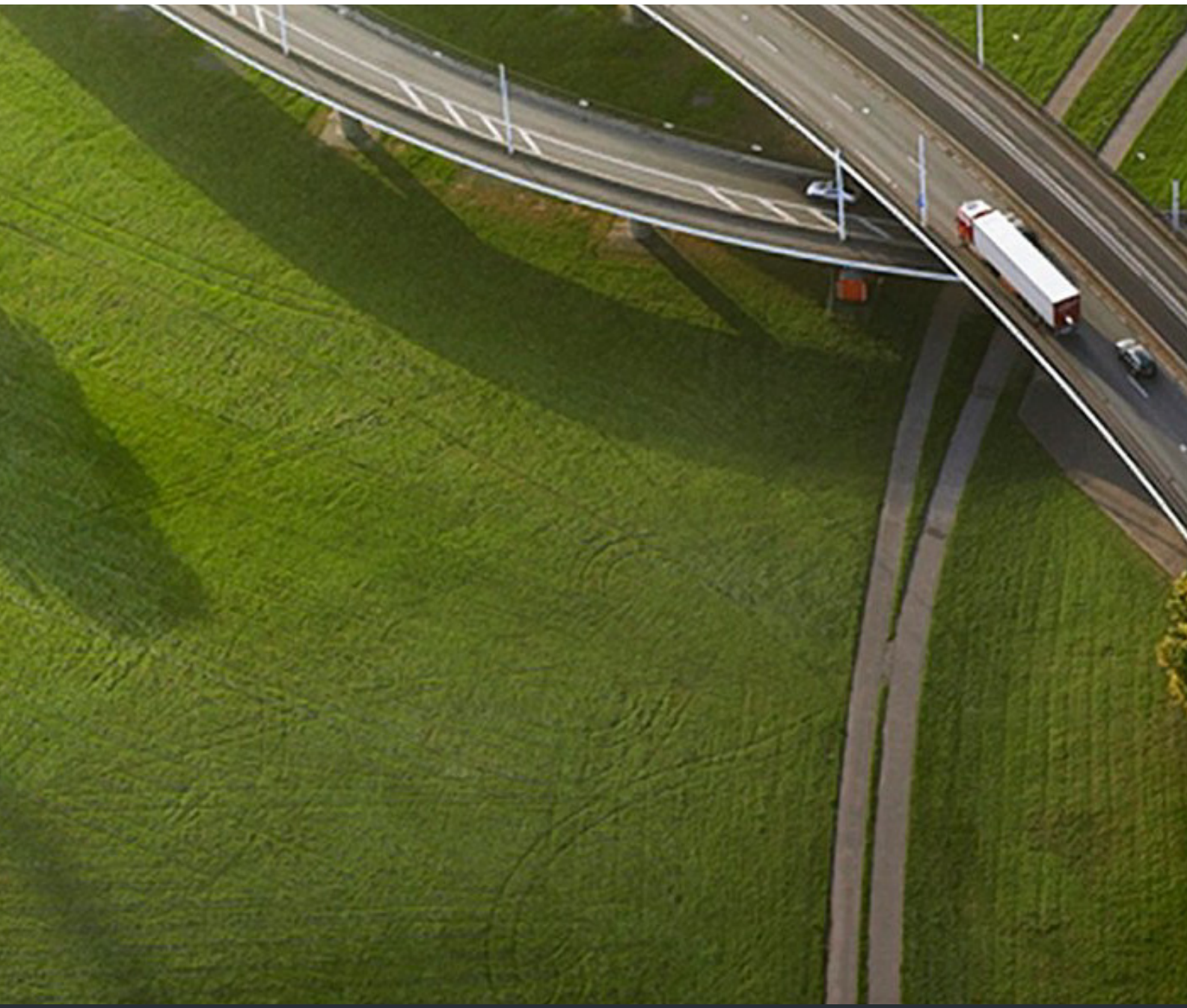
UNIFY Harmonize your enterprise



OpenScape Personal Edition V7

User Guide

A31003-G2570-U100-13-7619

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Contents

History of Changes

Date	Changes	Reason
2012-03-02	ADDED: When logging on in the **Profile creation** dialog for the first time the user need not perform any manual configurations.	FRN4403
2012-03-02	ADDED: Depending on the configuration, the context menu of a consultation call offers the option to start a local or server-based conference.	FRN5079
2012-03-02	ADDED: In the **Port restrictions** dialog of the SIP Service Provider you can define the port ranges for audio and video streaming.	FRN4685
2012-04-26	CHANGED: The dialog for configuring the QoS settings of the **SIP Service Provider** are available under Microsoft Windows XP only.	CQ00207211
2012-09-10	ADDED: Description of the new options in the configuration dialog of an audio scheme: **Echo cancelling Enable**/disable and **Echo cancelling delay (ms)**.	FRN4942
2012-09-10	ADDED: Description of the new options for the **default video configuration** in the configuration dialog of a video scheme. New video layouts are supported during a video call: **In call**, **Full window** and **Full screen**.	FRN4954
2012-09-10	ADDED: Description of the features in the Softphone toolbar in the **Video** window.	FRN4956
2012-09-19	CHANGED: Information about the display of new voicemails in the **Pearl menu > Status Information**.	CQ00226077
2012-09-20	ADDED: The video screen quality or screen resolution may change during an active call. Such changes result from the bandwith for transmitting video data streams automatically adjusting to the available bandwidth resources of the communications system.	FRN4943
2013-03-18	ADDED: The user can activate/disable the video call feature via a new icon in the main toolbar, in the **Video** group of the ribbon and in the Softphone toolbar of the **Video** window. In addition, when creating a new contact in the contact input form, a video-compatible device **Video Phone 1** under which the contact can be reached can be configured. The configured video device is displayed in the **Contacts** frame and can be dialed from there.	FRN4977
2013-03-18	CHANGED: The volume control in the main toolbar and in the status bar of the main window is no longer available.	V7R1
2013-03-18	REMOVED: The Microsoft Outlook Provider module from the list of installed modules.	V7R1
2013-04-18	ADDED: The Video Call feature is displayed in the main toolbar.	CQ00250966
2013-04-18	CHANGED: Description of the Speaker and Additional Speaker features in the main toolbar.	CQ00249784
2013-06-11	ADDED: Automatic detection of audio and video devices.	CQ00216848
2013-07-17	ADDED: Selection of the contact folders in the *Microsoft Outlook*-Integration.	FRN5652
2013-09-04	ADDED: Procedure applied for specifying **system-wide hotkeys**	CQ00269710

Date	Changes	Reason
2014-01-09	REMOVED: Option for setting a color scheme has become obsolete.	CQ00283374
2014-02-14	CHANGED: Restrictions on specifying **System-wide keyboard tokens (hotkeys)**.	CQ00285013
2014-02-24	ADDED: Only phone numbers (FQTN) fully specified according to E. 164 are supported for dialing via hotkeys.	CQ00282797
2014-03-28	ADDED: The current audio device can only be changed via the audio schemes, not via the Windows control panel.	CQ00292486
2014-05-28	CHANGED: Note on the configurability of the TLS protocol's port 5061.	CQ00265343
2014-08-07	ADDED: Ring tones may not be played if speakers integrated in the monitor are disabled in the scope of power management or with activation of a screensaver.	CQ00308534
2014-09-26	REMOVED: Restriction on **Additional Lines**.	CQ00314864
2015-01-27	Add information about File access for Citrix (FRN9048)	CQ00323945
2015-02-02	Add information about Citrix client	FRN9048
2015-03-11	11 - Add stand-by behaviour for VDI (Citrix) - FRN9048	CQ00327953
2015-03-24	11 - Section 2.3.5.20 correction of typo	
2015-05-26	12 - minor changes	
2015-06-16	13 - Adding DHCP option 120 for outbound domain under domain name	CQ00332320

1 About this Manual

The OpenScape Personal Edition (also called OpenScape Desktop Client in this manual) is an IP-based communications software that can be used as an SIP or HFA softphone when connected to an SIP or HFA communications system. It is installed on a computer and enables mobile users to take their phone number with them. Calls can thus be made and accepted independently from the location. In addition, it enables managing a local contact list, integrating corporate directories and private contact lists (for example Microsoft Outlook contacts) via LDAP as well as calling Microsoft Outlook contacts directly from Microsoft Outlook. During operation, all calls are logged in a local journal. In combination with an OpenScape Voice there is the option of conducting video phone calls and taking part in video conferences with up to three participants.

1.1 Target Group of this Manual

This manual addresses:

- all users who deploy OpenScape Personal Edition; in particular also newcomers who require information about the program's interface and operation.
- advanced users who want to customize OpenScape Personal Edition.

The instructions contain important information about using OpenScape Personal Edition safely and correctly. Please follow them precisely to avoid incorrect operation and to make best use of this application.

1.2 Contents of this Manual

This manual describes how to configure and operate OpenScape Personal Edition after the setup.

The information is structured as follows:

Chapter 1: About this Manual

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

Chapter 2: Configuration and Settings

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

Chapter 3: Operation Reference

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

Chapter 4: Step-by-Step

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

Chapter 5: Communicating with Contacts

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

1.3 Representation Conventions

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

1.3.1 Formats and Display Forms

In the manual on hand the following conventions apply:

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

1.3.2 Notes

Types of notes

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

NOTICE: Denotes information worth knowing or useful tips.

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

1.3.3 Figures

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

1.4 Continuative Documentation

You find further information about OpenScape Desktop Client in the following documentation:

- *OpenScape Personal Edition V7 Installation and Administration*, setup guide
  Contains information about setting up and uninstalling OpenScape Personal Edition and as well as detailed information about program configuration and the tools supplied for administrators.
- *OpenScape Personal Edition V7*, quick guide
  Describes the basic OpenScape Personal Edition features.

1.5 Acronyms

Table: Acronyms used

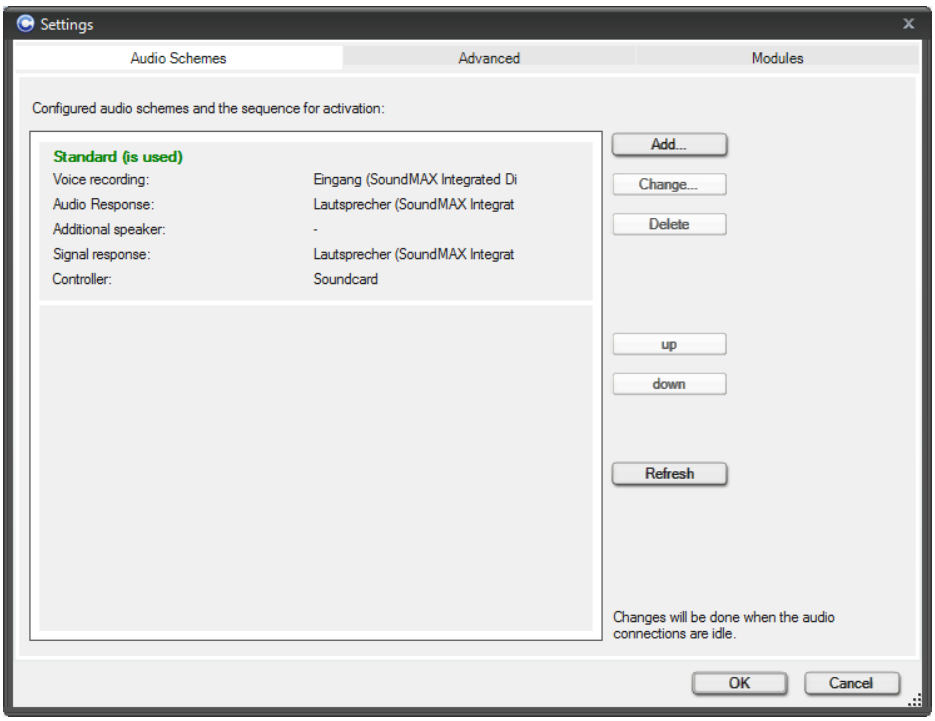
Abbreviation	Meaning
ACD	Automatic Call Distribution
BLF	Busy-Lamp Field
CAC	Call Admission Control
CCBS	Completion of Calls to Busy Subscriber
CCNR	Completion of Calls on No Reply
CLA	Customer License Agent
CMP	Common Management Platform
CSV	Comma Separated Value
DLC	DLS Client
DLS	DepLoyment Service
DMC	Direct Media Connect
DNS	Domain Name System

Abbreviation	Meaning
DTMF	Dual -Tone Multi-Frequency
GAL	Global Address List
HFA	HiPath Feature Access
HLM	HiPath License Management
IPC	InterProcess Communication
LAN	Local Area Network
LDAP	Lightweight Directory Access Protocol
LED	Light-emitting Diode
LIN	Local Identification Number
MLHG	Multi-Line Hunt Group
MWI	Message Waiting Indicator
NANP	North American Numbering Plan
OCS	Office Communications Server
QoS	Quality-of-Service
qWAVE	Quality Windows Audio/Video Experience
RNA	Ring-No-Answer
SDES	Session Description Protocol (SDP) Security Descriptions for Media Streams
SIP	Session Initiation Protocol
SRTP	Secure Real-time Transport Protocol
TCSPI	Telephony Conferencing Service Provider Interface
TLS	Transport Layer Security
UC	Unified Communications
URI	Uniform Resource Identifier
VDI	Virtual Desktop Infrastructure
VPN	Virtual Private Network

2 Configuration and Settings

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

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



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

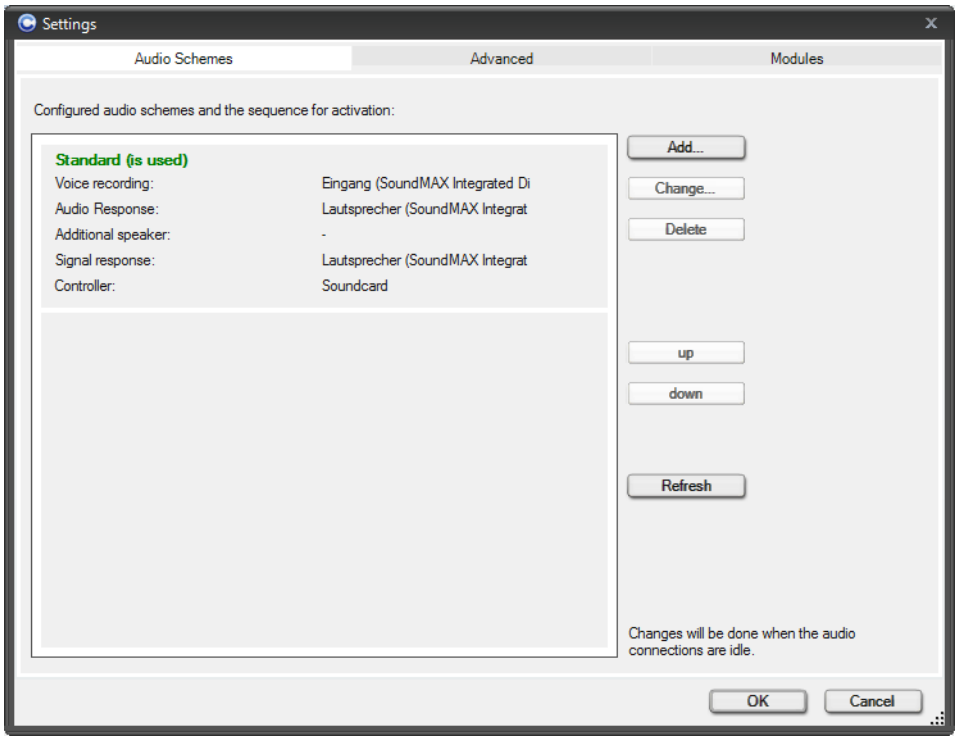
NOTICE: During live operation, not all settings can be modified.

2.1 “Audio Schemes” Tab

So that you can conduct phone calls, your computer must be equipped with speaker and microphone, for example in the form of a headset.

NOTICE: OpenScape Desktop Client supports operating a range of audio devices. You find a list of these devices in the setup manual of OpenScape Desktop Client.

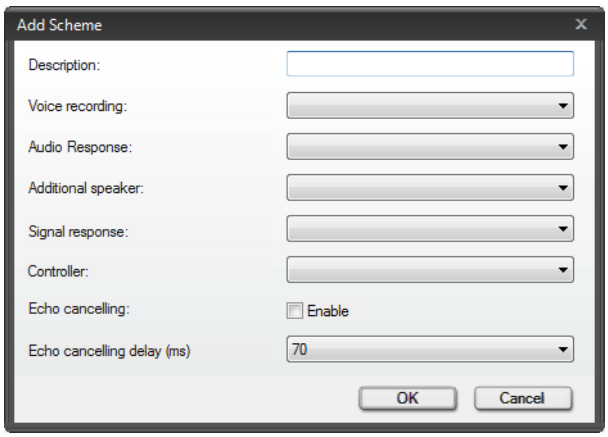
The hardware settings are grouped in audio schemes. To set the audio schemes, select in the **Settings** dialog the **Audio Schemes** tab during the user login.



You can add audio schemes and modify or delete single audio schemes. In this way you can easily program various audio options (for example on different hardware) and then select them as the scheme you want to use.

Adding an audio scheme

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



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

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

- You determine the audio hardware for the ring tone under **Signal response**.
- Under **Controller** you select the audio hardware for controlling special hardware functions.
- **Echo cancelling Enable**/Disable
  Selecting the **Enable** option activates the echo cancelling.
  This will remove unwanted echo signals during voice transmission. Echo cancelling is disabled by default but we recommend to activate it.
- **Echo cancelling delay (ms)**
  During an active call (for example in an audio conference), feedbacks may occur between speaker and microphone. The signal that the speaker sends is picked up by the microphone and transmitted in addition to the actual voice signal as so-called echo signal with a slight delay. The **Echo cancelling delay (ms)** specifies the possible delay time between sending the loudspeaker signal and its being picked up by the microphone. The delay influences the echo cancelling efficiency. A delay of 70 ms is assumed by default but depending on the system used this value may deviate and needs to be adjusted accordingly. The values you can select for this setting are **0 ms**, **70 ms** or **140 ms**.

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

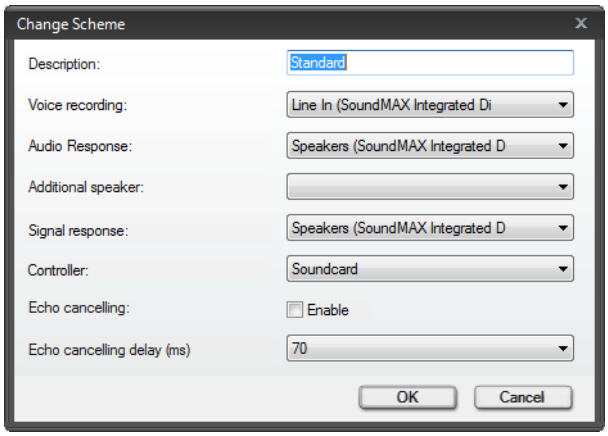
  NOTICE: Components of an audio scheme currently locally unavailable are represented in brackets. The entire audio scheme is then considered unavailable. The OpenScape Desktop Client may then use the next available audio scheme.

Selecting/activating audio schemes

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

Changing an audio scheme

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



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

Deleting an audio scheme

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

Sequence of audio schemes

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

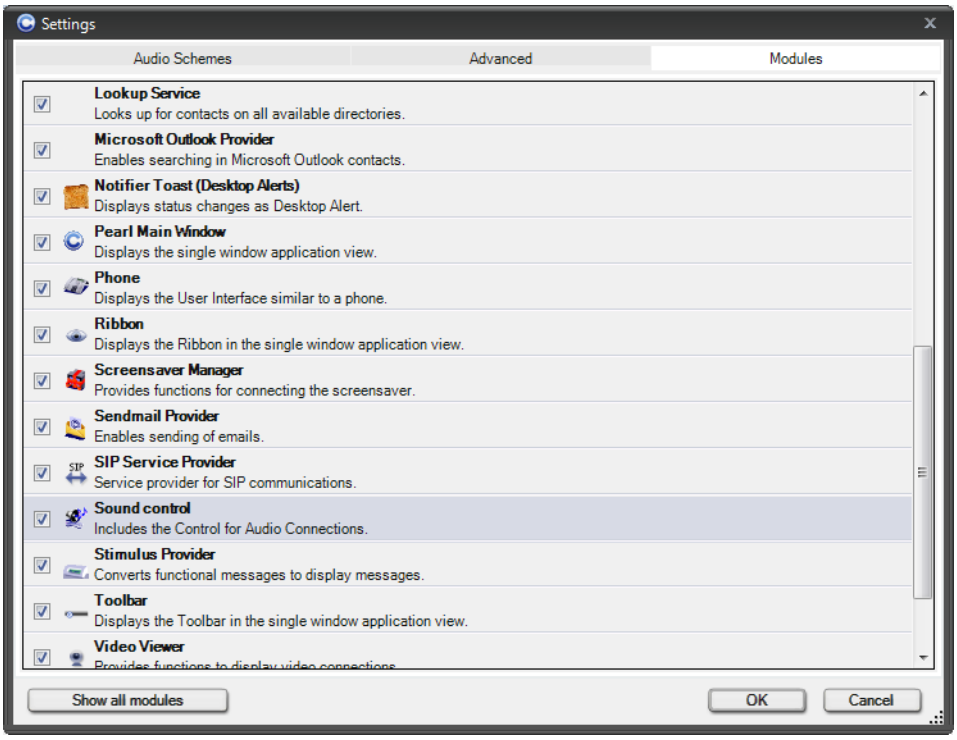
You can change the sequence of an audio scheme with the buttons **up** and **down**.

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

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

2.2 “Modules” Tab

The **Modules** tab lists all modules that, based on their functionality and features, have been specified for operation with the standard provider selected during the installation.



Click the **Show all modules** button to see all installed modules.

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

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

IMPORTANT: Do not activate modules not contained in the below table! If you add modules not described here, considerable problems may occur during the operation of OpenScape Desktop Client!

Module	Description	Setup type
Screensaver manager	Provides the OpenScape Desktop Client screensaver feature.	All (✓)
Communication Provider[1]	Enables SIP Service Provider operation.	SIP Provider
Directory Manager	This module activates name resolution via configured directory services (for example LDAP, private contact list) and controls the priority with which the information in these directories is handled.	All (✓)
Device State	This module is in charge of the **telephone** and **redirection** menus in the main bar and ribbon of the OpenScape Desktop Client.	All (✓)
HiPath Provider	Provides the connection to a OpenScape 4000 or OpenScape Office MX PBX.	HiPath Provider

Module	Description	Setup type
HLM License Provider	Provides the connection to the HiPath license server.	SIP Provider and HiPath Provider
IPC Manager[1]	This module is required for initiating calls from Microsoft Outlook or IBM Notes via the OpenScape Desktop Client. It provides a dialog for selecting phone numbers.	All (✓)
Journal	Provides the Journal user interface.	All (✓)
Keyboard manager	This module provides keyboard support features.	All (✓)
Contact List[1]	This module provides a contact list for local use.	All (✓)
LDAP Directory Provider	The LDAP Directory Provider enables connecting OpenScape Desktop Client to external LDAP directories used for resolving phone numbers.	All (✓)
Local journal Provider	Stores connection data for the journal in the local database. These data records are automatically deleted after a specific period or when a certain maximum number of data records has been reached.	All (✓)
Lotus Notes Provider	This module provides the connection to a IBM Notes client and enables the IBM Notes integration.	All
Ribbon[1]	This module is in charge of representing the ribbon in the main window.	All (✓)
Notifier Toast (Desktop Alerts)	This module controls the display of a dynamically appearing notification window at the bottom right screen margin.	All (✓)
Pearl Main Window[1]	This module is in charge of the individual window view.	All (✓)
Sendmail Provider[1]	This module enables sending e-mails to a contact directly from one of the directories or from the contact list.	All (✓)
SIP Service Provider	This module enables the OpenScape Desktop Client to perform SIP telephony services.	SIP Provider
Softphone[1]	This module provides user interface of a telephone.	All
Sound control[1]	This module is in charge of the audio command (audio buttons, menu volume, volume control, button additional speakers).	All (✓)
SQLite Provider	The SQLite Provider enables accessing Microsoft Outlook contact directories via an SQLite database.	All (✓)
Stimulus Provider	This module is in charge of showing information on the telephone display.	SIP Provider and HiPath Provider
Lookup Service[1]	Enables looking for contacts in all available directories.	All (✓)
Toolbar[1]	The activated module is in charge of representing the main bar in the individual window view.	All (✓)
Telephone	The telephone module controls the integrated and free telephone in the OpenScape Desktop Client.	All (✓)
Call Control	Provides the call control feature.	All (✓)
Directory Search[1]	Enables searching contact directories from several data sources, for example LDAP directories, Microsoft Outlook contacts, etc.	All (✓)
Video Viewer	This module is in charge of representing the video window in the video viewer.	SIP Provider

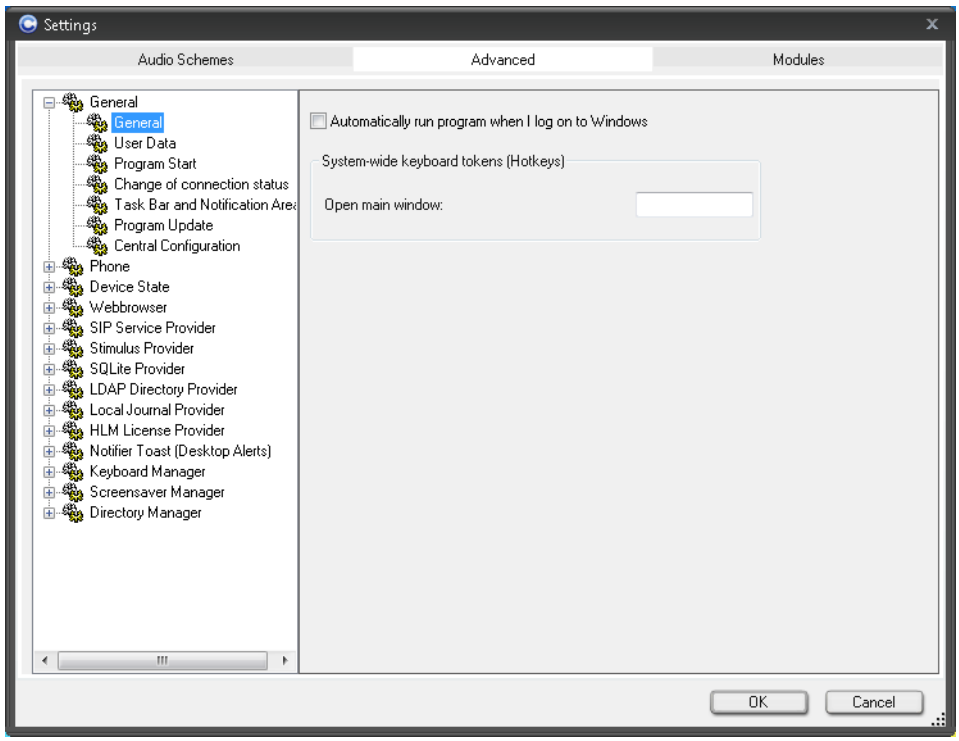
Module	Description	Setup type
Dialing Helper[1]	Using this module the OpenScape Desktop Client initiates calls started in Microsoft Outlook or in IBM Notes. The dialing helper is exclusively used in combination with the IPC manager.	All (✓)
Webbrowser	This module enables opening frequently accessed internet pages directly in the web browser of the OpenScape Desktop Client.	All (✓)
Web Access Manager[1]	This module enables configuring and opening web addresses for your contacts.	All (✓)
Status and Event Display[1]	This module serves as indicator plugin and enables the display of various events and stati, for example secure or non-secure connection, in the main bar.	All

1 For this module there are no **settings** in the registercard extended possible or necessary.

NOTICE: How to add or remove modules is outlined in the setup manual of OpenScape Desktop Client of the OpenScape Personal Edition.

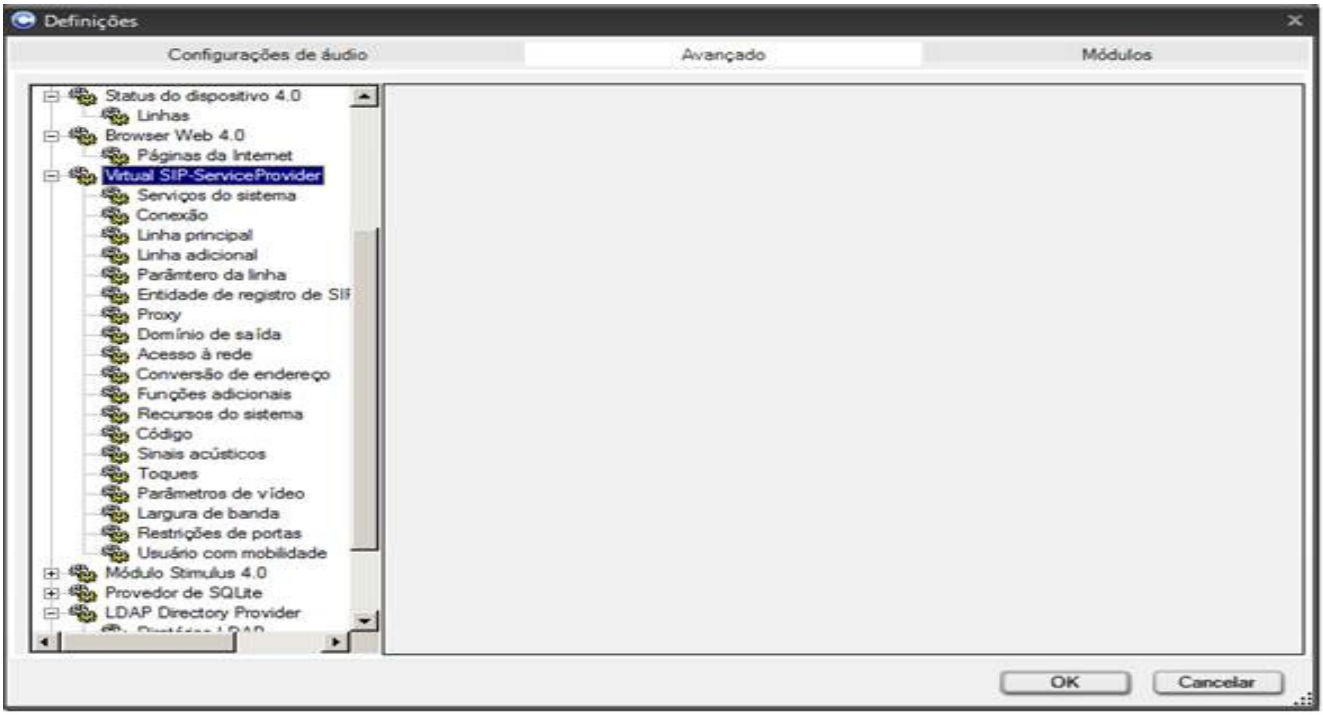
2.3 “Advanced” Tab

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



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

In case of VDI-Environment (Citrix) the SIP Service Provider is shown as Virtual SIP Service Provider

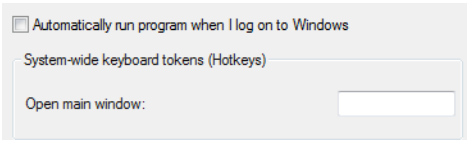


2.3.1 General Settings

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

2.3.1.1 General

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



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

- Activating the **Automatically run program when I log on to Windows** check box starts the OpenScape Desktop Client automatically when you perform your Windows logon to the system.
- **Open main window**
  In this input field you can specify a key or hotkeys considered **System-wide keyboard tokens (hotkeys)** for reopening the main window or moving it to

the foreground when it is hidden or minimized. The cursor is automatically positioned in the **<Name or Number>** input field of the main menu.

NOTICE: Only phone numbers (FQTN) fully specified according to E.164 are supported for dialing via **System-wide keyboard tokens (hotkeys)**.

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

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

Admissible keys or hotkeys are:

- **[F2]** to **[F11]**, also in combination with **Shift** or **[Ctrl]**,
- Letter keys **A** to **Z** in combination with **[Ctrl]**,
- Digit keys **0** to **9** in combination with **[Ctrl]**,
- **Shift key + [Esc]**,
- **Blank key**

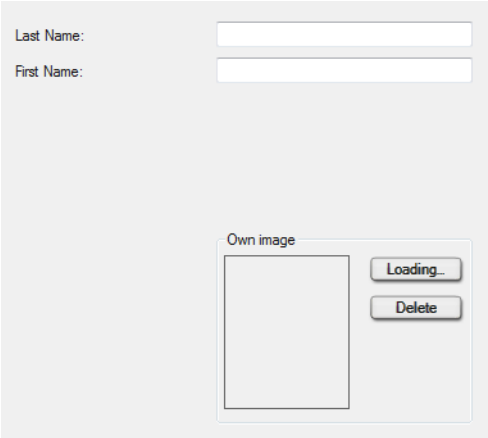
NOTICE: You must not define the function keys **[F1]** and **[F12]** as hotkeys.

