Edit**, and update the fields.
5. Click **Save** to confirm the update.

5.1.7 Deleting a Contact

To delete a contact from Connect Client when it is not integrated with Outlook:

1. In the **Quick Dialer Search** field, type the contact name or extension.
2. Click the name of the contact that you want to delete.
3. Click **Info** on the contact card.
4. Click **Delete**.
5. In the confirmation dialog box, click **Delete**.

Note:
You can delete only the external contacts that you have added to Connect Client. You cannot delete contacts available through the system directory of your organization.

You can delete the contacts imported from the Outlook all at once using the Connect Client interface.

To delete the contacts imported from Outlook:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Outlook**.
3. Click **Remove Synced Contacts.**
4. In the confirmation dialog box, click **Remove.**

All your contacts imported from Outlook are deleted at once. The **Remove Synced Contacts** option is disabled and the **Sync my Outlook contacts** option is cleared.

5.1.8 Deleting an External Contact

1. In the **Quick Dialer Search** field, type the contact name or number.
2. From the search results, click on the contact name that you want to edit.
3. The contact card opens on the third pane, click **Info** the contact card.
4. Click **Delete**.
5. In the confirmation dialog box, click **Delete**.

5.1.9 Adding a Contact to your Favorites List

1. In the **Quick Dialer Search** field, type the contact name or extension.
2. From the search results, click the **Star** icon next to the contact name that you want to mark as favorite.

   Alternatively, you can mark a contact as favorite by clicking the **Star** icon on the Avatar in the third pane.

   You can mark a contact favorite from both Direct Matches and Exchange Public Matches.

To remove a contact from the favorites list, click the **Star** icon next to the contact name or on the Avatar.

5.1.10 Viewing Favorites

1. Click the **Contacts** tab on the dashboard.
2. Click the **Favorites** tab on the second pane to view the list of contacts marked as favorites.

In Favorites and Groups lists, you can view the contacts in **List** mode or **Compact** mode.

On the second pane, click to view in List mode, and click to view in Compact mode.

- **List Mode**: The contact's name, extension number, phone number, department name, and availability status are displayed.
- **Compact Mode**: The contact's name and availability status are displayed.

5.1.11 Searching Contacts

You can for search the contacts added to your Favorites or Group

To search for a contact, enter the contact's name, or extension in the **Search** field in the **Favorites** or **Group** tab.

The search results open on the second pane displaying the contact's name, availability status, extension number, and phone number.

If the contact is online and has set an additional note to the availability status, the additional note is displayed. If the contact is offline, the availability status is displayed as unknown.

For more details about viewing information of a contact, refer to Adding an External Contact on Windows on page 32.

5.1.12 Sorting Contacts

You can sort the contacts in your **Favorites** and **Groups** list by last name, first name, availability state, and last contact.

To sort your contacts in the Favorites or Groups:

1. On the dashboard, click **Contacts> Favorites.**
2. On the second pane, select **Favorites** or **Groups**.
3. Click and select one of the following:
   - **Last Name**
   - **First Name**
   - **Availability**
   - **Last Contact**

5.1.13 Viewing Call Stack Information of a Contact

You can view the availability state and call stack information of a contact if the contact is added to your **Favorites** or **Groups** list. To view the call stack information, do one of the following:

- In the dashboard, click **Contacts** > **Favorites** or **Groups**. Hover on a contact to view the tool tip. The tool tip displays the contact's availability state and call stack information.
- Open the contact card and click at the top right corner of the contact card to view the contact's availability state and call stack information.

  If the contact has included an additional note to the availability status, the additional note will be displayed instead of the default status.

You can answer incomingcalls, parkedcalls, and on-hold calls from the contact's call stack. To answer a call from the call stack of a contact, refer to Exporting Call Data on page 54.

5.2 Managing Contact Groups

5.2.1 Creating a Contact Group

1. On the dashboard, click **Contacts** > **Groups**.
2. In the page that opens, click  and select **Add Group**.
3. In the **Group Name** field, type the group name.
4. In the **Group Members** field, type the contact name and select the contact.
5. In the **Quick Dialer Search** field, type the contact name or number, and then drag the contact from the search results to the **People** field.

> **Note**:
> You can use the **More** option to list the complete members for larger numbers.

6. Click **Create** to save the group, or **Discard**.

5.2.2 Reordering the List of Contact Groups

1. On the dashboard, click the **Contacts** tab.
2. In the page that opens, click the **Groups** tab to view all the groups created.
3. Click the group header and drag it to the required position.

Any changes to the order of groups persist between the client restarts.

You can hide or view members for a particular group. Click  on the group header to alternatively expand and collapse the group.

> **Note**:
> When you log in after logging out, the groups under the **Groups** tab are displayed as expanded or collapsed as they were during the previous login.

5.2.2.1 Editing or Deleting a Contact Group

1. On the dashboard, click **Contacts** > **Groups**.
2. Click  on the group header you want to edit.

3. Click next to the group name.
4. In the **Group Name** field, edit the group name.
5. In the **Group Members** field:

    - To add a contact to the group, enter the contact name and select the contact.

    > **Note**:
    > Enter the contact name or the number in the **Quick Dialer Search**, right-click the contact on the second pane, and select **Add Contact to Group** field to add the contact to the required group.

    - To remove a contact from the group, click **X** next to the contact.
    - To reorder the contact names, select a contact, and drag the selected contact to the required order.
6. Click **Save** to save your changes, or click **X** at the top-right corner of the third pane, and in the confirmation dialog box, click **Discard** to remove the user changes.

To delete a group, do the following:

1. On the dashboard, click **Contacts** > **Groups**.
2. Click on the group header you want to delete. The group expands in the third pane.
3. Click next to the group name in the third pane, and click **Delete**.
4. In the confirmation dialog box, click **Delete** to confirm the group deletion.

Managing Availability States 6

This chapter contains the following sections:

This chapter provides information about managing availability states for users and their contacts.

6.1 Understanding Availability States

You can check or verify the availability status of a contact on Connect Client before communicating with that contact. Connect Client automatically updates the availability status of users as they make and receive calls. When integrated with Microsoft Exchange, Connect Client also displays users' meeting status.

You can monitor the availability of up to 500 contacts. This can be configured by your Connect Client administrator.

The different availability states are described in Availability States.

Table 5: Availability States

Color	State	Predefined/Customizable	Description
Green	Available	Predefined	The contact is available for a call or IM session.
Yellow	In a Meeting	Predefined	The contact is in a meeting, but you can still reach the contact through an IM session. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing as explained in Playing Envelope Information for Voicemail on page 79.

Color	State	Predefined/Customizable	Description
Red	Out of Office	Predefined	If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 79.
Red	Do Not Disturb	Predefined	The contact is busy and does not wish to be reached. However, you can reach this contact through an IM. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 79.
Red	Vacation	Predefined	If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 79.

Color	State	Predefined/Customizable	Description
Gray	Custom	Customizable	The contact has a custom status, depending on the configured option. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 79.
Orange	Ringing	Predefined	When you receive an incoming call, the availability state flickers and changes to orange.
Orange	On the Phone	Predefined	When you answer an incoming call, the availability state changes to orange. When you are already on a call and receive another incoming call, the availability state starts flickering and changes to Ringing.

6.1.1 Setting Alert for Contact's Availability State

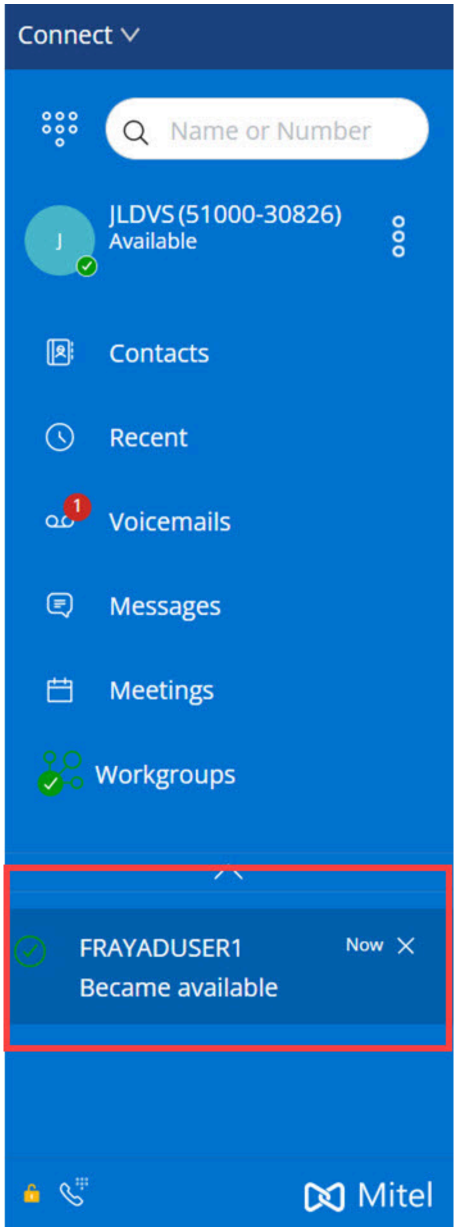
If you want to communicate with a contact who is currently not in Available state, you can set the Connect Client to notify you when the contact's status changes to Available.

To receive a notification do either of the following:

- In the **Quick Dialer Search** field, enter the contact name or extension, and select the contact. In **Contact Card**, click  and select **Alert When Available**.
- If the contact is added to your **Favorites** or **Groups** list, right-click the contact in the **Favorites** or the **Groups** tabs, and select **Alert When Available**.
- In the **Quick Dialer Search** field, enter the contact name or extension, right-click the contact in the second pane, and select **Alert When Available**.

A notification appears on the dashboard alerting you when a contact becomes available.

Figure 7: Alert when Available Notification



You can set the alert only for the contacts available through the system directory of your organization. You cannot set this alert for any external contacts that you have added to Connect Client.

Note:
Alerts are disabled when the Connect Client restarts or quits.

6.2 Changing Availability State

Connect Client automatically updates your availability state when you use the system, but you can select a predefined availability state or configure a custom availability state.

6.2.1 Selecting a Predefined Availability State

1. On the dashboard, click the drop-down menu below the **<username>.**
2. Select one of the following availability states:
   - **Available**
   - **In a meeting**
   - **Out of office**
   - **On vacation**
   - **Do not disturb**

A check mark is displayed next to the current set state.

6.2.2 Adding a Note to Availability States

You can add a custom note to each availability state on Connect Client. To add or edit an availability state note:

1. On the dashboard, click either or the **<username>** tab.
2. In the drop-down list, hover over the selected availability state, and click .
3. In the **Additional Note** field, enter the description.

> **Note**:
> You can enter a description containing up to 50 characters.

4. Click **Done** to save the changes, or **Cancel** to discard the changes.

If you do not want to add or edit the note, click **Back** to go back to the availability state drop-down menu.

6.2.3 Configuring a Custom Availability State

To configure a custom availability state:

1. On the dashboard, click the drop-down menu below the **<username>.**

2. In the drop-down list, click **Custom** and select one of the availability state color:
   - Green - **Available**
   - Yellow - **Busy**
   - Red - **Unavailable**

   > **Note**:
   > The color of the availability state cannot be customized.

3. Enter your custom status and click **Done** to save changes or **Cancel** to discard. Click **Back** to go back to the availability state drop-down menu.

The custom availability status and color is displayed on the **<username>** tab.

> **Note**:
> To view your availability state in Microsoft Outlook after integration with Connect Client, ensure that you launch the client before launching Outlook on Windows.

6.3 Allowing a Contact to Manage your Availability State

You can configure a contact to manage your availability state on the Connect Client. To manage your availability state, the contact must meet the following requirements:

- The contact must have added you to a contact group.
- The contact must have a Workgroup Supervisor or Operator license type and be configured with a specific class of service in Connect Director.

To allow access to a contact to manage your availability states:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Account**.
3. In the page that opens, click **Access**.
4. Enter in the contact name for whom you want to allow access, and close the page. The contact is configured to change your availability state until you revoke access by removing the contact from the **Access** page.

Managing Phones 7

This chapter contains the following sections:

This chapter provides information about managing your desk phone, softphone, and external phones.

7.1 Managing your Desk Phone

This section provides information about assigning a deskphone to Connect Client.

7.1.1 Assigning your Desk Phone

1. On the desk phone, press the **Assign** soft key.
2. In the **Extension** field, enter your assigned extension number, and press **Next** or the down key.
3. In the **Voicemail password** field, enter your voicemail password, and press **OK** or the # key.
4. Verify the desk phone status in the Connect client as follows:

    a. Launch Connect Client.

    b. Verify the status on the dashboard:

    - If the deskphone is successfully assigned,  is displayed at the bottom of the Connect Client screen.
    - If the **Deskphone** icon is not displayed, then repeat steps 1 to 3.

    c. Verify the desk phone status on the second pane:

    - On the dashboard, click either  or the **<username>** tab.
    - In the **Primary Assignment** tab, verify whether the **Deskphone** option is displayed.

7.1.2 Customizing your Desk Phone

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Deskphone**.

3. In the page that opens, do the following:

   a. In the **Wallpaper** field, in the drop-down list, select the preferred wallpaper.
   b. In the **Ringtone** field, in the drop-down list, select the preferred ringtone.

7.1.3 Removing the Desk Phone Assignment

1. On the dashboard, click either or the **<username>** tab.
2. In the page that opens, click the **Primary Assignment** tab.
3. To reset the current extension assignment, click **Go Back To My Desk Phone.**

The **Deskphone** option is removed from the **Primary Assignment** tab. The corresponding extension number is also unassigned from the desk phone.

7.2 Using the Softphone

When you select softphone as your primary assignment, incoming calls are routed to Connect Client. The desk phone functionality is disabled until you assign your desk phone again to Connect Client.

7.2.1 Assigning Softphone

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Primary Assignment**.

> **Note**:
> If the **Softphone** option is not displayed, contact your Connect administrator.

3. In the page that opens, do the following:

   a. Under **Microphone**, select either of the following from the drop-down list:

      - **Default**
      - **Communications**

Note:
The **Communications** option is available only in Windows.

- **Microphone Array**
- **Headset Microphone**

Note:
The **Headset Microphone** option is shown in the drop-down list only after you plug a headset into your computer.

b. Under **Speaker**, select either of the following from the drop-down list:

- **Default**
- **Communications**

Note:
The **Communications** option is available only in Windows.

- **Speakers/Headphones**

After the softphone is successfully assigned, is displayed at the bottom of the Connect Client screen.

7.2.2 Customizing the Softphone

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Softphone**.

Note:
If you do not see the **Softphone** tab, contact your Connect administrator.

3. To switch to a different audio device, in the **Capture audio through** field, click the drop-down list, and select the preferred audio device.

Note:
If required, plug your audio device into the computer's headset port or use the computer's built-in speakers.

4. Select **On startup assign me to my softphone** to handle calls and voicemails on the softphone from the time you first log in to the client.
5. Select **Enable auto gain control** to enable the automatic control.

Note:
The Connect Client softphone supports a variety of Plantronics and Jabra headsets. For details, search the Mitel knowledgebase at the following location:

- For Customers: https://mitelcommunity.force.com/customer/s
- For Partners: https://mitelcommunity.force.com/partner/s

7.3 Assigning External Phones

Note:

The Connect Client administrator can enable, disable, or configure the external assignment option from Connect Director.

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Primary Assignment**.
3. In the page that opens, select **External Assignment Number**.
4. Click **Add New Number**.
5. In the **Add Label** field, enter a name for the number. For example, Home or Mobile.
6. In the **Add Number** field, enter the phone number.

Note:

- If you enter the format of the number incorrectly, the **Cannot save this number** pop-up message is displayed.
- You cannot use a phone number that is assigned to Connect for iOS or Android.

7. In the **Number of Rings** field, select a number from 1 through 20. By default, the number of rings is set to 3.

8. To choose a method to connect to the external number, click the drop-down list and select one of the following:
   - **Automatically connect**
   - **Press 1 to connect**
9. Click **Add**.

After the external number is successfully assigned, is displayed at the bottom of the Connect Client screen.

To add a new number, click **Add New Number**.

To delete a number:

1. Select the number from the drop-down list and click **Edit**.
2. In the **Edit Number** field, click **Remove** to delete

Note:
You can click **Keep Number** to retain the external number.

If you have more than one external number, you must select one number from the drop-down list to assign to the Connect client.

Note:
You can add up to seven external numbers, and assign your extension to any one number.

You can select the number of rings after which you want the calls to be routed to voicemails.

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. In the page that opens, click **Availability Routing**.
4. Click **Change** next to the **3 rings before incoming calls are routed to voicemail** option.
5. Select 6 or more rings from the **rings before forwarding** drop-down list.
6. Click **Save**.

Managing Calls 8

This chapter contains the following sections:

This chapter provides information about making voice calls and using related features in the Connect client.

8.1 Making a Voice Call

You can make a call from:

- Quick dialer search bar
- Directory
- Recent
- Dial pad
- Outlook-Webmail/MS Teams

To make a call from the quick dialer search bar or from the system directory:

1. Enter the contact details in the quick dialer search bar on the dashboard.

> **Note**:
> Enter the first or last name, extension, company name, department name, phone number, or an email address of the person you want to search for. For more information about searching for a contact, see Adding an External Contact on Windows on page 32.

2. Do either of the following:

   - Double-click the contact in the second pane.
   - Click the contact, and then click in the third pane, which dials the default number of the user.

If the user has configured more than one number, to call the user at a particular number, click in the third pane, and select the number.

To attach an account code for the call:

1. In the third panel click , and then click **Call with Account Code**.
2. Enter an account code or select from the list, and then press **Enter**.

> **Note**:
> For more information about account codes, see Account Codes.

To make a call from the **Recent** tab:

1. Click the **Recent** tab on the dashboard.
2. Do one of the following:
   - Double-click the contact in the second pane.
   - Click the contact, and click in the third pane.

To make a call from the dial pad:

1. Click on the dashboard.
2. Enter the extension or the mobile number, and press **Enter**.

To make a call from Outlook-Webmail or MS Teams:

> **Note**:
> - Install Mitel Web Extension. See Mitel Web Extension Online Help for information about how to install the Mitel Web Extension.
> - Set Connect Client as default telephony application in your system settings. To do so:
>   1. Navigate to **Settings** > **Apps**.
>   2. On the right side, click **Default apps**.
>   3. Click **Choose default apps by protocol**.
>   4. Under **Tel**, select **Mitel Connect as default App**.

1. In the Outlook-Webmail or MS Teams, click the number you want to dial.
2. On the warning pop-up, click **Open**.

> **Note**:
> Connect Client opens with pre-filled quick dialer

3. Click in the third pane.

8.2 Answering a Voice Call

Connect Client displays a call notification on the dashboard for every incoming call. If you have enabled the system notification for incoming calls, Connect Client also displays a system notification with the following information:

- Name of the Contact. If the caller is not listed in the system directory of your organization, the name is displayed as Unknown.
- Phone Number
- Dialed Number Identification Service (DNIS) if available
- Huntgroup or Workgroup name, if the caller belongs to any. This is applicable only for MiVoice Connect users.

> **Note**:
> To enable the system notification for an incoming call, see Managing Incoming Call Notifications on page 54.

To answer an incoming call, do one of the following:

- On the system notification, click **Accept** to answer or **Ignore** to send the call directly to voicemail.

> **Note**:
> For users with Extension-only license, only the **Accept** option is displayed in the system notification.

- On the Dashboard, click to answer, and click to directly transfer the call to voicemail. To reject the call and respond through IM, click and type the message or select the canned message, and click **Send**. Click to end the active call.

- Use the following shortcut keys:
  - On Windows, press **CTRL+ A**
  - On macOS, press **Cmd+ A**

Note:
When there are multiple calls ringing, pressing the shortcut keys answers the first call in the UI stack.

- To answer a call using the Plantronics headset:

Note:
You must install the Plantronics hub. If you do not install the Plantronics hub or the hub is down, the headset acts as a normal audio device, and you cannot use the headset buttons to perform call functions. To download and install the Plantronics hub software, refer to the Plantronics website.

  - Set your extension to the softphone. (For more information, see Assigning Softphone on page 46.)
  - Press the call answer option on your headset.

Note:
You can place a voice call on hold and resume when required.

You can use the call control functions available on your headset. For more information, refer to the Plantronics website.

To attach an account code for the call:

1. In the third panel, click , and then click **Call with Account Code**.
2. Enter an account code or select from the list, and then press **Enter**.

Note:
For more information about account codes, see Account Codes.

You can place a voice call on hold and resume when required. To do so:

1. In the call notification area, click to place the call on hold and click to resume the call.

2. On the contact card, click to place the call on hold and click to resume the call.

> **Note**:
> If you are unable to release a call placed on hold from Connect Client, check and ensure that the **Shared Call Appearances (SCA)** option under **Users** > **Telephony** > **Ensure shared call appearances** in Connect Director is disabled.

You can send a call note on an active call. For more information about adding a call note, see Managing Call Notes and Viewing Routing Slips on page 63.

8.2.1 Managing Incoming Call Notifications

To receive a system notification for an incoming call:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Notifications**.
3. In the page that opens, on the second pane, click **Popup**.
4. To enable notifications, select the **Show a system notification for an incoming Call** check box.
5. In the **Keep notification on screen for** field, select the time from the drop-down list.

8.3 Exporting Call Data

Users can export the call history details and the associated call notes by using the ‘Export Call Data’ feature. To export the call data, do the following:

1. Click the **Recent** tab on the dashboard.
2. Under the **All** tab, in the second pane, click .
3. Use the drop-down menu to do the following:
   - **Today** - Export the entire call history with the contacts for the current day.
   - **Last week** - Export the entire call history with the contacts for the last seven days.
   - **Last month**- Export the entire call history with the contacts for the last month.
4. Select **Export** from the drop-down menu.

> **Note**:
> The **Save As** dialog box is displayed. The default file format is `.csv`, and the default path for saving the file is `C:\Users\<user>\Downloads`.

5. Enter the file name, and select the location or accept the default location, and click **Save**.
6. Locate the file on your computer, and double-click to open the `.csv` file, or you can rename the file in the `.xlsx` format and open it.
7. Review the information about the call data.

8.4 Answering Call from Call Stack of a Contact

Note:

This option is available only if your Connect administrator has enabled the **Allow Call Pick Up** and **Show Caller ID name and number for other extensions** options in Connect Director.

You can answer incoming calls, parked calls, and calls on hold from a contact's call stack. To answer a call:

1. View the call stack of a contact. For information about call stacks, see Viewing Call Stack Information of a Contact on page 36.
2. Click beside the call you want to answer.

Note:
When you answer a call from the contact's call stack, the answered call is removed from the contact's call stack and appears on your call stack.

Note:

You can also answer the parked calls from the contact card. Click and in the pop-up window, click to answer the call.

8.5 Viewing Call Interaction History with a Contact

1. In the **Quick Dialer Search** field, type the name or extension number and select the contact.
2. In the third pane, click **Calls**.

In the drop-down list, by default, All is selected. It displays the entire call history with the contacts. To view only the missed calls, select **Missed** in the drop-down list.