To specify hotkeys, click in the input field and push the desired key or hotkey. The desired key or hotkey is displayed in the input field.

2.3.1.2 User Data

NOTICE: You can set or modify user data only while logging on and not while operating the system.

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



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

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

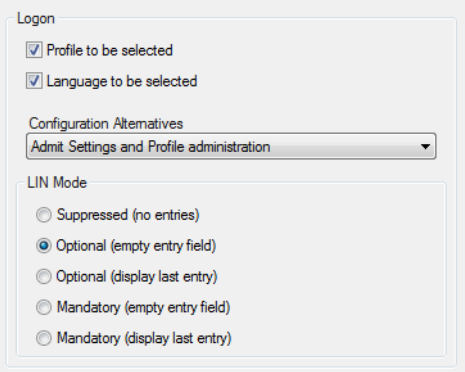
NOTICE: In Citrix environment, the 'Browse Folders/Files' is executed in Citrix Server machine and not in the user machine. However the administrator can give you a permission so that you can access your local files. Please ask your administrator for more information.

Refer also to the Installation and Admin Guide.

2.3.1.3 Starting the Program

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

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



You can define the following settings for the program start:

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

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

- **Language to be selected**
  When you select this option, the login dialog displays the field for selecting a **Language**. Select this setting, for example, if staff members with different native languages operate the OpenScape Desktop Client on the same computer.
- **Configuration Alternatives**
  You can use this setting to specify whether – and if so which – configuration options shall be available to a user when logging on. The following options are available:
  - **Admit Settings and Profile administration**
    The complete list of management features as well as the **Settings** option is displayed in the menu of the **Manage** button when you click on the **Manage** button. The **Add Profile ...** button appears in the Logon dialog in addition.
  - **Hide Settings and Profile administration**
    You cannot access the menu of the **Manage** button. The **Add Profile ...** button is hidden.
  - **Only accept settings**
    The **Settings** entry is displayed in the menu of the **Manage** button after you have clicked on the button. The other management functions are not available. The **Add Profile ...** button is hidden from the Logon dialog.

- Settings for the **LIN mode**
  This option controls how an LIN (*Local Identification Number*) is entered in the Logon dialog. The LIN can be used to pinpoint emergency calls by assigning location numbers to buildings, building section numbers, etc.

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

  The following options are available:

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

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

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

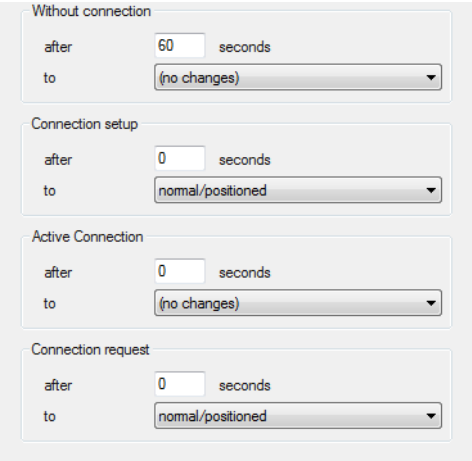
  NOTICE: If you want to see the Logon dialog every time, but do not wish to assign a password, select the **Optional (empty entry field)** option.

2.3.1.4 Connection Status Change

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

Depending on the display mode set for the OpenScape Desktop Client in normal mode you may want the display mode to reflect a connection status change. For example, if the main bar is minimized in connection-free status, you can perform a setting that places the OpenScape Desktop Client back on top in the case of incoming or outgoing calls.

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



The following connection stati exist:

- **Without connection**
  There is no connection (no connection request, no connection setup, no active connection).
- **Connection setup**
  You set up a connection to another station, for example, a call connection, by dialing a phone number.
- **Active Connection**
  There is an active connection. This may be an active call.
- **Connection request**
  You receive a connection request, for example, an incoming call.

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

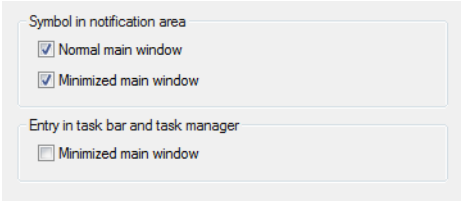
- **(no changes)**
  The current display is not modified.
- **normal/positioned**
  The main bar is reset to the active status (normal or positioned) in which it was before it was minimized. The OpenScape Desktop Client reappears on the desktop.
- **minimized/hidden**
  The main bar is minimized or hidden.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

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

2.3.1.5 Task Bar and Notification Area

NOTICE: Options for editing settings for the Windows task bar and notification area of the Windows task bar are only available after you have activated them when logging on, not when you activate them during operation.

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



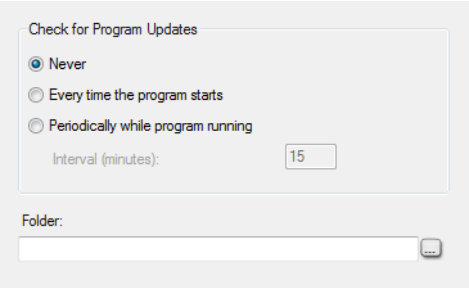
- **Symbol in notification area**
  Depending on the status of the main window you can display an icon (we call it OpenScape icon as we proceed) in the notification area of the Windows task bar.
  - **Normal main window**
    The OpenScape icon is displayed when the main window is not minimized.
  -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

2.3.1.6 Program Update

NOTICE: You find detailed information about the automatic program update of OpenScape Desktop Client in the manual *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration*.

NOTICE: Options for editing program update settings are only available after you have activated them when logging on, not when you activate them during live operation.

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



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

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

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

2.3.1.7 Central Configuration

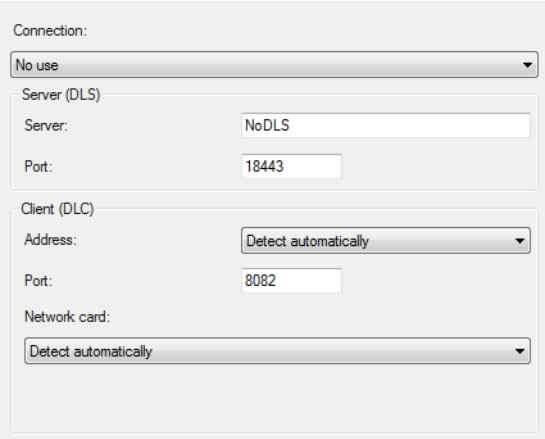
NOTICE: The central configuration settings are performed by default if a central configuration is used during the OpenScape Desktop Client setup.

NOTICE: Options for editing the central configuration settings are only available when activated while logging on, not when activated during live operation.

NOTICE: Useful information about necessary DLS settings and functional restrictions on using a central configuration for automatic configuration is contained in the *OpenScape Personal Edition V7 Installation and Administration* setup guide.

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

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



The following settings are required for using the central configuration:

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

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

– In the **Port** field, enter the number of the local port under which the OpenScape Desktop Client responds to queries from the central server.
– In the **Network card** combo box select the network card ID used for DLS-server exchange. The options available here are **Detect automatically** or the network card IDs configured on the PC.

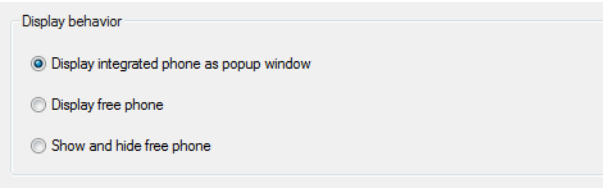
NOTICE: IDs of network cards no longer available in the computer are listed in brackets ( ).

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

2.3.2 Telephone Settings

The telephone module controls the integrated and free telephone in the OpenScape Desktop Client.

While the display of the integrated phone is a permanent main bar feature, the corresponding function, dial and dialog keys (depending on the individual setting) are usually not displayed. Under **Advanced > Telephone > Integrated phone** you can specify the action to be performed following a click on the display in the main bar.



By selecting the desired option you can control the display behavior that follows a click on the display of the integrated phone. The following options are available:

- **Display integrated phone as popup window**
  When you click on the display, the dial and dialog keys appear as popup window on the display (subject to individual setting). You can then use the keys in the window as usual. When you click on another window, the popup window with the keys is hidden again.

- **Display free phone**
  When you click on the integrated-phone display, the free phone opens (subject to individual setting). If the free phone is already open, this window will be switched to.
- **Show and hide free phone**
  When you click on the integrated-phone display, the free phone opens (subject to individual setting). If the free phone is already open, it will be closed now.

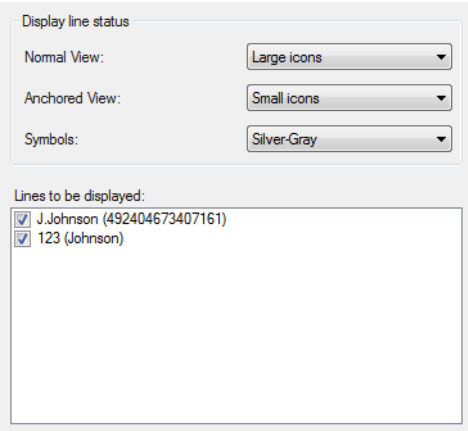
2.3.3 Device State Settings

The **Device State Settings** module provides the phone menu as an element of the Softphone menu. Since no additional settings are required for this module, no editing parameters can be selected.

2.3.3.1 Line Settings

NOTICE: Options for editing line display settings are only available when activated during live operation, not when activated during login.

You define the line display options on the tab **Advanced > Device State > Lines**. You can select the lines you wish to display in the **Lines** window from the list of configured lines:



In the **Display line status** section you can define the icon size (**Large icons** or **Small icons**) for the line options displayed in the **Lines** window.

- **Normal View**
  Select the icon size for the **Lines** window, if it is docked to the main bar or freely positionable.
- **Anchored View**
  Define the icon size in the **Lines** window.

- **Symbols**
  You can also specify whether the symbols in the **Lines** window are to appear in **Gold** or in **Silver-Gray**.

All lines configured in the OpenScape Desktop Client are listed in the **Lines to be displayed** section. Select here the lines to be displayed in the **Lines** window. Only the lines activated here can later be operated in the **Lines** window.

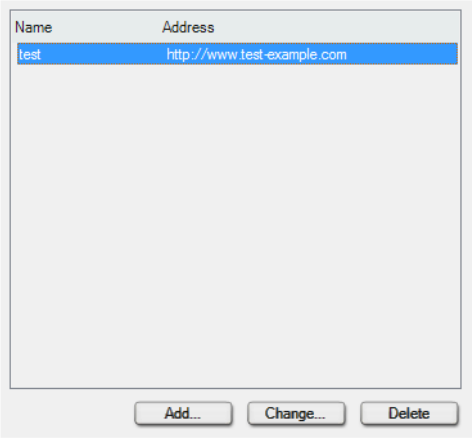
2.3.4 Web Browser Settings

NOTICE: You can edit the web browser settings via the **Settings** dialog during the program start or during live operation. Click on the **Manage** button in the Logon dialog or the **OpenScape Options** button in the Pearl menu.

In daily operation you can directly open frequently visited internet pages in the **web browser** of the OpenScape Desktop Client without having to leave the program. The selectable internet pages are configured in the **Internet pages** section and subsequently offered as selection options in the **Pearl menu > View > Webbrowser**.

2.3.4.1 Internet Page Settings

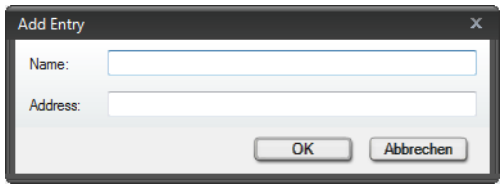
If you want to perform web browser settings, click on the **Internet pages** option in the **Webbrowser** area.



Here you can add a new internet page, edit already configured web pages or delete them. The following operating elements are available in this dialog:

Add...

A click on this button opens the following dialog:



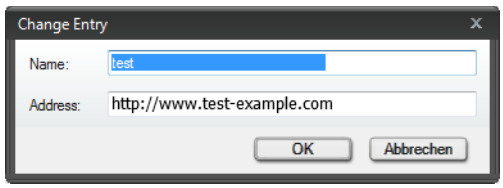
In this dialog you can configure a new internet page address for the web browser.

- **Name**
  Enter an expressive name for the desired internet page in this field. While you operate the OpenScape Desktop Client, this name appears in the **Pearl menu > View > Web Browser** and enables invoking the respective internet page.
- **Address**
  Enter the URL of the desired internet page in this field.

Change...

> ***NOTICE:*** The corresponding button remains inactive until you select an entry in the list of configured internet pages.

A click on this button opens the following dialog:



In this dialog you can change the already configured **Name** and the **Address** of a selected internet page.

Delete

> ***NOTICE:*** The corresponding button remains inactive until you select an entry in the list of configured internet pages.

A click on this button removes a selected entry from the list of configured internet pages.

2.3.5 SIP Service Provider Settings

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

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

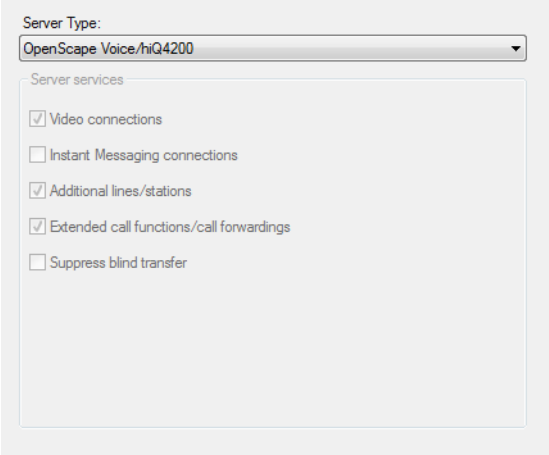
To edit the SIP Service Provider settings, select on the tab **Advanced > SIP Service Provider**. Then click on one of the following settings.

NOTICE: In case of VDI-Environment (Citrix) the menu is Advanced -> Virtual SIP Service Provider.

2.3.5.1 System Services

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

NOTICE: In case of VDI-Environment the menu is Advanced > Virtual SIP Service Provider > System Services



Server Type

- **OpenScape Voice/hiQ4200**
  Select this server type if the OpenScape Desktop Client is connected to an OpenScape Voice or a hiQ4200.
- **OpenScape Voice/hiQ4200 without video**
  Select this server type if the OpenScape Desktop Client is connected to an OpenScape Voice or a hiQ4200 without video support.
- **HiPath 3000/OpenOffice EE**
  Select this server type if the OpenScape Desktop Client is connected to this server.
- **HiPath 3000 >=V8**
  Select this server type if the OpenScape Desktop Client is connected to an HiPath or later.
- **OpenScape 4000 >=V6**
  Select this server type if the OpenScape Desktop Client is connected to an OpenScape 4000 or later.

- **Default without Video/Instant Messaging**
  Select this server type if the OpenScape Desktop Client is connected to any SIP-protocol-based SIP server. In this case the video and instant-messaging features are not supported.
- **Custom**
  If you select this server type, you can individually activate the support for the following features for the connected communications system (if available):

Server services

- **Video connections**
  Enables connections for exchanging video images.
- **Instant Messaging connections**
  Enables connections for exchanging instant messages.
- **Additional lines/stations**
  Enables the **Lines** module window.
- **Extended call functions/call forwardings**
  Enables extended features and functions, such as Transfer.
- **Suppress blind transfer**
  The "Blind Transfer" feature (**transfer to** a device or subscriber) is not supported by this PBX.

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

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

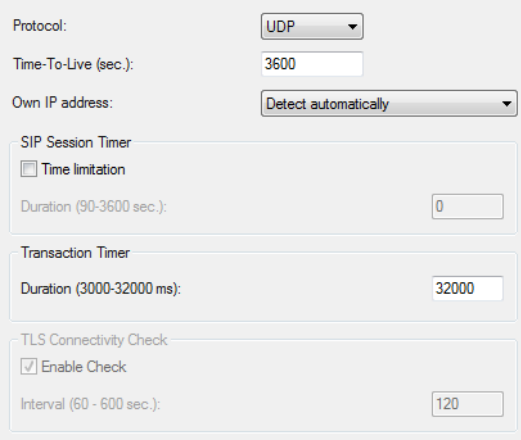
NOTICE: If a listed server service is active, the associated features and elements such as buttons, menu options, module windows, etc. are also active in the OpenScape Desktop Client.

These controls are unavailable or inactive if the associated server service is not active.

2.3.5.2 Connection

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

NOTICE: In case of VDI-Environment (Citrix) the menu is Advanced > Virtual SIP Service Provider > Connection.



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

IMPORTANT: Furthermore, you need to set **Port** `5061` in the **SIP Signaling** section under **Advanced > SIP Service Provider > Port restrictions**. (Under VDI-Environment (Citrix) it is Advanced > Virtual SIP Service Provider > Port restrictions)

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

NOTICE: You find more information about data encryption in the manual *OpenScape Personal Edition V7 Installation and Administration*.

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

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

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

SIP Session Timer

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

Transaction Timer

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

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

TLS Connectivity Check

If OpenScape Desktop Client is connected to an OpenScape Voice via the TLS protocol, the connection to the PBX can be checked regularly. As soon as a

connection breakdown has been detected, the program attempts automatically to re-establish the connection to the PBX.

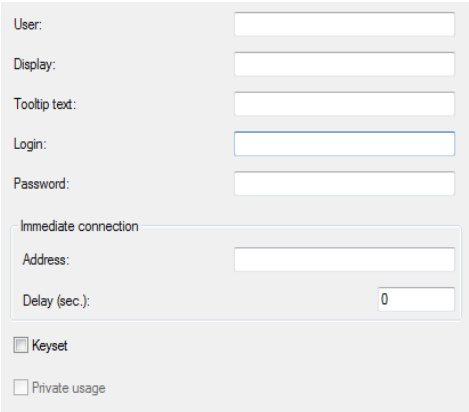
> ***NOTICE:*** You can change the settings for monitoring the TLS connection to the OpenScape Voice after you have selected the **TLS** option under **Protocol**.

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

2.3.5.3 Main Line

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

> ***NOTICE:*** In case of VDI-Environment (Citrix) it is Advanced > Virtual SIP Service Provider > Main line.



- **User**
  For logging on to the SIP communications system you need to enter a unique OpenScape Desktop Client phone number/user address.
  If you leave this field emtpy, logging on to the SIP communications system (for example OpenScape Voice) will fail. In this case it is not possible using the OpenScape Desktop Client as SIP softphone.
- **View**
  Enter the complete name. The text is displayed by the free or integrated phone when idle and is also transferred as name information to your connection partners. This text is also used as a description of the primary line in the **Lines** window or menu.

- **Tooltip text**
  The tooltip text appears when the mouse pointer is moved close to the main connection line in the **Lines** window.
- **Login**
  Enter here your SIP ID that has been configured for authentication at the SIP communications system.
- **Password**
  Enter here the SIP password that has been configured for the SIP ID specified under **Login**.

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

You can define a connection target in the **Immediate connection** section. This target is automatically called after you have picked up the receiver or pushed the corresponding headset button (pick up/put down receiver), and after a configurable period has elapsed, in which you have not dialed a phone number.

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

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

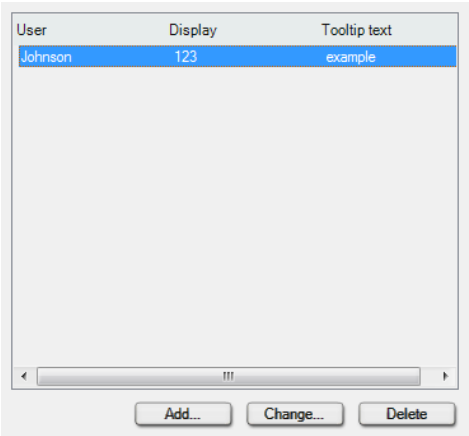
- **Delay (sec.)**
  This entry specifies the delay after which the above address is to be dialed. If the delay is set to `0`, the immediate connection is set up without delay.
- **Keyset**
  Activate this check box to configure your OpenScape Desktop Client as **Keyset**. A **Keyset** is a telephone that can support several lines and on which each line is represented by a key with LED. As soon as you have defined at least one assignment, this check box becomes automatically active. In this case the setting can only be deactivated by deleting the additional line. If your OpenScape Desktop Client is connected to an OpenScape Voice PBX, the user of a single line (i. e. only one main line and no additional lines are configured) must activate the check box for logging on to the system.
- **Private usage**
  Activating this check box defines this line as private line. That is, if you use this line, other stations with a secondary line do not receive any status change messages on your call number/user address.

> ***NOTICE:*** The administrator of your PBX provides the required details.

2.3.5.4 Additional Lines

Your connections are conducted via lines in the OpenScape Desktop Client. Every user has at least one separate line that is individually assigned and used only by that specific user (main line). If supported by the communications system connection, SIP users can use additional configured lines or share them with other SIP users. The choice of available lines is defined in the connected communications system. You can define further lines for the user on the **Advanced** tab under **SIP Service Provider > Additional lines**.

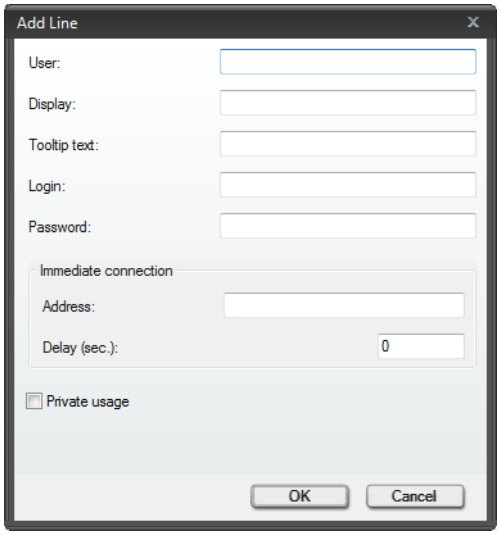
> ***NOTICE:*** In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Additional lines.



Previously configured additional lines are displayed in the list. You can add additional lines, change settings or delete lines.

Adding additional lines

After clicking the **Add...** button you can define an additional line for the user. The following dialog opens:



- Under **User** enter the phone number of the SIP user.
- Enter an expressive text in the **Display** field. This text will be shown in the display of the free respectively integrated phone in idle state and also transmitted as name information to your connection partners. Furthermore, this text will be used as description of the respective line in the line window respectively line menu.
- The **Tooltip text** appears when the mousepointer rests on the connection line in the line window.
- **Login**
  Enter your login here.
- **Password**
  If the authentication was configured on the server, you need to enter your password in this field.

In the **Immediate connection** section you can configure an immediate connection for the main line.

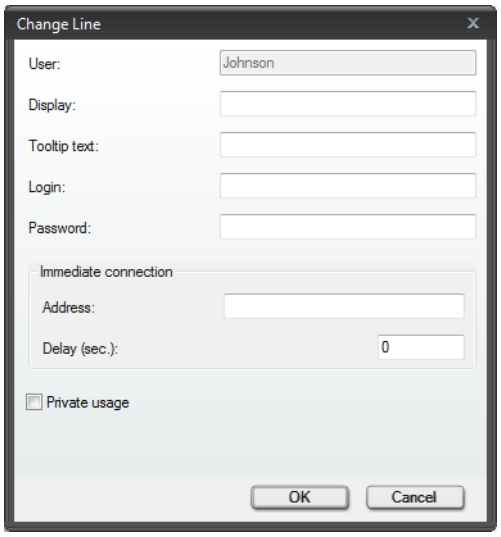
- **Address**
  Use this input field to specify which address is to be dialed after the line has become active (for example after lifting the handset).
- **Delay (sec.)**
  This entry specifies the delay after which the above address is to be dialed. If the delay is set to `0`, the immediate connection is set up without delay.
- **Private usage**
  Activating this check box defines this line as private line. That is, if you use this line, other stations with a secondary line do not receive any status change messages on your call number/user address.

NOTICE: The required details are provided by your OpenScape UC Application or PBX administrator.

The main line and all additional lines configured here can be selected in the **Lines** menu on the main bar. The **Lines** window, on the other hand, only contains lines that were specially activated and suitable for editing.

Changing additional lines

After clicking the **Change...** button you can edit the already configured settings of a line. The following dialog opens:



NOTICE: You cannot change the entry in the **User** input field.

Deleting additional lines

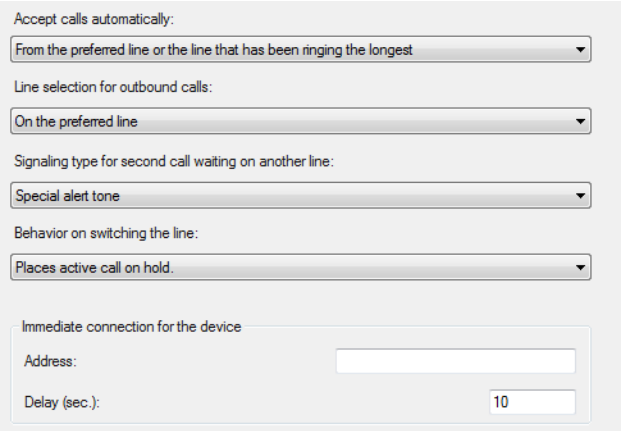
You can remove a selected line from the list of configured lines with a click on the **Delete** button.

2.3.5.5 Line Parameters

NOTICE: The **line parameters** settings are only required in combination with configured **additional lines**.

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

NOTICE: In case of VDI-Environment (Citrix) it is Advanced > Virtual SIP Service Provider.



Accept calls automatically

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

The following settings are available:

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

Line selection for outbound calls

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

The following settings are available:

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

Signaling type for second call waiting on another line

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

You can choose from:

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

Behavior on switching the line

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

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

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

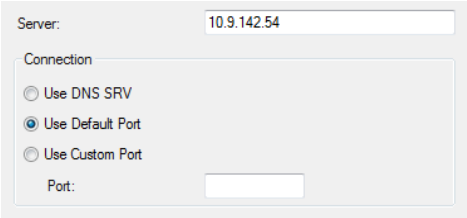
- **Address**
  Use this input field to specify a number to which a connection is automatically set up independently from the line-specific immediate-connection settings.
- **Delay (sec.)**
  This entry specifies the delay after which the number specified under **Address** is to be dialed. 0 seconds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

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

2.3.5.6 Registrar

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

> ***NOTICE:*** In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Registrar)



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

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

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

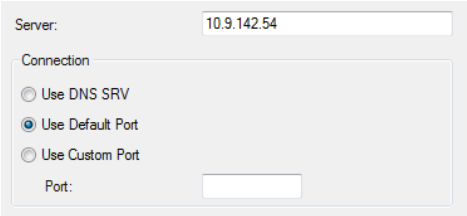
- **Use DNS SRV**
  If this option is active, the settings for the registrar portion of the SIP server are determined by a DNS service. In this case, enter the domain name of the registrar portion of the server under **Server**.
- **Use Default Port**
  Depending on the selected transport type, this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

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

2.3.5.7 Proxy

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

> ***NOTICE:*** In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Proxy.



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

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

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

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

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

2.3.5.8 Outbound Domain

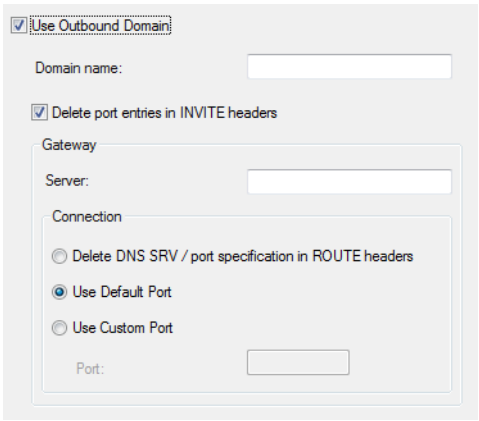
An outbound domain (outbound proxy server) is used, for example, for a (*Survivable Branch Office Solution*) with an OpenScape Voice. In this case the survivability is provided by an extra proxy component of the SIP server (survivable SIP proxy, for example *Comdasys Convergence*). A survivable SIP proxy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

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

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

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Outbound Domain.



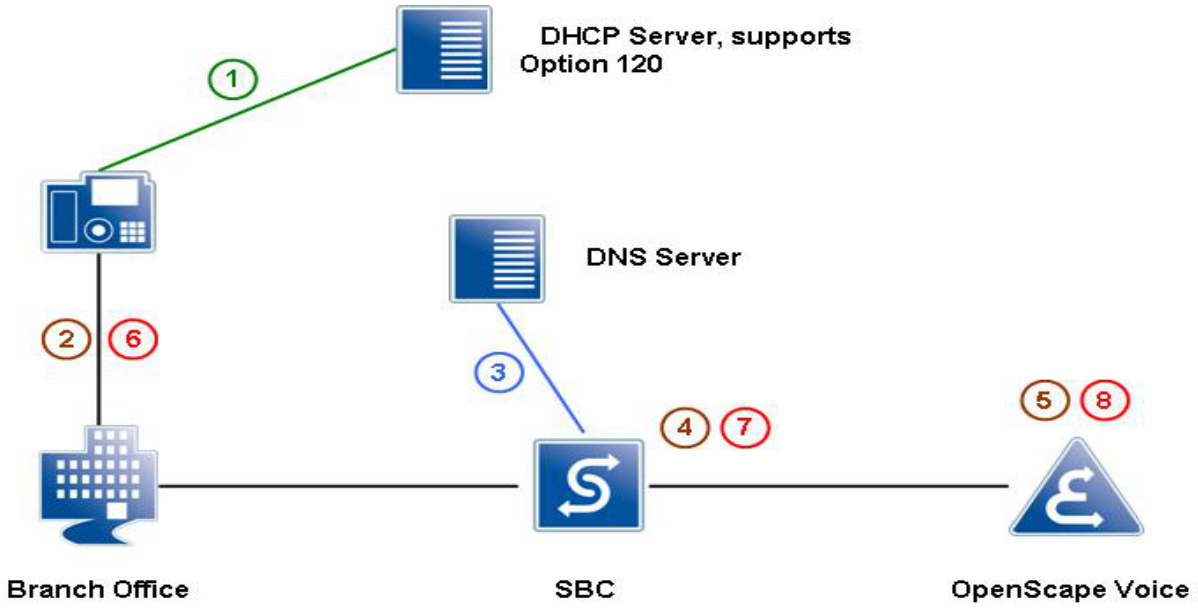
- **Use Outbound Domain**
  Activate this option so that you can fill in the fields in this dialog.

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

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

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

  domain names can be provided also via DHCP option 120.
  With this domain names are provided at startup via DHCP option 120. This is possible only for users behind an SBC or Proxy.



1) ODC receives site specific domain name via DHCP Option 120.
2) ODC sends domain name as host part of the header field in SIP Register request.
3) DNS server resolves Location Domain of the address of OSV.
4) SBC does not change the domain name in the To header field
5) OSV saves the domain name for each contact in its Location Database.
6) ODC sends domain name as host part of From header field in SIP INVITE request.
7) SBC does not change the domain name in the From header field.
8) OSV provides the conveyed domain name to interested services.

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

NOTICE: You need to set the IP address or the server name of the Survivable SIP Proxy also under **SIP Service Provider > Proxy**. In case of VDI-Environment (Citrix) it is under Virtual SIP Service Provider > Proxy.

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

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

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

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

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

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

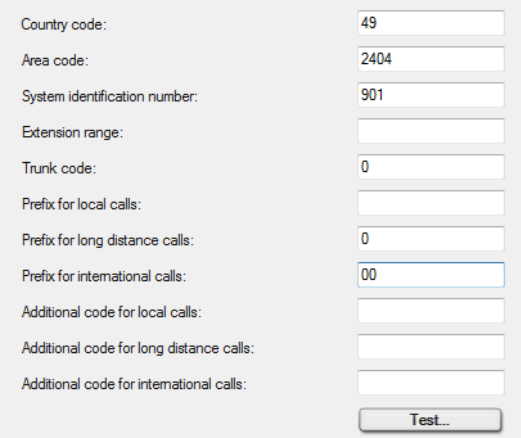
2.3.5.9 Network Access

NOTICE: The network access settings are used for normalizing phone numbers. They need to be configured only if the **Normalize call numbers** option has been activated in the **Settings** dialog on the tab **Advanced > SIP Service Provider > Address conversion**. In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Server Provider > Address conversion.

Network access settings (location information) are needed for setting up a direct connection to telephone numbers from OpenScape Desktop Client directories or call lists. These settings are also used for converting call numbers into the internationally dialable format. If these settings are not configured properly, you may encounter problems when setting up connections.

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Network access.



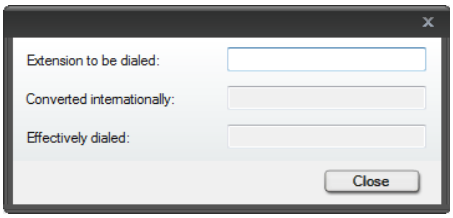
- **Country code**
  Enter here the international prefix for your location, for example `49` for Germany.
- **Area code**
  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.
- **System identification number**
  Enter the system identification number. This system ID number identifies internal call numbers in the directories that only set up internal connections when selected.
- **Extension range**
  Specify the extension range of your network in the form of a *regular expression.*
  Example:
  You have been assigned the system identification number with the numbers 0049 35 12345-2000 to 0049 35 12345-4999. In this case the extension range reads 2000 to 4999. Enter the following in the **Extension range** field for these phone numbers: `\b[2-4][0-9]{3}\b`.
  - \b - the number must begin with a blank
  - [2-4] - the first digit may be a character between 2 and 4 inclusive, thus 2, 3, 4
  - [0-9]{3} - for the next three digits, numbers 0 to 9 are allowed
  - \b - the number must end with a blank
- **Trunk code**
  Enter here the code that has been configured on your system or on your PBX to allocate trunks for outgoing connections.
- **Prefix for local calls/long distance calls/international calls**
  Enter the network operator ID for the respective call type in the corresponding fields. For example, in Germany no **Prefix for local calls** is used, while for other countries in Europe and members of the NANP (North American Numbering Plan) the zero is used to mark local calls. In Germany, for

example, the **prefix for long distance calls** is `0` and the **prefix for international calls** is `00`. This data is independent from the configuration of the connected communications system and determined by the network operator.

- **Additional code for local calls/long distance calls/international calls**
  Enter here any additional digits to be used as call-by-call prefixes. This data is independent from the configuration of the connected communications system.
  The sequence of the various codes is as follows:
  <office code><additional code><prefix><phone number>

Test

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

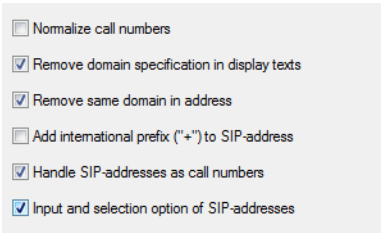


- **Extension to be dialed**
  Enter the number to be dialed in this entry field. Based on the currently set parameters the OpenScape Desktop Client determines the phone number in international format.
- **Converted internationally**
  The phone number entered in the above field is automatically displayed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

2.3.5.10 Address Conversion

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Address conversion.



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

  NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Network Access

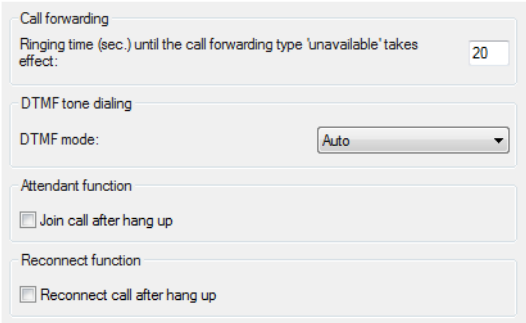
  NOTICE: Make sure that all required network access data on the tab **Advanced > SIP Service Provider > Network access** is set correctly. In case of VDI-Environment (Citrix) check Advanced -> Virtual SIP Service Provider > Network access.

- **Remove domain specification in display texts**
  Activate this option to suppress the domain port for a SIP-URI to be displayed (for example display the calling station) on the display.
- **Remove same domain in address**
  Activate this option to suppress the domain port in the case of SIP-URIs from the same/own registrar in addresses, for example call lists.
- **Add international prefix (“+“) to SIP-address**
  Activate this option if the OpenScape Desktop Client is to indicate the SIP address as international.
  Example:
  The SIP Service Provider delivers the address *sip:4924049087666@siemens.com* and the OpenScape Desktop Client converts it in *sip:+4924049087666@siemens.com*.
- **Handle SIP-addresses as call numbers**
  If this option is active, the domain portion is ignored and the text that precedes the domain considered a phone number.
  Example:
  sip:+4924049087666@enterprise.com is considered *+4924049087666*.
- **Input and selection option of SIP-addresses**
  Activate this check box to allow the input and selection option of SIP-addresses.

2.3.5.11 Additional Functions

On the **Advanced** tab, under **SIP Service Provider > Additional functions** , you can define additional features depending on the connected communications system.

NOTICE: In case of VDI-Environment it Virtual SIP Service Provider > Additional functions.



Call forwarding

- Ringing time (sec.) until the call forwarding type ’unavailable’ takes effect
  Using this option you can set a ringing time after the expiry of which a call forwarding you have configured becomes active. Specify the desired value in the associated field.

DTMF tone dialing

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

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

Attendant function

- **Join call after hang up**
  This option determines the telephone's reaction when you hang up via during a consultation call: you are connected to the consultation call subscriber while the connection to the original caller is being held. If this option is active, the original caller and consultation call subscriber are then connected. If this option is inactive, the connection to the consultation call subscriber is closed and you are automatically reconnected to the original caller.

NOTICE: If, however, you put down the receiver, the held connection persists. Your PBX automatically triggers a call signal. After picking up the receiver, you are reconnected to the held subscriber.

Reconnect function

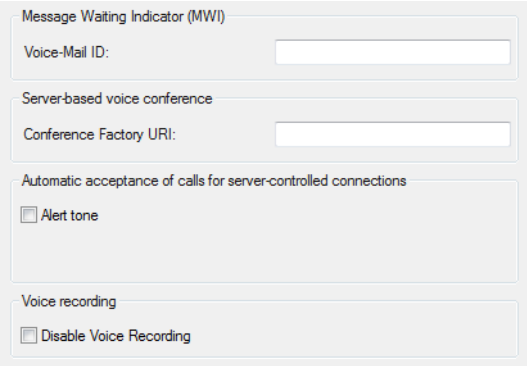
- **Reconnect call after hang up**
  If a connection (partner A with partner B) is set to call-hold owing to a consultation call (A consults with C) and the consultation call is finished, activating this option will effect the following:
  - Partner A is automatically reconnected to the held partner B, after partner C has closed the consultation call connection.
  - The held partner B calls partner A again after partner A has closed the consultation call connection.

2.3.5.12 System Functions

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > System functions

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



Message Waiting Indicator (MWI)

You can use this feature to be alerted to available voicemails and retrieve them.

- **Voice-Mail ID**
  Enter the phone number for the callback access of the voicemail system under **Voice-Mail ID**. This setting effects the display of the **Request messages** option in the telephone menu .

NOTICE: The necessary details for this can be obtained from the administrator of the connected communications system.

Server-based voice conference

A server-based voice conference is a conference connection based on a consultation call connection that can connect more than three participants to each other.

> ***NOTICE:*** In the OpenScape Voice documentation this type of conference is referred to as device-controlled conference.

- **Conference Factory URI**
  Enter here the number or URI of the conference server supported by your communications system. For example, the OpenScape Desktop Client sends during a consultation call the **conference server URI** to the OpenScape Voice, which then establishes a conference connection to the connected Media Server of the OpenScape UC Application.
  If this function is configured, the context menu of a consultation call contains the "**Initiate server-based conference**" option. Otherwise, the context menu of a consultation call contains the "**Initiate local conference**" option.

  > ***NOTICE:*** We recommend to only enter the user portion of the **conference server URI**, for example "`4989`" instead of "`4989@<address of the SIP server>`".

Automatic acceptance of calls for server-controlled connections

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

Voice recording

- **Disable Voice Recording**

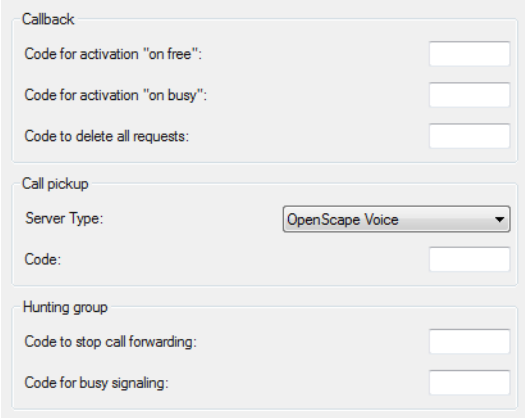
  > ***NOTICE:*** This option is not activated by default.

  Activating this option hides the voice recording icon in the main bar and in the **ribbon > SoftPhone tab > Calls group**. Recording an active call with OpenScape Desktop Client is then not possible anymore.

2.3.5.13 Codes

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual Service Provider > Codes.



Callback

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

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

- **Code for activation "on free"**
  The setting defines the key (`0` to `9`, `*`, `#`) used for automatic activation in case of a free line.
- **Code for activation "on busy"**
  The setting defines the key (`0` to `9`, `*`, `#`) required for automatic activation in case of a busy line.
- **Code to delete all requests**
  This setting defines the key (`0` to `9`, `*`, `#`) required for deleting all automatic callback requests
  The option **Delete callback** is additionally available in the telephony menu of the main bar ( ) and in the **ribbon > SoftPhone tab > Functions** by configuring this code during operation.

Call pickup

Call pickup is a telephony function that allows the members of a subscriber group (or *business group* in OpenScape Voice terminology) to pick up calls for other members of the group. Two features are available for this function:

- *Call pickup group*
  This feature combines subscribers in pickup groups. Each group member can accept a call for another group member. Calls signalled acoustically to a subscriber of a call pickup group are at the same time signalled visually to the other group members by an LED (next to the programmed key) on the display. You can pick up the call by pushing a key or dialing a code number as well as via the displayed desktop notification.

NOTICE: To use the *Call Pickup Group* feature you need to perform appropriate settings in the OpenScape Voice.

- *Directed call pickup*
  This feature allows subscribers to accept signalled or waiting calls and to resume manually held calls for every phone number within a *business group*.

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

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

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

- **Code**
  Here you can define the key (0 to 9, *, #) used for call pickup and configured in the OpenScape Voice.
  By configuring this code during operation, the options **Directed call pickup** and **Pickup call** are additionally available in the telephony menu of the main bar ( ) and in the **ribbon > SoftPhone tab > Functions**.

Hunting group

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

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

- **Code to stop call forwarding**
  This setting defines the key (0 to 9, *, #) required for ending the automatic call forwarding. You can use the keypad of the integrated/free phone as well as of the OpenScape Personal Edition SoftPhone.
  The option **Logoff from hunting group** is additionally available in the telephony menu of the main bar ( ) and in the **ribbon > SoftPhone tab > Functions** by configuring this code during operation.
- **Code for busy signaling**
  This setting defines the key (0 to 9, *, #) required for signaling a busy line. You can use the keypad of the integrated/free phone as well as of the OpenScape Personal Edition SoftPhone.
  The option **Unavailable for hunting group** is additionally available in the telephony menu of the main bar ( ) and in the **ribbon > SoftPhone tab > Functions** by configuring this code during operation.

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

2.3.5.14 Sounds

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Sounds.

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

2.3.5.15 Ring Tones

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

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

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

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

NOTICE: In case of VDI-Environment (Citrix) it under Advanced > Virtual SIP Service Provider > Ring tones.

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

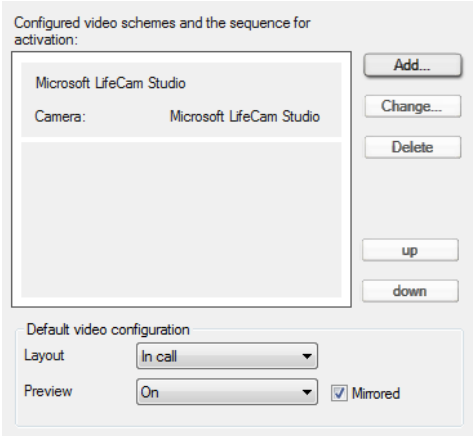
- Via the **Use individual ring tones** option you activate an individual ring tone. After you have activated this option, the OpenScape Desktop Client uses the tone specified under **File** to signal incoming calls.
- Under **File** you define the `WAV` or `MP3` file that contains the desired ring tone.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

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

2.3.5.16 Video Schemes

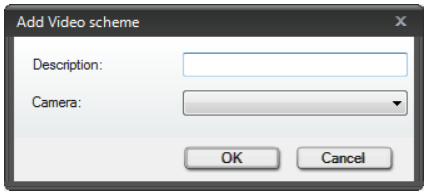
One or more video cameras must be installed in your workplace for sending video signals. No camera installation is required for receiving and representing video signals from other subscribers. The video hardware settings are grouped in video schemes. You can add video schemes and modify or delete single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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Video schemes.



Adding a video scheme

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



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

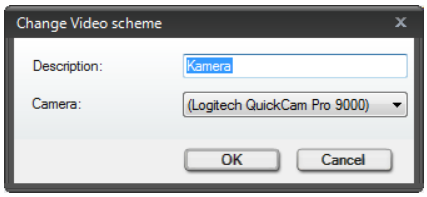
Selecting/activating a video scheme

To select/activate a video scheme, click the one you want in the list of configured video schemes. If a video scheme is available and active and the user logged in, the **SoftPhone** tab in the ribbon displays in the **Video** group the following icon for switching the camera on and off: **camera preview**.

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

Changing a video scheme

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



Deleting a video scheme

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

Video scheme sequence

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

Default video configuration

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

- **Layout**
  This option lets you specify the default view for your video window. You can select one of the following views:
  - **In call** (default)
    This view displays images of the connection partners in a frame and slightly turned. Your own image (camera image) appears bottom left. When it is being transmitted, it is shown in a red frame.
  - **Full window**
    In this view the image of the connection partner occupies the entire video window. Your own image (if configured) appears bottom left. When it is being transmitted, it is shown in a red frame.
  - **Full screen**
    In this view the image of the connection partner occupies the entire screen. Your own image (if configured) appears bottom left. When it is being transmitted, it is shown in a red frame.
  - **Keep previous**
    With this setting you determine that the view used last is saved when you shut the OpenScape Desktop Client down and used again when you restart the program.
- **Preview**
  - **Off**
    Your own image is not displayed or the video camera is switched off.
  - **On** (default)
    Your own image is displayed or the video camera is switched on.
  - **Keep previous**
    With this setting you determine that the view used last for your own image is saved when you shut the OpenScape Desktop Client down and used again when you restart the program.
- **Mirrored**
  - When this option is active, your own image is displayed mirrored in the **Video** window but transmitted unmirrored to the connection partner.

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

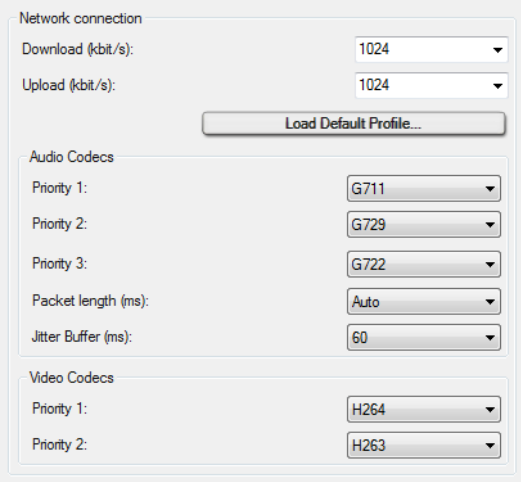
2.3.5.17 Bandwidth

Audio and video communication between the OpenScape Desktop Client and the communications system is based on fixed compression algorithms (codecs). To achieve high quality when transmitting audio and video signals via network as far as possible, you must perform appropriate bandwidth and codec settings in the OpenScape Desktop Client.

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

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced -> Virtual SIP Service Provider > Bandwidth.



Network connection

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

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

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

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

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

Audio Codecs

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

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

Video Codecs

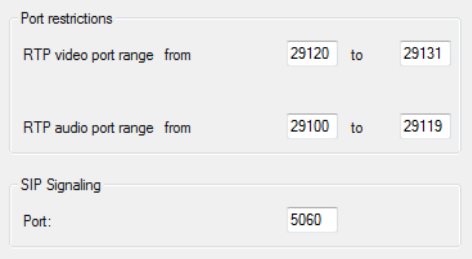
Determine in this section the codec sequence required for video connection. The two video codecs that the OpenScape Desktop Client supports are **H.263** and **H.264**.

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

2.3.5.18 Port Restrictions

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

> ***NOTICE:*** In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Port restrictions.



Port restrictions

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

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

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

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

SIP signaling

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

> ***NOTICE:*** If you have set the **TLS** entry under **SIP Service Provider > Connection** in the **Protocol** field, specify the recommended value `5061` here. Your administrator may have set a different port. This port is used for secure connections. In case of VDI-Environment check under Virtual SIP Service Provider > Connection.

2.3.5.19 Mobile User

> ***NOTICE:*** You can use the SIP Mobile User functionality only if a DLS server is available in your SIP communications system. Furthermore, the **Use central configuration** option must have been activated when setting up OpenScape Desktop Client. In addition, you must enter the DLS configuration parameters for the central configuration on the tab **Advanced > General > Central Configuration**.

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

SIP Mobile User logon

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

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

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

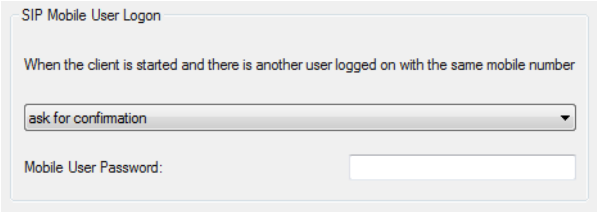
If you are still conducting a call with OpenScape Desktop Client, there are two options, which depend on the DLS configuration:

- The active connection is immediately closed. You are logged off from the communications system afterwards. The user interface, however, is visible

until you click on **OK**. The message is closed and the OpenScape Desktop Client terminated.

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

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



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

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

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

NOTICE: The program start is also abandoned if you do not have a valid mobile-user license or if the device has not been

configured as mobility-enabled device in the DLS. A corresponding error message is displayed.

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

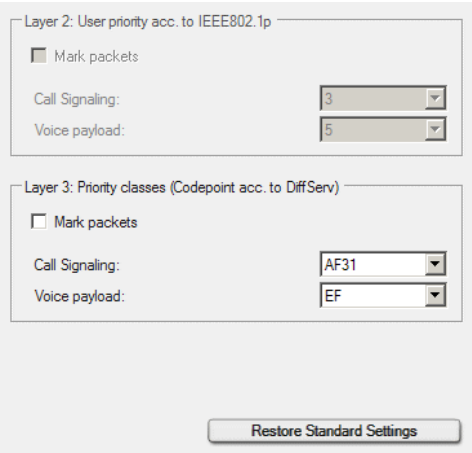
2.3.5.20 Quality of Service (QoS)

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

NOTICE: Please obtain further information about configuring the QoS settings and creating the QoS policies for the operating systems Microsoft Windows Vista SP1/Microsoft Windows 7/ Microsoft Windows 7 SP1 from the setup guide *OpenScape Personal EditionV7 Installation and Administration*.

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

NOTICE: In case of VDI-Environment (Citrix) it is under Advanced > Virtual SIP Service Provider > Quality of Service.



The displayed dialog shows the default settings for the following parameters:

- **Layer 2: User priority acc. to IEEE802.1p**
  Under Microsoft Windows XP Professional SP2 and later you cannot perform any settings for **Layer 2**.

- **Layer 3: Priority classes (Codepoint acc. to DiffServ)**
  Under Microsoft Windows XP Professional SP2 and later you can set the QoS values for the traffic types **Call Signaling** and **Voice payload** individually. You can use the **Mark Packets** option to individually define whether the data of the traffic types **Call Signaling** and **Voice payload** is furnished with the respectively set QoS values.
- **Restore Standard Settings**
  Click on this button if you want to reset the QoS settings to the default values.

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

NOTICE: The computer needs to be rebooted for the QoS settings changes to become active.

2.3.6 HiPath Provider Settings

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

You perform settings for the **HiPath Provider** to use the OpenScape Desktop Client as softphone at a HiPath 3000 or OpenScape 4000. To edit the **HiPath Provider** settings, select in the left-hand area of the tab **Advanced > HiPath Provider**.

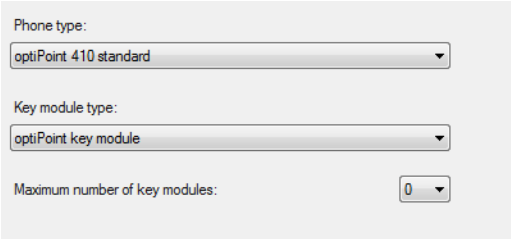
You can configure the following settings for the **HiPath Provider**:

2.3.6.1 Device

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

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

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



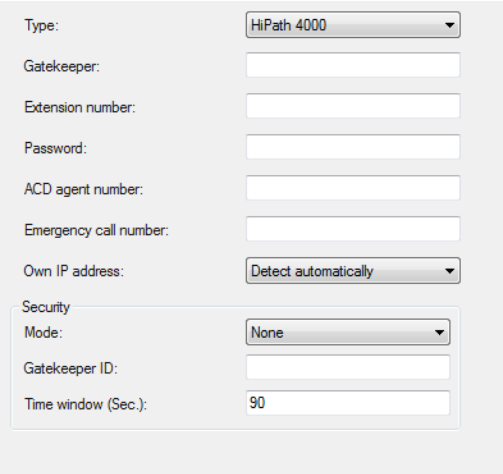
- **Phone type**
  Select your **phone type** in this combo box. Phone type determines also the following properties for the free and integrated phone of OpenScape Desktop Client:
  - Number of display lines shown in the OpenScape Desktop Client freephone (in the integrated phone of the main bar always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

2.3.6.2 Main Connection

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

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

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



- **Type**
  Select your PBX type in this combo box. Available are **HiPath 2000/3000/ 5000** and **OpenScape 4000**.

  NOTICE: For connecting an OpenScape Office MX select the option **HiPath 2000/3000/5000**.

  NOTICE: Select option **OpenScape 4000** to connect a OpenScape 4000.

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

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

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

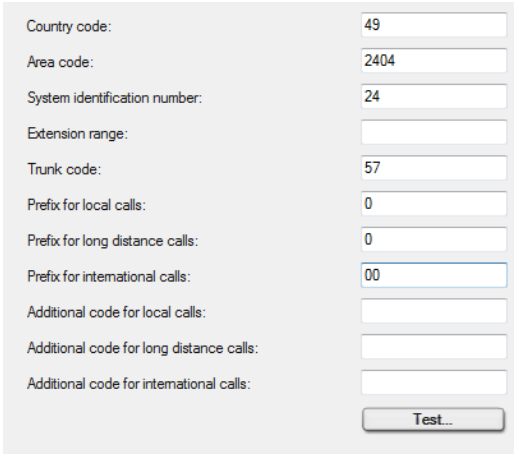
NOTICE: You can obtain more detailed information about these parameters from your system administrator.

2.3.6.3 Main Network Access

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

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

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

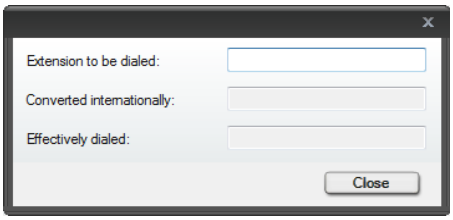


- **Country code**
  Enter here the international prefix for your location, for example `49` for Germany.

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

Test

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



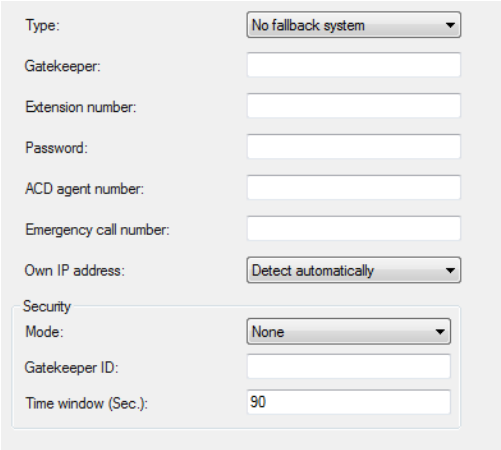
- **Extension to be dialed**
  Enter the number to be dialed in this entry field. Based on the currently set parameters the OpenScape Desktop Client determines the phone number in international format.
- **Converted internationally**
  The phone number entered in the above field is automatically displayed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

2.3.6.4 Fallback Connection

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

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

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



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

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

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

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

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

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

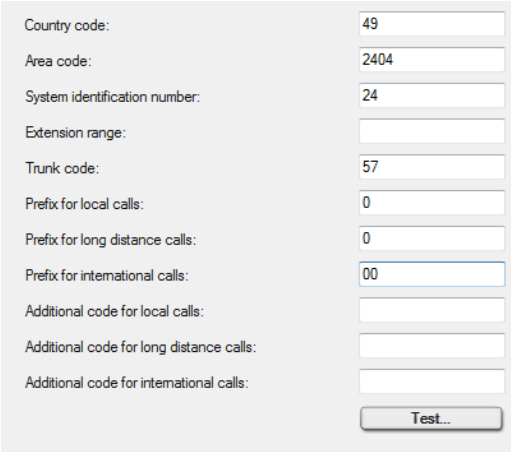
2.3.6.5 Fallback Network Access

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

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

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

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

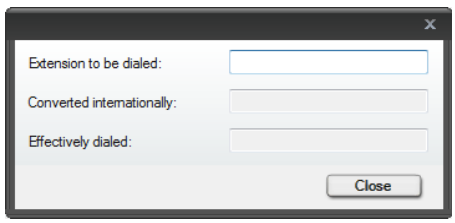


- **Country code**
  Enter here the international prefix for your location, for example `49` for Germany.
- **Area code**
  Enter here the telephone prefix for your location in the national phone number scope. Omit the leading zero for this entry.

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

Test

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



- **Extension to be dialed**
  Enter the number to be dialed in this entry field. Based on the currently set parameters the OpenScape Desktop Client determines the phone number in international format.

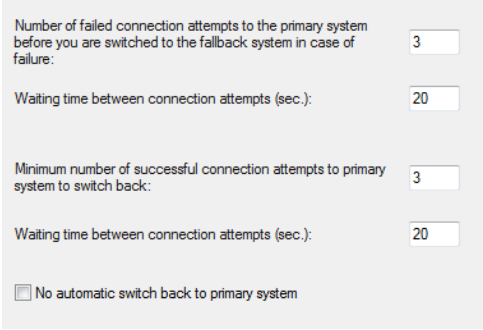
- **Converted internationally**
  The phone number entered in the above field is automatically displayed in this field.
- **Effectively dialed**
  This field displays automatically the actually dialed number. Depending on the set network access parameters the number may be shorter, for example, if an internal phone number has been recognized.

2.3.6.6 Failover

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

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

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



Determine the values for the following parameters:

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

- Under **Waiting time between connection attempts** you specify in which intervals the OpenScape Desktop Client attempts to reach the main communications system again.
- With the **No automatic switch back to primary system** option you determine whether OpenScape Desktop Client automatically switches back to the main communication system as soon as it is operable again. If you activate the check box of this option, the OpenScape Desktop Client does not automatically switch back to the main communications system.

2.3.6.7 Ring Tones

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

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

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

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

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

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

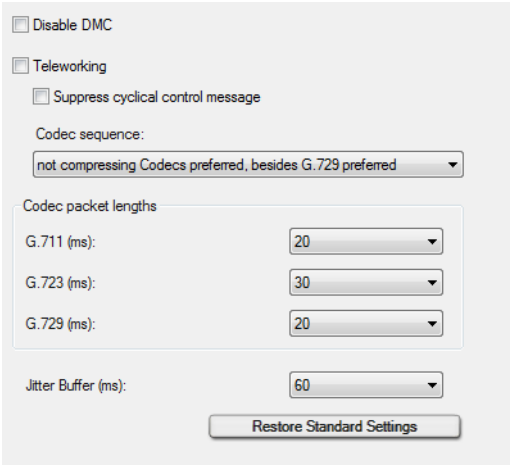
> ***NOTICE:*** OpenScape Desktop Client copies the content of the selected `WAV` or `MP3` file. In this way the ring tone is still available even if the original sound file is deleted.

2.3.6.8 Bandwith Reduction

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

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

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



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

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

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

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

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

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

Specialties upon selecting the jitter buffer

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

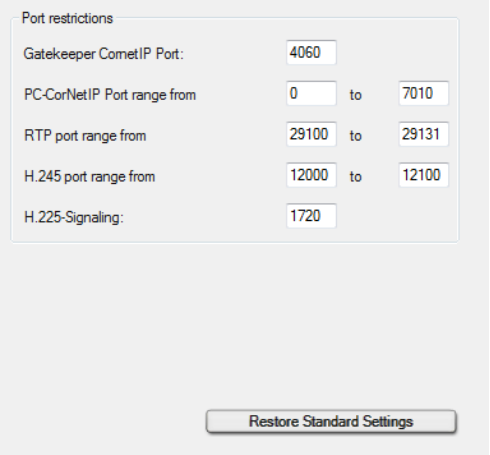
- The better the network quality, the smaller the jitter buffer may be.
- The bigger the jitter buffer, the more the voice transmission will be delayed.
- We recommend to set the jitter buffer to value `60`.

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

2.3.6.9 Port Restrictions

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

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



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

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

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

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

2.3.6.10 VPN

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

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

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

Virtual Private Network (VPN)

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

- **none** – No VPN is used or you use a VPN where the VPN client provides a virtual network adapter for the VPN tunnel.
- **automatic** – VPN is used, the IP address is determined by the OpenScape Desktop Client.

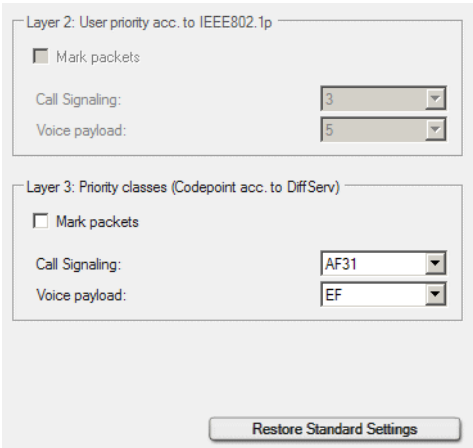
> ***NOTICE:*** If the VPN client does not provide a virtual network adapter on the PC on which the OpenScape Desktop Client is installed, you need to select the **automatic** option.

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

2.3.6.11 Quality of Service (QoS)

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

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



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

The QoS settings depend on the operating system used.

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

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

NOTICE: The computer needs to be rebooted for the QoS settings changes to become active.

2.3.6.12 Operation Settings

NOTICE: The **Operation settings** entry is only available when you invoke the **Settings** dialog with a started OpenScape

Desktop Client. Select the **OpenScape Options** item in the context menu of the Windows taskbar for this purpose.

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

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

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

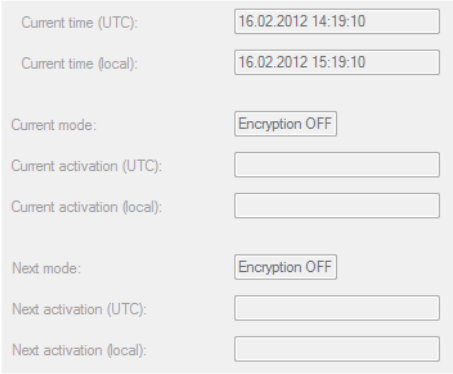
You hear the ring tone currently set. Via the **Next ring tone** and **Previous ring tone** buttons you can set the ringer pitch individually. A click on **Close** closes the configuration dialog for these settings. The setting you have selected last is immediately active.

2.3.6.13 Security

NOTICE: These settings are centrally configured and cannot be modified in the OpenScape Desktop Client. More details about how to display these settings is provided in the manual *OpenScape UC Application V7 OpenScape Desktop Client Installation and Administration*.

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

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



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

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

2.3.7 Stimulus Provider Settings

NOTICE: You can perform the Stimulus Provider settings only via the dialog **Logon > Manage button > Settings**.