Your call history with the selected contact is displayed in the third pane. Click each call entry to view the call origin, the call duration, the call routing slip, and to enter a call note.

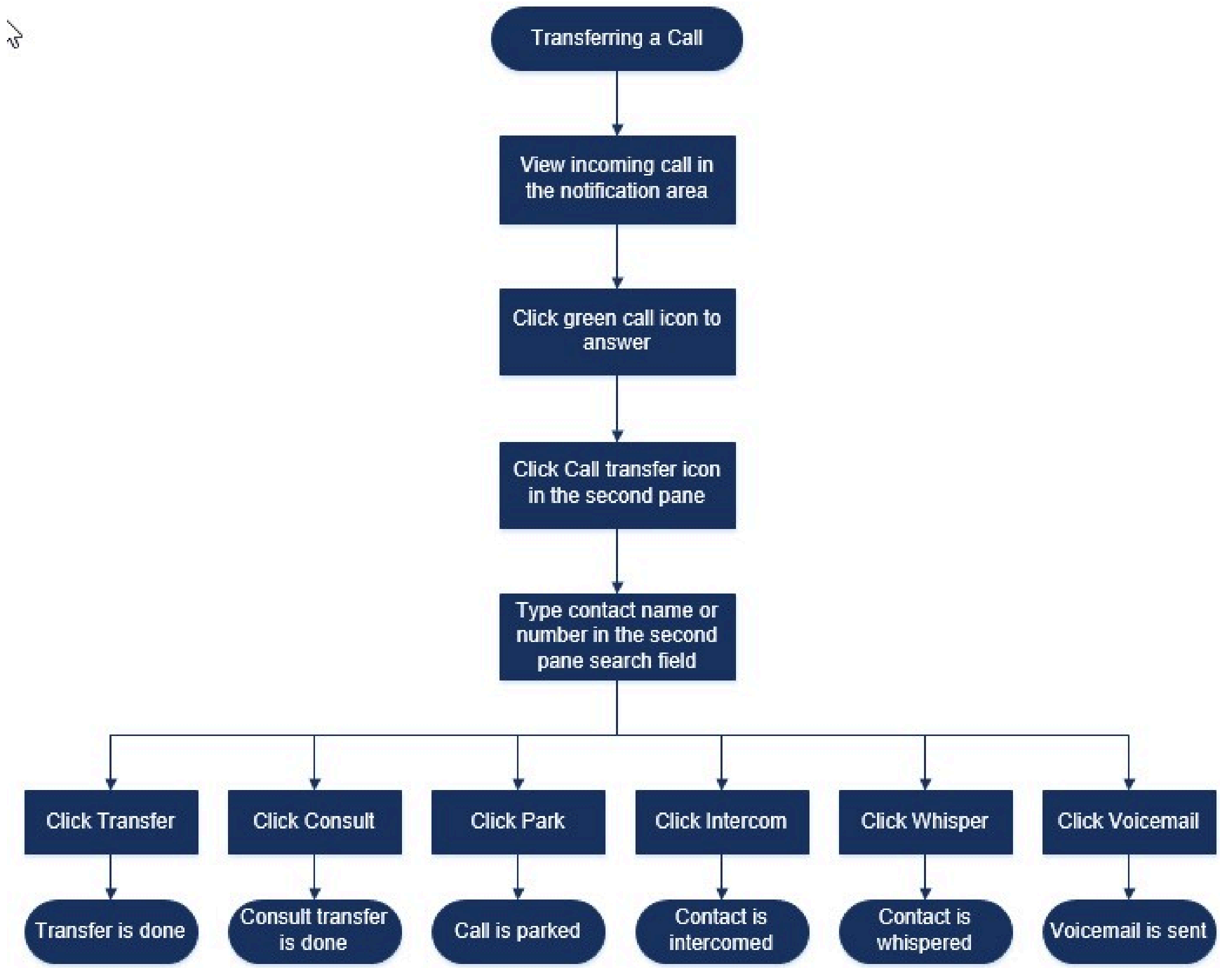
8.6 Transferring a Call

Connect Client allows you to do the following kinds of transfer operations or other actions related to transfers:

- Blind transfer
- Consultative transfer
- Park
- Intercom
- Whisper
- Voicemail

Transferring a Call describes the different types of call transfer options; Transfer, Consult, Park, Intercom, Whisper, and Voicemail.

Figure 8: Transferring a Call



8.6.1 Transferring a Call Using the Blind Transfer Option

In blind transfer, you cannot to talk to the person that you want to transfer the call to, before making the call transfer. You can do the blind transfer using the drag-and-drop option, the contextual menu, or from the call notification area.

Note:
You can do the blind transfer either before or after answering a call. To answer a call, see Answering a Voice Call on page 52.

To do a blind transfer using the drag-and-drop option:

1. In the **Quick Dialer Search** field, enter the contact name or the extension number.
2. Drag the call from the call notification area and hover over the contact for two seconds to view contextual menu. Select **Blind transfer** from the contextual menu to complete the call transfer.

To do a blind transfer using the contextual menu:

1. In the **Quick Dialer Search** field, enter the contact name or the extension number.
2. Drag the call from the call notification area and hover over the contact for two seconds to view the contextual menu. Select **Blind transfer** from the contextual menu to complete the call transfer.

> **Note**:
> Under **Groups** and **Favorites**, if the contact list is long, you can drag the call to the list and scroll through the list to locate the contact to whom you want to transfer the call.

To do a blind transfer from the call notification area:

- Before answering the call:

  1. On the dashboard, click in the call notification.

     > **Note**:
     >
     > - Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.
     > - Pressing the shortcut keys will perform the transfer action for the connected call.
     > - If there are multiple calls, the most recent call will be transferred.

  2. In the second pane search field, type the contact name or the phone number.
  3. Click **Transfer**.

After answering the call:

1. In the second pane, click .

   > **Note**:
   > Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

2. In the second pane **Search** field, enter the contact name or phone number.
3. Click **Transfer**.

8.6.2 Transferring a Call Using the Consult Option

In consultative transfer, you can talk to the person that you want to transfer the call to, before making the call transfer.

- Before answering the call:

    1. On the dashboard, click in the call notification.

    Note:
    Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

    2. In the second pane search field, enter the contact name or the phone number.
    3. Click **Consult**.
    4. In the **Consulting** window, click to complete the call transfer.
- After answering the call:

    1. In the second pane, click .

    Note:
    Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

    2. In the second pane search field, enter the contact name or phone number.
    3. Click **Consult**. The active call goes on hold and the **Consulting** window appears.
    4. Click to complete the call transfer.

8.6.3 Parking a Call

You can park a call using the contact card or the contextual menu. If the call is not answered at the specified extension, the call is returned to you with the routing slip indicating that you have already spoken to this caller.

To park a call using the contact card:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, enter the contact name or phone number.
4. Click the **Park** option.
5. Click to park the call.

To park a call using the contextual menu:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the **Quick Dialer Search** field, enter the contact name or number and select the contact.

3. Drag the active call in the notification area and hover over the selected contact for two seconds to view the contextual menu.
4. Select **Park** from the contextual menu to complete the call transfer.

appears next to the contact name indicating that the call is parked on the contact's call stack.

8.6.3.1 Park and Page

To park a call and page a contact:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, enter the contact name or phone number.
4. Click the **Park** option.
5. Click to park and page the call.

8.6.3.2 Park and Intercom

You can use the park and intercom option to place an intercom call in which the recipient phone automatically answers with mute activated and broadcasts your message through the recipient's speaker phone, headset, or handset.

To park and intercom a call:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, enter the contact name or phone number.
4. Click the **Park** option.
5. Click to park the call and place an intercom call to the selected contact.

8.6.4 Transferring a Call Using the Intercom Option

Before answering the call:

1. On the Dashboard, click in the call notification.

> **Note**:
> Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

2. In the second pane search field, enter the contact name or the phone number.
3. Click **Intercom**.
4. On the **Consulting** window, click to complete the call transfer.

After answering the call:

1. In the second pane, click .
2. In the second pane search field, enter the contact name or phone number.

> **Note**:
> Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

3. Click **Intercom**. The active call goes on hold and the **Consulting** window appears.
4. Click to complete the call transfer.

8.6.5 Transferring a Call Using the Whisper Option

Before answering the call:

1. On the Dashboard, click in the call notification.
2. In the second pane search field, enter the contact name or the phone number.
3. Click **Whisper**.
4. On the **Consulting** window, click to complete the call transfer.

After answering the call:

1. In the second pane, click .

> **Note**:
> Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

2. In the second pane search field, enter the contact name or phone number.
3. Click **Whisper**. The active call goes on hold and the **Consulting** window appears.
4. Click to complete the call transfer.

8.6.6 Transferring a Call to Voicemail

On the dashboard, click in the call notification to transfer the call directly to your voicemail without answering the call.

To transfer the call to another contact's voicemail:

1. On the Dashboard, click in the call notification to answer the call.
2. In the second pane, click .

> **Note**:
> Alternatively, you can press **CTRL** + **T** on a Windows machine or **Cmd** + **T** on a Mac machine.

3. In the second pane search field, enter the contact name or phone number.
4. Click **Voicemail**. The active call goes on hold and the **Consulting** window appears.
5. Click to complete the call transfer to voicemail.

8.7 Making a Conference Call

A conference call involves more than two parties connected in a call. The number of people you can conference together in a call depends on your system configuration. Contact your Connect administrator for details about your system's conference capabilities.

You can set up a conference call using either of the following approaches:

- In a blind conference call, you conference the people together without the other person first answering your call.
- In a consultative conference call, you talk to the person before adding that person to the conference call.

8.7.1 Setting Up a Blind Conference Call

To set up a blind conference using the contact card:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, enter the contact name or extension and click **Conference**.

To do a blind conference using the contextual menu:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the **Quick Dialer Search** field, enter the contact name or the extension number.
3. Drag the active call in the notification area and hover over the selected contact for two seconds to view the contextual menu.
4. Select **Conference Blind** from the contextual menu to initiate the conference.

8.7.2 Setting Up a Consultative Conference Call

To set up a consultative conference call:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, enter the contact name or extension and click **Consult**. The active call is placed on hold automatically, allowing you to consult the third person.
4. Click to initiate the conference call.

8.7.3 Setting Up an Intercom Conference Call

You can add a participant to an active call by placing the active user on hold and then using the intercom conference feature to call the third user without ringing the phone line.

To set up an intercom conference call:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click
3. In the second pane search field, enter the contact name or extension and click **Intercom**.

   The active call is placed on hold, and the call to the third user is automatically answered on the phone line.
4. Click icon to initiate a conference call.

8.8 Managing Call Notes and Viewing Routing Slips

Call note allows you and the other members on the call to add, view, and edit notes for an incoming call, a call that is on hold, and an active call.

Routing Slips displays the history and call routing details of the call.

Call Note and Routing Slip Status describes the various call note and routing slip status for an incoming call, call on hold, and active call.

Table 6: Call Note and Routing Slip Status

Icon	Description
	Indicates that the return routing slip is open. This icon is displayed when the call that you parked is returned to you and when the routing slip is open.
	Indicates that the return routing slip is closed. This icon is displayed when the call that you parked is returned to you and when the routing slip is closed.
	Indicates that the routing slip is closed. To open, click the icon.
	Indicates that the routing slip is open. If there is only one call, by default, the routing slip of the call is open. If there are multiple calls, by default, the routing slip is open only for the oldest call on the dashboard. For the other calls, click the icon to open the routing slip.
	Indicates that the call note is closed and there is no text. To open, click the icon. You can add the text to the call note.
	Indicates that the call note is open and there is no text. You can add the text to the call note.
	Indicates that the call note is closed and it has text. To open, click the icon. You can then view or edit the text.

Icon	Description
	Indicates that the call note is open and it has text. You can view or edit the text.

To enable routing slips and call notes:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Telephony**.
3. Select **Show access to routing slip and call note for each call in the dashboard**. The call stack displays routing slip and call note icons.

Click to view or hide the routing slip and click to view or hide the call note for a call. You can also edit the previous call note during an active call.

Note:

By default, the routing slip is open for the oldest call on the dashboard. To open other calls, click .

8.9 Making a Video Call

To make a video call, the Primary Extension must be assigned to your softphone. (For details about how to assign your extension to the softphone, see Assigning Softphone on page 46.)

1. Find and select a contact. (For more information, see Managing Contacts on page 29.)
2. To make a voice call, do one of the following:
   - In the third pane, click .
   - In the search results, double-click the contact.
   - From Favorites or Groups, double-click the contact.

3. To start broadcasting your video to the other party, click

   A select layout button appears on the third pane, when a screen share and a video call are active at same time. Click drop-down to share with other members on the video call. (For more information about Screen sharing, see Sharing Screens with a Contact)

   - All
   - Data
   - Video

   To end the video, click Turn off Video Camera icon.

   .

8.9.1 Setting Up Video Camera Preferences

You can set up Connect Client to use the video camera:

- By default
- Prompt you to turn on the camera
- Wait for you to activate the camera manually, which lets you have complete control of your video camera.

To set up the video camera:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Video**.
3. Under **Permissions**, select one of the following video options:
   - **Automatically start my camera without asking**
   - **Ask me if I want to use my camera**
   - **Never ask me, I'll turn the camera ON myself**
4. Click **Camera Setup** and select the video device from the drop-down list. (You can view a preview from the selected video device.)

8.10 Managing Voicemail

Callers can leave a voicemail message if a call is not answered. The voicemail message is delivered to your assigned desk phone, Connect Client, and your email inbox. This section includes the following topics:

- Forwarding Calls to your Voicemail Inbox on page 69
- Leaving a Voicemail Message on page 70
- Accessing Voicemail Messages on page 70

Note:

To alert you about an incoming voicemail message you can set an email notification or a system notification. For more information, see the following

- Configuring Email Notifications for Voicemail Messages on page 75
- Managing System Notifications for Voicemail Messages on page 75

Voicemails and auto-attendant responses are transferred throughout the system using Simple Mail Transfer Protocol (SMTP). The default message size and session size limits on Information Services (IIS) 6.0 Manager are as follows:

- The maximum message size is 2048 KB.
- The maximum session size is 10240 KB.

Note:

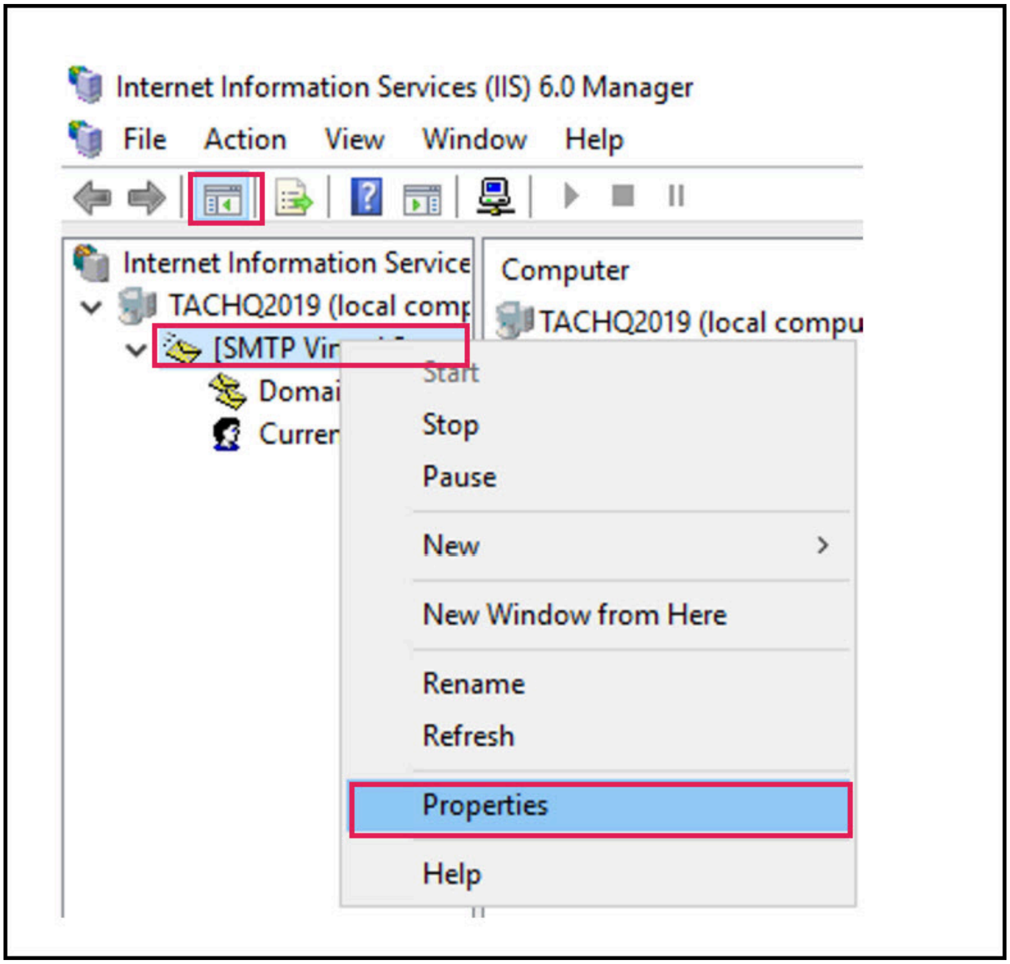
- These limits are usually very low and must be modified to be over the size of the largest voicemail to avoid losing voicemails when voicemail boxes are moved between servers.
- Administrators must be careful when using the Bulk Edit tool to move multiple voicemail boxes at once. Mitel recommends moving fewer than 50 mailboxes at a time, even after adjusting the settings as described here.
- You can modify these limits on the headquarters (HQ) server or distributed voice server (DVS).

To view the default limits in Information Services (IIS) 6.0 Manager, follow these steps:

1. Open **Internet Information Services (IIS) 6.0 Manager**.

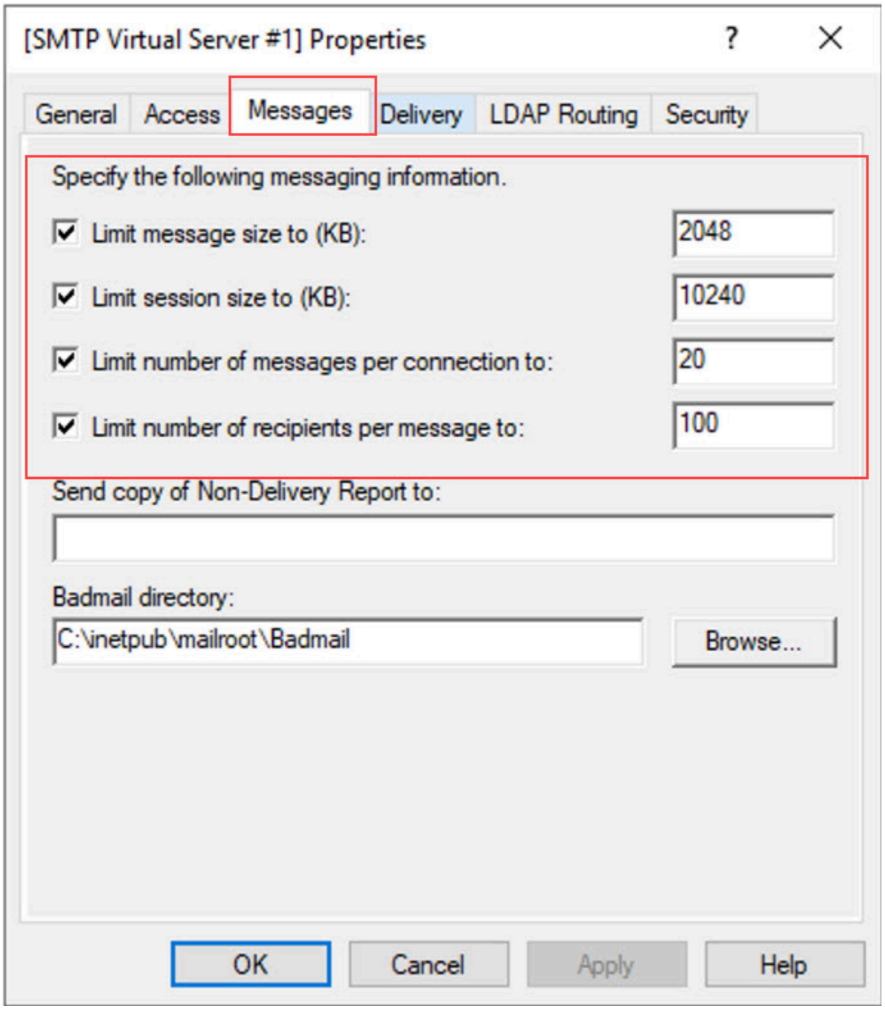
2. Expand the server, right-click **SMTP Virtual Server**, and select **Properties**.

Figure 9: IIS 6.0 Manager



3. In the window that opens, click the **Messages** tab to view the default limits on Information Services (IIS) 6.0 Manager.

Figure 10: Messages tab



Note:

- Voicemails are stored at the following location: `Shoreline Data/Vms/Message`.
- The maximum size of voicemail messages for each user is directly related to the maximum message size set for the user's Class of Service in HQ server.

8.10.1 Forwarding Calls to your Voicemail Inbox

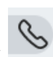
When you receive an incoming call that you do not want to answer, click in the notification area. The caller is directed to record a voice message.

After a caller leaves a voicemail message, you receive a badge notification on the **Voicemails** tab on the dashboard and on the Connect Client icon on your computer task bar.

8.10.2 Leaving a Voicemail Message

1. Dial a contact. (For more information, see Making a Voice Call on page 50.)
2. When you are prompted to leave a voicemail message, record your message.

8.10.3 Sending a Group Voicemail

1. On the dashboard, click **Contacts**.
2. In the page that opens, click the **Groups** tab, and click  on the group header to which you want to send a voicemail.
3. Click **Send Voicemail**.
4. Do the following:
    - To record the message through the desk phone, click .
    - To record the message through the computer speaker, click .
    - To start recording the message, click .
    - To stop recording, click .
    - To play the recorded message, click .
5. Enter a title for your recording in the **Subject** field.
6. Specify any of the following options for the message:
    - **Urgent**—recipient can see an exclamation point (!) next to the voicemail.
    - **Private**—recipient cannot forward a private voicemail.
    - **Receipt**—sends an acknowledgment to the sender when the recipient has listened to the voicemail.
7. Click **Send** to send a group voicemail.

8.10.4 Accessing Voicemail Messages

Each voicemail displays the following:

- Name and number of the voicemail sender.
- Date on which the voicemail was received. If you receive it on the current day, "Today" is displayed along with time and duration.
- Duration of the voicemail.

- Icons to indicate Saved ( ), Private ( ), and Urgent ( ) voicemails.

To access a voicemail message:

1. On the Dashboard, click the **Voicemails** tab.
2. To access the voicemail messages for a specific category:
   - Click the **All** tab to view all (opened, unopened, and saved) the voicemail messages. The unheard voicemail messages are displayed in bold font, and preceded by a blue dot.
   - Click the **Unheard** tab to view the unheard voicemail messages along with the duration.
   - Click the **Saved** tab to view the saved voicemail messages that you have marked for easy retrieval.

   You can choose to reply, forward, save, or delete the received voicemails.