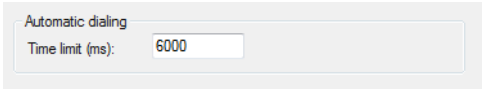
The Stimulus Provider ensures displaying information about the conversational partner (phone number or name, connection duration) and about the available telephony features (for example call transfer, consultation, etc.) on the display of the integrated phone, free phone or softphone. Furthermore, it enables automatically setting up the connection to a number specified by the user after a configurable waiting period has expired.

NOTICE: The **Stimulus Provider** module cannot be activated in combination with the **HiPath Provider**.

The following settings are possible:

2.3.7.1 General Stimulus Provider Settings

You reach these settings on the tab **Advanced > Stimulus Provider > General**.

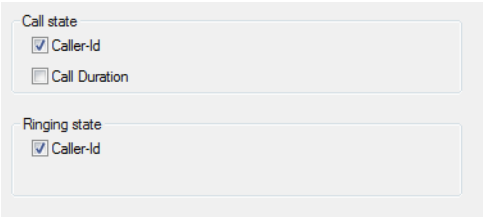


If you enter a phone number but do not click on , the OpenScape Desktop Client can automatically establish the connection to the entered phone number after a specified period.

- **Time limit (ms)**
  Specify here a period after which the OpenScape Desktop Client establishes automatically a connection to the entered number. Value 0 means that the connection is not automatically set up.

2.3.7.2 View

You reach these settings on the tab **Advanced > Stimulus Provider > Display**.



- **Call state**
  The settings in this section refer to displays during an active call. If you want the **Caller-Id** and/or the **Call Duration** to appear, activate the respective option.
- **Ringing state**
  The settings in this section refer to displays during a connection request. If you want the **Caller-Id** to appear then, activate this option.

2.3.8 SQLite Provider Settings

The SQLite Provider enables connecting OpenScape Desktop Client to external directories via an SQLite database. Thus you can search external directories for contacts and resolve phone numbers on the basis of external directories.

NOTICE: You can edit the SQLite Provider settings only if the **Settings** dialog is opened during the program start. To open this dialog, click on the **Manage** button in the user Logon dialog during the program start.

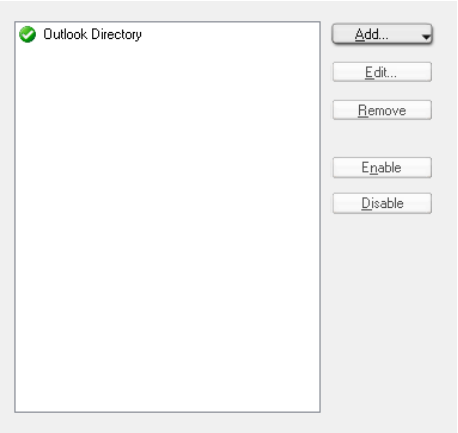
NOTICE: For the time being, the SQLite Provider allows connecting Microsoft Outlook directories and Lotus Sametime contact lists to OpenScape Desktop Client.

NOTICE: So that the SQLite Provider can access the Microsoft Outlook directories or the IBM Notes contact list, the respective client and subsequently OpenScape Desktop Client must be started after the installation of OpenScape Desktop Client.

You can perform and edit the settings for SQLite directories on the tab **Advanced > SQLite Provider > SQLite Directories**.

2.3.8.1 SQLite Directories

The SQLite directories OpenScape Desktop Client uses to search for contacts and resolve phone numbers are configured and edited in the following dialog.



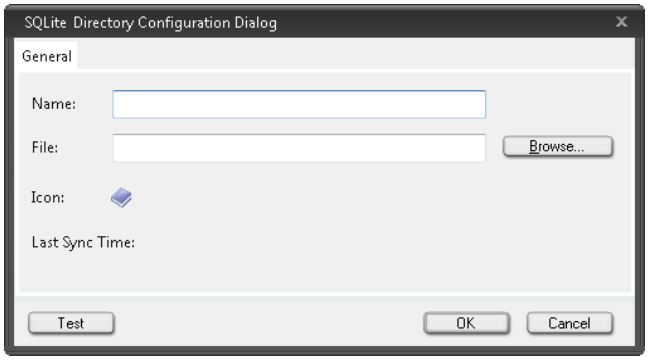
The left-hand section of this dialog displays a list of all configured SQLite directories.

On the right, controls for configuring SQLite directories are available:

- **Add...**
  A click on this button opens the dialog for configuring a new SQLite directory. The small triangle on the button lets you select pre-configurations for the supported connections.
- **Edit...**
  This button opens the configuration dialog for the SQLite directory selected in the directory list so that you can change the settings.
- **Remove**
  Using this button you can remove the SQLite directory selected in the SQLite directory list from the list or configuration of the SQLite Provider.

- **Enable**
  This button activates the SQLite directory selected in the directory list.
- **Disable**
  This button deactivates the SQLite directory selected in the directory list.

The configuration dialog, which you reach via the **Add...** or **Edit...** button, provides the following options:



- **Name**
  Specify here the name under which the SQLite directory is managed in the OpenScape Desktop Client configuration.
- **File**
  Here you specify the file name of the SQLite database to be used for the SQLite directory.
- **Browse...**
  If you do not know the name of the desired file you can click on the **Browse…** button to open a search dialog and find available SQLite databases.
- **Test**
  This button starts a test for checking the connection to the SQLite database.

2.3.9 Settings for the LDAP Directory Provider

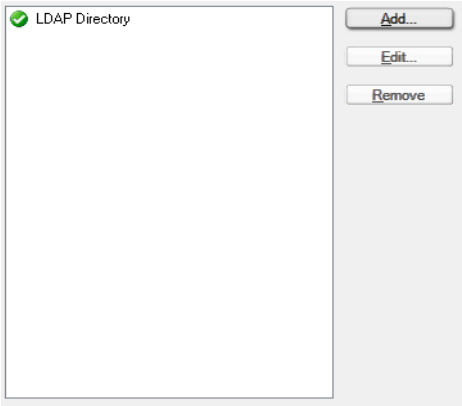
The **LDAP Directory Provider** enables connecting OpenScape Desktop Client to external LDAP directories. Such a connection is used for resolving phone numbers.

> ***NOTICE:*** You can edit the LDAP directory settings only if the **Settings** dialog is opened during the program start. To open this dialog, click on the **Manage** button in the user Logon dialog during the program start.

The directories OpenScape Desktop Client is to use for resolving phone numbers must have been previously configured in the **LDAP Directory Provider**. Select on the tab **Advanced > LDAP Directory Provider > LDAP Directories** for this purpose.

2.3.9.1 LDAP Directories

The directories OpenScape Desktop Client uses for resolving phone numbers are configured and edited in the following dialog.



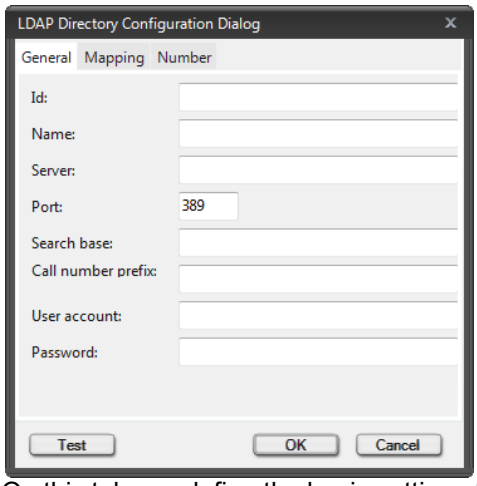
The left-hand section of this dialog displays a list of all configured LDAP directories.

On the right, controls for configuring LDAP directories are available.

- **Add...**
  A click on this button opens the dialog for configuring a new LDAP directory. In this dialog you can define various directory parameters.
- **Edit...**
  A click on this button opens the configuration dialog for the LDAP directory selected in the directory list. In this dialog you can change the settings performed for the directory.
- **Remove**
  A click on this button removes the selected LDAP directory from the directory list or from the configuration of the LDAP Directory Provider.

The configuration dialog for entering the directory parameters is divided into three tabs:

- **General**



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

– **Id** (optional)
  Specify here the ID under which the LDAP directory is managed in OpenScape Desktop Client. It must identify the LDAP directory uniquely.
– **Name**
  Specify here the name under which the LDAP directory is managed in OpenScape Desktop Client.
– **Server**
  In this input field you specify the host name of the LDAP server on which the LDAP directory is available. Instead of the host name you can also enter the IP address of the LDAP server.
– **Port**
  In this field you define the port number under which the LDAP server is accessed. The default value is here the entry `389`.
– **Search base**
  If only part of the LDAP directory shall be shared for access, you can define an LDAP search base here. You find detailed information about the search base of an LDAP directory in the OpenScape Desktop Client setup guide.
– **Call number prefix** (optional)
  In this input field you can specify a prefix to be considered when searching for phone numbers or to be added to the phone number.
– **User account**
  Defines the ID for accessing the LDAP server.
– **Password**
  Defines a password as far as it is required for access under the specified ID.
– **Test**
  This button starts a connection test with the specified data. A message will then inform you whether or not the test was successful.

- **Mapping**
  On this tab you define how OpenScape Desktop Client maps the structure of the LDAP directory on the proprietary, internal data structure.

  To do this, assign appropriate LDAP attributes to the OpenScape Desktop Client criteria in the right-hand column.

- **Number**
  On this tab you define the LDAP attribute that OpenScape Desktop Client uses for resolving a phone number in a name.

  The specified attribute must contain the phone number of the respective contact.

NOTICE: To ensure that phone number resolution via an LDAP directory works correctly, the phone numbers must be entered in the defined attribute in normalized format, for example 490489901100.

2.3.9.2 Base DN for an LDAP Directory

With integrating an LDAP directory in OpenScape Desktop Client, you can define a Base DN in the scope of the directory configuration. On the basis of this Base DN, LDAP directory entries are searched for and displayed in the OpenScape Desktop Client.

> ***NOTICE:*** If you do not define a Base DN, the entire LDAP directory is used as search base.

You can define the Base DN in the corresponding input field of the **Add Directory** dialog in two possible formats:

- *<Level name 3>=<Name>, <Level name 2>=<Name>, <Level name 1>=<Name>*
- *<Level name1>=<Name>/<Level name 2>=<Name>/<Level name 3>=<Name>*

An LDAP directory shall be filtered for all users of the corporate unit `ICN`. The directory to be integrated shall have the following structure:

- Name of level 1: *C* (for example country code)
- Name of level 2: *O* (for example company name)
- Name of level 3: *OU* (for example corporate unit).

OpenScape Desktop Client is only to access directory entries for which the following applies:

- Level 1: *C=DE*
- Level 2: *O=ENTERPRISE*
- Level 3: *C=ICN.*

According to these defaults the following is to be entered for the Base DN:

- `OU=ICN,O=ENTERPRISE,C=DE`

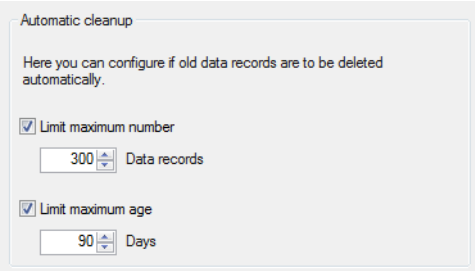
or alternatively

- `C=DE/O=ENTERPRISE/OU=ICN.`

2.3.10 Local-Journal-Provider Settings

> ***NOTICE:*** To edit the Local-Journal-Provider settings you need to open the **Settings** dialog during the program start. Click on the **Manage** button in the logon dialog for this purpose.

Using this module you store connection data for the journal in the local database. These data records are automatically deleted after a specific period or when a certain maximum number of data records has been reached. You can perform the Local-Journal-Provider settings on the tab **Advanced > Local Journal Provider > General** .



Activate the check box of the desired option to apply the default value or to change it if necessary. By default, the maximum number of the **data records** is set to `300` and the maximum age of these data records is set to `90` **days**.

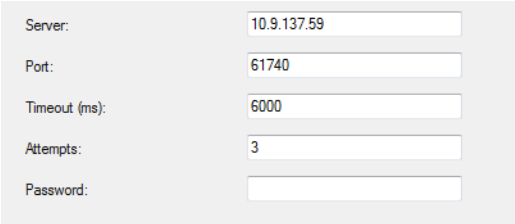
2.3.11 HLM License Provider Settings

If you want to use the OpenScape Desktop Client as softphone at an SIP or HFA communications system, you need to have the matching SIP or HFA licenses. These licenses are generated by a central license server and managed by a License Agent server (Customer License Agent).

The **HLM License Provider** is the licensing component of the OpenScape Desktop Client. Every time the program starts the provider checks whether a valid license exists for the program. For this purpose it connects to the License Agent server (CLA), which must have been set up either on the local user computer or on a central computer in the network.

> ***NOTICE:*** You find more information about licensing of OpenScape Desktop Client in the *OpenScape Personal Edition V7 Installation und Administration* setup guide.

Select on the tab **Advanced > HLM License Provider > Licensing** to perform the settings for the connection to the License Agent (CLA) server.



- **Server**
  Specify in this input field the IP address of the PC on which the License Agent (CLA) server for the OpenScape Desktop Client is installed. If the License Agent (CLA) server is installed locally, enter the local IP address or the address of the local host. If the License Agent (CLA) server is installed on the network, enter the IP address in the network.
- **Port**
  Enter here the default port number for accessing the License Agent (CLA) server. It is `61740`.

- **Timeout (ms)**
  Specify in this field the maximum time (in milliseconds) an attempt to set up a connection to the License Agent (CLA) server may take.
- **Attempts**
  Use this field to determine the number of connection setup attempts.
- **Password**
  If an access password has been defined on the License Agent (CLA) server, enter that password here as well.

> ***NOTICE:*** If no License Agent (CLA) server has been configured or the OpenScape Desktop Client cannot connect the License Agent (CLA) server because, for example, of invalid parameters, the program start is aborted and a corresponding message displayed.

2.3.12 Lotus Notes Provider Settings

The **Lotus Notes Provider** provides the connection to a IBM Notes client.

It enables you to access the following features:

- Searching IBM Notes address books for contacts
- Making calls in the IBM Notes client
- Resolving phone numbers and names on the basis of IBM Notes address books.

You can perform and edit the **Lotus Notes Provider** settings only during the program start. To do this, click on the **Manage** button in the Logon dialog and select the tab **Advanced > Lotus Notes Provider** in the **Settings** dialog.

> ***NOTICE:*** Details specific to IBM Notes are required for configuring the **Lotus Notes Provider**. You receive such details from the administrator of your IBM Notes system.

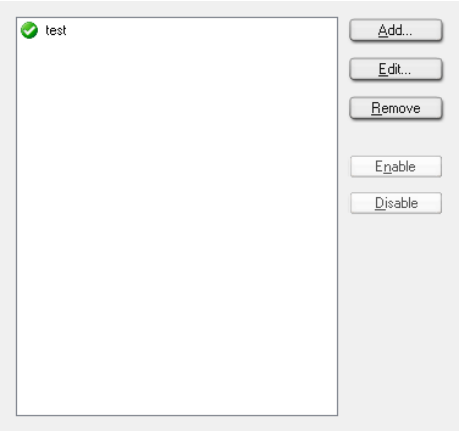
You can perform settings for the following areas:

- IBM Notes Databases
- Authentication

2.3.12.1 Lotus Notes Databases

To use the **Lotus Notes Provider** you need to specify the IBM Notes databases to be deployed.

To specify the IBM Notes databases, select in the **Settings** dialog on the tab **Advanced > Lotus Notes Provider > Lotus Notes Databases**.



The following options are available for specifying the IBM Notes databases:

- ***<Database list>***
  This list contains all databases configured in the **Lotus Notes Provider**.
- **Add...**
  A click on this button opens the dialog for configuring a new IBM Notes database to be used in the **Lotus Notes Provider**.
- **Edit...**
  This button lets you edit the settings of an already defined IBM Notes database selected in the database list. The configuration dialog that opens for editing a database features the same settings as the dialog for configuring a new IBM Notes database.
- **Remove**
  With a click on this button you can remove a selected IBM Notes database from the database list.
- **Enable**
  You can use this button to activate a database selected in the database list.
- **Disable**
  You can use this button to deactivate a database selected in the database list.

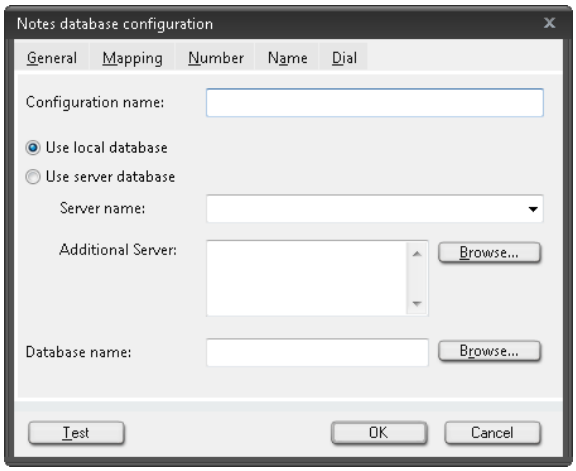
2.3.12.2 Dialog for Configuring a Lotus Notes Database

In this configuration dialog you can specify the settings for a IBM Notes database to be used in the **Lotus Notes Provider**. You reach the dialog on the tab **Advanced > Lotus Notes Provider > Lotus Notes Databases** with a click on the **Add...** button.

The settings are divided into the following tabs:

"General" tab

On this tab you define the general settings of the IBM Notes database.



Such settings comprise:

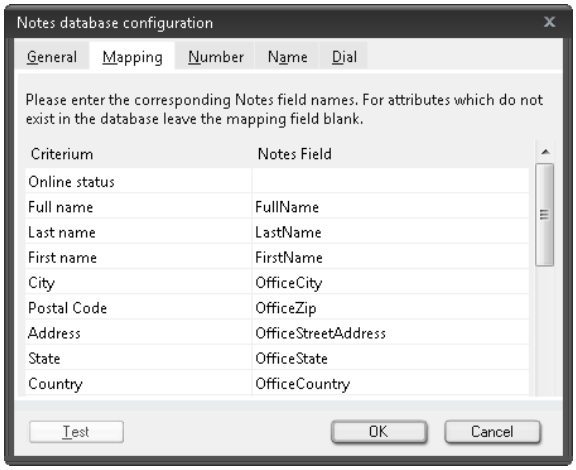
- **Configuration name**
  Specifies the name under which the relevant database entry is managed in the database list. It is independent from the database name under IBM Notes.
- **Use local database**
  Select this option to configure a local database for the IBM Notes integration.
- **Use server database**
  Select this option to configure a server database for the IBM Notes integration.
- **Server name**
  Specifies the name of the IBM Domino server on which the desired server database is available. The field provides a selection list with available servers. If you wish to configure a server name not contained in the list, you can enter it in the text field directly.

  NOTICE: This field is evaluated only if the **Use server database** option is active..

- **Additional Server**
  If the desired database is provided by other IBM Domino servers also, you can specify such servers in this field. This setting can be useful e.g. for a IBM Notes cluster.
- **Database name**
  Specifies the name under which the desired database is available on the server or on the user computer. If you do not know the database name, you can open a search dialog via the associated **Browse…** button. In the dialog you can then look for available databases.
- **Test**
  A click on this button starts a check as to whether a connection to the specified database can be set up.

"Mapping" tab

To enable OpenScape Desktop Client processing the information of a IBM Notes database correctly, the attributes of the IBM Notes database must be assigned to the corresponding directory fields (criteria) of OpenScape Desktop Client. You perform this assignment on the **Mapping** tab.

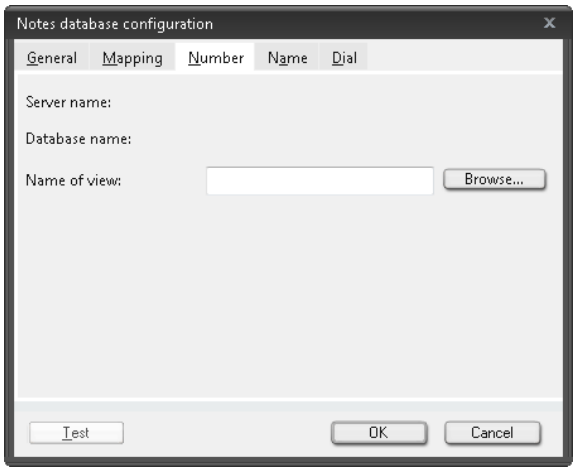


If a new database is created, the pre-set assignment corresponds to the default assignment.

- **Criterion**
  This column shows the criteria available in OpenScape Desktop Client.
- **IBM Notes Field**
  In this column you can assign the attributes of the IBM Notes database to the various criteria of OpenScape Desktop Client.
- **Test**
  A click on this button starts a check as to whether the attributes specified in the mapping exist in the documents of the specified database. OpenScape Desktop Client searches the specified database and checks the first found IBM Notes document that is based on the view displayed in the test dialog and on the form possibly defined. If the specified attributes are contained in this document, the test terminates successfully. If the mapping includes attributes that do not exist in the checked document, the test will point to this discrepancy. However, such a message does not necessarily point out an error, because OpenScape Desktop Client always searches only the document found first.

"Number" tab

The **Number** tab contains settings for resolving phone numbers in names via the relevant database.



- **Server name**
  Displays the server name you defined on the **General** tab. No server name is displayed when a local database is configured.
- **Database name**
  Displays the name of the database you defined on the **General** tab.
- **Name of view**
  Defines the view OpenScape Desktop Client uses for accessing the relevant database when a phone number is to be resolved in a name. If you do not know the name of the desired view, you can open a search dialog via the associated **Browse…** button. In the dialog you can then look for available views.

  NOTICE: If you wish to enter the name of the view in the input field via keyboard, you need to use the view's alias.

- **Test**
  A click on this button starts a check as to whether the specified view exists in the defined database.

"Name" tab

The **Name** tab contains settings for searching the relevant database for contacts and resolving names in phone numbers.

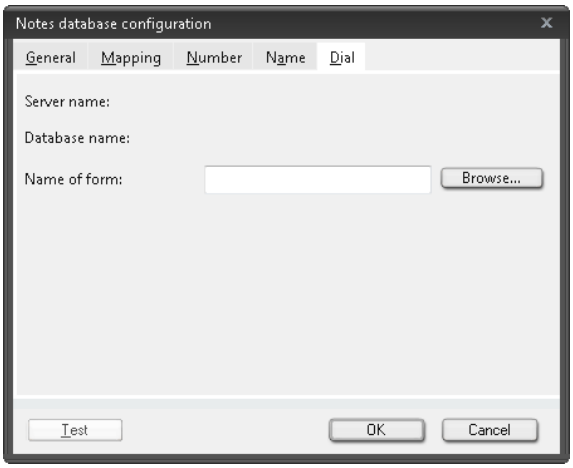
- **Server name**
  Displays the server name you defined on the **General** tab. No server name is displayed when a local database is configured.
- **Database name**
  Displays the name of the database you defined on the **General** tab.
- **Name of view**
  Defines the view OpenScape Desktop Client uses for accessing the relevant database when you look for a contact or a phone number is to be resolved in a name. If you do not know the name of the desired view, you can open a search dialog via the associated **Browse…** button. In the dialog you can then look for available views.

  NOTICE: If you wish to enter the name of the view in the input field via keyboard, you need to use the view's alias.

- **Test**
  A click on this button starts a check as to whether the specified view exists in the defined database.

"Dial" tab

The **Dial** tab contains settings for dialing from a database.



- **Server name**
  Displays the server name you defined on the **General** tab. No server name is displayed when a local database is configured.
- **Database name**
  Displays the name of the database you defined on the **General** tab.
- **Name of form**
  This name serves for finding the correct assignment of the database fields in OpenScape Desktop Client for a database under IBM Notes.

  NOTICE: If you initiate a call from a IBM Notes database, the configuration of the IBM Notes integration is searched for a database that has the same form name as the database from which you are dialing. If such a database exists in the configuration, the associated assignment of the database fields is used for finding the dial information in the database. The dial process fails if no database with the form searched for is configured in the IBM Notes integration.

  If you do not know the name of the desired form, you can open a search dialog via the associated **Browse…** button. In the dialog you can then look for available views.

  NOTICE: If you wish to enter the form's name in the text field via keyboard, you must use the form's alias.

  – **Forms for address books**
    Select the `Contact` form for a database based on the `pernames.ntf` template. As a rule, this applies for local address books.
    Select the `Person` form for a database based on the `pubnames.ntf` template. As a rule, this applies for server address books.
  – **Forms for mail database**
    Every mail displayed in your IBM Notes client is based on a defined form. If you wish to dial from an e-mail of your IBM Notes client with OpenScape Desktop Client you need to specify this form when configuring the

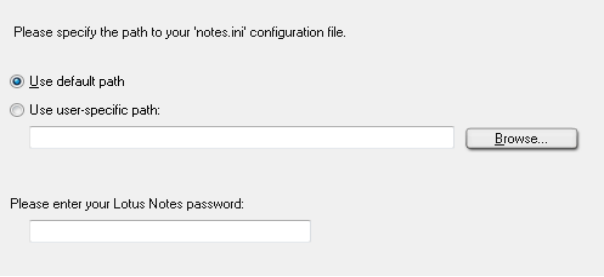
relevant IBM Notes mail database in the IBM Notes provider. Because various e-mails in a mail database may be based on different forms, you may have to specify several forms for a mail database for dialing from all e-mails. To do this you need to create several database entries and configure one of the required forms for each of these entries.

- **Test**
  A click on this button starts a check as to whether the specified form exists in the defined database.

2.3.12.3 Authentication

Communication between OpenScape Desktop Client and IBM Notes client requires the storage location of the `notes.ini` configuration file and the password for accessing the IBM Domino Lotus Domino server.

To perform these settings, select in the **Settings** dialog on the tab **Advanced > Lotus Notes Provider > Authentication**.



The following options are available for specifying the storage location:

- **Use default path**
  If this option is active, OpenScape Desktop Client expects the `notes.ini` configuration file to be in its default directory. If the `notes.ini` file is not stored in the default directory, you need to specify the individual directory path under the **Use user-specific path** option.
- **Use user-specific path**
  If the `notes.ini` file is not stored in the default directory, you need to specify the individual path under which the configuration file is stored.
- **Please enter your Lotus Notes password**
  Enter here your IBM Notes passoword for accessing the IBM Domino server.

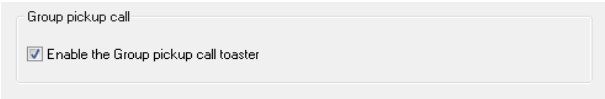
2.3.13 Notifier Toast (Desktop Alerts) Settings

The **Notifier Toast (Desktop Alerts)** module enables displaying status changes as desktop notifications. It is included in the setup by default and independently from the selected default provider.

NOTICE: You can edit the settings for the **Notifier Toast (Desktop Alerts)** via the **Settings** dialog during the program start

and while operating the program. Click on the **Manage** button in the Logon dialog or on the **OpenScape Options** button in the Pearl menu of the main window.

You reach the configuration dialog for the settings of the **Notifier Toast (Desktop Alerts)** module on the tab **Advanced > Notifier Toast (Desktop Alerts) > General**.



You can use the **Enable the Group pickup call toaster** option to activate (default setting) or deactivate the display of desktop alerts for incoming calls to subscribers of a call pickup group. When this option is active, incoming group pickup calls are indicated in a desktop notification and can be accepted from there.

2.3.14 The Sendmail Provider Module

You need the **Sendmail Provider** to send e-mails to a contact directly from one of the directories or from the contact list. This provider starts the e-mail client (for example Microsoft Outlook) installed/configured on the computer and uses the contact's e-mail address as recipient address for a new e-mail.

The **Sendmail Provider** module is added and provided after launching the OpenScape Desktop Client by default. The **Sendmail Provider** does not require any further settings.

For sending e-mails to contacts directly from OpenScape Desktop Client the following requirements must have been met:

- A standard mail client is installed and configured on the OpenScape Desktop Client computer.
- The **Sendmail Provider** module is active.
- The directory or contact list entries of the relevant contacts include an e-mail address that has been selected for direct message transmission.

2.3.15 Keyboard Manager Settings

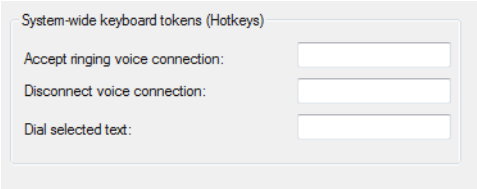
The **Keyboard Manager** provides keyboard support features. You can edit the following parameters for the keyboard support.

2.3.15.1 Key Assignments

You can program hotkeys for accepting connection requests or closing connections by performing the appropriate key assignments in the Keyboard Manager. Hotkeys are useful when you mostly use the keyboard for triggering functions.

Select on the tab **Advanced > Keyboard Manager > Key assignments**.

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



System-wide keyboard tokens (hotkeys)

In this area you can determine the keys or hotkeys for the following actions:

- **Accept ringing voice connection**
  Picking up the receiver
- **Disconnect voice connection**
  Hanging up
- **Dial selected text**
  When you push the assigned key or hotkey, the OpenScape Desktop Client interprets the current cursor marking as target number and initiates a connection setup.

NOTICE: Only phone numbers (FQTN) fully specified according to E.164 are supported for dialing via **System-wide keyboard tokens (hotkeys)**.

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

Admissible keys or hotkeys are:

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

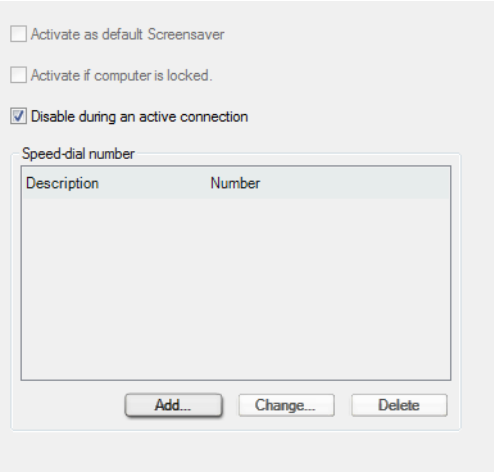
NOTICE: You must not define the function keys **[F1]** and **[F12]** as hotkeys.

2.3.16 Screensaver Manager Settings

OpenScape Desktop Client comes with its own screensaver, which can be activated as the default screensaver for Windows. While the screensaver is active, incoming calls can be accepted and individually defined speed-dial numbers dialed. You can perform the following settings for the screensaver.

2.3.16.1 Settings

Select on the tab **Advanced > Screensaver Manager > Settings**.



- **Activate as default Screensaver**
  The screensaver is used as default screensaver for the PC.

  NOTICE: The special features of the screensaver (call acceptance, speed-dial number) are only available if the screensaver was activated with this option. If you select the OpenScape Desktop Client screensaver merely in the Windows display options, the special features do not become active.

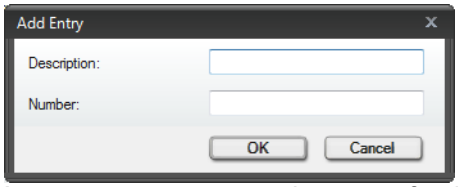
- **Activate if computer is locked**
  If you lock your computer upon activating a screensaver, the screensaver will not be activated until a specific period has elapsed. With this option, the OpenScape Desktop Client is automatically activated ten seconds after locking the computer. This setting ensures that you can at least dial the speed-dial number when the screensaver is active.
- **Disable during an active connection**
  When you select this option, the Windows screensaver is inactive during an established connection. As soon as the connection is closed, the screensaver becomes active again.

Speed-dial number

Use this section to store the phone numbers that you also want to dial with an active screensaver. The speed-dial numbers are displayed in the screen saver as

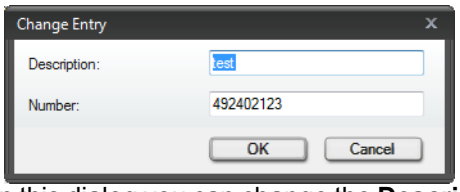
keys and can be dialed if the screen saver is active and furnished with a password.

- **Adding a speed-dial number**
  You can configure a new speed-dial number with a click on the **Add...** button. The following dialog opens:



  You can enter an expressive name for the new speed-dial number in the **Description** field and configure the desired phone number for speed dialing in the **Number** field.

- **Editing a speed-dial number**
  A click on the **Change...** button opens the following dialog:



  In this dialog you can change the **Description** and/or the **Number** of a speed-dial number already configured.

> ***NOTICE:*** The **Change...** button remains inactive until you select an entry in the list of configured speed-dial numbers.

- **Deleting a speed-dial number**
  With a click on the **Delete** button you remove a selected speed-dial number from the list.

> ***NOTICE:*** The **Delete** button remains inactive until you select an entry in the list of configured speed-dial numbers.

2.3.17 Directory Manager Settings

The **Directory Manager** controls the priority with which information from various configured directories is handled for phone number resolution and contact search.

To resolve a phone number into a name, the number is sent to all available directories simultaneously. If contact information is then returned, its display depends on the priority the respectively associated directory has in the directory list of the Directory Manager. The directory in top position of the directory list has the highest priority, the one at the bottom has the lowest priority.

Example:

An LDAP and a Microsoft Outlook directory have been configured in the OpenScape Desktop Client. The contact directory of OpenScape Desktop Client does not contain any contact data. In the **Directory Manager** directory list, the directories are arranged as follows:

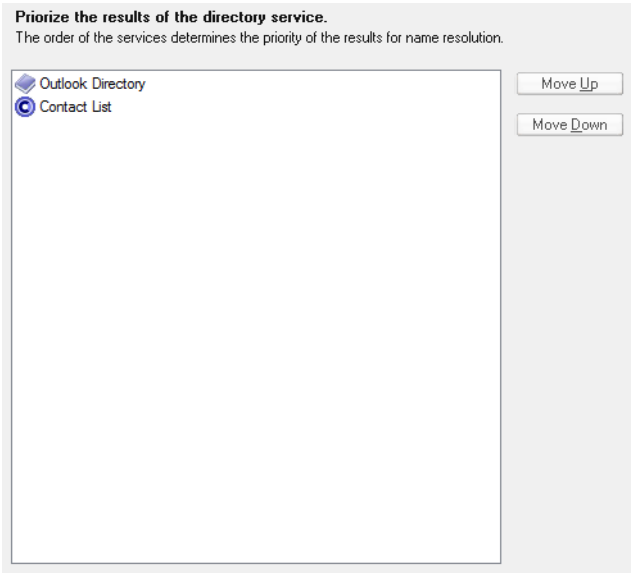
- LDAP directory
- Contact list
- Outlook directory

Obviously, the LDAP directory has higher priority than the Outlook directory.

The phone number for retrieving the associated name is sent to all directories simultaneously. If the LDAP directory is the first one to return a name for the relevant phone number, this name is displayed and kept.

If, on the other hand, the Outlook directory is the first one to return a name, this name is displayed for a start even if the Outlook directory has a lower priority. In the case of the LDAP directory also returning a name some time later, the information displayed so far will be updated by the information delivered from the LDAP directory.

To set the priority of the configured directories in the Directory Manager, select on the tab **Advanced > Directory Manager > Service Prioritization**.



The directory list shows all directories available for resolving phone numbers. The position of a directory in this list indicates the priority with which the information of the associated directory is handled.

The directory list may display the following directories:

- The contact list of OpenScape Desktop Client
- LDAP directories configured via the LDAP Directory Provider
- IBM Notes directories configured via the IBM Notes Provider.

The **Move Up** and **Move Down** buttons let you adjust the priorities of the single directory information.

- **Move Up**
  Is used to move the selected directory entry up by one position. This increases the priority of the relevant directory.
- **Move Down**
  Is used to move the selected directory entry down by one position. This decreases the priority of the relevant directory.

3 Operation Reference

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

3.1 How to Start the Program of OpenScape Desktop Client

You can start the OpenScape Desktop Client as follows:

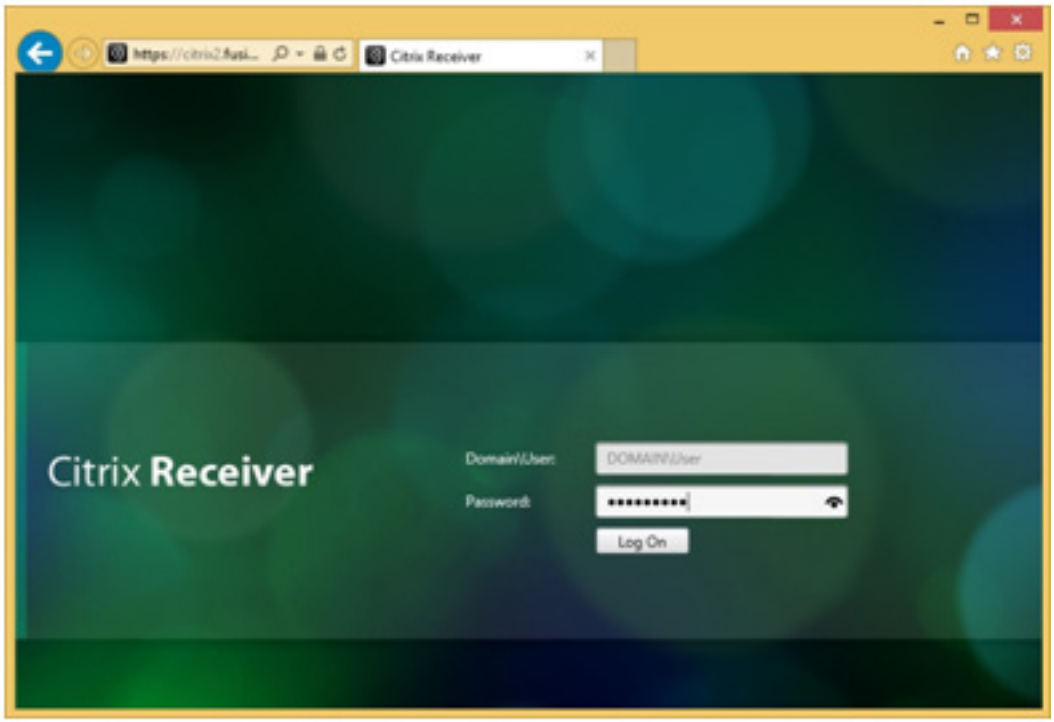
- Classic way without OpenScape Personal Edition VDI (Citrix) :

- Click on **Start** in the Windows task bar and select **OpenScape Desktop Client**.
- Doubleclick the OpenScape Desktop Client link on the desktop of your user computer.

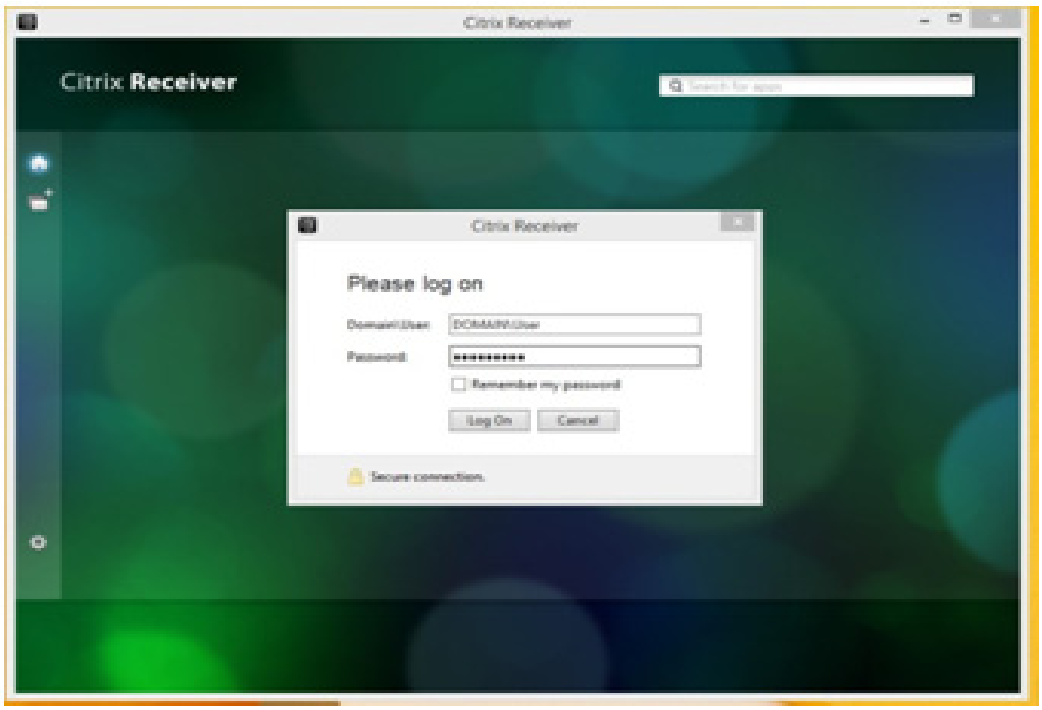
- With OpenScape Personal Edition VDI (Citrix) :

- Login to Citrix Receiver with the username and password you have received by the administrator.

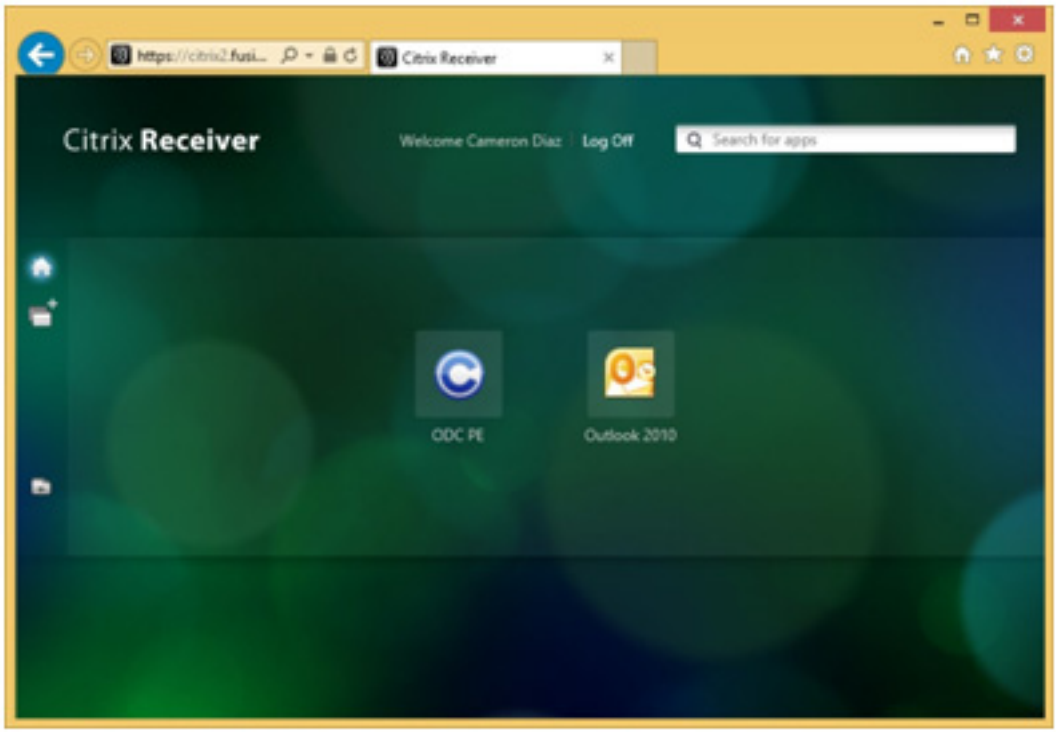
  - via browser:



  - via desktop:



- After you have logged in successfully you can see the desktop.



- Double click on the ODC PE symbol

NOTICE: In case you cannot access your files, please contact the administrator, so that you can get the permission to access your files. Refer also to the Installation and Admin Guide.

After you have double clicked on the ODC PE symbol

OpenScape Desktop Client starts under the user profile used last by default.

If the field for specifying the **LIN** number is hidden, the OpenScape Desktop Client starts without any further login actions.

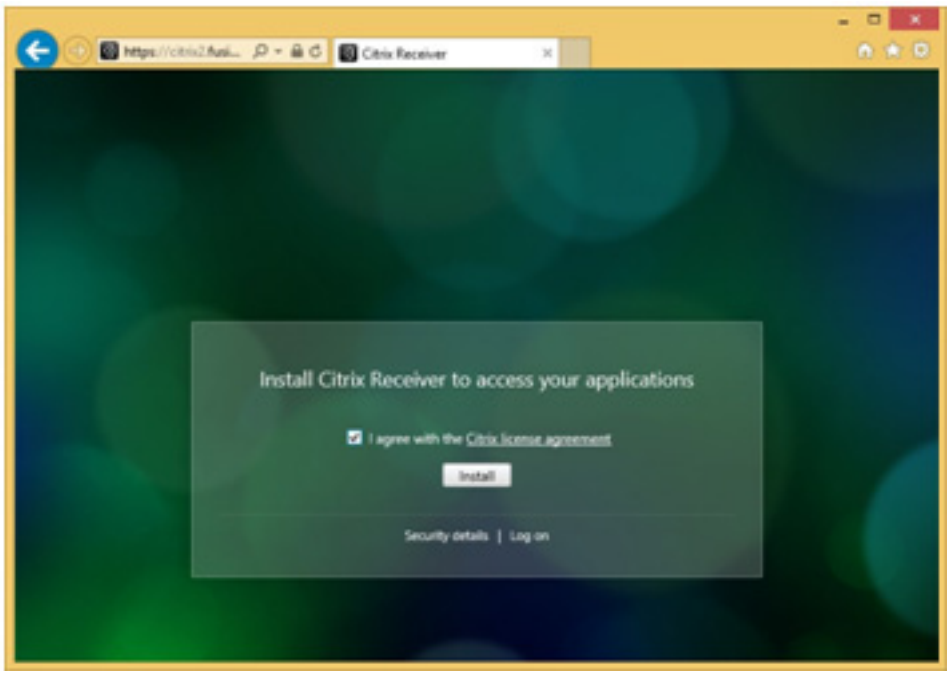
3.1.1 Error Signaling at the Program Start

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

If an error occurs during operation, it is indicated in the Pearl menu and in the OpenScape context menu in the notification area of the Windows task bar by

In case of OpenScape Personal Edition VDI the Citrix receiver is not installed, normally the Citrix Server provides it.

You will see the following :



Please contact your administrator for further details.

3.2 Logging on to the Program

The user can deploy three login types for logging on to the OpenScape Desktop Client:

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

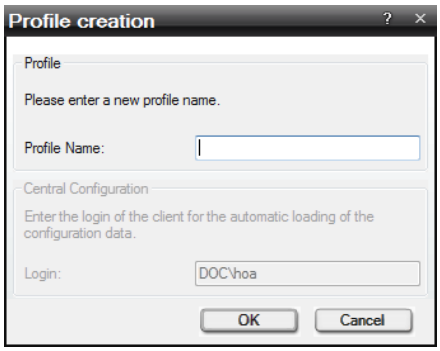
  NOTICE: If profile data from the last session is available when you start the program, it is entered by default for the current session.

- **Automatic login**
  If no LIN number has been configured for your user account or the **LIN** entry field is hidden, you are automatically logged on and need not fill in the Logon dialog. In this case, changes to the profile preferences (language selection, for instance) are impossible before the program starts.

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

3.2.1 Initial Program-Login

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



In this dialog you can perform the following settings:

- **Profile Name**
  Specify the name of the profile you wish to work with under **Profile Name**. A profile defines specific module and private settings, which are stored in a configuration file. These settings are read during login. This enables you to access your individual program environment when working with this program in different locations or on different computers.
- **Login**
  If the program was installed with available central configuration (*Deployment Service (DLS)*), the **Login** field displays your Windows user ID automatically. Based on the Windows user ID the OpenScape Desktop Client will connect to the central configuration automatically and download the centrally stored configuration data.
- **OK**
  A click on this button closes the **Profile creation** and the desired profile is created. The **Settings** dialog opens automatically. In there you need to perform the profile-specific settings. You cannot operate the program without these settings.
- **Cancel**
  A click on this button closes the **Profile creation** dialog and the initial login at the program is abandoned.

3.2.2 Default Login

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

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

In the following we describe the functions of all input fields and buttons of the Logon dialog:

- **Profile**
  Select the profile that allows you to operate as a user in the **Profile** field. If the profile you are using is not yet listed, click on the **Add Profile...** button (if configured).
- **Language**
  Select from the languages list the language to be used for the OpenScape Desktop Client controls and online help.
- **LIN**
  The **LIN** (*Local Identification Number*) field is used for local assignments of building and room numbers or coordinates, for example. This number serves for quickly locating an OpenScape Desktop Client computer. Depending on your configuration, this field can be hidden, furnished with a default value or configured as required field.

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

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

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

- **Manage**
  A click on this button invokes the menu for managing the configuration settings.

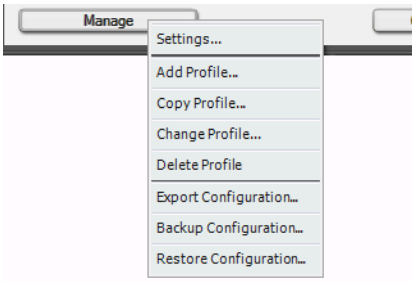
- **OK**
  A click on this button closes the Logon dialog. Modifications to the settings are saved. Subsequently, the program starts and the main window opens.
- **Cancel**
  A click on this button aborts the logon and program start.

3.3 Administering the Configuration Settings

NOTICE: You can perform some configuration settings only during the logon procedure. Other settings that do not directly affect operating the OpenScape Desktop Client can also be edited after the user login, for example configuring the individual ring tone.

NOTICE: You can display the configuration settings via the **OpenScape Options** item of the OpenScape context menu while operating OpenScape Desktop Client. You open this context menu by rightclicking the OpenScape icon in the notification area of the Windows task bar.

You open the OpenScape Desktop Client configuration settings via the **Manage** button in the Logon dialog.



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

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

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

- **Change Profile...**
  Opens the **Change Profile** dialog in which you can define a different **Profile Name** for the current profile.
- **Delete profile**
  Deletes the current profile.
- **Export Configuration...**
  Lets you export the parameter settings for the current Windows user account, the current login computer or the current login profile either fully or partially to the configuration or script files. You find further information about exporting the configuration in the *OpenScape Personal Edition V7 Installation and Administration* manual.
- **Backup Configuration...**
  Outsources all parameter settings for the current Windows user account, the current login computers and login profiles. You can create a destination folder to which this full configuration is then exported in a defined structure. You find further information about backing up the configuration in the *OpenScape Personal Edition V7 Installation and Administration* manual.
- **Restore Configuration...**
  Loads all parameter settings for a user/PC/profile combination. You can enter a source folder from which the defined structure for a full configuration is loaded. You find further information about backing up the configuration in the *OpenScape Personal Edition V7 Installation and Administration* manual.

With Introduction of VDI (Virtual Desktop Infrastructure) there is an additional option for file access (refer also to OpenScape Personal Edition V7 Installation and Administration Guide) .

- **in OpenScape Personal Edition VDI (Citrix Environment)**
  The 'Browse Folders/Files' is executed in Citrix Server machine and not in the user machine. The administrator can give the permission to access also local files.

> ***NOTICE:*** Ask your administrator for more information

3.4 Ending the Program

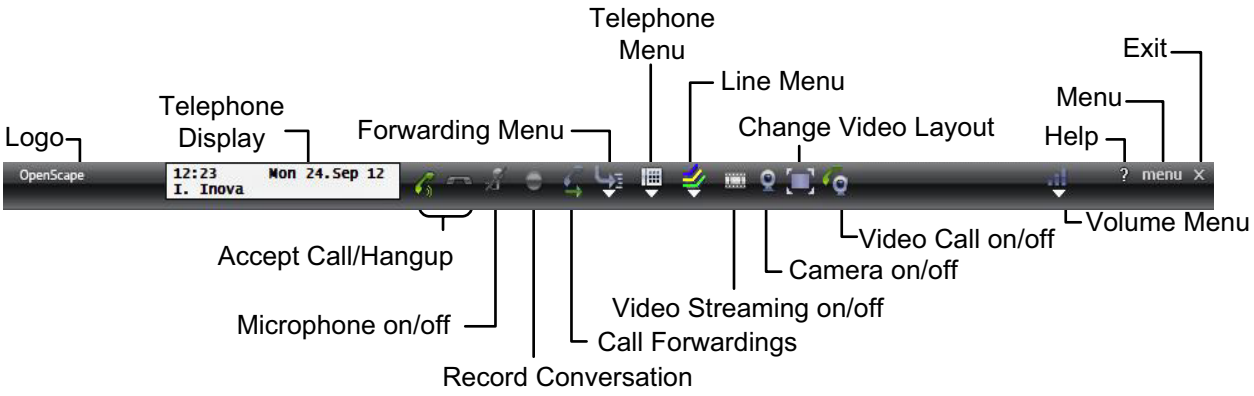
You can shut the OpenScape Desktop Client down as follows:

- By doubleclicking the **Pearl** menu.
- By clicking on at the top right margin of the main window.
- Via the **[Alt] + [F4]** hotkey.
- Via the **Exit OpenScape** option in the OpenScape Desktop Client context menu in the notification area of the Windows task bar.

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

3.5 Main Bar

Different users may see different layouts after they have logged in. Layouts vary depending on the modules installed and activated as well as on the user preferences and window settings that were active when the program was last ended. The main bar is a central element of the user interface. It offers a compact representation of the telephony, menu and volume control functions, which are otherwise also available in the main view.



NOTICE: You display the main bar with a click on **Pearl menu > View > Main Toolbar**.

The main bar features the following elements:

- **OpenScape**
  Doubleclick this label to open the **Current status report** window, which displays a current error and status report. The report shows all the modules monitored by the system.
- **Telephone display**
  A click on the telephone display next to the **OpenScape** label opens an operable telephone keypad. Using this keypad or your computer keyboard you can enter the desired number. Then click on ✓ or push the **return key** (computer keyboard). The connection to the desired contact will be established.
- Dials the phone number entered via the keypad or accepts an incoming call.
- Closes an existing connection.
- Switches the microphone on or off.
- Switches the voice recording function on or off. You find the recorded conversation in the following folder:

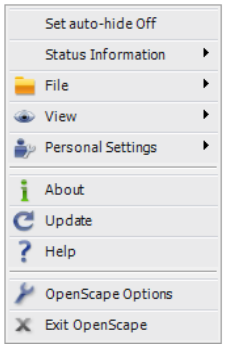
```
My Documents\My Music\VoiceRecordings
```

- 
  Activates or deactivates the speaker during an active call or in idle state. This feature is available for example if plathosys CT-180/220/Headset is used as audio device and plathosys CT-180/220/Headset is selected under **Control** in the corresponding audio scheme.
- 
  Switches the additional speaker on/off during an active call
- 
  Displays the currently active call forwardings.
- 
  Displays the configured call forwardings.
- 
  Opens the phone menu.
- 
  Opens the line menu.
- 
  Switches video streaming on or off during an active call.
- 
  Switches the video camera of the preview of your own video image on or off.
- 
  Enables toggling three default layouts of the **Video** window: **In call**, **Full window** and **Full screen**.
- 
  Activates/disables the Video Call feature
-  **New Audio Device**
  This button appears only if a new audio device is connected during operation. It allows you to integrate the new device in a new audio scheme and to connect and use the audio scheme or the new device. The program need not be rebooted for this purpose.
-  **New Video Device**
  This button appears only if a new video device is connected during operation. It allows you to integrate the new device in a new video scheme and to connect and use the video scheme or the new device. The program need not be rebooted for this purpose.
- 
  Enables setting the volume of **ring tone**, **microphone**, **speaker** and **additional speaker** (if configured)
- 
  Opens the program's online help.

- **menu**
  Opens the main bar menu.
- 
  Closes the main bar.

3.5.1 The Main Bar Menu

When you click on **menu** in the main bar, the following menu opens:



This menu contains the following options:

- **Set auto-hide On**
  The OpenScape Desktop Client main bar is hidden when the mousepointer is outside of it.
- **Set auto-hide Off**
  The main bar is docked to the top desktop margin.
- **Status Information**
  This option provides connection status information, for example about missed calls and newly arrived voice messages. In addition, you are informed about the availability of new audio and/or video devices that you can configure and subsequently use.

  NOTICE: New voicemail messages are only displayed if the system you are logged in at is configured as voicemail server.

- **File**
  You can use this option to create a backup file of your contact list in `CSV` or `XML` format (**export contacts to a file**) or restore your contact list (**import contacts from a file**).
- **View**
  Depending on the active modules, the individual user may deploy different options in the view.
- **Personal Settings**

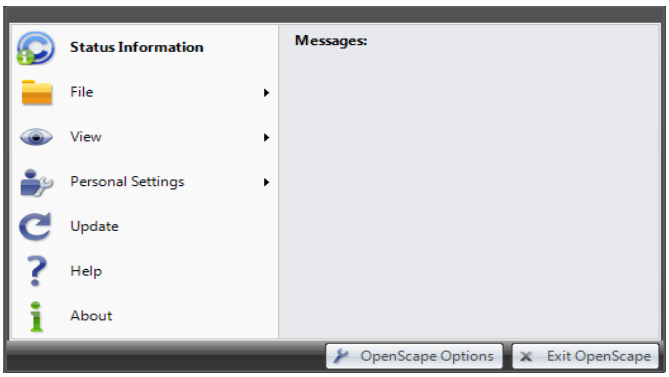
NOTICE: This option is only available if you operate the OpenScape Desktop Client with a connection to an SIP communications system or at a HiPath PBX.

Enables configuring an individual ring tone. A click on Ring tones in the right-hand section of the Pearl menu opens the **Settings** dialog with displayed configuration options for the individual ring tone.

- **About**
  Opens the **Product information** window and displays the OpenScape Desktop Client version number.
- **Update**
  Establishes a connection to the latest OpenScape Desktop Client version that your system administrator has downloaded. If no update is available, a message informs you accordingly.
- **Help**
  Opens the help file for the entire application.
- **OpenScape Options**
  Serves to display the current application settings.
- **Exit OpenScape**
  Serves to close the application.

3.6 Pearl Menu

You invoke the **Pearl** menu with a click on the opposite icon.



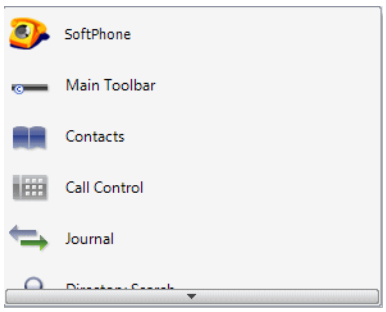
If an error occurs while a module is being loaded, the Pearl icon displays a . If an unanswered call exists in the journal or you have received a new voice message, a appears in the **Pearl** icon. Both icons can be displayed parallel. While the mousepointer is hovering over the icon, a quickinfo appears that provides details about the error(s) or indicates the number of missed calls.

The **Pearl** menu contains the following options:

- **Status Information**
  This option provides connection status information, for example about missed calls and newly arrived voice messages.

NOTICE: New voicemail messages are only displayed if the system you are logged in at is configured as voicemail server.

- **File**
  You can use this option to create a backup file of your contact list in `CSV` or `XML` format (**export contacts to a file**) or restore your contact list (**import contacts from a file**).
- **View**
  Depending on the active modules, the individual user may deploy different options in the view. The following figure exemplifies this.



  – **SoftPhone (optional)**

NOTICE: This option is only available if the **SoftPhone** module is active.

Opens the softphone in a separate window.

  – **Main bar**
  Displays the main bar at the top screen margin.
  – **Contacts**
  Enables integrating the **Contacts** frame in the OpenScape Desktop Client main menu.
  – **Call Control**
  Enables integrating the **Call Control** frame in the OpenScape Desktop Client main menu.
  – **Journal**
  Enables integrating the **Journal** frame in the OpenScape Desktop Client main menu.
  – **Directory search**
  Enables integrating the **Directory Search** frame in the OpenScape Desktop Client main menu.
  – **Webbrowser**

NOTICE: This option is available as soon as you have configured at least one Internet page in the dialog **Settings > Advanced > Webbrowser > Internet pages**.

Displays a list of your pre-configured internet pages. Select an internet page with a click on the corresponding name. OpenScape Desktop Client opens this internet page in a separate window in which you can navigate. Each internet page is displayed in a separate window.

- **Free phone**
  A click on this option opens or closes a freely positionable phone (display and keypad) on the desktop in a separate window. This option is only available if the **Telephone** module is active.
- **Lines (SIP, optional)**
  A click on this option integrates the **Lines** frame in the OpenScape Desktop Client main window. Another click removes it from the OpenScape Desktop Client main window. This feature is only available in connection with an SIP Provider.

- **Personal settings**

NOTICE: This option is only available if you operate the OpenScape Desktop Client with a connection to an SIP communications system or at a HiPath PBX.

Enables configuring an individual ring tone. A click on **Ring tones** in the right-hand section of the Pearl menu opens the **Settings** dialog with displayed configuration options for the individual ring tone.

- **Update**
  Establishes a connection to the latest OpenScape Desktop Client version that your system administrator has downloaded. If no update is available, a message informs you accordingly.
- **Help**
  Opens the program's online help.
- **About**
  Opens the **Product information** window and displays the OpenScape Desktop Client version number.
- **OpenScape Options**
  This button opens the **Settings** dialog, which displays the current settings of the application.
- **Exit OpenScape**
  This icon serves for closing the application.

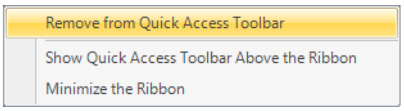
3.7 Quick-Access Toolbar

The Quick Access Toolbar enables fast access to your OpenScape Desktop Client features. It is positioned in the caption bar of the main window above the ribbon.

The **<name or number>** combo box as well as the **Call** and **Hangup** features are included in the Quick Access Toolbar by default.

> ***NOTICE:*** The remains inactive (shaded gray) as long as the **<Name or Number>** field does not contain any entry. The icon is only active during an active call.

The context menu options let you remove features from the bar, adjust the bar's position as well as minimize the ribbon. You reach the context menu with a click of the right mouse button on the Quick Access Toolbar.



- **Remove from Quick Access Toolbar**
  Removes the relevant icon from the Quick Access Toolbar
- **Show Quick Access Toolbar Below the Ribbon**
  Moves the Quick Access Toolbar below the ribbon. The option changes to **Show Quick Access Toolbar Above the Ribbon** for repositioning the Quick Access Toolbar above the ribbon.
- **Minimize the Ribbon**
  Minimizes the ribbon. Only the tabs' captions are displayed. A click on one of these captions displays the associated tab. Another click minimizes the displayed tab again.

3.8 Ribbon

Below the Pearl menu and Quick Access Toolbar, the ribbon displays the OpenScape Desktop Client controls in tabs and groups by default.

Tabs

Tabs organize controls in the ribbon around core scenarios and tasks the users perform with the OpenScape Desktop Client.

The ribbon includes the following tabs, regardless whether you use OpenScape Desktop Client at an HFA or SIP communications system:

- **Home**
- **SoftPhone**.

Groups

Groups within each tab show related controls together.

The following groups are always available on the **Home** tab of the ribbon:

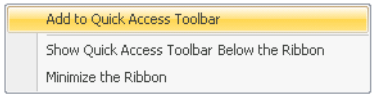
- **Call Control**
- **Contacts**.

The following groups are available on the **SoftPhone** tab of the ribbon:

- **Calls**

- **Device Feature**
- **Video** this group is available only with an SIP connection with operable video camera and configured video scheme.

You can integrate all features available in the ribbon in the Quick Access Toolbar via the ribbon's context menu. You reach the context menu with a click of the right mouse button on the ribbon.

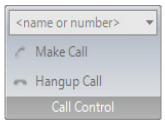


- **Add to Quick Access Toolbar**
  Integrates the icon that was clicked with the right mouse button in the Quick Access Toolbar also.
- **Show Quick Access Toolbar Below the Ribbon**
  Moves the Quick Access Toolbar below the ribbon. The option changes to **Show Quick Access Toolbar Above the Ribbon** for repositioning the Quick Access Toolbar above the ribbon.
- **Minimize the Ribbon**
  Minimizes the ribbon. Only the tabs' captions are displayed. A click on one of these captions displays the associated tab. Another click minimizes the displayed tab again.

3.8.1 “Home” Tab

On the **Home** tab you find the groups **Call Control** and **Contacts** with their controls.

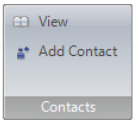
3.8.1.1 Controls of the "Call Control" Group



The **Call Control** group contains the following controls:

- **<name or number>**
  You can enter the phone number or the contact name of the desired conversational partner in this field.
- **Call**
  For initiating a new call.
- **Hang up**
  To clear an existing connection.

3.8.1.2 Controls of the “Contacts” Group



The **Contacts** group provides controls to view and add contacts in your contact list.

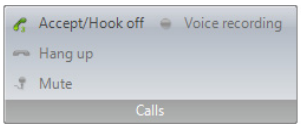
- **View**
  Click on **View** to add the **Contacts** frame to the OpenScape Desktop Client main window.
- **Add Contact**
  Click on **Add Contact...** to open the **Add New Contact** dialog and add a contact to your list.