   To mark the message as heard or unheard, right-click the voicemail message and select **Mark as Heard or Mark as Unheard.** or **Mark as Unheard**.

   > **Note**:
   > You cannot mark the Workgroup voicemail messages as heard or unheard.

3. The **Deleted Voicemails** tab is displayed only if you have any deleted voicemail messages.

To access the deleted voicemails, click on the **Deleted Voicemails** header. By default, the **Deleted Voicemail** tab is in collapsed view and displays the number of deleted voicemails on the header.

From the **Voicemail** tab, you can add the contact from whom you have received a voicemail message to your **Favorites** or **Groups** list. To add the contact to the **Groups** list:

1. Right-click the contact's voicemail message, and select **Add Contact to Group**.
2. From the drop-down list, select **<group name>** to which you want to add the contact.

To add the contact to the **Favorites** list:

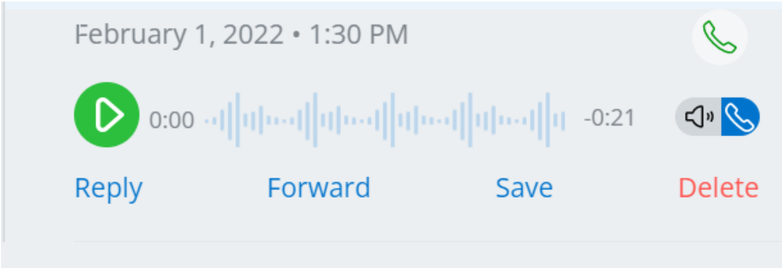
1. Right-click the contact's voicemail message, and select **Add Contact to Group**.
2. From the drop-down list, select **Favorites**.

8.10.5 Viewing Voicemails from a Contact

1. In the **Quick Dialer Search** field, enter the name or extension number and select the contact.
2. On the Contact card, click **Voicemails**.

All voicemails from a selected contact are displayed in the third pane. Click each voicemail entry to reply, forward, save, or delete the voicemail. See Viewing Voicemails for more information.

Figure 11: Viewing Voicemails

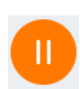


8.10.6 Listening to a Voicemail Message

> **Note**:
> When playing back a voicemail message through the PC audio device (speakers), Connect Client does not support pause/resume and rewind/fast forward functions on the first playback of a message. This is because the client is streaming the message to the local computer. After the message is played for the first time, it is cached, and these functions are available.

1. On the dashboard, click the **Voicemails** tab.
2. In the second pane, select the voicemail.
3. Click  to play the message through desk phone or  to play through the computer speaker.

> **Note**:
>
> - The audio path for voicemails listened on computer speakers when Connect Client is in the soft phone mode does not change to desk phone after you select the desk phone mode. Because of this, voicemails continue to be played on the computer speakers even when Connect Client is in desk phone mode. Therefore, you must explicitly select Computer Speakers or Phone as the audio path to play the voicemails.
> - If a voicemail message is marked as private, the computer speaker and the deskphone speaker options are disabled. The private voicemail message can only be played through the deskphone.

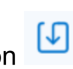
4. Click  to play the voicemail message, and click  to pause the voicemail message. Use the progress indicator to skip forward or backward within the message.

> **Note**:
> If you have a desk phone and log in to Connect Client, you will have soft phone and desk phone mode options. You have a choice to play voicemails either from desk phone or computer speakers in desk phone mode. If you have assigned Connect Client to softphone, desk phone option will be displayed.

You can choose to reply, forward, save, or delete the received voicemail.

> **Note**:
> The user record in Connect Director must contain an email address for the mailbox to play back voicemails. Enter the address in the **Email address** field by accessing the **Administration** > **Users** > **General** tab in Connect Director. The **Email address** field must be:
>
> - In standard email address format.
> - Not be a duplicate of an email address of any other user already in the system.

8.10.7 Saving a Voicemail Message

1. On the Dashboard, click the **Voicemails** tab.
2. On the second pane, click the **All** tab.
3. Right-click the voicemail you want to save, and select **Save Voicemail**. The save icon  is displayed next to the voicemail name.

To remove the voicemail from the Saved list, right-click the voicemail you want to remove, and select **Unsave Voicemail**.

8.10.8 Replying to a Voicemail Message

1. On the Dashboard, click the **Voicemails** tab.
2. Click the voicemail that you want to reply to.
3. Click **Reply** and select any of the following icons:
   -  to record the message through the telephone.
   -  to record the message through the computer microphone.
4. Click  to record your message.

5. Click  to stop recording.
6. Click  to play your recorded message.
7. Edit the **To** and **Subject** fields as required. While replying to a private voicemail message, you cannot add more members to the **To** field.
8. Specify one of the following options for sending the response:
   - **Urgent**
   - **Private**
   - **Receipt**
   - **Include Original**
9. Click **Send** to send the voicemail, or **Cancel** to discard the recorded voicemail.

8.10.9 Forwarding a Voicemail Message

> **Note**:
> You cannot forward private voicemail messages.

1. On the Dashboard, click the **Voicemails** tab.
2. Click the voicemail message that you want to forward.
3. Click **Forward** and select any of the following icons:
   -  to record the message through the telephone.
   -  to record the message through the computer microphone.
4. Click  to record your message.
5. Click  to stop recording.
6. Click  to play your recorded message.
7. Edit the **To** and **Subject** fields as required.
8. Specify one of the following options for sending the response:
   - **Urgent**
   - **Private**
   - **Receipt**
9. Click **Send** to forward the voicemail, or **Cancel** to discard.

8.10.10 Deleting a Voicemail Message

1. On the Dashboard, click the **Voicemails** tab.
2. In the page that opens, do one of the following:
   - Right-click the voicemail you want to delete, and select **Delete Voicemail**.
   - Select the voicemail you want to delete and click **Delete**.

8.10.11 Restoring a Deleted Voicemail Message

1. On the Dashboard, click the **Voicemails** tab.
2. Click on the **Deleted Voicemails** header to view the deleted voicemail messages.
3. Select the voicemail you want to restore.
4. Click **Restore** to restore a deleted voicemail.

8.10.12 Configuring Email Notifications for Voicemail Messages

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Notifications**.
3. Click **Voicemail**.
4. Select **Send email notification about incoming voicemail to <email address>**. Your email address configured on the Connect Director is displayed.
5. Do the following to customize the email notification:
   - To receive the voicemail as `.wav file` format, select the **Attach voicemail as a wave file** option.
   - To mark the voicemail as heard in your voicemail inbox, select the **Mark voicemail as heard** option.

8.10.13 Managing System Notifications for Voicemail Messages

1. On the dashboard, click either or the **<username>** tab.
2. From the drop down, click **Settings** and then click **Notifications**.
3. Click **Popup**.
4. To get a system notification for an incoming voicemail, for Windows, select the **Show a system notification for a voicemail** option.

5. To get a system notification for an incoming voicemail, for macOS:

    a. Under **Incoming Voicemail**, click **Configure via macOS Notification Center**.
    b. In the **Notification Center** box, click the **Connect Client** icon.
    c. Click any of the following:

        - **None**
        - **Banners**
        - **Alerts**

8.10.14 Changing your Voicemail Password

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Voicemail**.
3. Click **Setup**.
4. Enter:

    - Old password
    - New password
    - Confirm new password
5. Click **Change Password**.

8.10.15 Recording Voicemail Greeting Name

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Voicemail**.
3. Click **Setup**.
4. Under **Record Name for Default Voicemail Greeting**, do the following:

    a. Click  to record your message.
    b. Click  to stop recording.
    c. Click  to play your recorded message.
5. Do one of the following:

    - To save the recording, click **Save**.
    - To discard the recorded greeting, click **Discard**, and repeat step 4.

8.10.16 Setting Voicemail Escalation

You can set Voicemail Escalation notification for each new message or the first unheard message, by selecting the appropriate option. You can create 9 Voicemail Escalation Profiles.

To create a Voicemail Escalation Profile:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Voicemail**.
3. Click **Escalation**.
4. Select **Add New Profile** to create voicemail escalation profiles.
5. In the **Profile Name** field, enter a name.

> **Note**:
> In the **Profile Name** field, a default name appears. However, you can modify or update the field.

6. In the **Repeat Times** field, set the notification alert frequency.
7. In the **Add Step** section, do either of the following to enable the escalation routing notifications for all or urgent only voicemail:
   - Select the **Send email notification** check box to set email notifications and enter the email address in the field, for text only notifications.
   - Select the **Attach Wave File** check box to include a `.wav` file.
   - Select the **Send phone notifications** check box to set phone notifications, and enter the phone number in the field.

   > **Note**:
   > If the **Send phone notifications** check box is selected and the user enters their own DID number, an error message "Please do not enter your own office number" is displayed when the user clicks the **Update**/**Add**option.

   - If you select the **This number is a pager** option, enter the pager ID and pager data in the following fields:
     - **Enter pager ID**
     - **Enter pager data**
   - In the **Timeout** field, set the timeout period to end the notification.
   - Select the **Notify for urgent voicemails only** option.
8. Click **Add** to set the voicemail escalation notification.

To add additional steps, click **Add Step**.

To remove any additional steps, click .

Note:
After a voicemail is marked as **Heard**, the escalation process will stop. If a user sets the voicemail back to **Unheard**, the escalation process will continue to run until the voicemail again goes back to the **Unheard** state.

8.10.17 Assign Voicemail Escalation Profile to Availability State

1. On the Dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Availability Routing**.
4. In the **When** field, click the drop-down list, and select one of the availability states.
5. In the **Voicemail Escalation Profile** field, click the drop-down list, and select the required profile.

Note:
You can assign a Voicemail Escalation Profile for your availability state except for **Do Not Disturb** state.

8.10.17.1 Editing a Voicemail Escalation Profile

You can edit a Voicemail Escalation Profile:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Voicemail**.
3. Click **Escalation**.
4. Select the profile from the main list, click **Edit**.
5. Update the information and click **Update** to confirm the changes.

8.10.17.2 Deleting a Voicemail Escalation Profile

You can delete a Voicemail Escalation Profile to cancel the escalation route.

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Voicemail**.
3. Click **Escalation**.

4. Select the profile from the main list, click **Delete**.
5. In the confirmation dialog box, click **Delete** to delete the Voicemail Escalation Profile.

8.10.18 Playing Envelope Information for Voicemail

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Voicemail**.
3. Click **Playback**.
4. Select **Play envelope information when listening to messages** to hear the received date and time of the voicemail.

> **Note**:
> The system will announce the date and time when the voicemail was received in the user's inbox before playing the message.

8.11 Routing Calls

Use the following methods to route incoming calls to your predefined external phones:

- Availability Routing—To assign call routing rules based on availability states
- Power Routing—To set customized rules

8.11.1 Availability Routing

Availability Routing allows you to route incoming calls according to your availability state. You can configure Availability Routing with or without Mobility.

8.11.1.1 Configure Availability Routing with Mobility

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Availability Routing**.
4. In the **When** field, click the drop-down list, and select one of the availability states.

> **Note**:
> By default, incoming calls are routed to your extension and to your Mobility device.

5. Click the **Start Wizard** on the right.
6. To specify your Connect Mobility enabled device, do one of the following:
    - In the **Blank** field, type your 10-digit mobile number.
    - If you do not have a mobility device, then click **My device with Mitel Mobility will not have a number associated with it**.
7. Click **Next**. The **Simultaneous Ring** page opens.

> **Note**:
> By default, the **Simultaneous Ring** page displays an extension and a mobility device that are already included for simultaneous ring.

8. To enable an additional device, other than your extension and a mobility device, to ring simultaneously:
    a. Enable the **Also simultaneously ring these numbers** option.
    b. Click the **Select Number** drop-down list.
    c. Select the appropriate option, and click **Use Selected Number.**
9. Click **Next**.
10. To configure call forwarding, select one of the following options:

> **Note**:
> If you are not available on any of the devices configured for simultaneous ringing, then you can route the incoming calls either to your voicemail or to any other external number with appropriate permissions.

- **Keep ringing the numbers above.**
- **Incoming calls will not be forwarded, and only the devices dedicated for simultaneous ringing are permitted to ring**.
- To forward incoming calls to your voicemail or to another contact, do the following:
    a. Select **Forward the call to**, and click the drop-down list, and either select my voicemail or type in the contact name or the external number, if you have appropriate permissions.
    b. Click the drop-down list to select the number of rings before forwarding.
    c. In the **If I have more than 16 active calls forward immediately to** field, click the drop- down list, and either select my voicemail, or enter the contact name or the external number, if you have appropriate permissions.
- Select **Always forward my calls to**, and click the drop-down list, and either select my voicemail or enter the contact name or the external number, if you have appropriate permissions.

11. Click **Next**. The **Voicemail Greeting: Recording & Playback** page opens.

12. To record the voicemail greeting:

    a. Click to start recording your message, and click to stop the recording.
    b. Click to listen to the recorded greeting for any incoming voicemail messages.
    c. Do one of the following:

        i. To save the recorded greeting, click **Save Recording**.
        ii. To discard the recorded greeting, click **Discard Recording.**
13. Click **Next**. The **Interacting with Greeting** page is displayed.
14. To enable interaction with the voicemail greeting:

    a. Under **Are callers allowed to leave a voicemail after hearing your greeting?**, select one of the following options:

        - **Yes, callers can leave a voicemail.**
        - **No, callers will not be able to leave a voicemail.**
    b. If you want to forward the incoming call to a particular extension, in the **If callers press '0' while listening to your greeting Forward calls to** field, type a contact name or an extension.
15. Click **Done**.

8.11.1.2 Configuring Availability Routing without Mobility

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Availability Routing**.
4. Click the **Start Wizard**. The **Simultaneous Ring** page opens.

> **Note**:
> By default, the **Simultaneous Ring** page displays the device that is already configured for simultaneous ring.

5. To enable simultaneous ring for an additional device, do the following:

    a. Select **Also simultaneously ring these numbers**.
    b. Click the **Select Number** drop-down list.
    c. Select the additional number, and click **Use Selected Number**.
6. Click **Next**.

7. To configure call forwarding, select one of the following options:
   - If you do not want to forward incoming calls, select **Keep ringing the number above** so that the devices dedicated for simultaneous ringing are only permitted to ring.
   - If you want to forward incoming calls to your voicemail, do the following:
     a. Select **Forward the call to** and click the down arrow icon, and select **My voicemail**.
     b. Click the drop-down list to select a number for the rings before forwarding.
     c. In the **If I have more than X active calls forward immediately to** field, click the down arrow icon, and select **My voicemail**.
   - Select the **Always forward my calls to** option, click the drop-down list, and select **my voicemail**.
8. Click **Next**.
9. To enable **FindMe**, do the following:

> **Note**:
>
> If the **FindMe** option is not displayed, contact your Administrator to enable the **Allow external call forwarding and find me destination** option in Connect Director.

   a. Select **Enabled: Use my FindMe settings to continue routing the call**.
   b. Select any one of the following options:
      - Select **Ring my FindMe numbers sequentially before playing my voicemail**, and optionally select **Prompt the caller to record their name**.
      - Select **Play my voicemail first. If the caller presses 1 during the greeting then sequentially ring my FindMe numbers, and check Prompt the caller to record their name**.
   c. To define FindMe numbers that will be used sequentially, click the **Select Number** drop-down list, select the appropriate option and click **Use Selected Number.**
   d. To add another FindMe number, repeat the previous step.
10. Click **Next**. The **Voicemail Greeting: Recording & Playback** page opens.
11. To enable voicemail greeting, see To record the voicemail greeting:.
12. Click **Next**. The **Interacting with Greeting** page opens.
13. To enable interacting with the voicemail greeting, see To enable interaction with the voicemail greeting:.

8.11.1.3 Configuring Availability Routing Using Custom Settings

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Availability Routing**.
4. To configure a mobility device for incoming calls, see To specify your Connect Mobility enabled device, do one of the following:.

5. Click **Change**/**Record** to configure the following options, as required:

- **Incoming calls are routed to your Deskphone**
- **No phones selected to simultaneously ring**. To configure this option:
    - For simultaneous ring with mobility enabled, see To enable an additional device, other than your extension and a mobility device, to ring simultaneously:.
    - For simultaneous ring without mobility enabled, see To enable simultaneous ring for an additional device, do the following:.
- **Number of rings before incoming calls are routed to voicemail**. To configure this option:
    - For incoming call forwarding with mobility enabled, see To configure call forwarding, select one of the following options:.
    - For incoming call forwarding without mobility enabled, see To configure call forwarding, select one of the following options:
- To configure the **If callers press 1 while listening to my voicemail greeting, no phones are selected to sequentially ring** option, see To enable Find Me, do the following:.
- **No voicemail greeting recorded**. To configure this option, see To record the voicemail greeting:
- **Callers are allowed to leave a voicemail**. To configure this option, see To enable interaction with the voicemail greeting:.
- **Callers who press 0 during the voicemail greeting will be forwarded to the Auto- Attendant**. To configure this option, see To enable interaction with the voicemail greeting:.

8.11.2 Using Power Routing

Power Routing allows you to create customized personal rules for call routing. You can also edit and delete your power routing rules.

Power Routing overrides Availability Routing.

8.11.2.1 Creating a Power Routing Rule

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Power Routing**.
4. Click **Create New Power Rule**.
5. In the **Rule Name** field, enter a **<name>** for the new power rule.
6. In the **When** field, choose a combination of the following conditions to build a custom file for when to forward a call:

- **+ number matches**
- **+ dialed number**
- **+ my availability**
- **+ on the phone**
- **+ time is**

7. To add a rule by matching a number:

   a. Click **+ number matches**.
   b. Click the **The number is** drop-down list, and select a suitable option. (For a few of these options, you might have to enter an associated number in the corresponding field.)
   c. To create another rule, repeat the previous two steps.
8. To add a rule based on the known dialed number:
   - Click **+ dialed number**.
   - In the **Number caller dialed to reach me is** field, enter the known number.
9. To add a rule based on your availability:

   a. Click **+ my availability**.
   b. Select one of the availability states:
      - **Available**
      - **In a Meeting**
      - **Out of Office**
      - **On Vacation**
      - **Custom**
      - **Do Not Disturb**
10. To add a rule if you are already on a phone, click **+ on the phone**.
11. To add a rule based on the time or on the day:

    a. Click **+ time is**.
    b. Select either of the following:
       - If **Time** is selected, enter the time in the **from** and **to** fields for the power rule.
       - If **Day** is selected, select the days for the power rule.
12. Click **Then** > **Forward Call To** and select any of the following options:
    - To forward the call to voicemail, select the **My Voicemail** option.
    - To play a ring tone, select **play ringtone**. An additional **Standard Ring** option is displayed.
    - Click the drop-down list and select a ring tone option.
    - To forward the call to specific number, in the **Select Number** field enter the number.
13. Click **Create Rule.**

8.11.2.2 Modifying a Power Routing Rule

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Power Routing**.
4. For the power rule you want to edit, click **Edit**.
5. Edit the steps as required. (For more information, see steps 6 to steps 12 in the Creating a Power Routing Rule on page 83 section.)

6. Click **Save Rule**.

8.11.2.3 Deleting a Power Routing Rule

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Call Routing**.
3. Click **Power Routing**.
4. Click **Delete** for the power rule you want to delete.

8.11.3 Routing Calls to Mobile

You can route all your incoming calls to your Mobility device. You can select or enter the mobile number on which you have installed the Connect Mobility.

To enable this feature, your Connect administrator must configure the **Enable Enhanced Mobility with Extension** feature in the Connect Director.

8.12 Customizing your Call Option Settings

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Telephony**.
3. In the **Maximum number of concurrent calls** drop-down list, and select a number in the range configured by your Connect administrator.
4. To suppress call waiting tone, select **Suppress call waiting tone when I'm on a call**.
5. To suppress dial tone, select **Suppress dial tone when I'm off-hook in headset mode on an analog phone.**
6. To close contact card soon after you end the call, select **Close contact card after call ends** option.

Managing Messages 9

This chapter contains the following sections:

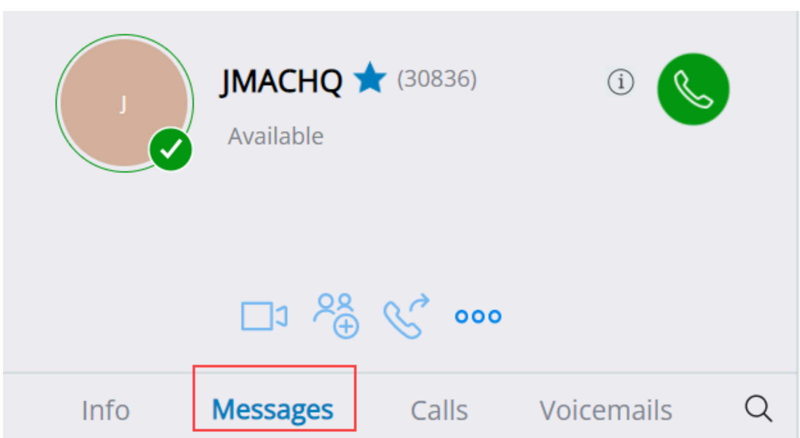
This chapter provides information about managing messages.

9.1 Sending a Message

MiVoice Connect users can send messages to:

- Individuals
- Multiple users
- Groups

Figure 12: Contact Card with message tab



To send a message to an individual contact:

1. Do either of the following to find the contact:
   - In the **Quick Dialer Search** field, enter the contact name or extension number and select the contact.
   - On the dashboard, click **Contacts** and select the contact from your **Favorites** list.
2. Do either of the following to send a message:
   - On the contact card, click the **Messages** tab.
   - From the Search results bar or from the **Favorites** list, right-click the contact, and select **Send IM**.

3. In the message input box, type the message, and press **Enter**.

To send a message to a group:

1. On the dashboard, click **Contacts** > **Groups** and select the group.
2. Click . The group contact card opens in the third pane.
3. Click **Start Chat**.
4. In the message input box, type the message, and press **Enter**.

> **Note**:
> Click the emoticon in the message input box, and select the emoticon to add it to your message.

9.2 Viewing Direct Conversation History with a Contact

To view the direct conversation history with a contact:

1. In the **Quick Dialer Search** field, enter the contact name or extension number and select the contact.
2. In the third pane, click **Messages**.

Your message conversation history with the contact is displayed in the third pane. Optionally, you can also search for a particular conversation by using a keyword in the **Quick Dialer Search** field.

9.3 Scheduling a Meeting with a Contact Group

1. On the dashboard, click the **Contacts** tab.
2. Click the **Groups** tab, and select a group.
3. Click  on the group header and click **Schedule Meeting**.
4. In the **New Event** > **Type**, select either **Video Conference** or **Audio Conference**.
5. Specify the details of the meeting.
6. Click **Create**.