3.8.2 “SoftPhone” Tab

Independent from the installed provider module (**HiPath** or **[Virtual] SIP Service Provider**), the **SoftPhone** tab contains the groups **Calls** and **Device Feature** with their controls.

If you use OpenScape Desktop Client as SIP softphone and have an operable video camera used by an active video scheme, the **SoftPhone** tab contains the **Video** group in addition. The controls of this group enable switching the video camera on and off as well as transmitting your own video image during an active connection.

3.8.2.1 Controls of the “Calls” Group

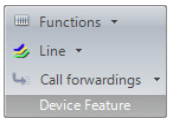


The **Calls** group is always displayed on the **SoftPhone** tab, regardless of the communications system (**HiPath** or **[Virtual] SIP Service Provider**) at which you operate OpenScape Desktop Client. Depending on the audio device used it contains the following controls:

- **Accept/Hook off**
  Accepts an incoming call or starts a new conversation
- **Hang up**
  Closes a connection
- **Mute**
  Activates and deactivates the muting of an existing connection.
- **Voice recording**
  Activates and deactivates the voice recording function.

- **Headset**
  Switches the headset on/off in case of an active call or in idle state
- **Additional speaker**
  Switches the additional speaker on/off for an active call. The additional speaker must be configured in the settings for the currently used audio scheme.

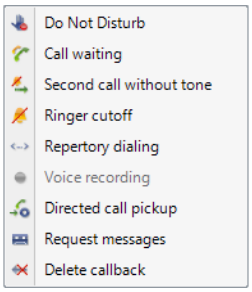
3.8.2.2 Controls of the “Device Feature” Group



The **Device Feature** group is always displayed on the **SoftPhone** tab, regardless of the communications system (**HiPath** or **[Virtual] SIP Service Provider**) at which you operate OpenScape Desktop Client. It enables access to the following telephone and dial tone features.

Functions

Click on the **Functions** button to display the following menu, for example:



NOTICE: Depending on your PBX further features are available, which are described in the following.

- **Do Not Disturb**
  Click on the **Do Not Disturb** option if you do not want to receive any calls. The caller receives a busy tone.
- **Call waiting**
  When the **Call waiting** option is active, another call that comes in during an active call is signaled by a so-called call-waiting tone. The caller hears a normal ringing tone and no busy tone. You can then accept, ignore or reject the second call. To accept the second call, click on the green handset icon. The active call will then automatically be held.
- **Second call without tone**
  This option corresponds to **Call waiting**, but no call-waiting tone is played.

- **Ringer cutoff**
  When you activate the **Ringer cutoff** option, your OpenScape Desktop Client will signal incoming calls without ring tone.
- **Repertory dialing**
  When the **Repertory dialing** option is active, the OpenScape Desktop Client creates from an entered character string a digit string that is the actual phone number, for example, the entered character string `0800OpenScape` is converted in the phone number `0800673672273`.
- **Voice recording**
  Activate/deactivate the **Voice recording** option to activate or deactivate the recording feature. You find the recorded calls in the folder `My Documents\My Music\VoiceRecordings`.
- **Directed call pickup**
  This feature allows you to accept calls that are designated for someone else. If, for example, your colleague is called but he/she cannot accept the call himself/herself (he/she is in a meeting, on the phone on another line, etc.), select the **Directed call pickup** option. In the open dialog of the same name enter the phone number of the device with the alerting call. Click on **OK**. You are connected to the caller.
- **Pickup call**
  This feature allows every member of a call pickup group to accept a call for another group member. Calls signalled acoustically to a subscriber of a call pickup group are at the same time signalled visually to the other group members by an LED (next to the programmed key) on the display. You can pick up the call by pushing a key or dialing a code number as well as via the displayed desktop notification.
- **Request messages**
  You can use this option to play newly received voicemails.
- **Delete callback**
  Selecting this menu option deactivates the callback feature.

  NOTICE: If you want to use the **Callback** feature, access the **Advanced** tab in the Settings dialog, select the **[Virtual] SIP Service Provider > Codes** option and specify the required codes in the **Callback** area. In case of VDI-Environment (Citrix) it is Virtual SIP Service Provider.

- **ACD Logon (HFA)**
  Logging on as call center agent.
- **ACD Post-processing (HFA)**
  Switching to status Post-processing after a call as call center agent.
- **ACD not available (HFA)**
  Call center agent loggs off temporarily.

Lines

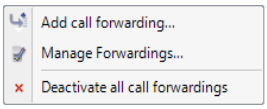
Click on the **Lines** button to display a selection list with all configured lines.

All lines configured in the OpenScape Desktop Client are displayed in the **Lines** menu. You can change the line options and the line/connection status for individual lines. Doubleclick a line to allocate it and to receive a dial tone in the **Lines** menu of the main bar, in the "Lines" window or in the line control in the **Device Feature Group** on the **Softphone** tab.

All lines configured in the OpenScape Desktop Client can be configured in the **Lines** frame. Only those lines that are shown can be edited.

Call forwardings

Click on the **Call forwardings** button to display the following menu:



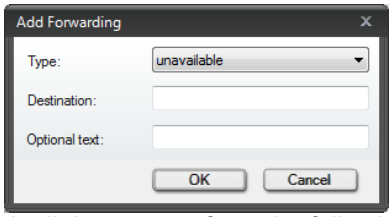
If connection requests are to be diverted in your absence, you can define settings for different forwarding types in the OpenScape Desktop Client. This feature can be activated or deactivated as required. The connected provider defines which types of forwarding are available.

NOTICE: In the call forwardings menu you see the currently active call forwardings highlighted. Forwardings set but not available any more are faded gray.

NOTICE: The active call forwarding items are effective when OpenScape Desktop Client is up. When you shut down OpenScape Desktop Client and reboot it, the forwardings that were active at the time the program was shut down are automatically reactivated and the deactivated ones stay inactive.

NOTICE: In case of an OpenScape Voice connection, active forwardings stay effective even if the OpenScape Desktop Client has been shut down. All incoming calls are then forwarded to a specific, pre-set destination.

- **Add call forwarding...**
  A click on this option lets you configure a new call forwarding. The following dialog opens:



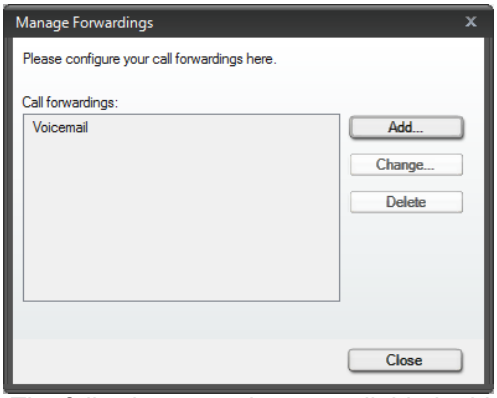
  In this dialog you perform the following settings for the new call forwarding:

  – **Type**
    Defines the type of the new forwarding

Forwarding type	Setting	Function
Forwarding in case of "unavailable"	unavailable	If you do not accept a call within a pre-set period while OpenScape Desktop Client is active, the call is forwarded to the phone number specified under **Destination**. Behavior of this forwarding type in case of a connection to an OpenScape Voice: • If you do not accept a call within a pre-set period while OpenScape Desktop Client is active, the call is forwarded to the phone number specified under **Destination**. • If the OpenScape Desktop Client is inactive, all incoming calls are forwarded to the phone number specified as **Destination**.
Forwarding in case of "busy"	Busy	If you are conducting a call while OpenScape Desktop Client is active, all incoming calls are forwarded to the phone number specified under **Destination**. Behavior of this forwarding type in case of a connection to an OpenScape Voice: • If you are conducting a call while OpenScape Desktop Client is active, all incoming calls are forwarded to the phone number specified under **Destination**. • If the OpenScape Desktop Client is inactive, all incoming calls are forwarded to the phone number specified as **Destination**.
Unconditional forwarding	always	With OpenScape Desktop Client being active, all incoming calls are forwarded to the phone number specified under **Destination** regardless the line state ("free" or "busy"). At an OpenScape Voice, all incoming calls are forwarded to the phone number specified as **Destination** regardless the line and OpenScape Desktop Client state (started or not started).

  - **Destination**
    Defines the phone number to which a call is forwarded
  - **Optional text**
    Specifies a text that describes the relevant forwarding. This text is displayed in the forwarding menu for selection

- **Manage Forwardings...**
  A click on this option opens the following dialog:

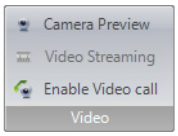


The following controls are available in this dialog:

  - **Add...**
    This button enables configuring a new call forwarding in the **Add Forwarding** dialog.
  - **Change...**
    This button enables editing the settings of an already defined call forwarding in the **Change Forwarding** dialog.
  - **Delete**
    Using this button you can remove a selected call forwarding from the call forwardings list.
  - **Close**
    A click on this button closes the **Manage Forwardings** dialog.
- **Deactivate all call forwardings**
  A click on this option disables all configured forwardings.
- ***<List of possible call forwardings>***
  Selecting a call forwarding displayed here toggles the forwarding state:
  - a previously inactive call forwarding is activated (displayed highlighted)
  - a previously active call forwarding becomes inactive.

3.8.2.3 Controls of the “Video” (SIP) Group

The **Video** group enables access to the video functions and features the following controls:



- **Camera image**
  Using this option you switch your own camera image on or off.
- **Video streaming**
  Activates or deactivates the video data transmission during an active call.
- **Activate video call**
  This option activates/disables the Video Call feature.

> ***NOTICE:*** The buttons **Camera image** and **Video Streaming** must be activated to enable video telephony. If these two buttons are inactive, the OpenScape Desktop Client can solely receive video data from other participants. Your video image is not sent to the conversational partners.

3.8.2.4 Video Features

Parallel to an audio connection, you can also exchange images of the connection partners. This requires an operable video camera on your and your communi-

cation partners' side, a sufficient number of free video licenses and adequate bandwidth as well as configuring a video scheme in the **[Virtual] SIP Service Provider** settings.

When the above requirements are complied with, you can use the video telephony features as follows:

- You can switch the video image to an existing audio connection.
  When your connection partner complies with the video transmission requirements, you receive the video image of your connection partner automatically, no matter whether a video camera is installed or switched on at your station. This requires the **Video Viewer** module to be active. Your own video image or the one sent to your connection partner as well as the video image received from your connection partner appear in the **Video** window.
- You can activate the Video Call feature via the **Activate video call** icon in the **Video** group on the **SoftPhone** tab to automatically set up a video and audio connection to the desired conversational partner. A video call is automatically initiated only if both conversational partners have enabled the **Activate video call** icon at the time the call shall be made. If they have done so, the **Video** window opens automatically on both sides. The partners' own video image is being transmitted and they receive the image of the respective other partner. The default view of the video window currently displayed depends on the settings in the **Default video configuration** of the **[Virtual] SIP Service Provider**.

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

  NOTICE: If the SIP communications system does not provide a sufficient amount of free bandwidth, no video call can be set up and no active call an be expanded to a video connection. A corresponding message informs the user about this fact.

The video telephony feature enables using the following functions:

Camera image

The camera image function opens your own video image in the **Video** window. You can perform camera image settings in the **Settings** dialog on the **Advanced > [Virtual] SIP Service Provider > Video schemes** tab. For example, you can configure whether the camera image or your own video image is automatically switched on at every program start or switched on/off with a click on the **Camera image** button of the **Video** group. Your connection partner does not see this image. In addition, there are two options for you to represent your own image: mirrored and unmirrored. By default, you see your own video image mirrored, but it is transmitted unmirrored to the connection partner. The following figure shows

an example of the **Video** window in which the camera image was automatically switched on at the program start. As long as there is no connection that transmits the video image of the connection partner, you can switch the camera image off with a click on the **Close (x)** button in the screen's top right corner or on in the Softphone toolbar. This also closes the **Video** window.

Receiving a video image

Received video images are always accepted and represented independently from an installed or active video camera. This, however, requires the **Video Viewer** module to be active. The representation of received video images cannot be suppressed or switched off. As long as your conversational partner sends his/her video image, the **Video** window stays open. There is no way you can close the **Video** window.

The next figure is an example of the **Video** window during an active call conducted between two connection partners. They receive the image of the respective other participant, but do not yet send any video data themselves.

Sending a video image (point-to-point video)

To send video images you need an installed and configured video camera as well as a video scheme defined in the **[Virtual] SIP Service Provider** settings. The video streaming can be switched to an audio connection only retrospectively. This applies for the caller as well as for the callee. During a call, a unilateral or a bidirectional video transmission may take place.

You start sending your own image with a click on the **Video Streaming** button in the **ribbon > SoftPhone tab > Video group** or on in the Softphone toolbar of the **Video** window. Your own video image appears in a red frame.

You stop sending your own image with another click on the **Video Streaming** button in the **ribbon > SoftPhone tab > Video group** or on . You can then still see the image of your connection partner. After the active call has been terminated, the video streaming comes automatically to an end too and you see only your own image (if activated) in the **Video** window.

NOTICE: While a video connection with mutual video streaming is up, you cannot close the Video window. You can merely disable the preview of your own video image via the Softphone toolbar with a click on .

Controls in the Softphone toolbar

You find the Softphone toolbar of the **Video** window at the bottom margin of the **Video** window where it provides the following features:

- Terminate active call

  NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

  A click on the icon closes the active connection. Video streaming then terminates automatically and the **Video** window closes.

- Switch microphone on/off

  NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

  A click on the icon mutes the microphone. The icon then changes to . A click on the icon undoes the muting.

- Activates or deactivates the speaker during an active call or in idle state. This feature is available for example if plathosys CT-180/220/Headset is used as audio device and plathosys CT-180/220/Headset is selected under **Control** in the corresponding audio scheme.

- Switches the additional speaker on/off during an active call

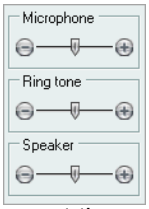
- Switch voice recording on/off

  NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

  A click on activates the conversation recording. The icon then changes its color from gray to orange.

- Display volume settings

  A click on opens the following menu:

  In there you can set the volume for **Microphone**, **Ring tone** and **Speaker** independently from your respective conversational state.

NOTICE: Depending on the operating system these icons are not visible because you can perform such settings only via the operating system settings.

- Hide/display DTMF keypad

NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

A click on displays the following keypad:

During an active call you can use this keypad to dial a phone number or select other options (sending DTMF characters), for example when using an answering machine, playing voicemails, etc.
You can enter DTMF characters in the DTMF dialing keypad also via computer keyboard or by copy&paste.

- Start/stop video streaming

NOTICE: This icon stays inactive (grayed out) as long as there is no connection.

A click on starts the transmission of your video image. The icon then changes its color from gray to orange. Your own image is represented in a red frame at the bottom left margin of the **Video** window. Another click on this icon stops video streaming.

- Switch camera image on/off

  A click on activates the camera image. The icon then changes its color from gray to orange. Another click on this icon deactivates the camera image.

- Toggle video player views

  With a click on you can change the layout in the **Video** window. The following three views are available:

  – **In call**
  – **Full window**
  – **Full screen**

- Enable/disable video call

NOTICE: This icon is only displayed if you operate the program at an SIP communications system (OpenScape Voice) and have an operable video camera currently used by a video scheme of the **[Virtual] SIP Service Provider**.

The state of this icon – active or disabled – specifies whether or not video resources are reserved during the connection setup. It thus determines whether the call shall be initiated as video or pure audio call.
The icon for activating/disabling the video call feature is inactive by default, i.e. the feature is in idle state. Consequently, all calls are set up as pure audio connections. However, you can extend such connections to video connections via the icon in the Softphone toolbar at a later date.
If the icon for activating/disabling the video call feature is enabled, each call is automatically initiated as video or audio connection depending on the state of this icon on the conversational partner's side. If both partners have activated this icon, a video connection is automatically switched to the audio connection. The **Video** window opens automatically. The video images of the conversational partners are being transmitted. The displayed video view corresponds to the **Default video configuration** in the **Settings** dialog on the tab **Advanced > [Virtual] SIP Service Provider > Video schemes**.
If only one of the two conversational partners has activated the video call feature, a message in the automatically opened **Video** window informs him/her that the other one does not wish to set up a video connection. The subscriber who has activated the icon sees only his/her own image in the pre-set view of the **Video** window. It is not automatically transmitted. In this case, supplementing the audio transmission with video via the icon in the Softphone toolbar at a later date is not possible.

Operating with computer keyboard

[F11] key - Enabling the **[F11]** key you can maximize or restore the **Video** window. This feature is only supported for the camera image and the views **In call** and **Full window**.

NOTICE: During a video conference or an active call with video streaming you can use the keys of your computer keyboard (or of your configured preferred device) to give control commands to the communications system by sending DTMF tones.

3.8.2.5 Video Streaming Behavior

The video streaming behavior follows the changes analog to the audio transmission:

- **Call is on-hold**
  When a call is held, the video streaming stops as well. The held subscriber does not see a video screen. If the video streaming status changes during a held call, restoring the connection follows this change. If, for example, the

camera is switched off, the video streaming is inactive when the call is resumed.

- **During a consultation call**
  For modifications to the video streaming status during a consultation call the same applies as for a held call.
- **Toggling**
  When you toggle the active and held subscriber, the video streaming to the active subscriber is held and resumed to the held subscriber also. The **Video** window shows only your own video image and the one of the respective subscriber. The video stati of the two connections are independent from each other in this case. In other words, if the video streaming status of one connection is changed, it does not affect the other connection.
- **Transferring a call**
  When a call is transferred, the video installation and configuration of the subscriber to be transferred and of the new subscriber decides whether no, a unilateral or a bidirectional video connection exists.
- **Local video conference**
  In case of a local conference in which all participants have activated the **video streaming**, the initiator of the conference receives the video images of the other two participants. Three video images can be seen in his/her **Video** window: his/her own one in a red frame and two of the other participants. The other two conference participants see in the **Video** window the following: their own video image in a red frame and one received video image. The initiator mixes the latter in a way that a participant receives the video image of the initiator and of the third participant in one video image.
  If the initiator has not installed, configured or activated a video camera, the initiator receives both video images within a conference, but since his/her own video transmission channel is missing, the other two participants do not receive a video image.
  If at least one participant has not installed, configured or activated a video camera in a conference, the initiator does not adopt a video mixing function, so that both participants receive the video image of the initiator.

3.8.2.6 Views of the Video Window

The OpenScape Desktop Client video window provides three default views: **In call**, **Full window** and **Full screen**. In addition, the video feature of OpenScape Desktop Client enables you to customize video window views. You can specify in the **Settings > Advanced > [Virtual] SIP Service Provider > Video schemes** dialog whether to switch the camera image automatically on at the program start and which view of the video window to display during an active video connection by default.

NOTICE: The figures shown in the following are examples. They help the user to imagine possible default views of the **Video** window.

In call

During an active video connection the **Video** window contains two images by default: your own (sent image) and the one of the connection partner (received image). The image of the connection partner appears in a larger frame than your own image and is represented slightly turned. Your own image is displayed in a smaller frame at the bottom left window margin. It is slightly turned and appears in a red frame during an active image transmission.

In the **In call** view the **Video** window may contain just one image, for example:

- If you have disabled the camera image, the **Video** window contains in the **In call** view only the image received from the connection partner. This image appears centered and in a frame.

- If the connection partner has not yet activated his/her video transmission, the **Video** window contains in the **In call** view your own image only. This image appears centered and in a frame.

Full window

In this view the **Video** window may contain one or two images. The image received from the connection partner always appears centered and without a frame. Your own image is displayed in a smaller frame at the bottom left window margin. It is slightly turned and appears in a red frame during an active image transmission. The following figure shows for example the **Video** window in the **Full window** view when the image of the conversational partner is received. Your own image is transmitted but the camera image is disabled.

If you activate the camera image in addition, the **Video** window in the **Full window** view may look as follows:

Full screen

In this view the **Video** window may contain one or two images. The received image occupies the entire screen. If the camera image is active, your own image appears bottom left. The Softphone toolbar is hidden and only displayed again at the bottom screen margin when you position the mousepointer on it.

Customized views

The video feature of the OpenScape Desktop Client enables you to customize the default view **In call**.

- Moving a video image in the video window
  To change the position of an image in the video window, click in the center of the video image. The mousepointer appears in the center of the image. Keep the left mousebutton pressed and drag the image to the desired position in the video window. Then release the mousebutton.

  NOTICE: While you adjust a video image, it appears transparent.

- Maximizing/minimizing the video image
  Click on one margin of the image frame, keep the mousebutton pressed and drag the mousepointer in the desired direction to maximize or minimize the image.
  You can also rightclick the center of an image, keep the right mousebutton pressed and move the mouse up and down. The proportions of the selected video image become smaller or larger.

  NOTICE: While you adjust a video image, it appears transparent.

- Turning the video image
  Rightclick the center of an image, keep the mousebutton pressed and move the mouse to the left or right. The image turns to the corresponding direction.

  NOTICE: While you adjust a video image, it appears transparent.

The changes you perform for the **In call** view are automatically applied to current operation. Whether such changes are kept to be used at the next program start or dismissed when you shut the program down depends on the configuration of the **[Virtual] SIP Service Provider** module. The view used last is saved when you shut OpenScape Desktop Client down and deployed again at the next start of the program if item **Keep previous** is selected for the **Layout** option in the dialog **Settings > Advanced > [Virtual] SIP Service Provider > Video**

schemes. Otherwise, only the three pre-defined views will be available when you start OpenScape Desktop Client again.

3.9 General Information about Frames

A frame is an element of the OpenScape Desktop Client graphic user interface marked by its caption bar and specific operating elements. The caption bar of each frame consists of the following elements:

By clicking on the section displayed on the left and with the left mouse button kept pressed each frame can be:

- added to the main view or deleted from it (the frame adopts the view of a window that you can freely position on the desktop),
- moved up or down in the main view.

This icon serves to minimize each frame in the main view. A frame is minimized if only its caption bar is displayed and has been replaced by . A click on restores the last frame size.

<Frame name>

- **Main bar**
- **Contacts**
- **Journal**
- **Call Control**
- **Directory Search**
- **Free phone**
- **Lines** (optional)
- **Webbrowser** (with at least one configured Internet page only)

Opens the online help window for the corresponding frame.

Maximizes the frame or minimizes all other main view frames.

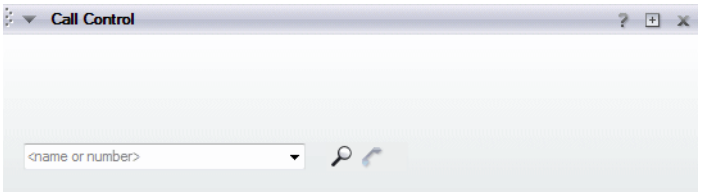
Click on in a maximized frame to return to the last view size of the frame.

Closes the frame. Via **Pearl menu > View > <desired option>** it can be opened again or displayed in the main view.

NOTICE: All options listed under **Pearl menu > View** except **Main Toolbar** and **Free Phone** can be added to the main view as frames.

The following sections describe the frames available in the OpenScape Desktop Client, their controls and functionality.

3.10 Frame "Call Control"



You can initiate, control and accept calls from the **Call Control** frame. It also displays information about incoming, active and outgoing calls. The frame displays the called or calling number followed by your phone number.

Depending on the connection status (outgoing call, incoming call, active call and number of calls), the right-hand section of the **Call Control** frame provides various control options.

Inbound call

In case of an incoming call, the **Call Control** frame provides the following control options:

- Accept call
- Opens the **Transfer to** window in which you can enter the phone number of another device to deflect the incoming call to.
- Reject call

Active call

In case of an active call, the **Call Control** frame provides the following control options:

- Terminate active call
- Set active call to on-hold The icon changes to: .
- Resume held call
- Opens the **Transfer to** window in which you can enter the phone number of another device to deflect the active call to.
- Displays a keypad on the screen that allows transferring digits as DTMF tones (tone dialing).

Consultation call

In case of a consultation call, the **Call Control** frame lists two calls: the held and the consultation call. The following control options are available in the area of the held call:

- Disconnect active call
- Transfers the held call to the consultation-call subscriber. Your connection is then automatically cleared.
- Displays a keypad on the screen that allows transferring digits as DTMF tones (tone dialing).

The following control options are available in the consultation call area:

- Disconnect active call
- Set active call to on-hold The icon changes to: .
- Resume held call
- Opens the **Transfer to** window in which you can enter the phone number of another device to deflect the active call to.
- Select this option if two connections exist (one is on hold and the other one is active) to connect the other two subscribers. Your telephone calls are now finished.
- Click on to display the below keypad.

You can use this keypad to dial a phone number or select other options (sending DTMF characters) when deploying an answering machine or while playing your voicemails.
You can enter DTMF characters also via the computer keyboard or by copy&paste. Copy the desired content (for example PIN, phone number, etc.) by simultaneously pushing **[Ctrl] + [C]** to the clipboard. Then click on .

Paste the copied content via **[Ctrl] + [V]** in the **DTMF dialing** keyboard.
Enable  at the top right margin on the **DTMF dialing** keyboard for sending this content. The selected DTMF characters are displayed at the top left margin of the **DTMF dialing** keypad.

- 
  The existing connections are extended to a conference (participant-controlled conference). You can add up to 48 participants to this conference.
- 
  Phone calls (one or both set to on-hold) are merged to a local conference (three-party conference), so that all three participants can talk to each other. No further participants can be added.
- 
  Using this feature you can toggle two connections. Only the subscribers to the active connection can talk to each other. The conversational partner who has been put on-hold listens to music-on-hold until the conversation is taken up again.
-
  This option allows you to record the conversation. You find the recording in the folder `My Documents\My Music\VoiceRecordings`.

Outbound call

In case of an outgoing call, the **Call Control** frame provides the following control options:

-
  Terminate initiated call

3.10.1 Context Menus of the "Call Control" Frame

When the **Call Control** frame displays a connection, you can invoke a context menu by clicking the right mousebutton. Depending on the connection status (outbound, inbound or existing connection and number of connections), the context menu offers various options for controlling the respective connection.

3.10.1.1 Context Menu of an outbound Connection

An *outbound connection* is a connection that you have initiated. OpenScape Desktop Client displays this connection in the **Call Control** frame. The desired connection partner has not yet accepted your call.

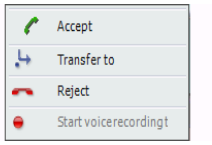
During an outbound call the context menu of the **Call Control** frame provides the following options:

- **Disconnect**
  Click **Disconnect** to clear the connection.

- **Callback**
  Select this option to activate the callback function.
  This feature is only available for specific PBXs.
- **Start voice recording**
  Click on **Start voice recording** to record the conversation. You find the recording in the folder `My Documents\My Music\VoiceRecordings`.

3.10.1.2 Context Menu of an inbound Connection

An *inbound connection* has been set up by another subscriber. OpenScape Desktop Client displays this connection in the **Call Control** frame. You have not yet accepted this call.

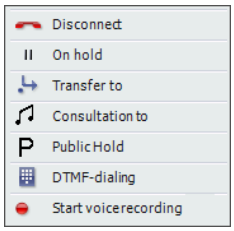


The context menu provides the following options:

- **Accept**
  Click on **Accept** to set up an active connection.
- **Transfer to...**
  Click on **Transfer to...** to open the **Transfer to** dialog and to enter the phone number of the device to which you want to transfer the incoming call.
- **Reject**
  Click on **Reject** to reject the call.
- **Start voice recording**
  Click on **Start voice recording** to record the conversation. You find the recording in the folder `My Documents\My Music\VoiceRecordings`.

3.10.1.3 Context Menu of an active Call

During an active call the context menu of the **Call Control** frame provides the following options:



- **Disconnect**
  Click on **Disconnect** to clear the existing connection.
- **On hold**
  Click on **On hold** to hold the active call. The **On hold** menu option is replaced with **Back to Waiting**. Click on **Back to Waiting** to retrieve the held call.

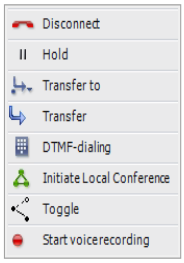
- **Transfer to**
  Click on **Transfer to...** to open the **Transfer to** dialog and to enter the phone number of another device to which you want to transfer the active call.
- **Consultation to**
  Click on **Consultation to** to place a call on hold and to set up a new connection to another extension.
- **Public Hold**
  Click on **Public Hold** to keep a call in the PBX. You can then ring off and accept the call at another telephone.
- **DTMF-dialing**
  Click on **DTMF-dialing** to display the below keypad.

  You can use this keypad to dial a phone number or select other options (sending DTMF characters) when deploying an answering machine or while playing your voicemails.
  You can enter DTMF characters also via the computer keyboard or by copy&paste. Copy the desired content (for example PIN, phone number, etc.) by simultaneously pushing **[Ctrl] + [C]** to the clipboard. Then click on . Paste the copied content via **[Ctrl] + [V]** in the **DTMF dialing** keyboard.
  Enable at the top right margin on the **DTMF dialing** keyboard for sending this content. The selected DTMF characters are displayed at the top left margin of the **DTMF dialing** keypad.
- **Start voice recording**
  Click on **Start voice recording** to record the conversation. You find the recording in the folder `My Documents\My Music\VoiceRecordings`.

3.10.1.4 Context Menu of a Consultation Call

> ***NOTICE:*** The number of provided options depends on the type of the communications system used.

During an active consultation call the context menu of the **Call Control** frame provides the following options, for example:



- **Disconnect**
  Click on **Disconnect** to clear the existing connection.
- **On hold**
  Click on **On hold** to hold the active call. Click on **Back to Waiting** to retrieve the held call.
- **Transfer to...**
  Click on **Transfer to...** to open the **Transfer to** dialog and to enter the phone number of another device to which you want to transfer the active call.
- **Transfer**
  Select this option if two connections exist (one is on hold and the other one is active) to connect the other two subscribers. Your telephone calls are now finished.
- **DTMF-dialing**
  Click on **DTMF-dialing** to display the below keypad.

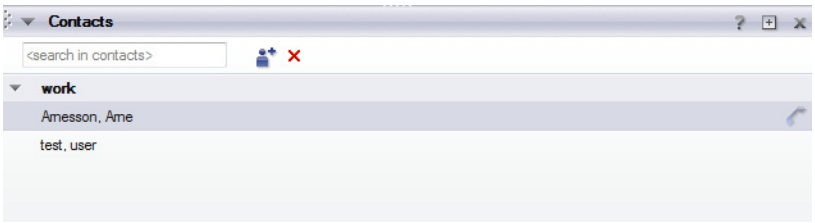
  You can use this keypad to dial a phone number or select other options (sending DTMF characters) when deploying an answering machine or while playing your voicemails.
  You can enter DTMF characters also via the computer keyboard or by copy&paste. Copy the desired content (for example PIN, phone number, etc.) by simultaneously pushing **[Ctrl] + [C]** to the clipboard. Then click on . Paste the copied content via **[Ctrl] + [V]** in the **DTMF dialing** keyboard.
  Enable at the top right margin on the **DTMF dialing** keyboard for sending this content. The selected DTMF characters are displayed at the top left margin of the **DTMF dialing** keypad.
- **Initiate server-based conference**
  The existing connections are extended to a conference (participant-controlled conference). You can add up to 48 participants to this conference.

NOTICE: This option is displayed only if the **Conference Factory URI** has been configured in the dialog **Settings > Advanced tab > [Virtual] SIP Service Provider > System functions**. If this setting is missing, the **Initiate local conference** option is available in the context menu.

- **Initiate local conference**
  Phone calls (one or both set to on-hold) are merged to a local conference (three-party conference), so that all three participants can talk to each other. No further participants can be added.
- **Enter Conference**
  Via this option further participants can be added to a conference. This option is only available during an active server-based conference (participant-controlled conference).
- **Toggle**
  Using this feature you can toggle two connections. Only the subscribers to the active connection can talk to each other. The conversational partner who has been put on-hold listens to music-on-hold until the conversation is taken up again.
- **Start voice recording**
  Click on **Start voice recording** to record the conversation. You find the recording in the folder `My Documents\My Music\VoiceRecordings`.

3.11 "Contacts" Frame

The **Contacts** frame displays all of the contacts you entered into the contact list. Use the contact list to perform the following actions:



- **Directory Search**
  You can enter the first or last name of a contact in the **<Search in contact list>** field to use this information as criterion for searching different directories. If a similar name is already available in your contact list, it is listed on top of the below **Search Directories for** button. A click on the name marks the contact entry in the list.

- **Adding a contact**
  A click on opens the **Add New Contact** dialog for adding a new contact entry to your contact list.