9.4 Managing Message Notifications

To receive a system notification for message:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Notifications**.
3. Click **Popup**.
4. To enable messaging notification on Windows, select the **Show a system notification for an incoming IM** option and do the following:
   - Select **Show IM content in the notification** option to see the message in the system notification.
   - Select the **Keep notification on screen for** option and click the drop-down list and select a number from the list to control the persistence of the notification on your system.
5. To enable messaging notification on macOS:
   a. Click **Configure via macOS Notification Center... in Incoming IM**.
   b. In the **Notification Center** section, scroll down to select the **Connect Client** icon and then click one of the following options:
      - **None**
      - **Banners**
      - **Alerts**
6. To disable messaging notification:
   - On Windows, disable the **Show a system notification for an incoming IM** option.
   - On macOS:
     a. Click **Configure via manOS Notification Center**.
     b. Select **Do Not Disturb** on the left notification area.

9.4.1 Managing Canned Response

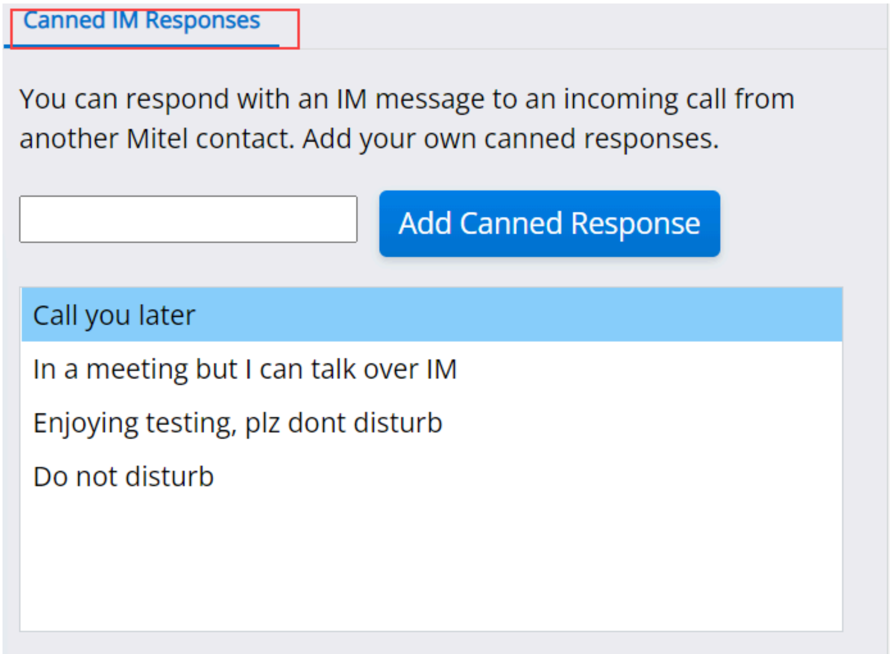
You can create a canned message for responding to an incoming call.

To create a canned response:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **IM**.
3. Click **Canned IM Responses**. The **Canned IM Responses** page opens.
4. In the blank field, type the canned message, and click **Add Canned Response**.

> **Note**:
> The canned message is saved in the box located below (see Canned IM Responses page). You have successfully added a canned response.

Figure 13: Canned IM Responses page



To delete a canned response:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **IM**.
3. Click **Canned IM Responses**. The canned IM responses are listed in the box.
4. Select a canned response, and click **Delete**. You have successfully deleted a canned response.

9.4.2 Managing Canned Message Responses for Mac

Canned IM response allows you to respond to an incoming call with an IM message that is predefined in the Connect Client application. If you are unable to respond to an incoming call in person, you can send a Canned IM response to the contact.

To add a canned IM response:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Preferences** and then click **IM**.
3. On the second pane, click **Canned IM Responses**.
4. Type your custom canned message, and click **Add Canned Response**.

Note:
The canned message is saved in the box located below You have successfully added a canned response.

To delete a canned response:

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Preferences** and then click **IM**.
3. On the second pane, click **Canned IM Responses**.
4. Select the required canned messages from the text box, and click **Delete** to delete the canned message.

Integrating with Microsoft Exchange 10

This chapter contains the following sections:

This chapter provides information about integrating Connect Client with Microsoft Exchange.

10.1 Integrating the Connect client with Microsoft Exchange

You must integrate Connect Client with your Microsoft Exchange to use the following client features:

- Synchronize events and availability status with the Outlook or Office 365 calendar.
- Synchronize your Outlook or Office 365 contact folders with Connect Client for Windows. For macOS, Connect Client synchronizes with the Mac Address book. (For more information about synchronizing Connect Client with Mac address book, see Importing the Contact Folders on page 33
- Send voicemail notifications to Outlook or Office 365.

> **Note**:
> Connect Client integration is not supported with Mac OS running Outlook version 16.

You can integrate Connect Client with Exchange/Office 365 in two ways:

- From the **Meetings** tab
- From the **Settings** tab

To integrate Connect Client with Exchange/Office 365 from the **Meetings** tab:

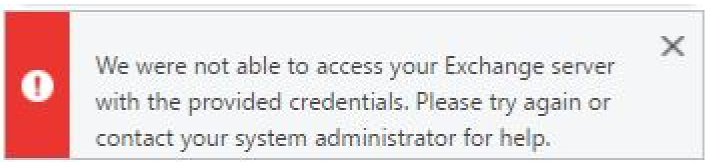
1. On the dashboard, click the **Meetings** tab.
2. If you are an Office 365 user and using an Office 365 Authentication (Modern Auth) version of the Connect Client, a Microsoft OAuth page appears, which captures your credentials.

> **Note**:
> If a sign in dialog appears, enter your Office 365 credentials.

3. If you are a non-Office 365 user or using a non- Modern Auth version of Connect Client, an **Exchange Credentials** dialog appears. Enter your user name and password, and then click **Submit**.

Note:
If you enter an invalid credential, an error as shown is displayed.

Figure 14: Non- Modern Auth version error



To integrate Microsoft Exchange with Connect Client:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Account**.
3. Click **Exchange Account**.

   The **Exchange Account** tab does not appear if you have integrated Connect Clientwith Microsoft Exchange while logging in. For more details about signing in to Connect Client, see Signing in to the Connect Client.
4. Click **Link Exchange Account**.
5. If you are an Office 365 user and using an Office 365 Authentication (Modern Auth) version of the Connect Client, a Microsoft OAuth page appears, which captures your credentials.

Note:
If a sign in dialog appears, enter your Office 365 credentials.

6. If you are a non-Office 365 user or using a non- Modern Auth version of Connect Client, an **Exchange Credentials** dialog appears. Enter your user name and password, and then click **Submit**.

Note:
If you enter an invalid credential, an error as shown is displayed (see Non- Modern Auth version error

Upon successful credentials validation, the **Unlink Mitel Connect from Exchange** option is displayed. To disable integration with Microsoft Exchange, click this option. You must restart Connect Client for the changes to take effect.

10.1.1 Azure Application Registration for Microsoft Office 365

To register the Azure application with Microsoft Office 365, refer to the guide *MiVoice Connect integration with Microsoft Office 365* for the instructions located at https://www.mitel.com/documentcenter/ business-phone-systems/mivoice-connect/mivoice-connect-platform

10.1.2 Synchronizing Events with Microsoft Outlook or Office 365 Calendar

Known Behaviors with Event Synchronization:

- Outlook for Mac versions 16.16 and prior work as expected, but later version have these limitations.
- After creating an event, it cannot be edited in Connect Client, but can be edited in Outlook.
- When creating an event, because the date and time may be incorrect, you must review the date and time in Outlook before sending the event.
- When creating an event, because the attendee list is not transferred to Outlook, but is copied to the clipboard, you must paste the attendee list in Outlook.

After integrating Connect Client with Office 365:

- Your Outlook appointments and Connect Client events are displayed on both the Outlook calendar and the **Meetings** tab.
- When you create an event on Connect Client, a meeting invite with the conference details is displayed in Outlook which can be sent to the participants. For more information about creating an event on Connect Client, see Creating a Conference on page 97.

Procedure:

On a Windows machine, you can enable a delegate to access your Outlook calendar and perform the following actions on your calendar through Connect Outlook add-in.

- Create new Connect conferences
- Edit existing Connect conferences
- Delete Connect conferences

> **Note**:
> The Connect Outlook add-in will work only if you log in to Connect Client using the **Use Windows Credentials** option.

You can synchronize the availability state between Connect Client and the Outlook or Office 365 calendar. For example, if you have a meeting currently scheduled on Outlook calendar, your availability state on Connect Client changes to **In a meeting**. However, you can also manually change your availability state on the Connect Client.

To synchronize your availability state on the Connect client with the Outlook or Office 365 calendar:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and do the following:
   - For macOS, click **Contacts/Outlook**.
   - For Windows, click **Outlook**.

> **Note**:
>
> - For Windows, the "ConnectUCBAddIn" add-in must be enabled on your Outlook to complete this synchronization. For more information about enabling add-ins in Outlook, see *Microsoft Outlook documentation*.
> - The "ConnectUCBAddIn" add-in will work only if you log in to Connect Client using the **Use Windows Credentials** option.
>
> .

3. Select the **Sync my Exchange calendar with my Mitel Connect availability modes** check box.
   - Your availability state on Connect Client changes based on your schedule on the Outlook or Office 365 calendar.
   - The **Do Not Disturb**, the **Vacation**, and the **Custom** availability states always take precedence and do not get affected by this setting.
4. Select the **Use my Outlook Work Hours to switch my Mitel Connect availability to Out of Office** option to change your availability state to Out of Office based on your work hours and days specified on your Microsoft Outlook or Office 365 calendar.

You must restart Connect Client for any changes to take effect.

For information about setting the work hours and days on Outlook calendar, see the *Microsoft Outlook documentation*.

10.1.3 Synchronizing Connect Client with Microsoft Outlook or Office 365 Contact Folders

After integrating Connect Client with the Microsoft Exchange, you can import the contact folders from Microsoft Outlook into Connect Client to make calls or send messages only for Windows.

To import contact folders from Microsoft Outlook or Office 365 into Connect client (this is applicable only for Windows):

Note:

Citrix users may encounter a limitation when utilizing the **Sync Outlook Contacts** option causing increased CPU usage, hindering their ability to perform other operations. The **Sync Outlook Contacts** feature is enabled by default making this synchronization occur automatically upon a fresh relaunch.

To address this, Mitel has disabled this option by default. However, users can use the feature by manually enabling it and relaunching the application to sync the contacts.

Note:

- The "ConnectUCBAddIn" add-in must be enabled on your Outlook to import the contact folders. For more information about enabling add-ins in Outlook, see *Microsoft Outlook documentation*.
- The "ConnectUCBAddIn" add-in will work only if you log in to Connect Client using the **Use Windows Credentials** option.

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and click **Outlook**.
3. Select the **Sync my Outlook contacts (Contacts are synced when Microsoft Outlook is running)** option.
4. Click **+Show contact** folders and select the folders that you want to synchronize with Connect Client.

You can also import the Outlook contact folders shared by other users into Connect Client. For the shared contact folders to appear in **+Show contact** folders, open the shared invitation email and click **Open this Contacts** folder. For more details about sharing a contact folder in Outlook, see *Microsoft Outlook documentation* .

For macOS, you can synchronize Connect Client with the Mac address book. For information about synchronizing Connect Client with Mac address book, see Importing the Contact Folders on page 33.

You can search for contacts from your Microsoft Outlook Public folders, but you cannot import contacts from Public folders to Connect Client.

To enable searching for the contact from the Exchange Public Contact folders:

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and do the following:
   - For macOS, click **Contacts/Outlook**.
   - For Windows, click **Outlook**.

3. Select the **Enable searching for contacts in my exchange public contact folders** check box.

You can view the contacts from your Exchange Public folders in the Connect Clientdirectory.

10.1.4 Understanding the Presence Status in Microsoft Outlook

Microsoft Outlook displays the presence status of a contact beside the contact's name. For Mitel system users, the presence status indicates the availability status of a contact as configured by the user. (See Understanding Availability States on page 39.)

If Outlook is not synchronized, incorrect or no presence status information might be shown.

For any issues related to Outlook synchronization, contact your system administrator and ensure that in Mitel Connect Director:

- The Outlook email address and the Mitel system email address are the same.
- The IM functionality is enabled for the user.

Managing Conferences 11

This chapter contains the following sections:

This chapter provides information about how to create and manage Connect conferences.

11.1 Creating a Conference

1. On the dashboard, click the **Meetings** tab.
2. Click the **New Event** icon at the top right corner of the second pane.
3. In the page that opens, in the **Type Field**, select either **Video Conference** or **Audio Conference**.
4. If you select **Video Conference**, do the following:

   a. Click **Meetings**.
   b. In the **MiTeam Meetings** application that opens, when prompted, enter your email address and click **Next**.
   c. If prompted, enter your password.
   d. Click **Schedule** to schedule a meeting.
   e. In the **Meeting Title** field, enter an appropriate meeting title.
   f. In the **Calender** field, select the **Exchange/Office 365**option from the drop-down list.
   g. In the **Search or enter email address** field, enter the name or email address of the attendees.
   h. In the Meeting options, select either the **Invite-only meeting** or **Remove waiting room** option.
   i. Click **Add to calender**.
   j. In the page that opens, enter the required meeting details.
   k. Click **Send**.

5. If you select, **Audio Conference**, do the following:

   a. In the **Name** field, enter a name for the conference. This name is used in email notifications about the conference.
   b. In the **Starts** field, enter the date, and the start time of the conference.
   c. In the **Meeting Lasts** field, enter the duration of the meeting in hours and minutes.
   d. From the **Occurs** drop-down list, select the recurring frequency of the conference.

> **Note**:
> You will see the **Occurs** field only if you have not integrated Connect Client with Microsoft Exchange.

   e. In the **On Site Location** field, enter the venue for the conference.

   Alternatively, check the **Use my own bridge** option to use the reservation-less conference bridge. Select the conference bridge of your choice from the drop-down list. For more information, click next to **Use my own bridge** option.

> **Note**:
> You will see the **Use my own bridge** option only if you have reservation-less conference and integrated the Connect client with Microsoft Exchange.

   f. In the **Organizers** field, enter the names of the people hosting the conference.
   g. In the **Presenters** field, enter the names of people presenting during the conference.

   Check the option below the **Presenters** field to add additional participants, that is, external contacts who require approval from the meeting organizer to share their screen.

> **Note**:
> You can drag and drop contacts to shift them between the **Organizers**, **Presenters**, and **Participants** fields.

> **Note**:
> For more information, about adding Presenters and Participants click .

   h. In the **Agenda** field, enter the name of the agenda and the duration of the agenda in minutes.
   i. In the **Overview** field, enter a brief description of the purpose of the conference.
   j. To attach any reference material for the participants, click **Choose from Dropbox** in the **Files** section. To attach files, you must sign in to Dropbox with your credentials.

> **Note**:
>
> - If the **Choose from Dropbox** tab is disabled for on-site users, you cannot add new files from the Dropbox.
> - To enable the **Choose from Dropbox** feature, contact the system administrator.

6. In the **More Settings** section:

   a. To set a customized access code, select the **Custom Access Code** option.
   b. To set a password, select the **Protect Meeting with Password** option, and enter the password in the **Password** field.

   > **Note**:
   > The Participant Code and the Organizer Code are automatically generated. Optionally, you can set the Participant and Organizer Code using settings in the D2 UCB.

   c. In the **Start the Meeting** section, choose one of the following options:

      - When anyone joins
      - When one of the organizers joins

   d. In the **Participants** section:

      - To announce the arrival of a participant on the conference call, select the Announce when participants arrive option, and select one of the following options:

        Play a simple audio tone

        Prompt participants to record their name, and announce when they try to join and leave the meeting
      - To mute all participants joining the conference call, select the **Mute participants on entry** option.
      - To display the names of all participants who have joined the conference, select the **Show everyone's name to all participants** option.
      - In the **When dialing out to participants area**, select one of the following options:

        Must press one to enter audio portion of the meeting

        Participants are automatically added to the audio portion of the meeting
7. Click **Create** to generate the invite.
8. Depending on your configuration, either of the following results is displayed:

   - If Connect Client is successfully integrated with Microsoft Exchange, the message **Create Conference Success Opening Outlook Please Wait** appears. An email invite draft is opened in Microsoft Outlook, where you can review the content, set reminders and recurrence, and review the list of participants before sending the invite. If you do not see this invite, see Integrating the Connect client with Microsoft Exchange on page 91 for information about integration.

- If you have not integrated Connect Client with Microsoft Exchange, the new event is created and displayed with the Connect assigned details as described in Connect Conference Details. When you click **Meetings** on the dashboard, the conference is listed on the **Upcoming** tab in the second pane.

Table 7: Connect Conference Details

Conference Detail	Description
ID	The meeting ID that is automatically generated by the Connect system when an event is created
Dial-in Info	The conference call dial-in info for host and participants
<Web Conference link for leader/host>	Connect Conference web page link for the host
Participant Code	The access code for participants to join the conference call
<Web Conference link for participants>	Connect Conference web page link for participants
Password (optional)	The password to join the secure conference call
Additional Calling Info	The dial-in info for different regions. This information is fetched from the Connect Director. To update this inform ation, contact your Connect administrator.

11.2 Editing a Conference

As an organizer, you can edit a conference. To edit a conference, do the following:

1. On the dashboard, click the **Meetings** tab.
2. Click the **Upcoming** tab to view all the upcoming conferences.
3. Select the conference.
4. Click .
5. Edit the conference details in the required fields and click **Save**.

11.2.1 Creating a Conference from Microsoft Outlook

1. Launch Microsoft Outlook.
2. Click **New Items** > **Meeting**.
3. Click the conference icon at the top right corner of the Outlook ribbon.

   A Connect conference is automatically generated with the details listed in Connect Conference Detailsappended to the email invite.
4. In the **To** field, enter the list of participants to invite to the conference. Click **Address Book** or **Check Names** to select or identify directory contacts.

5. To assign participant's role:

   a. Click **Conference** > **Settings** to open the conference settings window.
   b. Un-check **Collaborative meeting - everyone can present** field.
   c. Click the drop-down next to the presenter's name and select a role.
   d. Click **OK** to save.
6. In the **Subject** field, enter the purpose of the conference.
7. In the **Location** field, enter the venue of the conference.
8. In the **Start time** fields, enter the date and start time of the conference.
9. In the **End time** fields, enter the date and end time of the conference.
10. Click **Response Options** to configure the responses received from the participants.
11. Select the time slot from the **Reminder** drop-down list to set a reminder.
12. Click **Recurrence** if you want the conference to occur more than once.
13. Click the **Available Outlook** option to configure any other preferences.
14. Click **Send**.

11.2.2 Creating a Reservation-less Conference

> **Note**:
> You must have Outlook configured with Connect Client before creating a reservation-less conference. The event invite can be shared only using Outlook.

You can start a conference directly from the second pane on Connect Client without scheduling the conference in advance. This is called a reservation-less conference.You can also invite other users to join these conferences.

To invite participants to a conference:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **My Conference**.
3. Click the arrow next to the conference bridge name and do one of the following:
   - To dial into the conference, click .
   - To share the screen or send an IM without joining the conference, click . You can also dial into the conference or configure a call back from here.
   - Open the Link provided in the conference bridge in a web browser.
   - See **Additional Calling Info** to use the region specific toll free dial in info.

4. To invite participants to join your conference, do one of the following:
   - Click **Copy** to copy the conference information, and share the information with other users you want to invite.
   - After launching the conference, click and type the participant's name you want to invite and then click **Conference**.
5. To drop a participant, on the dashboard:
   a. Click icon below the participant name.
   b. In the confirmation dialog box, click **Yes**.

11.2.3 Adding a new Reservation-less Conference

To add a reservation-less conference:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **My Conference**.
3. Click **Add New Conference Bridge.**
4. In the **Add New Conference Bridge** pop-up window:
   - Enter the name of the conference in the **Name** field.

> **Note**:
> The Participant Code and the Organizer Code are automatically generated. Optionally, you can set the Participant and Organizer Code using settings in the Connect Director UCB.

5. In the **More Settings** section:

   - Set a password for the conference, by enabling the **Protect Meeting with Password** option, and entering a password.
   - In the **Start the Meeting** section, the **When anyone joins** option is selected by default. You can only use the default **When anyone joins** setting.
   - In the **Participants** section:

     - To announce the arrival of a participant on the conference call, select the **Announce when participants arrive** option, and select one of the following options:

       Play a simple audio tone

       Prompt participants to record their name and announce when they try to join and leave the meeting
     - To mute all participants joining the conference call, select the **Mute Participants on entry** option.
     - To display the names of all participants who have joined the conference, select the **Show everyone's name to all participants** option.
   - In the **When dialing out to participants** section, select one of the following options:

     - **Must press one to enter audio portion of the meeting**
     - **Participants are automatically added to the audio portion of the meeting**
6. Click **Add** to add a reservation-less conference.

11.2.4 Editing a Reservation-less Conference

Using the **Edit** option, a user can remove or update a reservation-less conference bridge. Click **Remove** to delete a conference bridge.

To update a reservation-less conference bridge:

1. On the dashboard, click either or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **My Conference**.
3. On the second pane, click the drop down next to the selected conference bridge name and click **Edit**.
4. Edit the name of the conference bridge in the **Name** field.
5. Do the following in the **More Settings** section:

   - Set a password for the conference, by enabling the **Protect Meeting with Password** option, and entering a password.
   - Select the required options from the **Participants** section and the **When dialing out to participants** section respectively.
6. Click **Update** to save the changes.

11.2.5 Migrating Reservation-less Conferences from ST Communicator

Reservation-less conferences migrate from ST Communicator to Connect Client as follows:

- Users who have a reservation-less conference that was previously configured in ST Communicator and who are unassigned to a service appliance will get an error message when trying to create a new event or if they try to join to an existing conference in Connect Client. To remove these conferences from Connect Client, users must manually delete the old conferences from Outlook Calendar.
- Users who have a reservation-less conference that was previously configured in ST Communicator and who are assigned to a service appliance will have a reservation-less conference created during migration, and the settings defined previously remain valid.

  While participant codes on a migrated reservation-less conference remain valid, the **When dialing out to participants** parameter in the event screen is always set to **Must press one to enter audio portion of the meeting** regardless of whether the conference was previously configured with **Participants are automatically added to the audio portion of the meeting**.

> **Note**:
>
> - If users have multiple reservation-less conferences configured in ST Communicator, all the reservation-less conferences are migrated.
> - Reservation-less conferences can be edited or changed after migration.

- Users who do not have a reservation-less conference previously configured in ST Communicator and who are not assigned to a service appliance will not have a reservation-less conference created during migration.

Accessing Recordings Made with ST Communicator

Before migrating from ST Communicator to Connect Client, download any recordings made with ST Communicator and save them to your local system. While the downloaded recordings cannot be played in Connect Client, you can use a Flash player to play them.

11.3 Viewing Conferences

1. On the dashboard, click the **Meetings** tab.
2. Click **Upcoming** to view the list of future conference
3. Click **Past** to the list of conference in the past.

The list is sorted by date, from the most recent to the oldest.

You can filter past events to display only Recorded events. To filter, click in the **Past** tab and select **Recorded Only**.

To view the events of a specific date, click on the second pane and select the date. The events for the selected date will display at the top of the second pane.

> **Note**:
> If you have integrated Connect Client with Microsoft Exchange, you see all your conferences in your Outlook calendar.