- **Removing contact/group**
  With a click on × you can remove the name of a contact or group from your contact list.
- **Call**
  Clicking on or (if several phone numbers are specified for a contact) you can initiate a call to the contact of your contact list. This outbound call is then displayed in the **Call Control** frame.

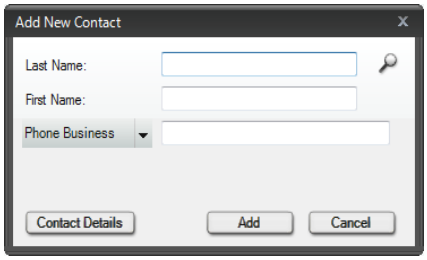
> ***NOTICE:*** If several phone numbers are available for the contact you wish to call, click on to select one of them.

3.11.1 Adding a new Contact

The contact list can contain names from several sources. You can add names from Microsoft Outlook. You can also copy contacts from an internal company directory. And you can create new contacts manually via the **Add New Contact** dialog.

> ***NOTICE:*** You reach the **Add New Contact** dialog via the context menu of the **Contacts** frame or with a click on in the **Contacts** frame.

The **Add New Contact** dialog lets you enter the following information for a new contact:



- **Last Name**
  Last Name of the new contact.
- **First Name**
  First Name of the new contact.
- **<Contact information>** combo box
  Select the contact information that you want to configure from the list. In the field to the right of the combo box you can make you entries for the following contact data:
  - **Phone Business**
  - **Phone Business 2**
  - **Phone Mobile**
  - **Phone Private**

  - **Fax**
  - **Video Phone 1**
    In case of active **[Virtual] SIP Service Provider** module only
  - **E-mail Business**
  - **E-mail Business 2**
  - **Web Address**
  - **SIP address**
    In case of active **SIP Service Provider** module only
- **Contact Details**
  With a click on the **Contact Details** button you open the **Add Contact** dialog. In this dialog you can enter further information for the new contact.
- **Add**
  A click on this button closes the **Add New Contact** dialog and integrates the new contact in the contact list.
- **Cancel**
  A click on this button closes the **Add New Contact** dialog. The settings you have made will then not be saved.

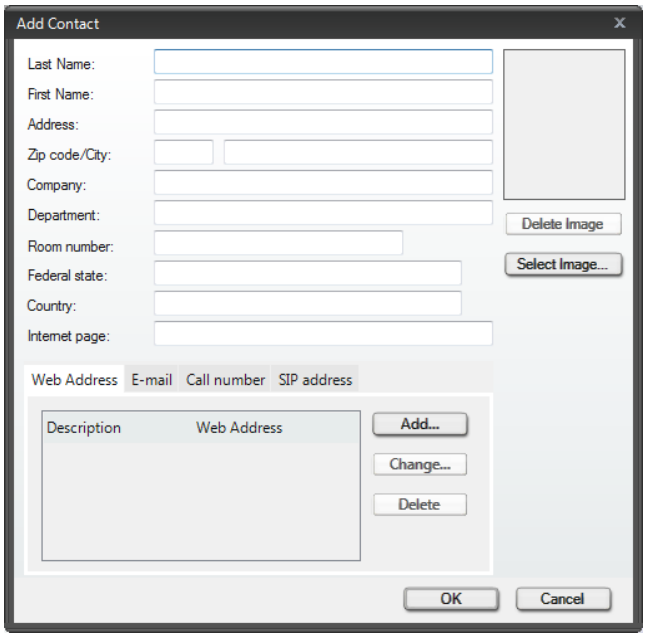
3.11.2 Contact Details

In addition to standard contact data such as name, first name, phone number etc. you can specify more detailed information on a contact in the OpenScape Desktop Client. This information includes the address, job-related facts or a photo that you can add to the contact profile.

You complete the information about a new contact in the **Add Contact** dialog. Furthermore, you can edit the detailed contact data of an already existing contact in the **Change Contact** dialog. You reach both dialogs in the **Contacts** frame via the **Add New Contact** or **Change Contact Information** dialog as well as with a click on the **Contact Details** button.

NOTICE: You invoke the **Add New Contact** dialog in the context menu of the **Contacts** frame by selecting the **Add Contact...** option.

NOTICE: You invoke the **Change Contact Information** dialog in the context menu of the **Contacts** frame by selecting the **Edit Contact...** option.



The following options are available for entering contact information:

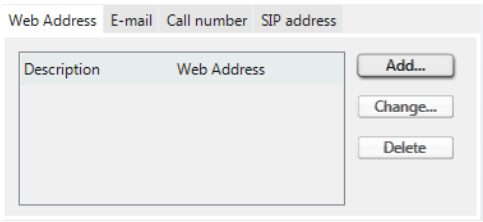
- **Last Name**
  You can enter here a maximum of 64 characters to specify a surname.
- **First Name**
  You can enter here a maximum of 64 characters to specify a forename.
- **Address**
  You can enter here a maximum of 64 characters to specify an address.
- **Zip code/City**
  In the first field you can enter a maximum of 7 characters to specify the Zip code. In the second field you can enter a maximum of 40 characters to specify a town or city.
- **Company**
  You can enter here a maximum of 64 characters to specify a company name.
- **Department**
  You can enter here a maximum of 64 characters to specify a department.
- **Room number**
  You can enter here a maximum of 32 characters to a room number.
- **State**
  You can enter here a maximum of 40 characters to specify a state or county.
- **Country**
  You can enter here a maximum of 40 characters to specify a country.
- **Internet page**
  You can enter here a maximum of 64 characters to specify a URL.
- **Select Image**
  A click on this button opens a dialog in which you can select an image for the relevant contact. A click on **Open** closes the dialog and the selected image is integrated.

- **Delete Image**
  A click on this button deletes the image assigned to the selected or new contact.

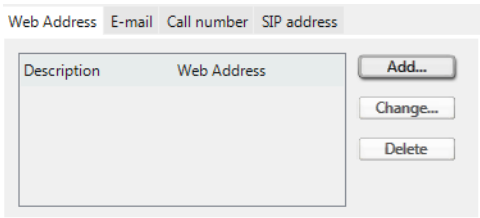
The **Add Contact** or **Change Contact** includes four tabs in the bottom section.

- **Web Address**
  Displays the contact's web address.

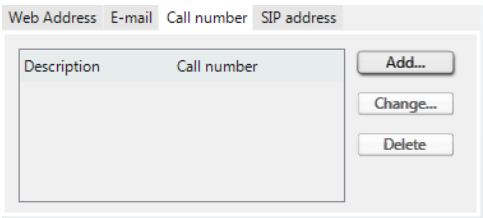
  NOTICE: The **Web Address** tab is available in case of the active **Web Access Manager** module only.



- **E-mail**
  Displays all e-mail addresses defined for this contact.

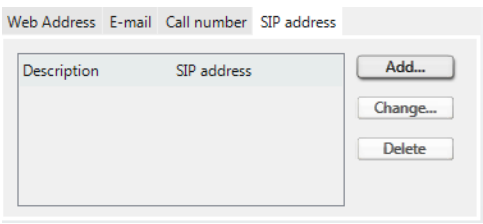


- **Call number**
  Displays all phone numbers entered for this contact.



- **SIP address**
  Displays the contact's SIP address.

  NOTICE: This tab is only displayed if you have selected the **[Virtual] SIP Service Provider** as default provider.



Each of the four tabs provides the following functions:

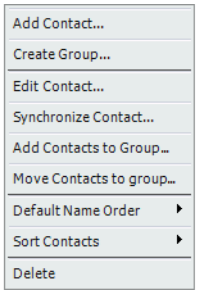
- **Add...**
  A click on this button opens an input dialog. In this dialog's **Description** field you enter a short description of the associated information (**web address**, **e-mail**, **phone number** or **SIP address**). If you specify several information items of the same type, a description helps to distinguish them. The type of information that you can add depends on the respectively active tab.
- **Change...**
  A click on this button opens a dialog in which you can edit the **web address**, **e-mail**, call number or **SIP address** already available for the contact.
- **Delete**
  With a click on this button you remove a selected **web address**, **e-mail**, call number or **SIP address** for the relevant contact. Before you can actually delete the selected item, a message appears that you need to confirm with **OK**, upon which the relevant information is deleted then.
- **OK**
  A click on this button closes the **Add Contact** or **Change Contact** dialog. Your entries or modifications are saved.
- **Cancel**
  A click on this button closes the **Add Contact** or **Change Contact** dialog. Your entries or modifications are not saved.

3.11.3 Context Menus of the "Contacts" Frame

The **Contacts** frame provides the following context menus.

3.11.3.1 Context Menu of a Contact

Rightclick a contact's name to display the following context menu.



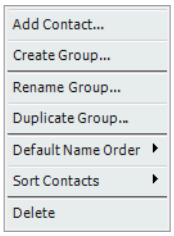
- **Add Contact...**
  Click on **Add Contact...** to open the **Add New Contact** window.
- **Create Group...**
  Click on **Create Group...** to open the **Create Group** window for assigning a group name to a contact.
- **Edit Contact...**
  Click on **Edit Contact...** to open the **Change Contact Information** window to modify the information of an existing contact.

NOTICE: The menu options **Add Contact...** and **Edit Contact...** open two dialogs that provide the same setting options.

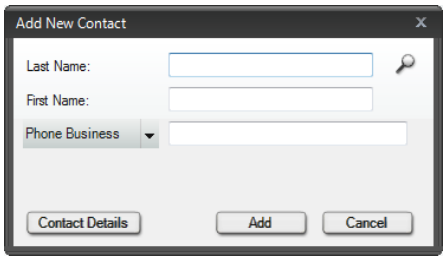
- **Synchronize Contact...**
  This feature requires an OpenScape UC Application server and has therefore no functionality.
- **Add Contacts to Group...**
  Select one or several contacts and click on **Add Contacts to Group...** to open the **Add Contacts** window and to add the contact(s) to one of the listed groups.
- **Move Contacts to group...**
  Select one or several contacts and click on **Move Contacts to group...** to open the **All Groups** window and to assign the contact(s) to another group.
- **Default Name Order**
  You can use the **Default Name Order** option to define in which sequence the first and last name of your contacts are displayed: *<last name, first name>* or *<first name, last name>.*
- **Sort Contacts**
  You can use the Sort Contacts option to determine whether the list of your contacts should be sorted alphabetically **Ascending** (A - Z) or alphabetically **Descending** (Z - A).
- **Delete**
  Click **Delete** to remove the name of the selected contact from your list of contacts.

3.11.3.2 Context Menu of a Group

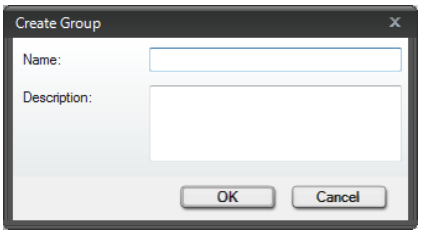
Right-click the name of a group to display a menu from which you can select the following settings:



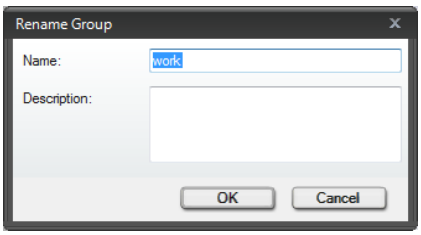
- **Add Contact...**
  Click on **Add Contact...** to open the **Add New Contact** dialog and to add a new contact to the selected group.



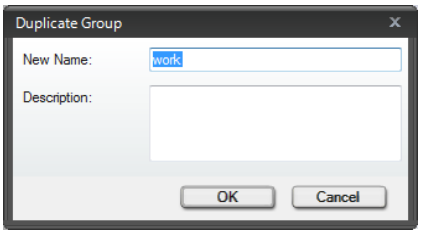
- **Create Group...**
  Click on **Create Group...** to open the **Create Group** dialog and to add a new group to your contact list.



- **Rename Group...**
  Click on **Rename Group...** to open the **Rename Group** dialog and to assign a different name to the selected group.



- **Duplicate Group...**
  Click on **Duplicate Group...** to open the **Duplicate Group** dialog in which you can assign a new name to the selected group. The same contacts will then be summarized under two different group names in the **Contacts** frame.

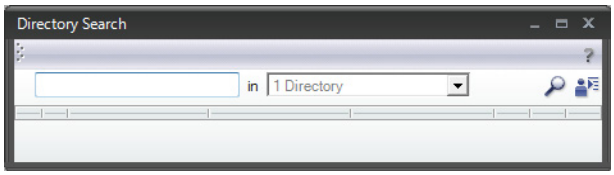


- **Default Name Order**
  You can use the **Default Name Order** option to define in which sequence the first and last name of your contacts are displayed in the selected group: *<last name, first name>* or *<first name, last name>*.
- **Sort Contacts**
  You can use the **Sort Contacts** option to determine whether the list of contacts in the selected group should be sorted alphabetically **Ascending** (A - Z) or alphabetically **Descending** (Z - A).
- **Delete**
  Click **Delete** to remove the selected group from your list of contacts.

3.12 Directory Search

In the **Directory Search** frame you can access your company directory and your private contacts.

It is not displayed in the OpenScape Desktop Client main view by default. Go to **Pearl menu > View** and select the **Directory Search** option. The separate **Directory Search** window is displayed.



To integrate this window as frame in the main view, click on the area and drag the frame to the desired position in the main view.

The following features are available in this window or frame:

<search address books>

In this field you enter the name to be searched for in the configured directories.

Please heed the following when making your entry:

- The “blank” character is the default field separator.
- The order of given name and surname is not important.
- Names that include an affix are handled like given name and surname. This may lead to **No Search Results**.

<number of directories>

Select in this combo box the directories to be searched for the desired contact.

- All Directories
  If this check box is set, OpenScape Desktop Client will search all configured directories for the desired contact.
- Microsoft Outlook directory
  If this checkbox is set, OpenScape Desktop Client will search your Microsoft Outlook contact list for the desired contact.
- <corporate directory>
  If this check box is set, OpenScape Desktop Client will search the configured directory of your company for the desired contact.

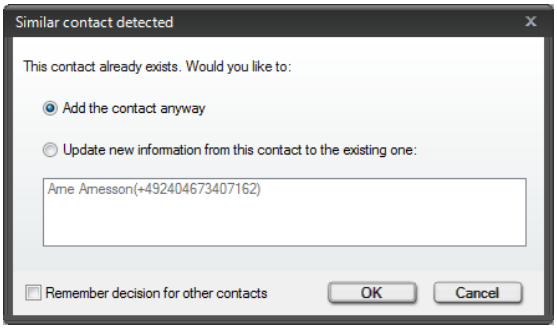
Execute the search

A click on this icon starts the search for the desired contact in the configured directories. The search results are listed in the **Directory Search** window or frame.

Add to contact list

A click on this icon integrates a selected contact in the OpenScape contact list.

If a contact with the same first and second name exists already in your contact list, the **Similar contact detected** dialog is displayed.

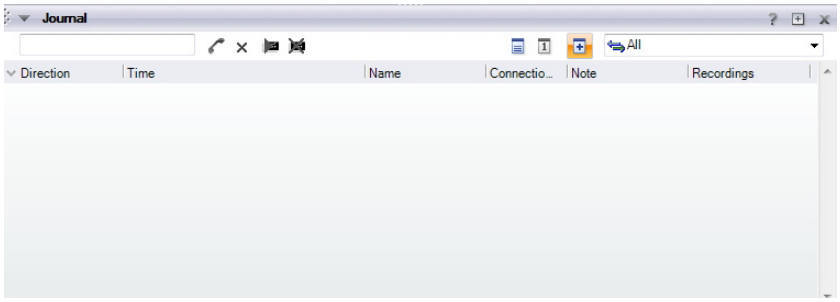


In this dialog you can perform the following settings:

- **Add the contact anyway**
  Adds the new contact under the same name to the contact list.
- **Update new information from this contact to the existing one:**
  Select this option if you want to update the contact information of one of the contacts in your OpenScape contact list.
- **Remember decision for other contacts**
  If this check box is active, the **Similar contact detected** dialog is no more displayed in case of repeated similarity of contact data. Depending on the active option, the new contact is directly integrated in the OpenScape contact list or the data of a contact already available in your OpenScape contact list is automatically updated.

3.13 "Journal" Frame

In the **Journal** frame OpenScape Desktop Client logs all in- and outgoing calls locally on the computer as long as the OpenScape Desktop Client is started. Furthermore, you can initiate connections to logged communication partners from the **Journal**.



The **Journal** frame remains empty until you make at least one call or receive a call.

NOTICE: Please note that no calls are logged in the **Journal** if OpenScape Desktop Client is not started. Incoming calls that

were missed while OpenScape Desktop Client was down are not displayed in the **Journal** after the application's start.

3.13.1 Journal Controls

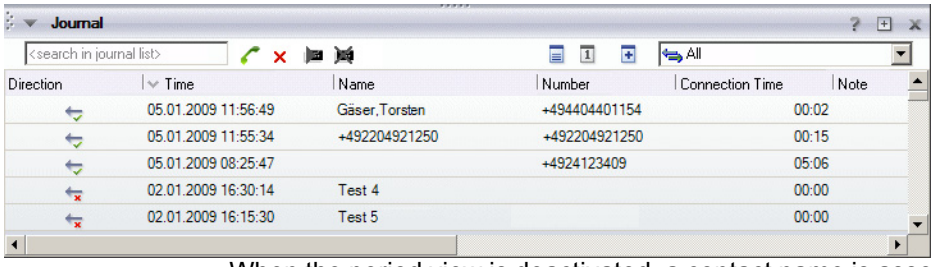
The following controls are available in the Journal frame for operating the journal:

- **<search in journal list>**
  Enter a contact name, a contact number or a conference description in the **<search in journal list>** input field to search for a corresponding journal entry. The journal entries that correspond to the entered search mask are automatically listed in **Journal** frame by the *OpenScape Desktop Client*. If the name or phone number searched for have not been found, the **Journal** frame does not show any entries.
- **Call a contact**
  Select a call entry in the journal and click on to set up the connection.
- **Delete journal entry**
  Select a call entry in the journal and click on to remove the entry from the journal.
- **Play voicerecording**
  If you have selected a journal entry for which a voice recording is available, you can click on to play the recording. The icon in the row of the relevant journal entry indicates whether a voice recording is available.
- **Delete voicerecording**
  If you have selected a journal entry for which a voice recording is available, you can click on to delete the voice recording.

In the **Journal** frame you can select the scheme for representing the journal information.

- **Change to period view**
  Click on to activate the period view. In this view, the entries in the **Journal** frame are grouped in periods.
  The number of entries for the following periods are displayed in the **Direction** column:
  - Today (number of entries)
  - This week (number of entries)
  - Last week (number of entries)
  - Two weeks ago (number of entries)
  - Three weeks ago (number of entries)
  - More than three weeks ago (number of entries)

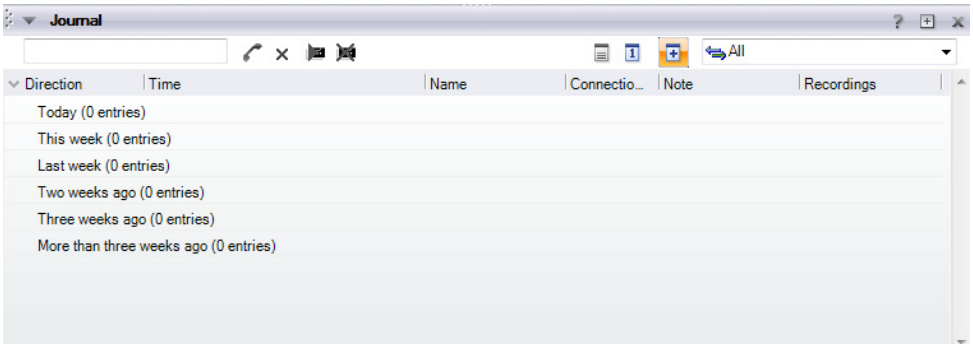
  The rest of the connection data in this representation are the same as in the normal view.
- **Switch to normal view**
  Click on to deactivate the period view and return to the normal view.



When the period view is deactivated, a contact name is associated with each call in the combined view for both the activated and deactivated states. In this representation the following call data is displayed:

- **Direction**
  The call direction is displayed as icon.
  Click the icon preceding the **Direction** label to sort the list of journal entries **Ascending** or **Descending** .
- **Time**
  The time at which the call was made or received.
  Click the icon preceding the **Time** label to sort the list of journal entries **Ascending** or **Descending** according to the respective times.
- **Name**
  Name or number of the contact or conference.
  Click the icon preceding the **Name** label to sort the list of journal entries **Ascending** or **Descending** in alphabetic order.
- **Number**
  Displays the called or calling phone number.
  Click the icon preceding the **Number** label to sort the list of journal entries **Ascending** or **Descending** in numerical order.
- **Connection Time**
  Displays the call duration.
  Click the icon preceding the **Connection Time** label to sort the list of journal entries **Ascending** or **Descending** according to the connection time.
- **Note**
  A note added to a call via the **Edit note** context menu option.
  Click the icon preceding the **Note** label to sort the list of journal entries **Ascending** or **Descending** according to notes.

- **Combined view**
  Click on to activate the combined view.



NOTICE: This view can be combined with one of the two other views - normal or period view.

In this representation the following call data is displayed:

– **Direction**
Depending on the other view that is active at the same time, this column is the same as the column of the period or normal view.
The call direction is displayed as icon.
Click the icon preceding the **Direction** label to sort the list of journal entries **Ascending** or **Descending** .

– **Time**
The time at which the call was made or received.
Click the icon preceding the **Time** label to sort the list of journal entries **Ascending** or **Descending** according to the respective times.

– **Name**
Name or number of the contact or conference.
Click the icon preceding the **Name** label to sort the list of journal entries **Ascending** or **Descending** in alphabetic order.

– **Connection Time**
Displays the call duration.
Click the icon preceding the **Connection Time** label to sort the list of journal entries **Ascending** or **Descending** according to the connection time.

– **Note**
A note added to a call via the **Edit note** context menu option.
Click the icon preceding the **Note** label to sort the list of journal entries **Ascending** or **Descending** according to notes.

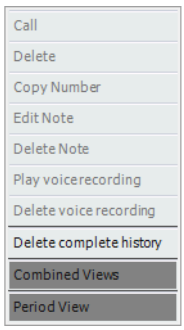
- Click to return to the normal or period view.
- **Options for filtering journal entries**
Select in the drop-down menu next to the combined view icon an option that determines how information is filtered in your journal. The selection list contains the following options:

Icon	Definition	Description
	All	All entries are displayed in alphabetic order according to the contact names.
	Incoming / outgoing – connected	All active calls are displayed.
	Incoming – connected	All active incoming calls are displayed.

Icon	Definition	Description
	Incoming – not reached	All unaccepted incoming calls are displayed.
	Outgoing – connected	All active outgoing calls are displayed.
	Outgoing – not reached	All unaccepted outgoing calls are displayed.

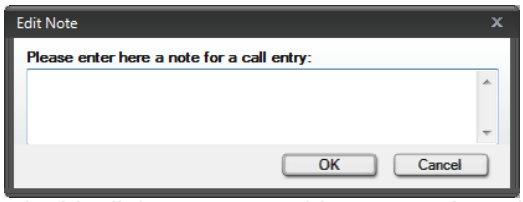
3.13.2 Context Menu of the "Journal" Frame

When you rightclick an entry in the **Journal** frame, a context menu appears that may look as follows:



In the following we describe all options provided in this context menu:

- **Call**
  Click on **Call** to call the contact.
- **Delete**
  Click on **Delete** to remove the journal entry.
- **Edit Note**
  Click on **Edit Note** to open the **Edit a Note** dialog.



  In this dialog you can add a note to the selected connection in the journal.
- **Delete Note**
  Click on **Delete Note** to remove a call note from the journal. If no note is available for the entry, this option is inactive.
- **Copy Number**
  When you click on **Copy Number**, the phone number of the entry is pasted to the clipboard and can be inserted in other applications.

- **Play voicerecording**
  This option is only available when you rightclick a journal entry for which a voice recording is available. A click on the **Play voicerecording** option starts the voice recording playback.
- **Delete voicerecording**
  This option is only available when you rightclick a journal entry for which a voice recording is available. A click on the **Delete voicerecording** option deletes the voice recording.
- **Delete complete history**
  Click on **Delete complete history** to remove the history of the call from the journal.
- **Combined Views**
  Click on **Combined Views** to activate the combined view.
- **Period View**
  Click on **Period View** to view the connection entries grouped in specific periods.

3.14 Lines

The **Lines** frame is not displayed in the OpenScape Desktop Client main window by default. Go to **Pearl menu > View** and select the **Lines** option. The **Lines** frame is displayed.

NOTICE: You must have configured at least one additional line to view the **Lines** option under **Pearl menu > View**.

To integrate this frame in the main window, click on the area and drag the frame to the desired position in the main window.

The **Lines** frame (SIP only) displays all configured lines that are activated for representation and their stati. You can configure the appearance of the lines display by clicking the **OpenScape Options** button at the bottom of the Pearl menu and then selecting the tab **Advanced > Device State > Lines**.

Icons indicate the line type, the line or call status and the line options. Furthermore, the display text or user deposited in the line configuration is put out in the lower row. If the line is not in idle state and call partner information is available, this information is shown in the upper row.

3.14.1 Icon Displays in the Line Window

The following status displays are shown per line:

Icon	Meaning
Line type	
	Corresponds to the primary line (own line).
	Corresponds to the secondary line (foreign line).
Line options	
	Line is the default line for incoming calls.
	Line is the default line for outgoing calls.
	Line is a private line.
	Line is a commonly used line.
	Line rings in case of incoming connection requests.
	Line does not ring in case of incoming connection requests.
	Line rings delayed in case of incoming connection requests.
Line/call status	
	Ringer cutoff (no call)
	Ringer cutoff (diverted)
	Line is used for an outgoing connection request, corresponds to status start / accomplish dialing.
	Line is used for an outgoing connection request, destination rings.
	Line is used, destination is busy.
	Line is used, status connected.
	Incoming connection request on preferred line.

Icon	Meaning
	Incoming connection request on non-preferred lines.
	Line is used by third party (currently not operable).
⊢	Call is publicly held on the line and can be accepted (similar to parking).
⊣ ⊢	Connection is held (in case of a consultation on one / the same line).

3.14.2 Working with Lines

Initiating a call

The following options are available for calling a contact via a specific line:

- You doubleclick the desired line and dial the call partner in the integrated or free phone. The connection is set up, using this line.
- Using the drag & drop method you drag a contact from the contact directory to the desired line. The connection is set up, using this line.
- Click on in the main bar. The preferred line will automatically be used for the following connection request.

Accepting a call

The following options are available to accept a call on a specific line:

- You can accept incoming connections requests with a doubleclick on the line on which they arrive. You conduct the call via this line then.
- If you click on in the main bar, the preferred line is automatically used to answer inbound connection requests (for incoming calls).

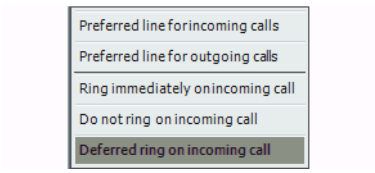
Parking a call

The following options are available for parking a call:

- You park an active call on a line by doubleclicking the line status icon.
- Another doubleclick on the line status icon will reactivate parked or privately held calls.

3.14.3 Context Menu of a Line

Right-click the line you want to edit in the **Lines** frame. A context menu opens.



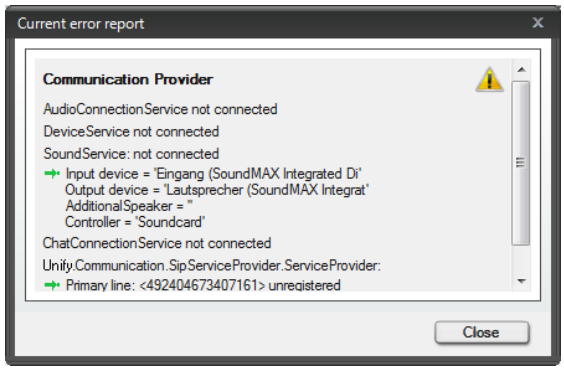
The currently active line options are marked and can be modified.

You can select one of the following features:

- **Preferred line for outgoing calls**
  The line is preferred for outgoing calls.
- **Preferred line for incoming calls**
  The line is preferred for incoming calls.
- **Ring immediately on incoming call**
  Incoming connection requests are signaled.
- **Do not ring on incoming call**
  Incoming connection requests are not signaled.
- **Deferred ring on incoming call**
  Incoming connection requests are signaled delayed.

3.15 Status Bar

In the status bar on the left hand side you can see the number of occurred errors. When you doubleclick this error status you receive more detailed information about the errors.

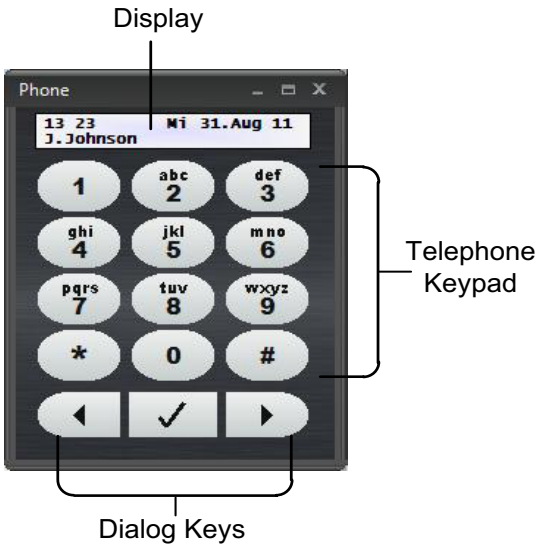


Furthermore, the right-hand section of the status bar displays the volume menu for setting the **ring tone**, **microphone** and **speaker** volume when no call is active. When the SIP connection is active, the payload is displayed. If a new audio or video device is connected to the user computer while OpenScape Desktop Client is operating, the corresponding icon will appear at this position.

3.16 Free Phone

The OpenScape Desktop Client has a telephone that can be freely positioned on the desktop and used as dial aid. With this telephone you can make calls, accept incoming calls etc.

To display the **Phone** window on the desktop, select **Pearl menu > View > Free phone**.



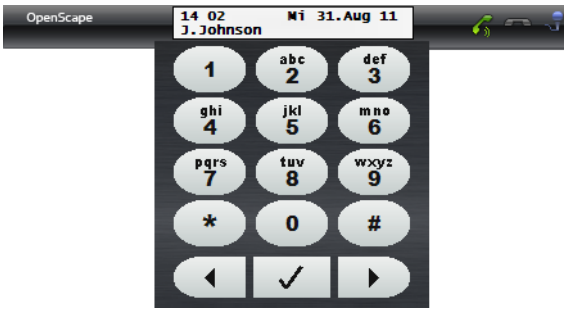
NOTICE: The free phone is only available (selectable in the **Pearl menu > View**) when the **Telephone** module is active.

The OpenScape Desktop Client free phone offers the following controls:

- **Display**
  The two-line display shows time, date and your own phone number. During an active call you can use dialog keys to browse different functions or select them.
- **Telephone keypad**
  On the telephone keypad you find digit keys from **[0]** to **[9]** (with the corresponding assignment to letters) as well as the keys **[*]** and **[#]**. Depending on the input mode you can enter normal and special characters by pushing keys. Push the appropriate key as often as it takes to show the desired character in the display.
- **Dialog keys**
  You use the three dialog keys for browsing (back and forth) and to confirm functions.

3.17 Integrated Phone

The OpenScape Desktop Client has an integrated phone that can be used as a dialing aid. The integrated phone is docked to the main bar. After a mouse click on the telephone icon in the main toolbar, a keypad appears under the telephone icon. Via this telephone you can make calls, accept incoming ones etc.



The integrated phone of OpenScape Desktop Client offers the same controls as in the free phone.

3.18 SoftPhone

To display the **SoftPhone** window on the desktop, select in the **Pearl menu > View > SoftPhone**.

> ***NOTICE:*** Opening the softphone via **Pearl menu > View** is only possible with the active **SoftPhone** module.

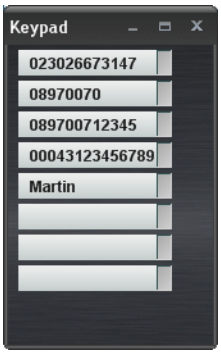
The SoftPhone serves as dial aid that you can freely position on the desktop. To integrate the softphone in the main window or to remove it from there, click on the depicted area at the left margin under the window caption bar with the mouse-button kept pressed.