11.4 Downloading the iCalendar Data (ICS) File for a Conference

Connect Client generates an ICS file for every event. Connect Client uses the generated ICS file to send a meeting invite if Microsoft Exchange is not deployed. All participants can use this ICS file to populate their calendars with the meeting invite.

To download the Conference iCalendar data file:

1. On the Dashboard, click the **Meetings** tab.
2. Click the **Upcoming** tab to view all upcoming conferences.
3. Select the conference in the second pane to download the ICS file.
4. Click .

   The **Save As** dialog box is displayed. The default file name is mitel.ics, and the default path for saving the file is C:\Users\<user>\AppData\Local\mitel\Meetings.
5. Enter the file name and select the location or accept the default, and click **Save**.
6. Locate the file on your computer, and double-click to open the iCalendar file.
7. Review all the information about the conference, and save to your calendar.

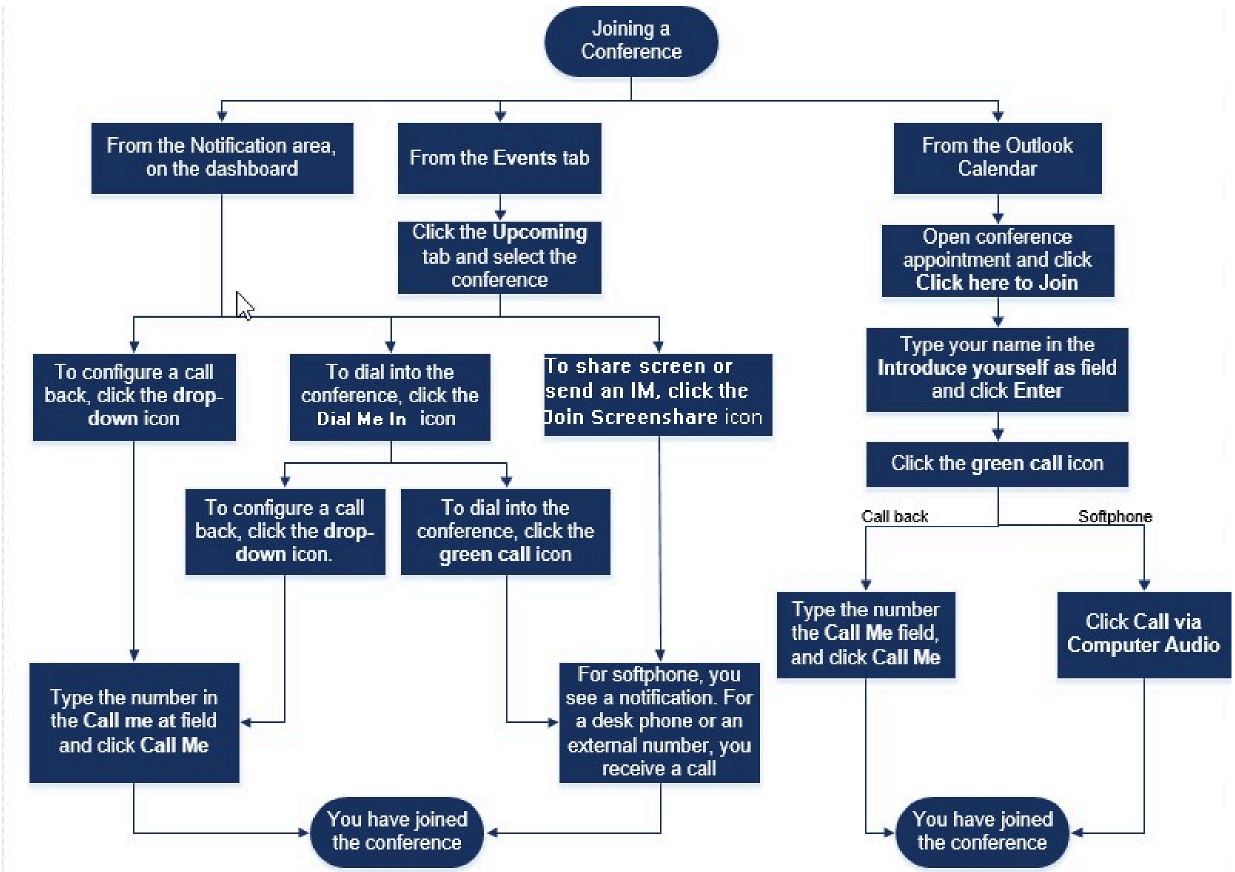
11.5 Joining a Conference

You can join a conference from Connect Client in the following ways:

- Joining a Conference from the Dashboard on page 106: Use this procedure if you see a notification for the upcoming conference in the notification area on the dashboard. The notification is usually sent 5 minutes prior to a conference.
- Joining a Conference from the Meetings Tab on page 107: Use this procedure to join the conference from the Events tab.
- Joining a Conference from Your Calendar on page 108: Use this procedure to join the conference from your calendar.
- Joining a Conference from iOS device on page 109: Use this procedure to join the conference from your iOS device.

Joining a conference describes the different ways to join a conference.

Figure 15: Joining a conference



11.5.1 Joining a Conference from the Dashboard

When you see an event notification on the dashboard, do one of the following to join:

- To configure a call back:

  1. Click the drop-down icon in beside the event name.
  2. In the **Call me at** field, enter your phone number. Optionally, you can skip this step if you have configured a call back in the previous conference and you want to use the same number (the previous number is saved in the **Call Me** field).
  3. Click **Call Me**.

- To dial into the conference, click the call icon in beside the event name.

  - If you have assigned a softphone to Connect Client, you see a notification on the dashboard when you are connected.
  - If you have assigned a desk phone or an external number to Connect Client, the assigned phone rings.

    If you are unable to dial into the conference through the assigned phone, see Managing your Desk Phone on page 45.

- To share the screen or send an IM without joining the conference, click . You can also dial into the conference or configure a call back from here.

  If you have joined the screen share, click on the task bar at the bottom of the second pane and do one of the following to dial into the conference:

  - To join the conference through the assigned phone (softphone or desk phone), click **Call via <assigned phone>.**If you have assigned any external number, click **Call External Assignment.**
  - To configure a call back, in the Call me at field enter your phone number, and click **Call Me**.

To end the conference, click .

11.5.2 Joining a Conference from the Meetings Tab

1. On the Dashboard, click the **Meetings** tab.
2. To view all upcoming conferences, click the **Upcoming** tab.
3. Select the conference that you want to join and do one of the following:

- To configure a call back:

  a. Click the drop-down icon in beside the event name.
  b. In the **Call me at** field, enter your phone number. Optionally, you can skip this step if you have configured a call back in the previous conference and you want to use the same number (the previous number is saved in the Call Me field).
  c. Click **Call Me**.

- To dial into the conference, click beside the event name.

  - If you have assigned a softphone to Connect Client, you see a notification on the dashboard when you are connected.
  - If you have assigned a desk phone or an external number to Connect Client, the assigned phone rings.

    If you are unable to dial into the conference through the assigned phone, see Managing your Desk Phone on page 45 for more information.

- To share the screen or send an IM without joining the conference, click . You can also dial into the conference or configure a call back from here.

  If you have joined the screen share, click on the task bar at the bottom of the second pane and do one of the following to dial into the conference:

- To join the conference through the assigned phone (softphone or desk phone), click **Call via <assigned phone>**. If you have assigned any external number, click **Call External Assignment**.
- To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me.**

To end the conference, click .

11.5.3 Joining a Conference from Your Calendar

If you have successfully integrated Connect Client with Microsoft Exchange or have downloaded and added the iCalendar data file to your personal calendar, you can join a conference by opening the appointment on your calendar.

1. Open your calendar.
2. Open the conference invitation.

   The invitation contains the details of the conference, as described in Connect Conference Details.
3. Do one of the following:
   - Click the **Click Here to Join** link.
   - Open the URL provided in the conference invitation on a web browser.
4. In the **Introduce yourself as** field, enter your name and press **Enter**.
5. Click on the task bar at the bottom of the page, and do one of the following:
   - To join the conference through the computer audio, click **Call via Computer Audio**.
   - To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.

> **Note**:
>
> - You can configure a call back only after the organizer joins the conference. If the organizer has not joined the conference, the **Call Me** option is disabled, and you see the message, **Available after an organizer joins** below the **Call Me** field.
> - **Call via Computer Audio** is not supported in the Safari 12.0 browser.

6. You can perform the following actions during the conference using the icons on the task bar at the bottom of the page:
   - To leave the call during the conference, click .
   - To mute and unmute your audio during the call, click .
   - To share your screen, a portion of the screen, or an application window, click .
   - To view and copy the meeting information, click .
   - To ask a question during the conference, click .
7. After the conference ends, close the browser to leave the conference.

Optionally, you can use the dial-in info and the participant code given in the conference invitation to join the conference through your cell phone.

11.5.4 Joining a Conference from iOS device

To join a web conference from an iOS device, do either of the following:

- If the Mitel Connect application is installed on your iOS device, all the Outlook meetings are displayed.

  1. Open Mitel Connect.
  2. Open the Conference invitation to display details of the conference.
  3. Select either **Join Audio** to join the audio bridge or **Join Web Bridge** to open the conference in a web browser.
  4. In the **Introduce yourself as** field, enter your name.
  5. (Optional) In the **Call me at** field, enter your number.
  6. Click **Join** to join the conference.
- If the Mitel Connect application is not installed on your iOS device.

  1. Do one of the following on your iOS device:
     - Open your calendar and select the meeting URL you want to join. The web portion of the conference opens in the Connect web collaboration client launched through the Safari browser.
     - Open the Safari browser and enter the meeting URL. The web portion of the conference opens in the Connect web collaboration client launched through the browser.
  2. In the **Introduce yourself as** field, enter your name.
  3. (Optional) In the **Call me at** field, enter your number.
  4. Click **Join** to join the conference.

Note:

- If you have not entered your call back number at the beginning, you can refresh the browser to navigate to the starting page and enter the number.
- Softphone, Agenda, screen sharing and individual chat are not supported for conferences on an iOS device.

After the conference ends, close the browser to leave the conference.

11.6 Placing a Participant on Mute

If you are an organizer of the conference, you can mute and unmute all participants or an individual participant.

- To mute all participants, click the icon on the conference task bar.
- To unmute all participants, click the icon on the conference task bar.
- To mute a participant, click the icon beside the participant name on the dashboard.
- To unmute a participant, click the icon beside the participant name on the dashboard.

Note:
If you enable the Mute participants on entry option while creating the conference, the Mute-all option is automatically enabled and all the participants will be on mute when they join the conference. For more information about creating a conference, see Creating a Conference on page 97.

11.7 Dropping a Participant from Conference

Organizer can drop a participant from the conference.

To drop a participant, do one of the following on the dashboard:

- Click icon below the participant name. In the confirmation dialog box, click **Yes**.
- Right-click the contact and select **Remove <user name>.**

11.8 Recording a Conference

1. Dial in to join a conference.
2. Click on the conference task bar to start recording the conference. The REC icon turns red to indicate that recording is in progress.
3. When you want to stop recording, click .

   You can stop a recording while a conference is in progress. To leave the conference, you must click the red call end icon as explained in Joining a Conference on page 105.

You can download, play or copy the recording URL.

1. On the Dashboard, click **Meetings** > **Past**.

   The conference with recordings are indicated with .

2. In the second pane, select the conference.
3. In the third pane, click and select the required option.

Note:

- You can play the conference recordings on Connect Client and all web browsers except the Microsoft Internet Explorer 11.
- If you do not find your recordings in the **Past** tab or if you do not have access to the Connect Client application, contact Mitel Support and request the required recording.

11.9 Canceling a Conference

You can cancel a Connect conference any time through either Connect Client or Microsoft Outlook.

11.9.1 Canceling a Conference from Connect Client

1. On the Dashboard, click the **Meetings** tab.
2. Click the **Upcoming** tab to view the list of future conferences. The list is sorted by date, from the current event to future events.
3. Click the conference that you want to cancel.
4. Click **Cancel Event** at the bottom of the third pane.
5. Click **Cancel** in the confirmation dialog box.

Note:
The **Canceling Event** message is displayed at the bottom of the third pane. This message is followed by **Opening Outlook Please Wait** message, and the Outlook invite is launched (if you have integrated with Microsoft Exchange).

6. Click **Send Cancellation** in the Outlook invite cancellation window to notify participants of the cancellation.

11.9.2 Canceling a Conference from Microsoft Outlook

If you have integrated Connect Client with Microsoft Outlook, you can cancel a conference from the Outlook client.

1. Launch Microsoft Outlook.
2. Open the conference appointment in the Outlook calendar.

3. Click **Cancel Meeting** at the top left corner of the Outlook ribbon.
4. Click **Send Cancellation** to notify participants of the cancellation.

11.10 Conferencing using Connect Client for Web

You can use the Connect client for Web to launch Connect conferencing without Connect Client. This feature is useful for remote users who have not installed the client on their systems.

By using Connect Client for Web, you can join a Connect conference from any non-Mitel network without entering any authentication details. Organizers joining the conference through Connect Client for Web can only serve as participants, not presenters or organizers in the meeting.

11.10.1 Using the Connect Client for Web

1. Do one of the following in the meeting invite sent by the conference host:
   - Open the Link in a web browser.
   - Click the **Click here to join** link.
2. In the **Introduce yourself as** field, enter your name, and press **Enter**. The navigation pane on the left displays:
   - **Meeting Title**—the conference name
   - **Now Sharing**—the contact currently sharing the screen
   - **Now Speaking**—the contact currently speaking in the conference
   - **Group Chat**—public chat window for all conference participants
   - **Attendees**—list of participants in the conference
3. Click  on the task bar at the bottom of the page, and do one of the following:
   - To join the conference through the computer audio, click **Call via Computer Audio**.
   - To configure a call back, enter the number in the **Call Me** field, and click **Call Me.**

> **Note**:
> You can configure a call back only after the organizer joins the conference. If the organizer has not joined the conference, the **Call Me** option is disabled, and you see the message, **Available after an organizer joins** below the **Call Me** field.

4. You can perform the following actions during the conference using the icons on the task bar at the bottom of the page:
   - To leave the call during the conference, click .
   - To mute and unmute your audio during the call, click .
   - To share your screen, a portion of the screen, or an application window, click .
   - To view and copy the meeting information, click .
   - To ask a question during the conference, click .
5. After the conference ends, close the browser to leave the conference.

Optionally, you can use the dial-in info and the participant code given in the conference invitation to join the conference through your cell phone.

11.10.2 Using Group Chat

Messages from other users are indicated with a red pop-up. Click the group chat window or a participant's name to view the message.

To send a message to the conference participants:

1. Click the **Group Chat** icon on the left navigation pane.
2. Enter your message in the **IM input** field at the bottom of the IM chat window, and click **Enter**.

You will receive IM message notifications with a red pop-out. Click the group chat window or participant's name to view the message.

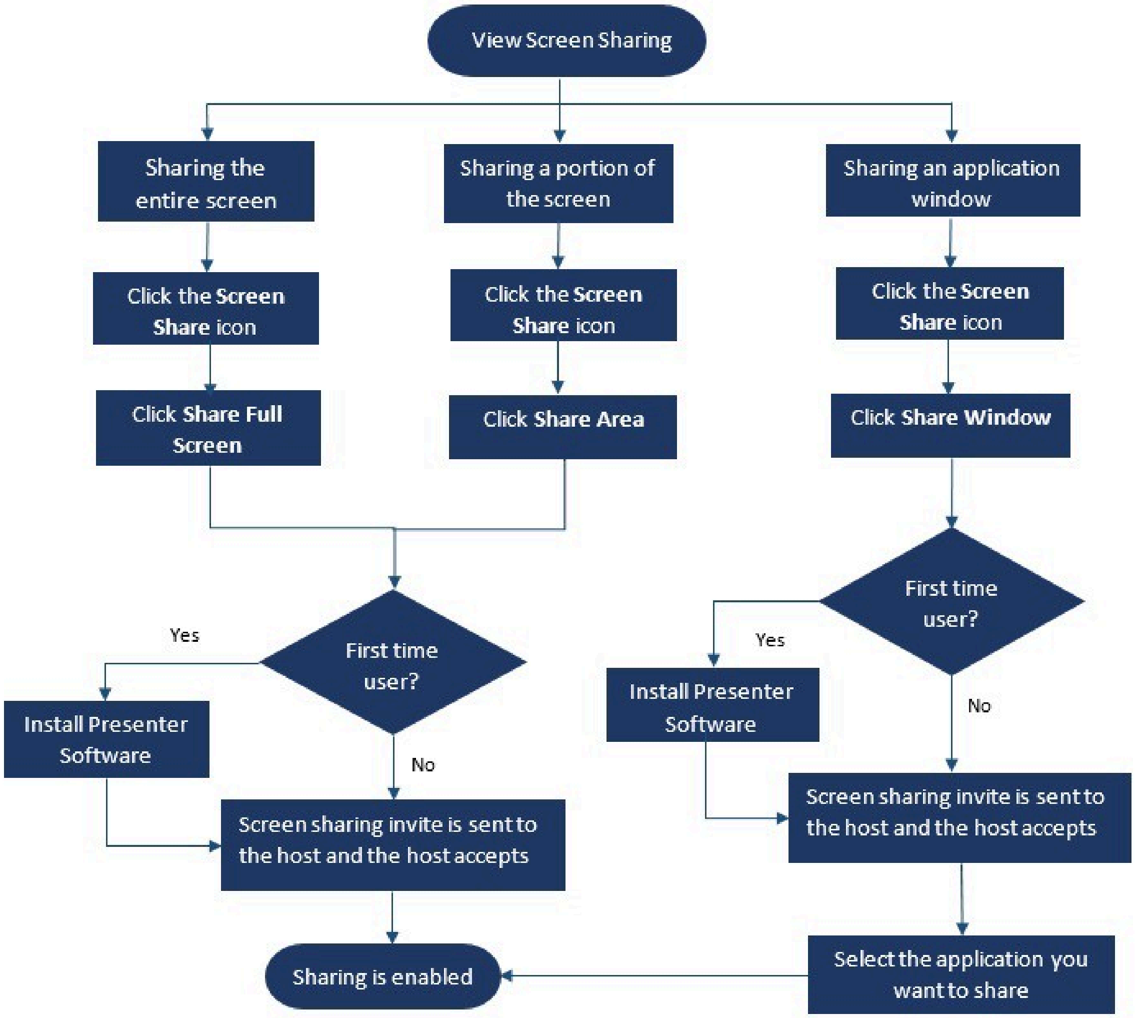
11.10.3 Using Screen Sharing

You can use the screen sharing feature to present your screen to the conference participants. You can share the entire screen, a portion of the screen, or an application window. The area being shared is outlined by a green rectangular border.

If the share icon is grayed out, your configuration might not support screen sharing. For more information, contact your Connect administrator.

Screen Sharing Methods describes the various ways to share the screen.

Figure 16: Screen Sharing Methods



To share your screen with the conference participants:

1. On the **Conference** task bar, click .
2. To share an application window, select **Share Window**.

   To share the full screen, select **Share Full Screen**. To share a portion of the screen, select **Share Area**.

   If you are a first-time user, select the appropriate option when you are prompted to install the presenter software.

Note:
When you attempt to share the screen in the Microsoft Edge browser for the first-time, Connect Client for Web displays multiple pop-ups to install the Connect Presenter.

3. If you are the conference host, screen sharing is enabled immediately after the connect presenter is installed.

   If you are a participant, the screen sharing request is sent to the host. Connect Client displays a notification on the conference task bar for all screen sharing requests. If the system notification for screen share is enabled, Connect Client also displays the system notification. Host must click **Accept** on the notification to view your screen, or click **Reject**.

   To receive a system notification for screen sharing requests, see Managing System Notification for Screen Sharing Request on page 115.

   After the host accepts your screen share invite, the screen share will start immediately.

   During screen share, the tool bar with the following options is displayed at the top of the screen:

   - **Conference name**
   - **Screen share status**
   - **Pause sharing**
   - **End sharing**

   To collapse or expand the tool bar, click the arrow next to the conference name.

4. Click  to pause screen sharing.
5. Click  to stop sharing.

If another user starts to share the screen while you are sharing, your Connect presenter will exit and stop your screen sharing.

11.10.4 Managing System Notification for Screen Sharing Request

> **Note**:
> By default, the system notification for screen sharing requests is enabled.

To disable the system notification for an incoming screen sharing request:

1. On the dashboard, click either  or the **<username>** tab.
2. From the drop-down list, click **Settings** and then click **Notifications**.

3. Click **Popup** and do the following:

- For Windows users, clear the **Show a system notification for incoming Screen Share** option.
- For macOS users:

    a. Click **Configure via OS X Notification Center…"**
    b. In the **Notifications center** scroll down, and then click **Mitel Connect**.
    c. Click **None** to disable notifications for screen sharing, incoming calls and voicemails.

Accessing MiTeam Meetings 12

This chapter contains the following sections:

About MiTeam Meetings

MiTeam Meetings is a cloud-based video collaboration tool (based on CloudLink infrastructure) that enables Connect Client users to access features, such as:

- **Collaborate:** Perform audio, video, and web sharing
- **Chat:** Hold chat sessions and receive chat notifications within the meeting

Note:

- To provision MiTeam Meetings for Connect Client users, Mitel Partners must first create Customer accounts in the CloudLink Account Console, and then add users (Connect Client users) to that account. For more information, see the *Provisioning MiTeam Meetings for MiVoice Connect* section in the *MiVoice Connect MiTeam Meetings Solution Document for Connect Client* located at https://www.mitel.com/document-center/business-phone-systems/mivoice-connect/connect-client.
- After the Mitel Partner provisions MiTeam Meetings, the users must register their MiTeam Meetings account. For more information, see Registering the MiTeam Meetings Account on page 117.
- The users can cross launch the MiTeam Meetings application from Connect Client. For more information, see Launching MiTeam Meetings from Connect Client on page 120.

12.1 Registering the MiTeam Meetings Account

To register your MiTeam Meetings account, follow these steps:

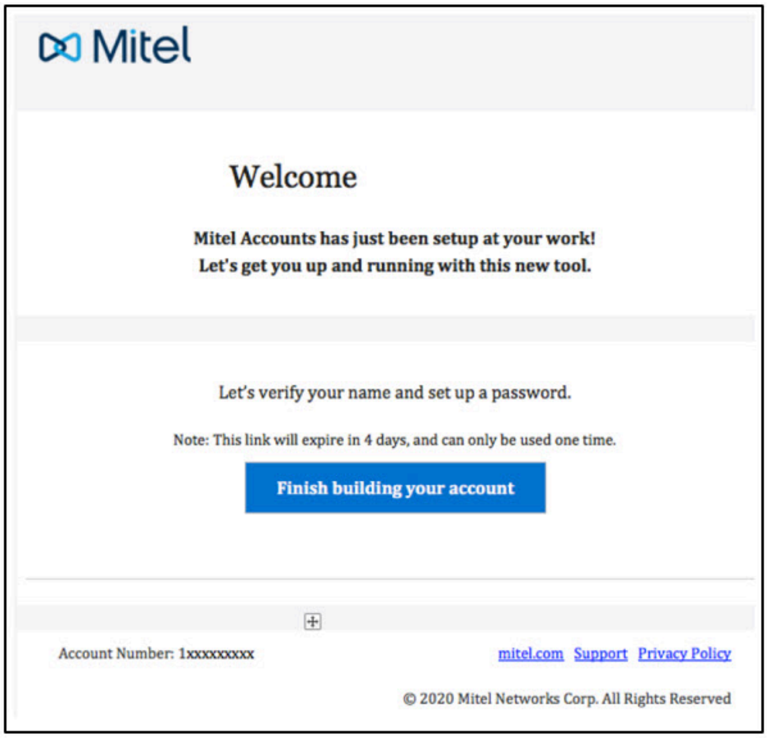
1. Ensure that you have received an email bearing the subject line Welcome to Mitel from `no-reply@mitel.io`.

   This is a verification e-mail sent to you when the administrator adds you as a user in the CloudLink Accounts Console. If you do not find this email in your mailbox, check your Junk or Spam folders for recent emails sent to you from `no-reply@mitel.io`.

> **Note**:
> The link provided in the welcome email will expire after 4 days and can be used only once.

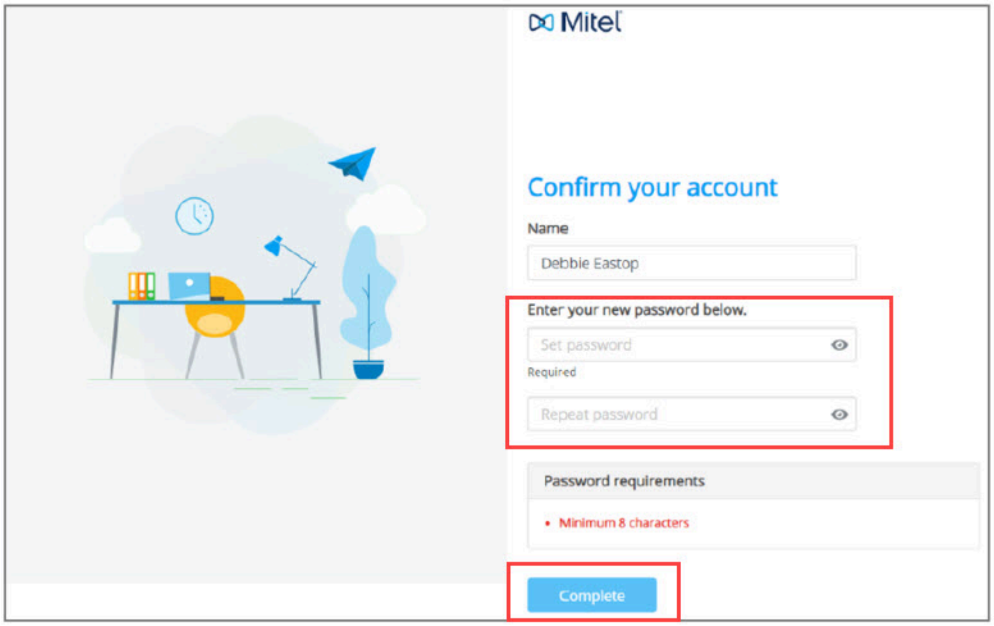
2. In the Welcome email, select **Finish building your account**.

Figure 17: Finish building your account option



3. In the window that opens, users must create a new password for the Mitel Accounts and click **Complete** to complete the registration process.

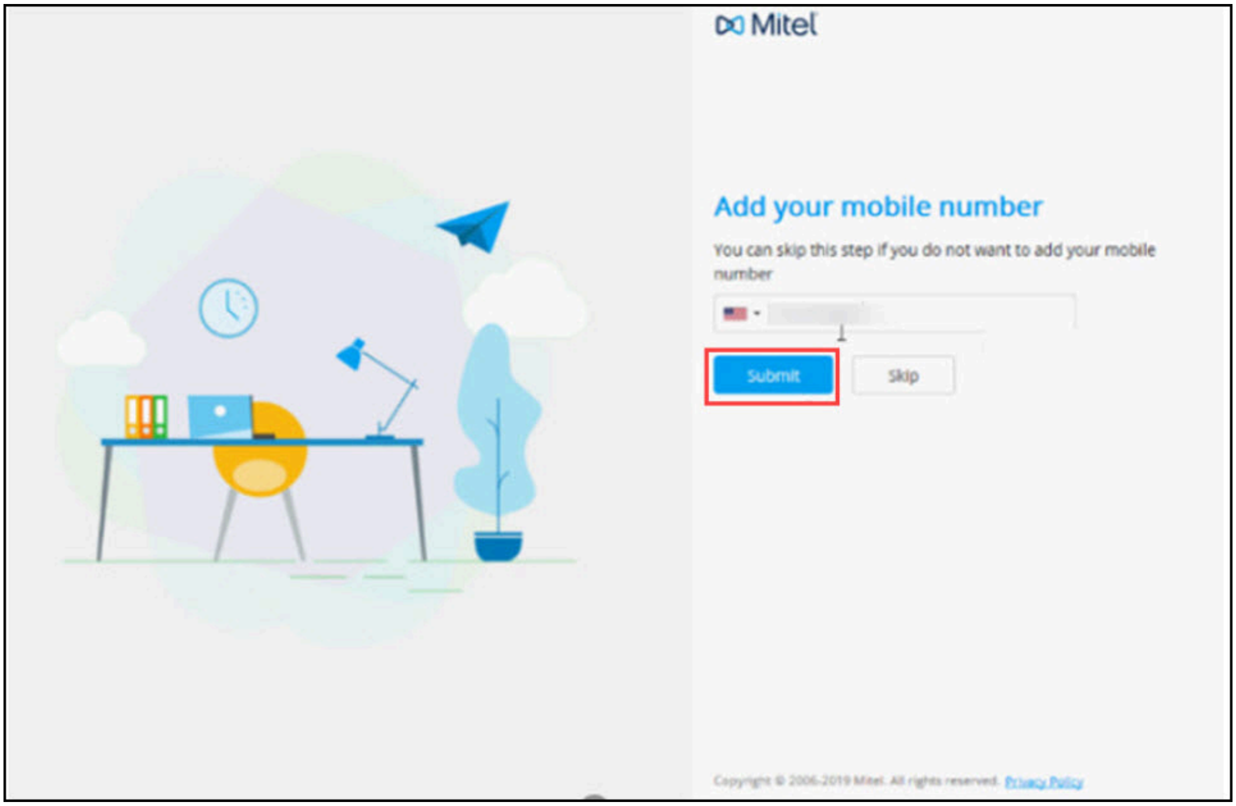
Figure 18: Completing the registration process



4. In the window that opens, it is recommended that you enter the mobile number in the **Add your mobile number** field.

5. Select **Submit** to register the account.

Figure 19: Registering the account



12.2 Launching MiTeam Meetings from Connect Client

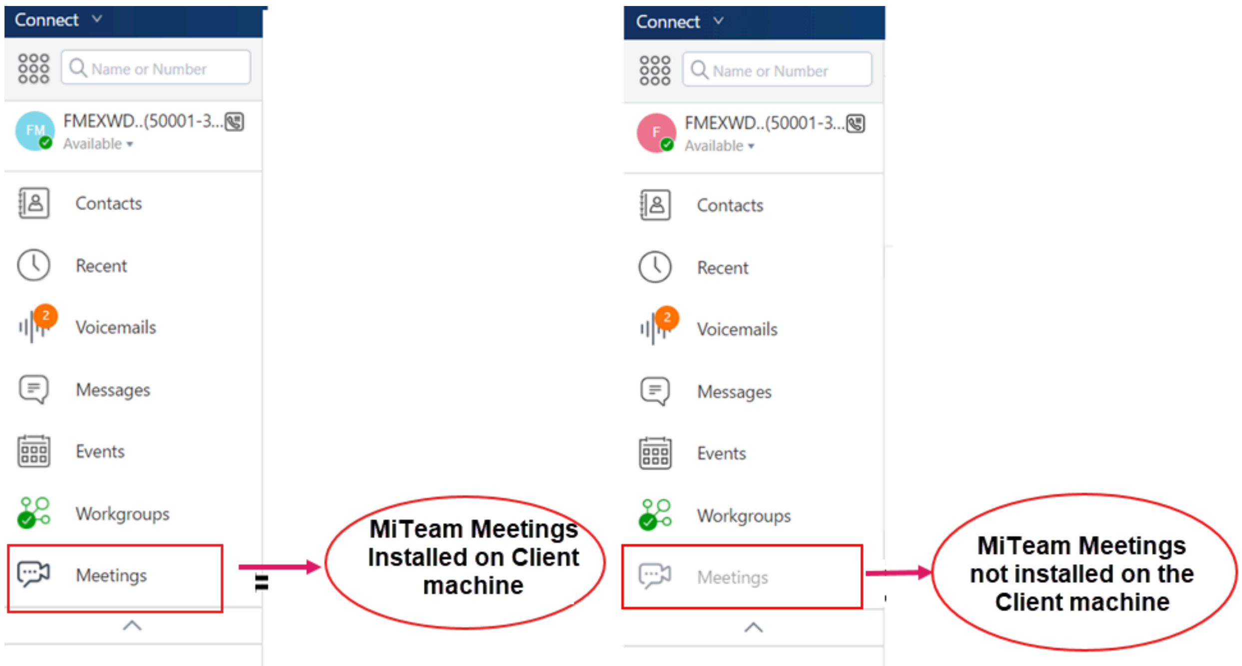
Note:

- To launch the MiTeam Meetings application from Connect Client, it is mandatory that you must have installed the MiTeam Meetings application on your system.
- When the MiTeam Meetings application installed on a client machine, the Meetings icon becomes active in the Connect Client menu. If the application is not installed on a client machine, then the icon will be greyed out and inactive.

After you successfully register MiTeam Meetings, you can launch MiTeam Meetings application from Connect Client by following these steps:

1. On your desktop, click the **Mitel Connect** icon and complete the following fields to log in:
   - **User name**
   - **Password**
   - **Domain**
2. The Connect Client application opens where you will see that the **Meetings** option is now enabled.

Figure 20: Miteam Meetings on Connect Client



3. Click the **MiTeam Meetings** icon to launch MiTeam Meetings application.

Using Video Conferencing 13

This chapter contains the following sections:

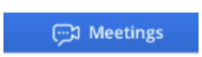
MiVoice Connect users can create video conferences for multiple participants from the Connect client.

Note:
This feature is available for US customers only.

13.1 Scheduling a Video Conference

You can schedule a video conference by creating a new event in the Connect client.

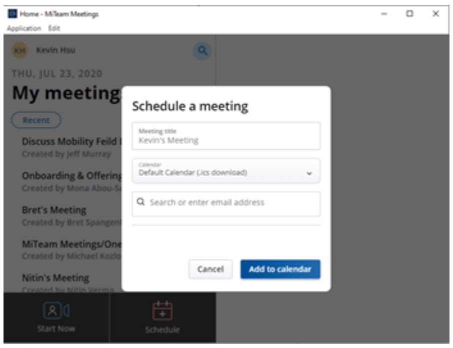
To create a video conference invite:

1. On the dashboard, click the **Meetings** tab.
2. Click  in the second pane.
3. In the **New Event** dialog, under **Meeting Type**, select **Video Conference**.
4. Click 

to launch MiTeam Meeting.

> **Note**:
> The MiTeam meeting's **Schedule a meeting** panel opens.

Figure 21: Scheduling a meeting



5. Specify a **Meeting title** for the meeting.

> **Note**:
> It is recommended that you give an identifiable name that the participants can easily remember.

6. Click **Calendar** and from the drop-down list, choose the calendar to which you want to add the meeting invite.
7. In the **Search or enter Email address** field, add the participants for the meeting. You can add a maximum of 100 participants with up to 16 video tiles. You can do either of the following:
   - To add a registered user, type the name of the user you are searching for. From the list, click the name to add the user as a participant to the meeting.
   - To add a guest user to a meeting, type the email address of the participant you want to add to the meeting.
8. Click **Add to Calendar**. The Scheduling proceeds based on the calendar type you selected from the **Calendar** drop-down list. The options are as follows:
   - **Default Calendar (.ics download)** – downloads an ICS file with meeting join details, title, and participants. Open it in your default calendar app (such as Outlook desktop) and schedule the meeting.
   - **Google Calendar** – opens a new tab in Gmail with a prepopulated calendar invite with meeting join details, title, and participants.
   - **Exchange / Office 365** – opens a new tab in Office 365 with a prepopulated calendar invite with meeting join details and title; but does not carry over the participants. You must add the participants directly in the open calendar in Office 365.

For more information, See MiTeam Meetings.

13.2 Editing a Video Conference Invite

You can edit an existing video conference invite from Microsoft Outlook. To do so:

1. Click the **Calendar** tab on the Shortcuts pane.
2. Open the video conference meeting invite.

> **Note**:
> If you open an invite that is part of a recurring series in the **Open Recurring Item** dialog box, select **Just this one**, and then click **OK**.

3. Make the required changes in the **Item Occurrence** page, and click **Send Update**.

When you edit the video conference invite in Microsoft Outlook, the video conference invite in Connect Client is automatically updated.

To cancel a video conference, open the conference invite, click **Meetings** tab > **Cancel Meeting** and then click **Send Cancellation** in the **Item Occurrence** page.

13.3 Canceling a Video Conference

If a meeting is no longer required, you can cancel the meeting from Microsoft Outlook. Canceling a meeting removes the invite from your Outlook calendar and sends a notification to all the meeting attendees.

To cancel from Microsoft Outlook, open the meeting invite and click **Cancel Meeting**.

13.4 Viewing Video Conferences

If you have integrated Connect Client with Microsoft Exchange, you can see your conferences in Connect Client. To do so:

1. In Connect Client, click the **Meetings** tab on the dashboard.
2. Click the **Upcoming** tab to view scheduled conferences or the Past tab to view past conferences.

The list is sorted by date, from the most recent to oldest meetings. Video conferences display a  (MiTeam icon) next to the meeting description.

13.5 Joining a Video Conference

You can join a conference in the following ways:

- Joining a Video Conference from the Notification Area on page 125: You can join a conference from the notification area on the dashboard of Connect Client. The notification is usually sent 5 minutes before the conference is scheduled to begin.
- Joining a Video Conference from the Meetings Tab on page 125: You can join a conference before you receive a notification from Connect Client by clicking the **Meetings** tab.
- Joining a Video Conference from Outlook on page 126: You can join a conference from your Microsoft Outlook calendar.

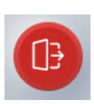
> **Note**:
> Guest (personal and external contacts) users will receive a meeting invite in their email inbox. Click the **join meeting** link to join the meeting.

13.5.1 Joining a Video Conference from the Notification Area

To join a video conference from the notification area:

1. Click the event in the notification area, and then click the  icon next to the conference.
2. Enter the required details, and then click **Enter now**.

> **Note**:
> You can mute the audio and disable the video during the call.

3. Click the  (Leave icon) to end the video conference.

13.5.2 Joining a Video Conference from the Meetings Tab

To join a video conference from the **Meetings** tab:

1. On the Dashboard, click the **Meetings** tab.

2. In the **Upcoming** tab, click the icon next to the conference you want to join.
3. Enter the required details, and then click **Enter now**.

> **Note**:
> You can mute the audio and disable the video during the call.

4. Click the (Leave icon) to end the video conference.

13.5.3 Joining a Video Conference from Outlook

If you have successfully integrated Connect Client with Microsoft Exchange, you can join a conference by opening the meeting invite in your Outlook calendar. To do so:

1. Launch your Outlook calendar and open the conference appointment.
2. Click the link to Join the meeting. Enter the required details, and then click **Enter now**.

> **Note**:
> You can mute the audio and disable the video during the call.

3. Click the (Leave icon) to end the video conference.

13.6 Sharing the Screen

You can share your screen with the video conference participants. While you are sharing, participants can view your entire computer screen and all your actions on the computer, until you stop the sharing.

To share the screen, click and select the screen that you want to share. To end the screen sharing session, click

Managing RingCentral Meetings 14

This chapter contains the following sections:

This chapter provides information about launching RingCentral meetings through the RingCentral application and Web browser.

> **Note**:
> The ring central cross launch is enabled only if the Call manager supports and enables the feature for all the clients.

> **Note**:
> You must download the RingCentral application and save it on your desktop to launch RingCentral meetings from the RingCentral application.

14.1 Overview

The RingCentral Services for Messaging and Video for MiVoice Connect Connect Client allows you to cross-launch the RingCentral application or Web browser to host, attend, or cross-launch the RingCentral Video Meetings from the Connect Client application. The RingCentral Messaging and Video service (client) is available to customers for free and provides Messaging and Video communications.

14.2 Creating and Activating Your Account in RingCentral

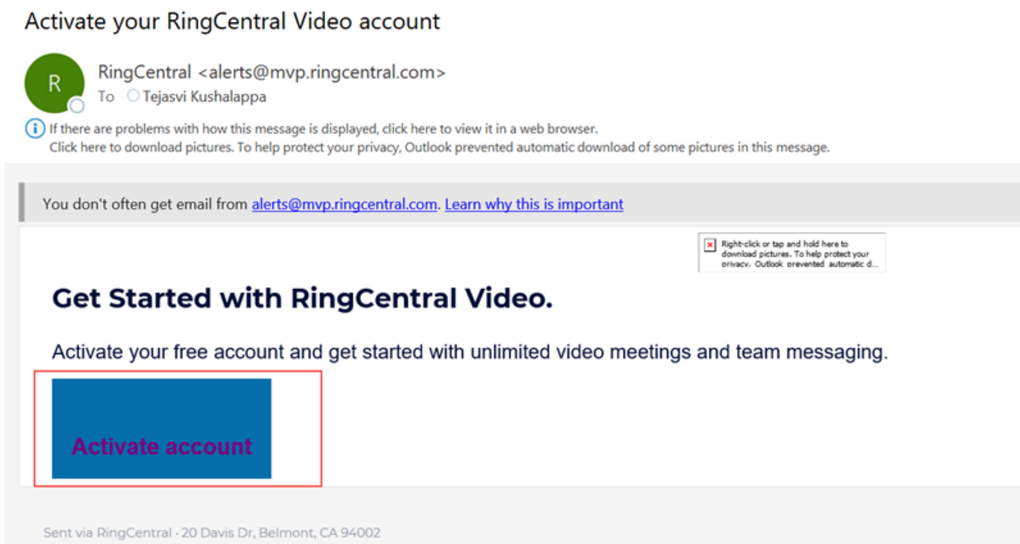
To access the RingCentral meetings from the RingCentral application or Web browser, you must create an account in RingCentral. To do so:

1. On the dashboard, click the **RingCentral** tab.
2. In the **RingCentral** application or the Web browser that opens, click **Create your free account**.
3. In the page that opens, under **Are you 16 years of age or older**, select the applicable option.
4. In the **Work email** field, enter your work email address and click **Sign up**.

Note:
An email to activate your RingCentral account will be sent to the email address entered in this field.

5. Open the email from RingCentral and click **Activate account**.

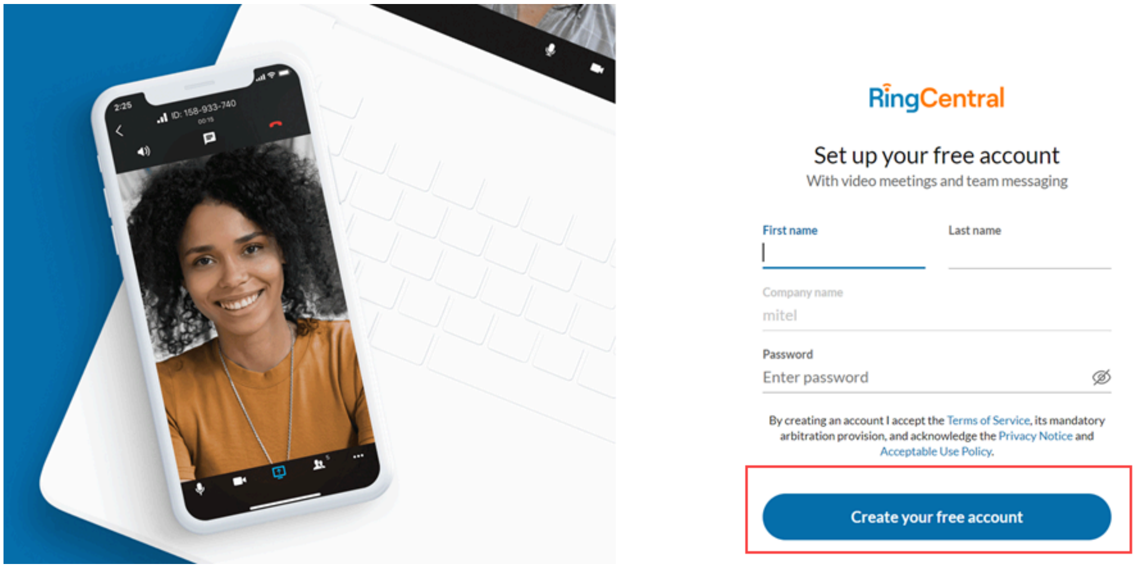
Figure 22: Activate account option



6. In the page that opens, do the following:

   a. In the **First name** field, enter your first name.
   b. In the **Last name** field, enter your last name.
   c. In the **Company name** field, enter the name of your company.
   d. In the **Password** field, enter a password.
7. Click **Create your free account** to create and activate your account in RingCentral.

Figure 23: Creating a RingCentral Account



14.3 Joining a RingCentral Meeting

You can join a RingCentral meeting in the following ways:

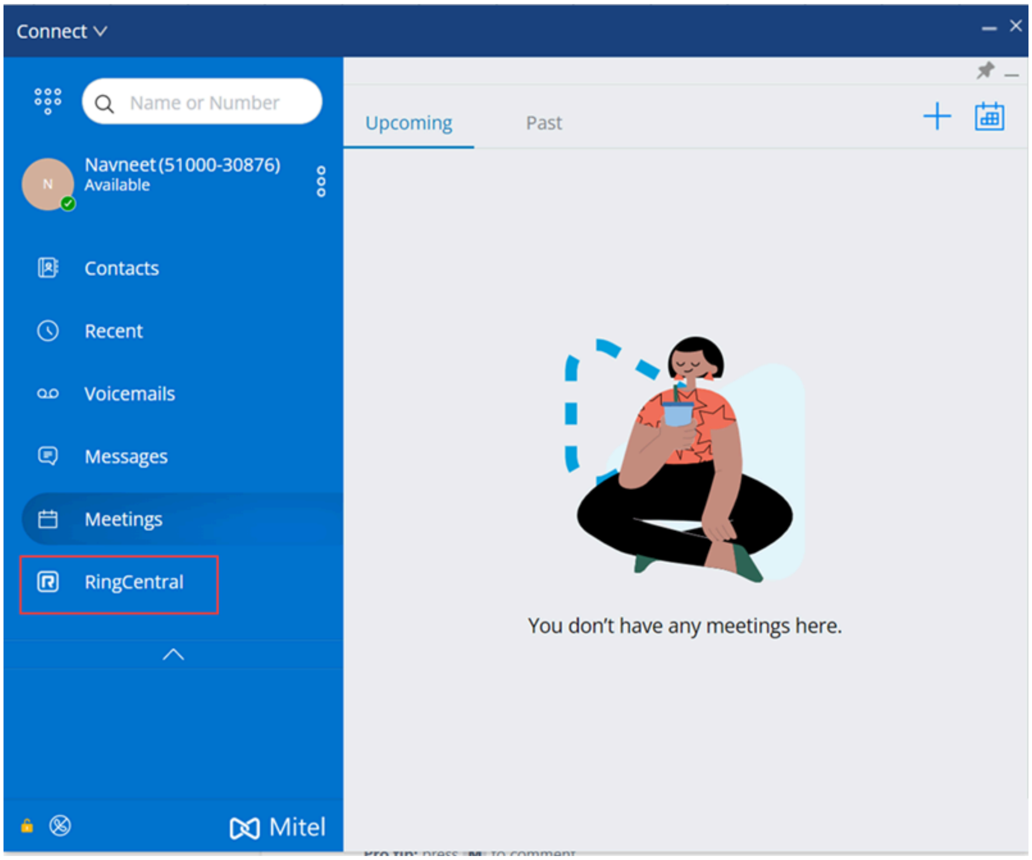
- Launching a meeting from the RingCentral Tab on page 129: You can join a RingCentral meeting before you receive a notification from Connect Client by clicking the **RingCentral** tab.
- Joining a RingCentral Meeting from the Meetings Tab on page 131: You can join a RingCentral meeting before you receive a notification from Connect Client by clicking the **RingCentral** tab.
- Joining a RingCentral Meeting from Outlook on page 132: You can join a RingCentral meeting from your Microsoft Outlook calender.

14.3.1 Launching a meeting from the RingCentral Tab

To launch a meetin from the **RingCentral** tab:

1. On the Dashboard, click the **RingCentral** tab.

Figure 24: RingCentral Tab

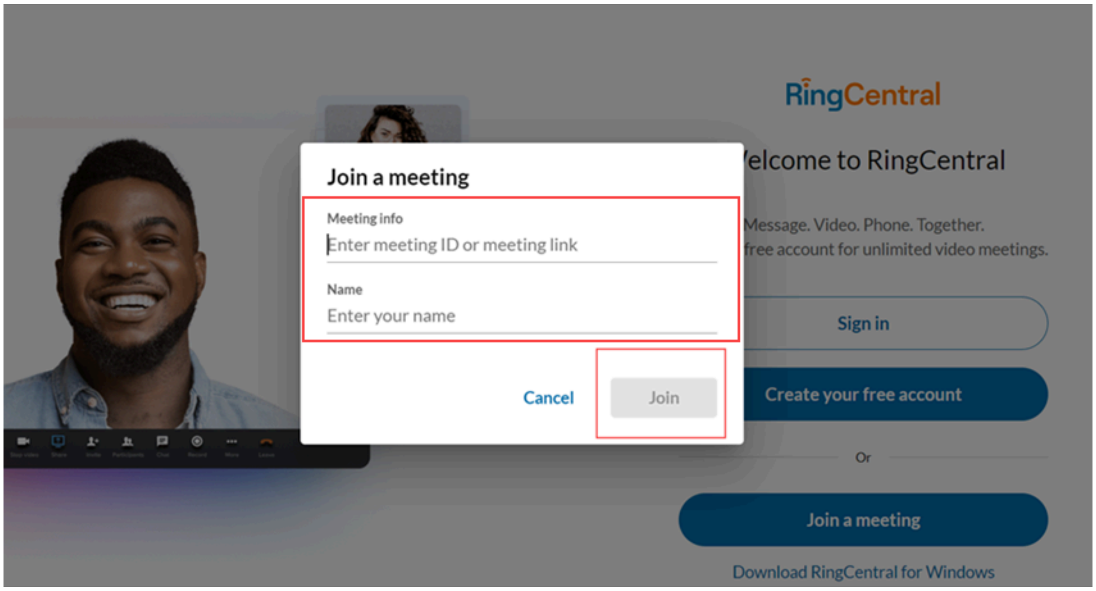


2. In the **RingCentral** application or the Web browser that opens, click **Join a meeting**.

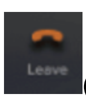
3. In the dialog box that opens, do the following:

   a. In the **Meeting info** field, enter the meeting ID or the meeting link.
   b. In the **Name** field, enter your name.

Figure 25: Join a meeting dialog box



Note:
You can mute the audio and disable the video during the call.

4. Click **Join** to launch the meeting.
5. Click the 

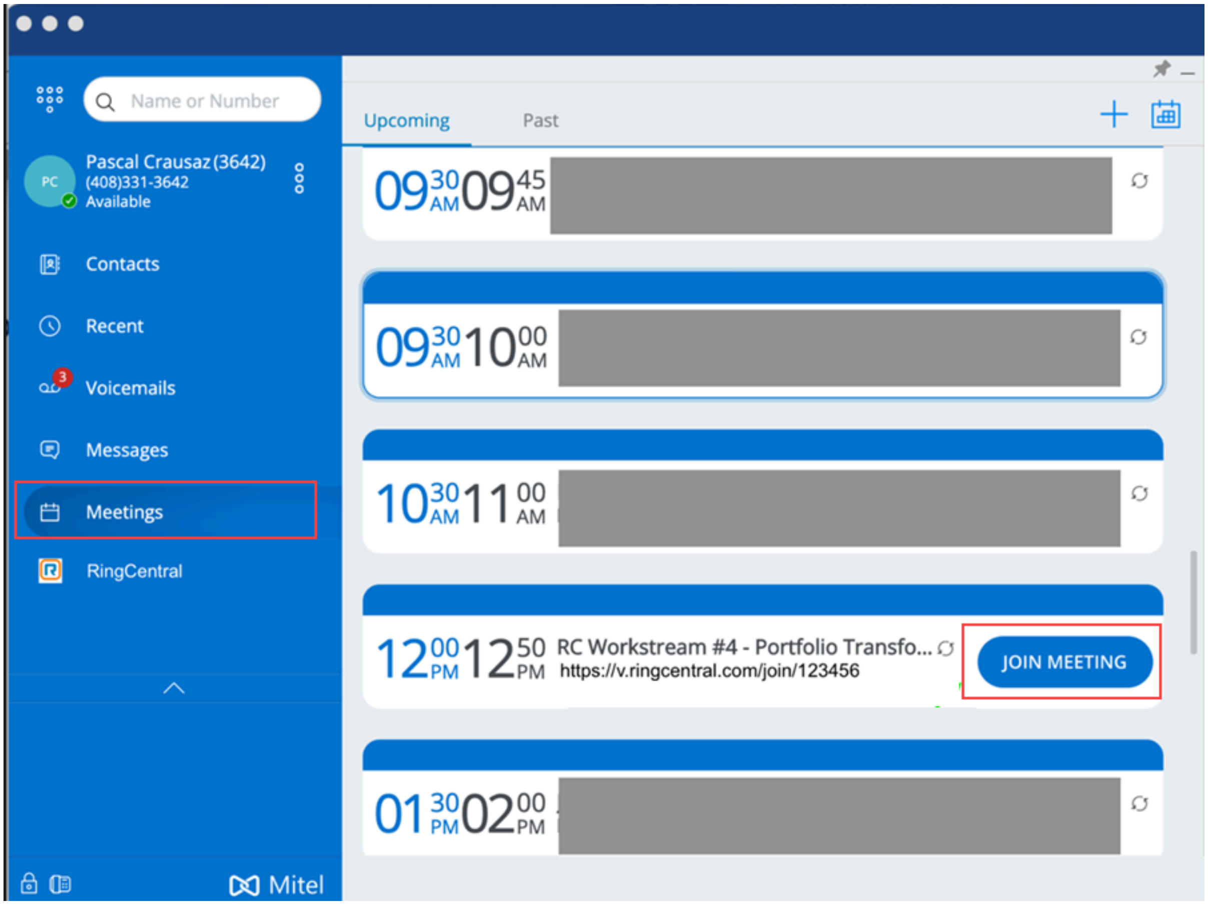
(Leave icon) to end the meeting.

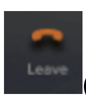
14.3.2 Joining a RingCentral Meeting from the Meetings Tab

To join a RingCentral meeting from the **Meetings** tab:

1. On the Dashboard, click the **Meetings** tab.
2. In the **Upcoming** tab, click the **Join Meeting** option next to the meeting you want to join.

> **Note**:
> You can mute the audio and disable the video during the call.



3. Click the 

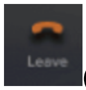
(Leave icon) to end the meeting.

14.3.3 Joining a RingCentral Meeting from Outlook

If you have successfully integrated Connect Client with Microsoft Exchange, you can join a meeting by opening the meeting invite in your Outlook calendar. To do so:

1. Launch your Outlook calendar and open the conference appointment.
2. Click the link to join the meeting.

> **Note**:
> You can mute the audio and disable the video during the call.

3. Click the (Leave icon) to end the meeting.

Sharing Screen 15

This chapter contains the following sections:

- Sharing Screens with a Contact

This chapter provides information about sharing screens.

15.1 Sharing Screens with a Contact

Connect Client enables easy sharing of screens with a contact.

1. On the dashboard, click the **Contacts** tab or enter the contact name/number in the **Quick Dialer Search** bar on the dashboard.
2. From the search results, select the contact.
3. On the Contact card to the left of the Avatar, click to share your screen.

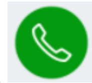
> **Note**:
> If you want to call your contact, before sharing your screen, see step 6 of this procedure.

4. Click:
   - **Share Full Screen:** To share your entire computer screen with your contact. The information displayed on your screen is visible to your contact.
   - **Share Area**: To share a movable rectangular area that you can use to share specific portions of your screen.
   - **Share Window:** To share any of the client application windows you have open on your computer. For example, you can choose to share only the Microsoft Outlook Email application window with your contact.

   A screen sharing invite is sent to your contact as a notification. The contact must click to accept viewing your screen, or click to reject the screen sharing invite.

   Optionally, if the contact card is open, click View Screen Share in the Actively Sharing pop-up notification to accept the screen share.
5. After the contact accepts your screen sharing, the screen share will start immediately. The screen area being shared is highlighted with a green rectangular border.

   To pause screen share, click . The rectangular border marking the area being shared becomes orange.

6. To call or have a conference with your contact, click  in the third pane (For information about using this feature, see Joining a Video Conference on page 125.

7. To end the screen sharing session, click the  at the top of the screen.

   A notification is displayed in your contact's third pane that indicates that you are no longer sharing your screen.

   If your contact starts to share the screen while you are sharing, your Connect presenter will exit and stop your screen sharing.

Managing your Account 16

This chapter contains the following sections:

- Setting a Sound Notification
- Managing History

This chapter provides information about managing the Mitel Connect client user accounts.

16.1 Setting a Sound Notification

You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or to identify a new or an existing conversation.

1. On the dashboard, click either or the **<username>** tab.
2. Do the following:
   - For macOS, click **Preferences** .
   - For Windows, click **Settings**.
3. Click **Notifications** > **Sounds**.
4. In the **Audio Alerts** field, select **ON**.
5. In the **For event** field, click the drop-down list on the right, and select any of the following:
   - **New voicemail**
   - **call from an internal number**
   - **call from an external number**
   - **new IM message initiating a new conversation**
   - **new IM message initiating an existing conversation**
   - **monitored call**
   - **shared line call**
6. Select **Play alert**, click the drop-down list on the right, and select a required sound from the list.
7. Under **Sound**, click the drop-down list on the right and select a required sound from the list.

> **Note**:
> Other than the default list of sounds, you can also add or remove a new `.wav file`.

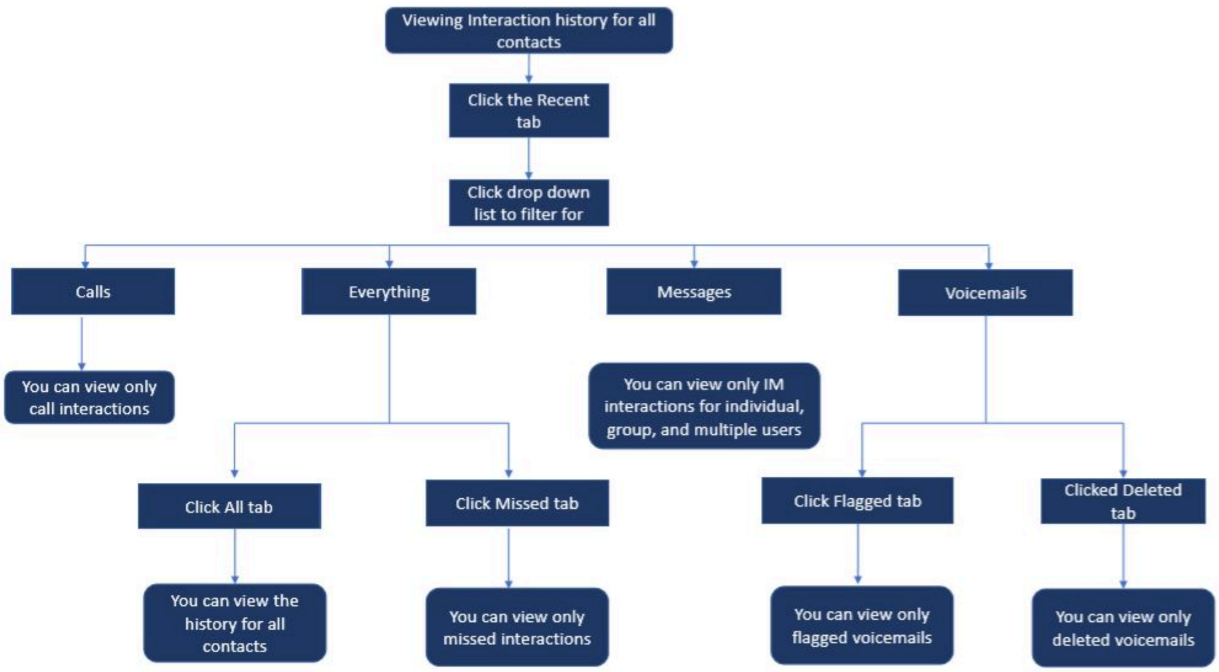
8. Click **Add New Sound**.

16.2 Managing History

You can view the history of your interactions for all your contacts at once or for only a specific contact.

Viewing Interaction History of all Contacts describes various methods to view interaction history of all contacts.

Figure 26: Viewing Interaction History of all Contacts



16.2.1 Viewing your Interaction History for all Contacts

To view the interaction history for all contacts:

1. On the Dashboard, click the **Recent** tab.
2. To view your interaction history for all contacts, click the **All** tab.
3. To view only missed interactions, click the **Missed** tab.

16.2.2 Viewing your Interaction History for a Single Contact

1. Find a contact (For more information, see Managing Contacts on page 29).
2. Double-click the contact in the second pane.

3. The third-pane displays the following tabs:

   - **Info**
   - **Messages**

   > **Note**:
   > You can search for a phrase within an IM history when a contact card is opened for a group or an individual in the IM history search in the IM input window.

   - **Calls**
   - **Voicemails**
4. To view all interactions from the history, select the **Info** tab.
5. To view only the IM interaction with the contact, select **Messages** tab.
6. To view only call interactions with the contact from the history, select **Calls** tab.

   > **Note**:
   > Click each call entry to see the details of origin of the call, duration of the call, call routing slip, and to enter any call note.

7. To view only the Voicemail interaction with the contact from the history, select the **Voicemails** tab.

   For more information about voicemail reply, forward, and delete, see the following sections:

   - Replying to a Voicemail Message on page 73
   - Forwarding a Voicemail Message on page 74
   - Deleting a Voicemail Message on page 75

Managing Workgroups 17

This chapter contains the following sections:

- Workgroups Overview
- Managing Workgroups
- Setting Queue Monitor Alert Threshold

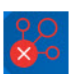
This chapter provides information about managing workgroups using Connect Client.

17.1 Workgroups Overview

Agents and supervisors can see the **Workgroups tab** on the Connect Client dashboard if they belong to any workgroup. The **Workgroups** tab displays the active workgroup calls for a user, and the current workgroup state.

Following table lists the workgroups states of agents and supervisors.

Table 8: Workgroups States of Agents and Supervisors

Icon	State	Description
	Logged In	Logged in to the workgroups
	Logged Out	Logged out of the workgroups
	Wrap Up	Agent or Supervisor is performing wrap-up work for a workgroup call.

17.1.1 Workgroups Access Types

You must be a member of a workgroup and have necessary license type to view information about workgroups. Your license type determines what type of member you are.

Types of workgroup members are:

- **Agent**: These users have the Workgroup Agent license type and access to workgroup information, but not agent information.
- **Supervisor**: These users have the Workgroup Supervisor or Operator license type and access to all workgroup and agent information. They must also be members of a workgroup.

17.1.2 Identify Call by Workgroup Name

When a supervisor or an agent receives a call for a workgroup, the call notification on the dashboard displays the name of the workgroup. This helps users who are members of multiple workgroups to identify which workgroup is receiving a call.

17.2 Managing Workgroups

17.2.1 Viewing Workgroups Information

A supervisor can view workgroup information. Click the **Workgroups** tab on the dashboard to view the following workgroup information in the second pane:

- Call Handling Mode icon—Shows the Call Handling Mode status
- Workgroup name—Name of the workgroup
- Queued Calls—Number of calls queued for the workgroup
- Longest Queued—Call that has been on hold for the longest period in the queue
- Longest Call—Call that has the longest call duration

To see the workgroup details:

1. On the dashboard, click the **Workgroups** tab.
2. Select a workgroup, and click **Show Workgroup Details**.
3. For all the workgroups selected in the second pane, a supervisor can view queued calls, agents and voicemail messages in the third pane.

Note:
You can also select the workgroups by clicking the **Settings** option at the bottom of the second pane.

17.2.2 Assigning Call Handling Mode Status

A supervisor can assign the Call Handling Mode status to the workgroup. To assign the Call Handling Mode status:

1. On the Dashboard, click the **Workgroups** tab.
2. In the second pane, click the **Call Handling Mode** icon beside the Workgroup name and select one of the following options:
   - **On-Hours**
   - **Off-Hours**
   - **Holiday**
   - **Custom**

The Workgroup Call Handling Mode status can be customized using the **Custom** mode.

> **Note**:
> The Custom mode can be configured only from the Connect Director.

17.2.3 Filtering Queued Calls

Select the **Queues** tab in the third pane for queued calls details. When you filter the workgroup information by queued calls, you can see name of the caller or telephone number. If caller name is not associated with the call, the following information is displayed:

- Duration that the queued call has been in the workgroup
- Duration of the call in the system
- Dialed number
- Caller ID

> **Note**:
> To pick calls from the queued calls list, agents and supervisors must select Allow agents to pick up from queue

option in Connect Director.

17.2.4 Managing Agents

A Supervisor can manage the Workgroup agents from the **Agents** tab on the third pane. The **Agents** tab is visible only to the supervisors and they can perform all actions without logging in to the Workgroups.

To search for an agent:

1. On the dashboard, click the **Workgroups** tab.
2. On the second pane, click **Show Workgroup Details**.
3. On the third pane, select the **Agents** tab.
4. In the **Search** field, type the agent name or extension number to search for agent.

To change the status of the agents of all Workgroups:

1. On the Dashboard, click the **Workgroups** tab.
2. On the second pane, click **Show Workgroup Details**.
3. On the third pane, select the **Agents** tab. By default, in the drop-down list on the left, **All** is selected. If another Workgroup is selected, click the drop-down icon and select **All**.
4. Click **Set As**.

5. From the drop-down list, select the required status:
    - **Logged In**
    - **Logged Out**
    - **Wrap-Up** (this option is available only when the agents are logged in to the Workgroup)
    - **End Wrap-Up**

To change the status of the agents of a single Workgroup:

1. On the Dashboard, click the **Workgroups** tab.
2. On the second pane, click **Show Workgroup Details**.
3. On the third pane, select the **Agents** tab. Click the drop-down icon on the left, and select the Workgroup.
4. To change the status of all agents in the selected Workgroup, click **Set As** and select the required status.

To change the status of a single agent in the selected Workgroup:

1. Click the availability state icon below the agent name and select the required status.
2. In the **Search** field, type the name or extension number of the agent, and click **Set As** and select the required status.

If the search result displays more than one agent, using the **Set As** option changes the status of all the agents in the search result.

Note:
When the Supervisor changes the status of all agents, the status of the Supervisor remains unchanged.

Supervisors can control the following actions for a single agent without logging in to the Workgroup:

- Call an agent
- Check voicemail
- Log in an agent
- Log off an agent
- Put the agent in Wrap Up state (this option is available only when the agent is logged in to the Workgroup)
- Change the Availability state of an agent

With the proper permissions configured by the Connect administrator, supervisors can also perform the following actions on agents:

- Pick up a call
- Add and manage call notes

- View routing slips
- Unpark call
- Intercom
- Whisper page the agent
- Silent coach the agent
- Barge in on the agent
- Silent monitor the agent
- Setting a Sound Notification
- Enable picking up calls and parking calls

17.2.5 Accessing Workgroups Voicemails

Supervisors and agents can view and listen to the workgroup voicemails without logging in to the workgroup.

1. On the dashboard, click the **Workgroups** tab.
2. In the second pane, click **Show Workgroup Details**.
3. In the third pane, click the **Voicemails** tab to view workgroup voicemails. The unheard voicemails appear in bold font with an orange dot indicator.
4. Select a voicemail and click to play the voicemail through the computer speaker or to play through the desk phone, and click .

> **Note**:
> If you have assigned Connect Client to softphone, the **Deskphone** option will not be displayed.

By default, the **Voicemail** tab displays the voicemails of all the workgroups you belong to. You can filter the voicemails list to view voicemails by workgroup.

To view voicemails by workgroup, click the drop-down list on the **Voicemail** tab in the third pane and select the workgroup.

> **Note**:
> After you exit and reopen the workgroup, the drop-down selection changes to the default value, “All”.

The **Deleted Voicemails** tab is displayed only if there are any deleted voicemails. By default, this tab is in collapsed view. Click on the **Deleted Voicemails** header to view the deleted voicemails.

To restore a deleted voicemail of the workgroup, locate the voicemail in the **Deleted Voicemails** list of the workgroup and click **Restore**.

17.2.6 Configuring Workgroup Notifications

To configure the workgroup notifications:

1. On the dashboard, click the **Workgroups** tab.
2. Click **Settings**.
3. Select **Show me notifications when calls arrive in queue** to view the notifications for the queued calls.
4. Enter the time duration in the **Keep the notification on screen for seconds (Zero is not a valid option)** field to set the time for displaying the notifications on the screen.
5. Select **Continue to show notification while logged out of workgroups** to view the workgroup notifications after you log out.

17.3 Setting Queue Monitor Alert Threshold

To specify the queue monitor alert thresholds and call arrive in queue notification:

1. On the dashboard, click the **Workgroups** tab.
2. Click **Settings** at the bottom of the second pane.

Supervisor can view all workgroups configured and edit Alert Thresholds for each workgroup. However, agents can view only Alert Thresholds. Closing the preferences window or switching to another tab saves your threshold settings.

When the specified workgroup queue thresholds are exceeded, the queued calls number and/or call duration label color changes to red in the second pane. After the parameter drops below the threshold, the label color changes back to default gray. When the queue threshold exceeds the specified time and number, a sound is played. You can turn the sound on or off using the Bell icon at the bottom of the second pane.

To configure Queue Monitor Alert Threshold:

1. On the dashboard, click the **Workgroups** tab.
2. Click **Settings** at the bottom of the second pane.
3. Select the **Enable Workgroup** option for the required workgroup to configure queue monitor alert threshold.
4. In the **Turn ON Threshold Alert** field, select the required workgroup to enable the threshold alert.
5. In the **Alert When Queue Reaches or Exceeds** field, increase or decrease the call queue number for the required workgroup.

> **Note**:
> This number determines the number of calls that can be queued before sending an alert to the user.

6. If required, in the **Alert When Queued Time Exceeds** field, enter the time duration to set the queue monitor alert threshold for the workgroup.

Managing the Emergency Location 18

This chapter describes how to add and manage the emergency location in the Connect Client softphone.

The emergency location is introduced in Connect Client as part of the RAY BAUM'S Act and it is available for US customers only.

Note:

- This is applicable only for Connect Client in softphone mode; it is not applicable for Connect Client in deskphone mode.
- If you move from US to any other country, use the local network connection (VPN) so that location change detection is disabled in Connect Client. This is because the location change information is applicable only for US.

RAY BAUM'S Act Overview

RAY BAUM'S Act is introduced in the US to ensure that proper and accurate dispatchable location information is conveyed when emergency 911 calls are made so that first responders can locate the caller quickly and accurately. The dispatchable location identifier is defined as "the civic address of the calling party and includes information such as room number, floor number, or similar information that accurately identifies the location of the calling party".

As per the RAY BAUM'S Act, Multi-line Telephone Systems (MLTS) must provide Public Safety Answering Point (PSAP) with the dispatchable location conforming to the above definition for emergency 911 calls for identifying the location of the calling party. This information can include floor-level for multifloor installations and quadrant-level information for large buildings. When an emergency call is made, the location information can be provided directly by phones or, MLTS can provide location information based on the configuration.

Note:
The RAY BAUM feature is not supported for Connect Client in virtual environments and for Connect Client installed on Windows 7, 32-bit operating systems. For unsupported environments, emergency calls (911) placed from the Connect Client softphone are routed to the National E911 Call Center.

Enabling RAY BAUM Configuration Options for Emergency Calls

To enable RAY BAUM for emergency calls:

1. Launch Connect Director.

2. In the navigation pane, click **Administration** > **System** > **Sites**. The **Sites** page is displayed.
3. In the **Sites** page, go to the **General** tab and select **Enable RAY BAUM** to enable RAY BAUM for emergency calls.

Note:

- This option is disabled by default and is applicable only for US customers.
- If you do not enable this option in Connect Director, then **Emergency Location** icon is not displayed in Connect Client.

HELD Configuration

The emergency location information is obtained from the third-party vendor database.

To add the emergency location to the third-party vendor database, you must first ensure that you add the third-party vendor in Connect Director. To do so:

1. Launch Connect Director.
2. In the navigation pane, click **Administration** > **System** > **Sites**. The **Sites** page opens.
3. In the **Sites** page, go to the **HELD Configuration** tab and provide values for the parameters as described in Parameters on the HELD Configuration Tab.

Note:
The **HELD Configuration** tab is applicable as part of RAY BAUM and is enabled only for US customers.

Table 9: Parameters on the HELD Configuration Tab

Parameter	Description
Vendor Name	Enter the third-party vendor name (RedSky or Intrado). The third-party vendor enables retrieving the location during emergency calls. The third-party vendor enables you to retrieve the location indirectly through a Location URI provided by the vendor’s location information service (LIS).

Parameter	Description
Main HELD Server URL	The address of the third-party vendor's main LIS server. Example: https://api.primelab.e911cloud.com
Back-up HELD Server URL	The address of the third-party vendor's back-up LIS server. Example: https://api.primelab.e911cloud.com
Secret Key	Enter the secret key obtained from the third-party vendor. **Note**: • Click the **SHOW/HIDE** option alternatively to view and hide the Secret Key.

Parameter	Description
	• Secret Key is a mandatory parameter for RedSky. Contact RedSky vendor for the secret key.

HELD Parameters	The HTTPS Enabled Location Discovery (HELD) parameters for a specific third-party vendor.
	Note:
	The administrator can specify any number of vendor-specific parameters in this field in the following format:
	`key1=value1`
	`key1=value2`
	`...`
	`keyN=valueN`

Note:
For information regarding the HELD parameters for RedSky and Intrado, see the following:

- *HELD parameters for Intrado* table in the *Connect Client Integration with Intrado* section in the MiVoice Connect RAY BAUM'S General Overview and Solution Deployment Guide for Intrado.
- *HELD parameters for RedSky* table in the *Connect Client Integration with RedSky* section in the MiVoice Connect RAY BAUM'S General Overview and Solution Deployment Guide for RedSky.

Managing the Emergency Location

Note:
If the location information is not added in Connect Director, then the **Emergency Location** icon will appear as follows at the bottom of the Connect Client log in screen:

As a Connect Client user, you can now add, edit, and verify your emergency location information in the **Emergency Location** page of Connect Client.

To manage the emergency location, do the following:

1. Log in to Connect Client.
2. On the dashboard, click either or the **<username>** tab.
3. Click **Settings**, and then click **Emergency Location**.

   Note:
   The **Emergency Location** page opens.

4. The first time you log in to Connect Client, you will be prompted to install the Mitel Network Helper. To download and install Mitel Network Helper:

   a. In the **Emergency Location** page, click **Download**.

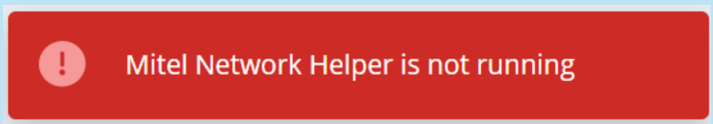
      Note:
      The installation package downloads and the network helper icon appears on the desktop.

   b. Double-click the Network Helper icon and follow the instructions to install Mitel Network Helper.

Note:

- For installing Mitel Network Helper, you must have administrator rights. If you do not have administrator rights, contact your administrator.
- After installing Mitel Network Helper on Mac OS, you must restart the Connect Client application.
- If Mitel Network Helper does not run on your system after the installation, the following error message displays in the Emergency Location page:

Figure 27: Network Helper Install Error



To resolve this issue, log out of Connect Client and log in again.

Note:
The following prerequisite must be met for location detection:

- For macOS/Windows, you must manually install and run the Mitel Network Helper in your system, and then relaunch Connect Client.

Note:

- If there is an update to the Mitel Network Helper after you click the **Emergency Location** icon, a message that the latest version of the Network Helper is available will appear. You must install the latest version of the Mitel Network Helper.
- In the **Settings** > **Emergency Location** page in Connect Client, the *Learn more* link appears. Clicking the *Learn more* link opens the **Dynamic E911** page with information about the RAY BAUM's ACT and Kari's Law and why it is required for 911 emergency calls.

5. To add the emergency location to the third-party vendor database:

a. In the **Emergency Location** page, click **Add**.

b. Complete the following fields:

- **Location Name:** The name of the emergency location.
- (Optional) **Location Info:** A description of the location.
- **Street:** The name of the street.
- **City:** The name of the city.
- **Country:** The name of the country.

> **Note**:
> In this field, select **USA** as RAY BAUM is applicable only for US customers.

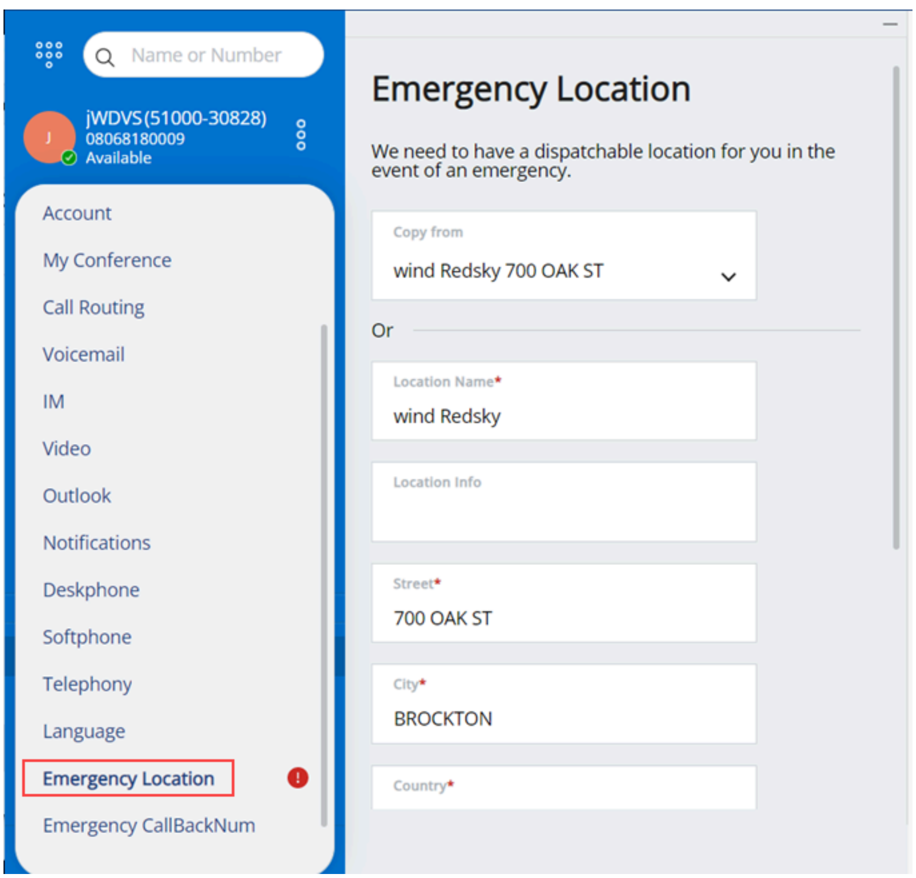


Figure 28: Adding location information

c. Click **SAVE**.

Note:

- Connect Client suggests valid locations if there are minor errors in the location information entered. Select the suggested location, and then click **Confirm**.
- The new location details are displayed in the **Emergency Location** page.

d. In the page that opens, verify the location information and click **Done**.

6. To edit the location information and make any updates:

    a. In the **Emergency Location** page, click **Edit** and make the required updates.

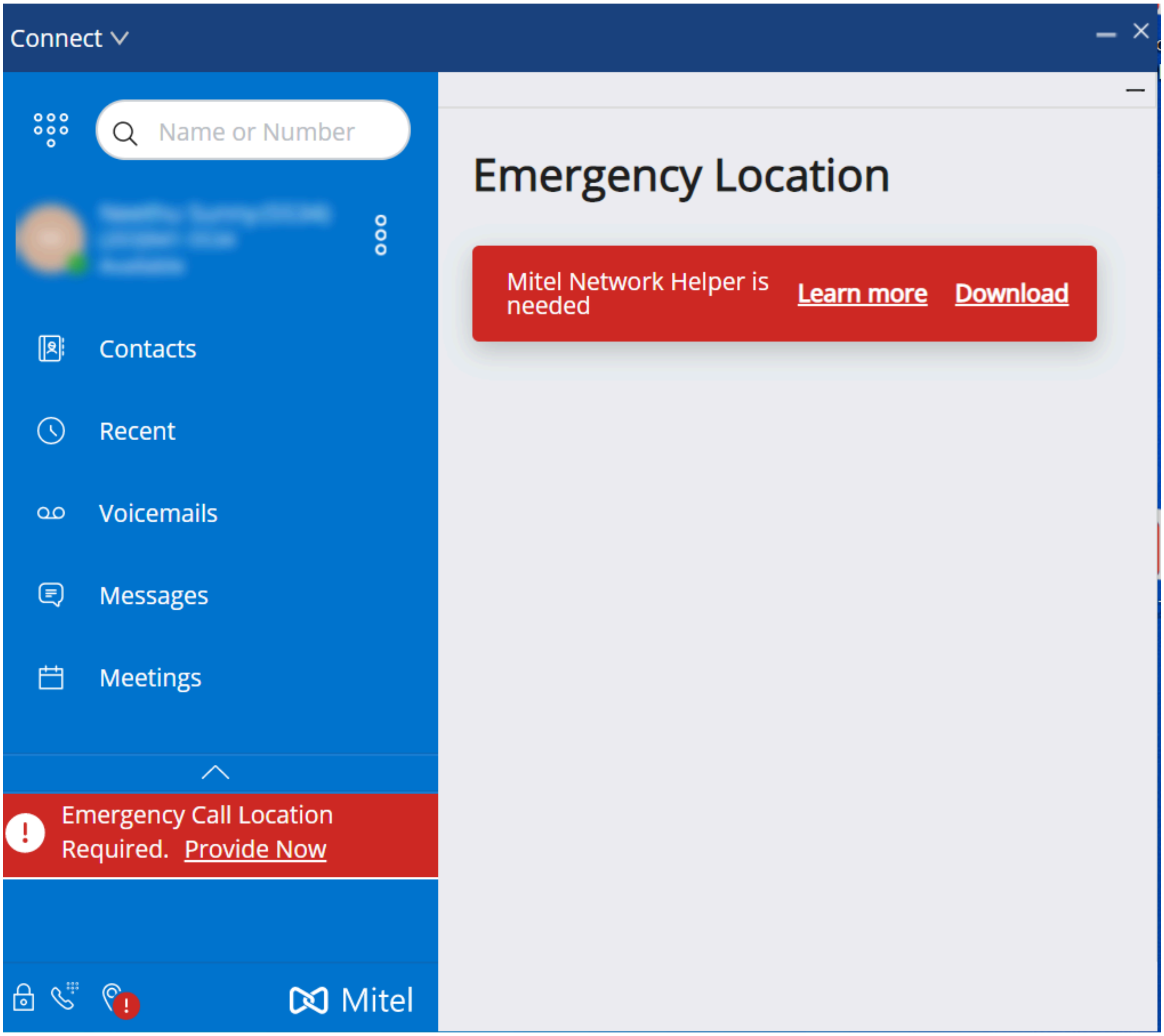
    b. Click **Save** and verify the updated details in the **Emergency Location** page.

Note:

The Emergency Location icon will appear as , and an error message that the emergency call location is required is displayed on the dashboard, as shown in Emergency Location Example, in the following situations:

- If the location information is not added.
- If a network change is detected.
- If Mitel Network Helper is not running in your system.

Figure 29: Emergency Location Example



To rectify the issue, click  or the **<username>** on the dashboard, click **Settings** > **Emergency Location**, and follow the instructions in Managing the Emergency Location Settings.

Managing the Emergency Location Settings

Note:

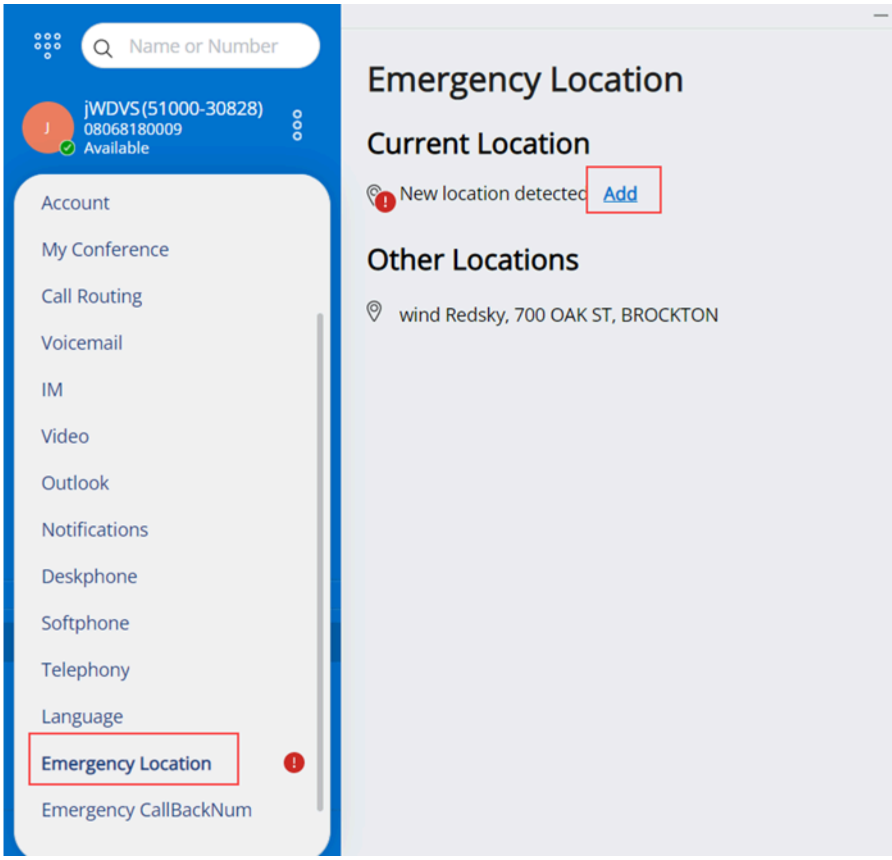
- If the emergency location is verified, you can view the location details by clicking either or the **<username>** on the dashboard and click **Settings** > **Emergency Location**, which causes the **Emergency Location** icon to disappear from the Connect Client screen.
- If the **Emergency Location** icon is not displayed after you log in to Connect Client, go to **Settings** > **Emergency Location** and verify whether the location information is displayed. If the location is not displayed or is incorrect, update the correct location details.

To manage the emergency location settings:

1. Log in to Connect Client.
2. On the dashboard, click either or the **<username>** tab.
3. From the drop-down list, click **Settings** and then click **Emergency Location** to view the emergency location that is already added.

4. To add the location information, click **Add** and enter the required details.

Figure 30: Adding location information



5. To edit the location information, hover on the location and click **Edit** and update the required details.
6. Click **Save**.

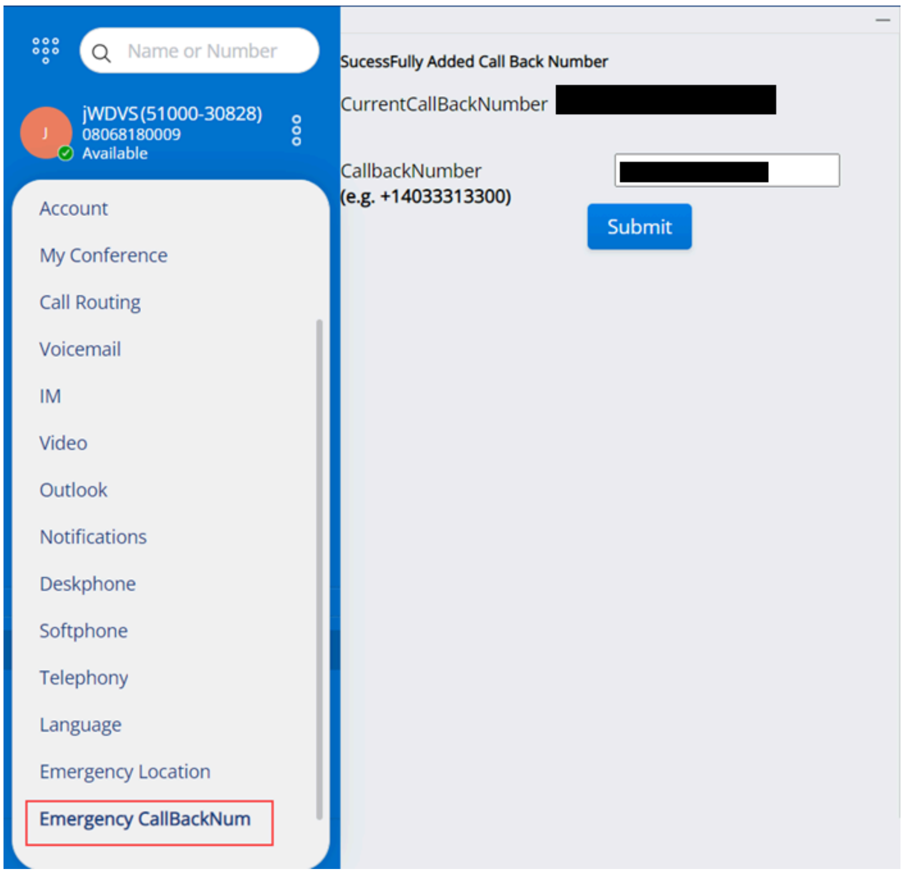
Managing the Callback Number

To manage the callback number for emergency calls:

1. Log in to Connect Client.
2. On the dashboard, click either or the **<username>** tab.

> **Note**:
> To access the **Emergency CallBackNumber** screen, macOS users must click **Preferences** instead of **Settings**.

Figure 31: Emergency CallBackNumber screen



3. In the **CallbackNumber** field, enter the callback number for emergency calls.
4. Click **Submit**. The callback number you entered will be displayed as the current callback number in the **Emergency CallBackNumber** screen.

Operator Features 19

This chapter provides information about how to enable, and access operator specific features.

Connect Operator license provides the operators with additional features and functionalities within Connect Client that makes easier to manage large volume of calls within the application.

You must have operator license to access operator features and functionalities. To enable operator license for MiVoice Connect, see the *MiVoice Connect System Administration Guide* located at https://www.mitel.com/document-center/business-phone-systems/mivoice-connect/mivoice-connect-platform

Connect Client provides special features for operators as listed in the table Operator Features Overview.

Table 10: Operator Features Overview

Features	Description
Drag and drop	Operators can left-click and drag an object in both the directions; from call stack to a contact and vice versa.
Drag and hover	Operators can left-click and hover an object in both the directions; from call stack to a contact and vice versa to access more telephony functions. The advanced telephony functions are: • Blind Transfer • Consultative Transfer • Intercom Transfer • Transfer to Mailbox • Park • Park and Page • Park and Intercom • Blind Conference • Consultative Conference • Intercom Conference • For more information, see Transferring a Call on page 56
Call stack orientation	Operators can view the oldest call at the top of the call stack and the most recent call at the bottom.

Features	Description
Double click to answer	To answer an incoming call, operators can: • Double-click anywhere in the incoming call notification area. • Click the green call icon as other users.
Routing slip	Operators can view or hide the routing slip for each call by toggling the routing slip icon in the incoming call notification area. **Note**: Routing slip is disabled by default. To enable routing slip, see Managing Call Notes and Viewing Routing Slips on page 63.
Changing availability state of a contact	Operators can change a contact's availability state if: • Contact belongs to the contact group created by operator. • Contact has added operator on his access list. To add a contact to access list, see Allowing a Contact to Manage your Availability State on page 44. To change a contact's availability state, do one of the following: • Right-click a contact, and select **Change Availability** < availability state>. • Open the contact card by selecting a contact, click the arrow next to contact's availability state, and select the state.
Identifying the call by workgroup name	When an operator receives a call for a workgroup, the call notification on the dashboard displays the name of the workgroup. This helps users who are members of multiple workgroups to identify which workgroup is receiving a call.