The following operating options are available in the OpenScape Desktop Client softphone:

- **Display**
  The two-line display shows time, date and your own phone number. During an active call you can use dialog keys to browse different functions or select them.
- **Keypad**
  On the keypad you find digit keys from **[0]** to **[9]** (with the corresponding assignment to letters) as well as the keys **[*]** and **[#]**. Depending on the input mode you can enter normal and special characters by pushing keys. Push the appropriate key as often as it takes to show the desired character in the display.
- **Dialog keys**
  You use the three dialog keys for browsing (back and forth) and to confirm functions.
- **Audio keys**
  The four audio keys let you switch an additional speaker as well as a microphone on or off, initiate or accept a call, and clear an existing connection or reject a connection request.

3.19 Extended Keypad

If you operate OpenScape Desktop Client via the **HiPath Provider** at a OpenScape 4000 or HiPath 3000, the extended keypad is available to you in the OpenScape Desktop Client. It contains programmable function keys, which are allocated with phone numbers frequently dialed or with telephony features.



You open the extended keypad via the **Pearl menu > View > Extended Keypad**.

The keypad can contain up to four key columns. The number of key columns, the number of function keys per column as well as the allocation of the function keys depends on the selected device or key module type in the **HiPath Provider** configuration.

If the extended keypad comprises several columns, you can unfold or hide them at will. For this purpose, use the triangle icons at the top margin of the respective column as exemplified in the next figure.

After the OpenScape Desktop Client setup, some keys may already be allocated with default functions of the HiPath 3000/4000 used.

The telephone or key module type configured in the **HiPath Provider** determines whether Electronc Key Labeling (EKL) is available. If EKL is available, all keys that are or will be programmed with a function are automatically labelled with the function text specified in the HiPath system for this purpose. In this case you cannot individually label the function keys configured in OpenScape Desktop Client anymore.

If you have a telephone or key module type without EKL selected for OpenScape Desktop Client, you can use the context menu of the extended keypad to allocate keys with functions individually and label them manually.

3.19.1 Context Menu of the Extended Keypad

You can use the context menu of the extended keypad to allocate keys with functions individually and to label such keys.

> ***NOTICE:*** If a telephone or key module type with EKL has been configured for the OpenScape Desktop Client telephone, you cannot allocate the keys of the extended keypad with functions individually and label them.

The following options are available for allocating and labelling the keys:

- **Change Caption...**
  Opens a dialog in which you can define a caption of the selected key.
- **Accept caption from display**
  Allows copying a key caption from the current display of the OpenScape Desktop Client telephone. Two options are available:
  - **Accept caption from display**
    Copies the phone number currently shown in the telephone display as key caption.
  - **Shift key + Accept caption from display**
    Copies the name currently shown in the telephone display as key caption.

3.20 Webbrowser

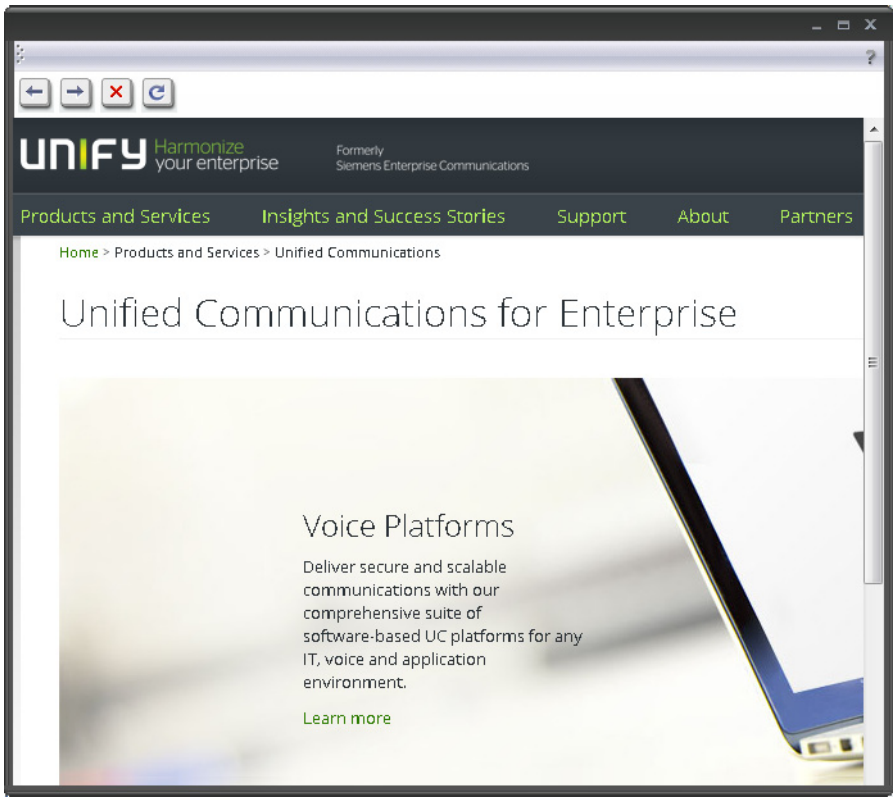
> ***NOTICE:*** Using the web browser features requires the **Webbrowser** module to be active.

You can use the OpenScape Desktop Client webbrowser like any other standard browser to open configured internet pages and deploy navigation features. The web browser thus enables fast access to internet pages frequently visited.

Opening the webbrowser

To open the window that displays the webbrowser, select **Pearl menu > View > Webbrowser**. In the submenu then available select a previously configured internet page.

The caption bar of the opened window features the internet page's name that was defined during the configuration of the internet addresses.

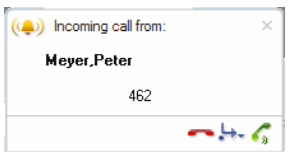


Four icons in the top left corner of the window assist you in working with the webbrowser:

- **Page back**
  Makes the browser return to the previous page.
- **Page forward**
  Makes the browser move forward to the next page.
- **Cancel**
  Stops the current internet page loading.
- **Update**
  Reloads the currently displayed internet page.

3.21 Notifier Toast

An incoming call displays a notifier toast in the bottom right area of the desktop on the first ring and for as long as the call continues to ring. You can accept the call ( ), reject it ( ) or forward it to another phone number ( ).



If the caller's phone number was found in the configured directories (private contact list, LDAP directory, Microsoft Outlook directory or Lotus Sametime

contact list), the notifier toast displays the contact's name and phone number. Otherwise, it contains the information "Unknown".

The notifier toast will stick and stay when you hover the cursor over it.

Notifier Toast for Call Pickup Group

> ***NOTICE:*** To use the *Enable the Group pickup call toaster* feature you need to perform specific settings in the modules **Notifier Toast (Desktop Alerts)** and **[Virtual] SIP Service Provider > Codes**.

A desktop notification for a call pickup group is displayed whenever a group member receives a call. The notification persists until the call is accepted or the caller hangs up. The names of the caller and of the callee are displayed if they were found in the configured directories. Otherwise, the names are represented as "Unknown".

You can accept the pickup group call with a click on  .

3.22 Screensaver

The OpenScape Desktop Client offers a screensaver feature that you can configure as default screensaver for the user computer. In this state you can dial a configured speed-dial number as well as accept and terminate an incoming call for yourself or a member of your call pickup group without having to close the active screensaver.

> ***NOTICE:*** You can start the screensaver on the user computer only if the OpenScape Desktop Client has been started also.

Depending on the connection status of OpenScape Desktop Client, the screensaver displays the following controls:

- **<Speed-dial number> Dial**
  If speed-dial numbers have been configured for the screensaver, you can click on Dial to open a menu for selecting the phone number to be dialed.

  > ***NOTICE:*** OpenScape Desktop Client must have been started so that a connection to the speed-dial number can be established.

- **Accept call**
  When a call arrives and the screensaver is active, the **Accept call** button appears. With this button you can directly accept the call without deactivating the screensaver.
- **Disconnect call**
  Terminates a call conducted while the screensaver is active.

- **Close Screensaver**
  Deactivates the screensaver.
- **OpenScape Desktop Client is up** or **OpenScape Desktop Client is not up**
  This display indicates the OpenScape Desktop Client status. If the OpenScape Desktop Client is inactive, you cannot accept incoming calls or establish a connection with the speed-dial number.

3.23 Operating OpenScape Desktop Client with the Computer Keyboard

The following information refers to operating the OpenScape Desktop Client with the computer keyboard:

Action	Key/hotkey
System-wide keys (independent from the cursor/mousepointer position)	
Accept incoming call	Key configurable
End active call (hangup)	Key configurable
Divert call (the current marking is used as forwarding destination).	Key configurable
Mousepointer in the OpenScape Desktop Client telephone or on the main bar	
Search features	**[left arrow key]** or **[right arrow key]**
Confirm feature	**Return key**
Return to idle state in the system menu	**[Esc]** (this key corresponds to the icon in the main bar.)
Dial directly from the clipboard; the conversion of the characters to be dialed is determined by the network access. The office code is not added.	**Shift key + [Ins]**
Dial directly from the clipboard; the conversion of the characters to be dialed is determined by the network access. In this case the office code is added.	**[Ctrl] + [V]**

In the OpenScape Desktop Client you can frequently directly dial with digit keys by selecting the relevant input field with a mouseclick and entering the number.

NOTICE: In the **Web browser** window you cannot directly dial with the keypad.

3.23.1 Operating with Hotkeys

You can use the OpenScape Desktop Client without the mouse via hotkeys.

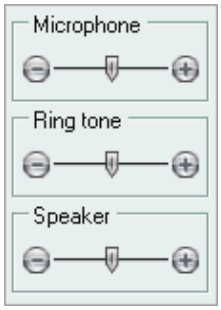
- Push the **Alt** key to display the hotkeys options. The options appear as letters and numbers over each function.

- Push the letter or number that corresponds with the function you want to use. Some of the functions are triggered immediately. Other functions display additional hotkey options (letters and numbers) that can be pushed.
- Push the **Esc** key at any time to return to the respective previous hotkey level. You can continue pushing the **[Esc]** key until the display of hot-key options does no longer appear.
- Push the **Alt** key a second time to hide the hotkey options.

3.24 Audio Control Operating Elements

When you integrate an audio scheme in OpenScape Desktop Client, various audio icons are displayed in the main bar depending on the hardware and user settings. Using these audio icons you can quickly and effectively activate the corresponding features:

Icon	Function / Meaning
	**Lift receiver** (handset or another provided audio device) • In case of an active connection request, for example an incoming call: accept call and set up connection. • In idle state: activate handset or another provided audio device.
	Hanging up (handset or another provided audio device) • In case of an established connection: close connection. • In the system menu: finish scrolling, return to idle state.
	**Microphone on/off** • In case of an established connection: activate or deactivate audio device muting.
	**Loudspeaker on / off** • In case of an established connection or in idle state: activate or deactivate speaker.

Icon	Function / Meaning
	**Headset on / off** • In case of an established connection or in idle state: activate or deactivate headset operation.
	**"Volume" menu** Open the "Volume" menu with a click on the "Volume" button to set the volume of **microphone**, **ring tone**, **speaker** and additional speaker (if configured) independently from your respective call state in OpenScape Desktop Client. Here you can adjust the volume of the relevant audio device. Depending on the operating system these icons are not visible because you can perform such settings only via the operating system settings.
	**Additional speaker on / off** If your computer has an operable additional speaker and this speaker is configured in the settings for the current audio scheme, you can activate or deactivate it with a click on the "additional speaker" icon.

NOTICE: The **headset** icon and the headset volume control are only available if you use a terminal device with appropriate signaling and this audio device was configured in the active audio scheme.

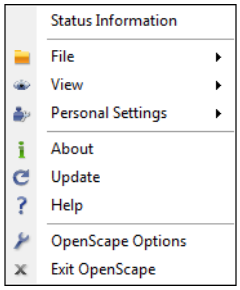
3.25 OpenScape Icon and Context Menu in the Notification Area of the Windows Task Bar

When the OpenScape Desktop Client is started, the OpenScape icon is displayed in the notification area of the Windows task bar by default. In the **Settings dialog > Advanced tab > General > Task Bar and Notification Area** you can activate/deactivate displaying this icon. The OpenScape icon displays status messages about missed calls and signals error messages and warnings .

NOTICE: You can open the current error report via the **<number of errors/warnings>** button in the status bar of the main window.

Double-clicking the OpenScape icon displays the main window again after it has been minimized or not the currently active window.

With a click of the right mouse button on the OpenScape icon you open the OpenScape context menu.



The OpenScape context menu provides the following features:

- **Status Information**
  This option provides connection status information about missed calls, for example.
- **File**
  You can use this option to create a backup file of your contact list in `CSV` or `XML` format (**export contacts to a file**) or restore your contact list (**import contacts from a file**).
- **View**
  Depending on the active modules, the individual user may deploy different options in the view. For example, you can display the main bar, open the web browser of OpenScape Desktop Client, show the contact list, the journal and the call control, etc.
- **Personal settings**
  Enables configuring an individual ring tone in the `WAV` or `MP3` format. A click on **Ring tones** opens the **Settings** dialog with options for configuring ring tones of the currently connected communications system - **[Virtual] SIP Service** or **HiPath Provider**.
- **About**
  Opens the **Product information** window and displays the OpenScape Desktop Client version number.
- **Update**
  Establishes a connection to the latest OpenScape Desktop Client version that your system administrator has downloaded. If no update is available, a message informs you accordingly.
- **Help**
  Opens the program's online help.
- **OpenScape Options**
  Serves to display the current application settings.
- **Exit OpenScape**
  Serves to close the application.

3.26 IBM Notes Integration

If the IBM Notes client is already available on the computer when you install OpenScape Desktop Client, you can use the IBM Notes Integration feature after

the setup. It extends the IBM Notes client by the features of the OpenScape Personal Edition. This enables IBM Notes users to deploy features of the OpenScape Personal Edition in their familiar IBM Notes environment.

NOTICE: To use the IBM Notes Integration you must add the **Lotus Notes Provider** module to the OpenScape Desktop Client configuration. A guide to adding or removing modules is given in the setup manual of OpenScape Personal Edition.

NOTICE: To use the IBM Notes Integration, a IBM Notes client must have been installed and started on the user computer.

The IBM Notes Integration provides the following features:

- **Searching IBM Notes address books for contacts**
  If you have IBM Notes address books configured in the **Lotus Notes Provider** you can search them for contacts. This search option is available in the **Directory Search** scope.
- **Initiating calls in the IBM Notes client**
  You can initiate a call from your private or global IBM Notes address book. In this process, all phone number information contained in the IBM Notes address book for the selected contact is transferred to OpenScape Desktop Client. If several phone numbers are available, you need to select one of them for setting up a connection.
  To initiate a call in the IBM Notes client, select the desired IBM Notes contact in the IBM Notes address book. Then click on **Dial** in the toolbar of the IBM Notes client.

  NOTICE: The **Dial** button in the toolbar of the IBM Notes client is always displayed. However, it only works in IBM Notes databases configured in the **IBM Notes Provider**.

  As soon as you have initiated the call, the main window of OpenScape Desktop Client appears in the foreground. In there you can control the connection in the **Call Control** frame as usual.
- **Resolving phone numbers and names**
  The IBM Notes Integration enables resolving phone numbers and names on the basis of IBM Notes address books. Phone numbers and names are resolved in the background. Private as well as global IBM Notes address books are supported.

3.27 Microsoft Outlook Integration

If the Microsoft Outlook client is already available on the computer when you install OpenScape Desktop Client, you can use the Microsoft Outlook Integration feature after the setup. It extends the Microsoft Outlook client by the features of the OpenScape Personal Edition. This enables Microsoft Outlook users to deploy

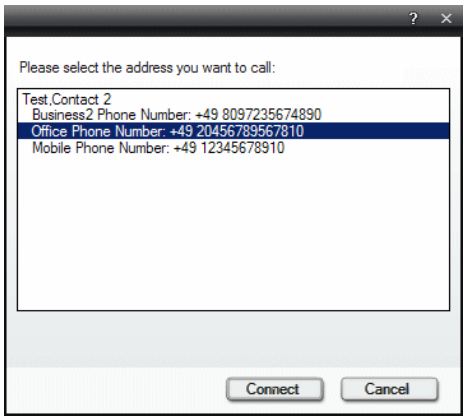
features of the OpenScape Personal Edition in their familiar Microsoft Outlook environment.

NOTICE: To use the Microsoft Outlook Integration you need to add the **SQLite Provider** module to the OpenScape Desktop Client configuration. How to add or remove modules is outlined in the setup manual of the OpenScape Personal Edition.

NOTICE: To use the Microsoft Outlook Integration, a Microsoft Outlook client must have been installed and started on the user computer.

The Microsoft Outlook Integration enables the following features:

- **Finding contact information in Microsoft Outlook contact directories**
  The **SQLite Provider** is used for accessing the information of Microsoft Outlook contact directories. The corresponding module is installed with the Microsoft Outlook Integration. In this process, it is automatically pre-configured for accessing the information of Microsoft Outlook contact directories. This search option is available in the **Directory Search** scope.
- **Initiating calls in the Microsoft Outlook client**
  For this feature, the toolbar provides different Microsoft Outlook windows and the **Dial** button. You can initiate a call from the following Microsoft Outlook windows:
  - Your Microsoft Outlook contact list or the window of an opened Microsoft Outlook contact
    If you have selected a contact entry in your Microsoft Outlook contact list and click the **Dial** button, Microsoft Outlook evaluates the current object (name, phone number, e-mail address etc.) and determines the associated phone number based on the Microsoft Outlook contacts. The phone number is transferred to the OpenScape Desktop Client that uses it as destination number and sets up a connection.
    If several phone numbers are available for the current Microsoft Outlook contact, for example business phone, private and mobile phone, the following dialog in which you must select one of them opens.



NOTICE: OpenScape Desktop Client refreshes your Microsoft Outlook contacts only with every program start. If you have added a new contact in Microsoft Outlook or changed contact data, you must restart the OpenScape Desktop Client. Only then your new contact entries or your changes in Microsoft Outlook are applied by the OpenScape Desktop Client.

If no phone number information is available, the connection setup fails.

– Your Microsoft Outlook inbox or the window of an opened e-mail
If you select an e-mail and click the **Dial** button then, the Microsoft Outlook client searches the Microsoft Outlook address books (your private Microsoft Outlook contact list and, for example, the corporate directory) for the originator's name. The phone numbers that can be associated to the originator are transferred to the OpenScape Desktop Client.
If several phone numbers have been stored for the selected contact, proceedings are the same as outlined above.
If no phone number information is available for the selected e-mail originator, the connection setup fails.

NOTICE: This dialog appears even if you have selected a sent e-mail with several addressees. Select the desired contact from this dialog.

– Your Microsoft Outlook task list or the window of an opened task
You can compare initiating a call from a task with the procedure described for initiating a call from your Microsoft Outlook inbox.

– The window of an opened appointment in your Microsoft Outlook calendar
You can compare initiating a call from an appointment with the procedure described for initiating a call from your Microsoft Outlook inbox.

As soon as you have initiated the call, the main window of OpenScape Desktop Client appears in the foreground. In there you can control the connection in the **Call Control** frame as usual.

• **Resolving phone numbers and names**
The Microsoft Outlook Integration enables resolving phone numbers and names on the basis of Microsoft Outlook address books. Phone numbers and names are resolved in the background. Private as well as global Microsoft Outlook address books are supported.

3.28 Operation in Restricted Mode

You can operate the OpenScape Personal Edition as SIP Softphone at an OpenScape Voice with a so-called survivability solution (for example OpenScape Branch). If the OpenScape Voice fails, the survivability solution ensures that the program switches automatically to restricted mode, thus being able to permanently provide basic SIP telephony services.

The status bar of OpenScape Personal Edition signals operation in restricted mode by a corresponding information display . In this case the following functions are available in the **Call Control**:

- Make call
- Accept an incoming call
- End call
- Set active call to on-hold
- Retrieve held call
- Make a consultation call
- Connect consultation call subscriber with waiting subscriber

When the OpenScape Voice is available again, the OpenScape Desktop Client returns automatically to the normal operation mode.

3.29 Session Expiring Timeout for ODC PE VDI

The terminal with VDI (Citrix) enters in stand-by mode after 15 minutes. in case of lacking communication with the softphone installed in the user's terminal.

This can happen for several reasons :

- result of hibernating the terminal computer
- result of sleeping the terminal computer
- missing network

The following warning message will be presented in this situation: The session has expired because your terminal is out for more than 15 minutes. This warning message reports that ODC!PE went to stand-by/safety mode in order to optimize resources in the Citrix Terminal server.

4 Step-by-Step

The information contained in this chapter helps the user to quickly familiarize himself/herself with the basic features of this software solution.

4.1 General Information

This section provides information about the following topics:

4.1.1 How to Start the Program

How to start the program OpenScape Desktop Client:

Step by Step

› Click on **Start** in the Windows task bar and select **OpenScape Desktop Client**.

> ***NOTICE:*** OpenScape Desktop Client starts always under the user profile used last. If an LIN number is configured for this profile, the **Logon** dialog appears immediately after the program start. If no LIN number exists for this profile, the OpenScape Desktop Client starts without any further login actions required. To change the profile then, you need to push the **shift key** at the program start. In this case the Logon dialog is also displayed if no LIN number has been defined for the last user.

4.1.2 How to Log on to the Program

> ***NOTICE:*** The program always opens the **Logon** dialog for the user to log in if a user profile already exists under the current Windows account.

To log on to the OpenScape Desktop Client in the dialog for the default user logon proceed as follows:

Step by Step

1) Start the OpenScape Desktop Client.

The **Logon** dialog opens.

2) Use the **Profile** combo box to select the desired profile or create a new profile via the **Add Profile ...** button.

3) Apply the default **language** used for displaying the OpenScape Desktop Client controls and online help or select another language from the list of available languages.

4) Then click on **OK**.

The Logon dialog closes.

The program is started.

4.1.2.1 How to Create a new Profile

You can change the user profile only during the default logon to the communications system by proceeding as follows:

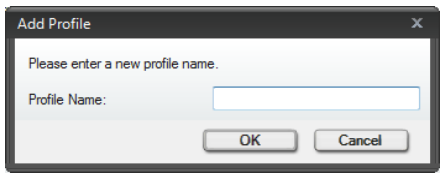
Step by Step

1) Start the OpenScape Desktop Client.

The **Logon** dialog opens.

2) Click on the **Add Profile...** button.

The **Add Profile** dialog opens.



3) Enter a **Profile Name**.

4) Confirm your entries with **OK**.

The **Add Profile** dialog closes.

You have successfully created the new user profile.

4.1.3 Configuring the Main Window

The main window opens after the OpenScape Desktop Client start. It contains the frames **Call Control**, **Contacts** and **Journal** by default.

4.1.3.1 How to Integrate a Frame in the Main Window

How to integrate further frames, such as **Directory Search**, in the main window:

Step by Step

1) Select under **Pearl Menu > View** the **Directory Search** option.

The **Directory Search** dialog opens as separate window.

2) Click in the **Directory Search** dialog on the area in the caption bar and drag the mouse pointer to the desired position in the main view with the left mouse button kept pressed.

The **Directory Search** window is now integrated in the main view.

4.1.3.2 How to Remove Frames from the Main Window

To remove a frame (for example **Directory Search**) from the main window, click on in the caption bar of the frame. The frame is closed. It is not automatically displayed in the main window again after a reboot of the program, but must be added manually via the **Pearl menu > View**.

4.1.3.3 How to Change the Quick-Access Toolbar Position

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to position the quick-access toolbar under the ribbon in the main window:

Step by Step

1) Click on the icon to the left of the OpenScape label in the caption bar of the main window.

The context menu of the quick-access toolbar is displayed.

2) Select the **Show Below the Ribbon** option.

The quick-access toolbar is displayed under the ribbon.

NOTICE: To move the quick-access toolbar back to its original position above the ribbon, select the **Show Above the Ribbon**

option, which is displayed instead of the **Show Below the Ribbon** option in the context menu.

4.1.3.4 How to Add an Icon to the Quick-Access Toolbar

How to integrate an icon, for example a frequently used one, in the toolbar for quick access:

Step by Step

1) Rightclick the desired icon in the ribbon to display a context menu.

A context menu opens.

2) Select the **Add to Quick Access Toolbar** option in this context menu.

The selected icon is displayed in the toolbar for quick access.

4.1.3.5 How to Remove an Icon from the Quick-Access Toolbar

Proceed as follows:

Step by Step

1) Rightclick the desired icon in the quick-access toolbar.

A context menu opens.

2) Select the **Remove from Quick Access Toolbar** option.

The selected icon is no longer displayed in the quick-access toolbar.

4.1.4 How to Shut the Program Down

The program can be shut down as follows:

Step by Step

1) Rightclick the OpenScape icon in the notification area of the Windows taskbar.

The OpenScape context menu is displayed.

2) Select **Exit OpenScape**.

The main window closes and the OpenScape Desktop Client is shut down.

4.2 Getting Started with the Program

This section contains information about configuration adjustments to be performed at the initial program start after the OpenScape Desktop Client setup.

NOTICE: You find detailed information about the installation and uninstallation of OpenScape Personal Edition in the manual *OpenScape Personal Edition V7 Installation Installation and Administration*.

4.2.1 How to Log on for the first Time

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

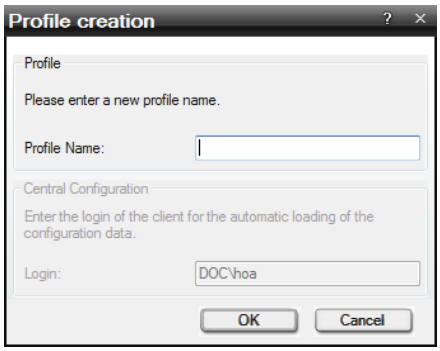
NOTICE: When you log on as user for the first time, you need to configure the user-specific settings to for example identify the OpenScape Desktop Client user. You cannot operate OpenScape Desktop Client without these settings.

How to log on to the OpenScape Desktop Client for the first time:

Step by Step

1) Start the OpenScape Desktop Client.

The **Profile creation** dialog opens.



2) Specify the name of the profile or location you wish to work with under **Profile Name**.

3) Click on **OK**.

The **Profile creation** dialog closes.

The program creates the specified profile and switches automatically to the Logon dialog in which you perform the language and LIN settings as well as manage the configuration settings.

4.2.2 Initial Configuration

When you perform the initial configuration in the **Settings** dialog you set the user data for connecting the communications system as well as the audio device for signaling connection requests and for conducting calls.

NOTICE: When you log on as user for the first time, you need to configure user-specific program settings, for example to connect to the communication systems, in addition to the user-specific login information. You cannot operate OpenScape Desktop Client without these settings.

4.2.2.1 How to Configure an Audio Device

So that you can conduct phone calls, your computer must be equipped with speaker and microphone, for example in the form of a headset. The hardware settings are grouped in audio schemes.

How to configure an audio device:

Step by Step

1) Start the OpenScape Desktop Client.

The Logon dialog opens.

2) Click on the **Manage** button.

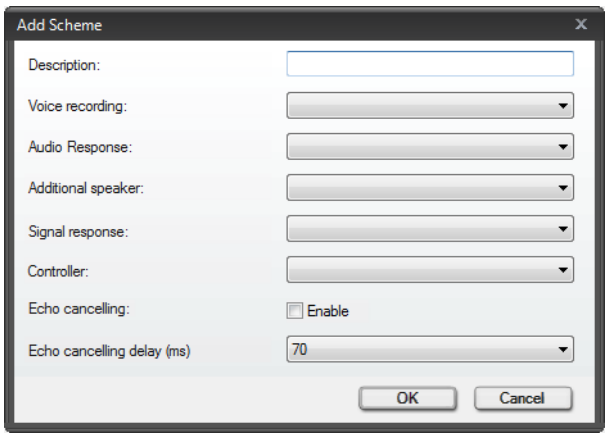
A selection menu opens.

3) Select the **Settings** menu option.

The **Settings** configuration dialog opens.

4) Switch to the **Audio Schemes** tab and click on **Add...**.

The following dialog opens:



5) Specify the **Description** of the audio scheme.

6) Define the audio hardware for the following features:

- **Voice recording**
  Microphone for voice recording
- **Audio Response**
  Primary playback speaker
- **Additional speaker**
  Additional speaker for voice output.

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

- **Signal response**
  Speaker for the signal output (ringing).
- **Controller**
  Select the hardware you use. If this hardware is not contained in the selection list, then use **Soundcard**.

7) Activate the **Echo cancelling** option.

8) Select the value suitable for your system under **Echo cancelling delay (ms)**.

9) Click on **OK**.

The **Add Scheme** dialog closes.

The new audio scheme is the top entry in the list of configured audio schemes on the **Audio Schemes** tab. This sets it automatically as the currently used hardware for audio connections.

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

4.2.2.2 How to Configure a HiPath Connection

Prerequisites

- When installing the program you selected the **HiPath Provider** as default provider.

How to configure the **HiPath Provider** module, thus the Softphone functionality of OpenScape Desktop Client:

Step by Step

1) Start the OpenScape Desktop Client.

The Logon dialog opens.

2) Click on the **Manage** button.

A selection menu opens.

3) Select the **Settings** menu option.

The **Settings** dialog opens.

4) Switch to the **Advanced** tab.

5) Under **HiPath Provider > Device** you select your **Phone type** and your **Key module type** if required.

6) Under **HiPath Provider > Main connection** set the following parameters:

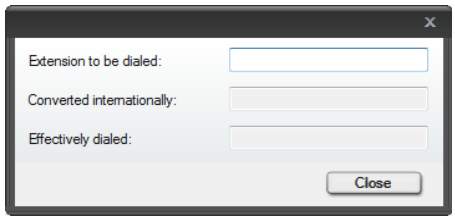
- **Type**: <Select your PBX here.>
- **Gatekeeper**: <Enter here the IP address of the communications system gatekeeper.>
- **Extension number**: <Enter here the number under which you can be reached on the connected communications system.>
- **Password**: <Specify here the password configured for your extension number.>
- **Own IP address**: <Select the **Detect automatically** option.>

7) Under **HiPath Provider > Main network access** determine the following parameters:

- **Country code**: <Enter here the international prefix for your site, for example `49` for Germany.>
- **Area code**: <Enter here the area code of your location without leading zero.>
- **System identification number**: <Enter here the system identification number.>
- **Trunk code:** <Enter the code configured on your system for allocating outbound trunks, for example 0.>
- **Prefix for long distance calls:** <Enter here the network operator code for long distance calls, for example 0.>
- **Prefix for international calls**: <Enter the network operator code for international calls, for example `00`.>

8) Click the **Test** button to check your entries.

The following dialog opens.



9) Enter the **Extension to be dialed**. Based on the parameters set for the **Main network access**, the OpenScape Desktop Client automatically determines the phone number in the international number format in the **Converted internationally** field.

10) When the test has confirmed your entries for the main network access parameter as correct, click on the **Close** button.

The test dialog closes.

You have configured the OpenScape Desktop Client as your softphone with connection to a HiPath communications system.

4.2.2.3 How to Configure an SIP Connection

Prerequisites

- When installing the program you selected the SIP Provider as default provider.

How to configure the **[Virtual] SIP Service Provider** module, thus the softphone functionality of OpenScape Desktop Client:

Step by Step

1) Start the OpenScape Desktop Client.

The Logon dialog opens.

2) Click on the **Manage** button.

A selection menu opens.

3) Select the **Settings** menu option.

The **Settings** dialog opens.

4) Switch to the **Advanced** tab.

5) Under **[Virtual] SIP Service Provider > Main line** enter the following parameters:

- **User**: <Enter your phone number here>
- **Display**: <Enter your name here>
- **Tooltip text**: <Enter something like `SIP Phone` optionally>
- **ID**: <Enter your phone number or e-mail address.>

- **Password**: <Enter here the password provided by your system administrator.>

6) Under **[Virtual] SIP Service Provider > Registrar** set the following parameters:

- **Server**: <Enter here the IP address provided by your system administrator>
- You determine the port for the server connection in the **Connection** area. Your system administrator will provide further information.

7) Under **[Virtual] SIP Service Provider > Proxy** set the following parameters:

- **Server**: <Enter here the IP address provided by your system administrator>
- You determine the port for the server connection in the **Connection** area. Your system administrator will provide further information.

8) Under **[Virtual] SIP Service Provider > Network access** enter the network access data provided by your system administrator (optional).

> ***NOTICE:*** Make sure that the **Normalize call numbers** option has been set under **[Virtual] SIP Service Provider > Address conversion**. The network access data is otherwise not required.

9) Under **HLM Provider > Licensing**, enter in the **Server** field the IP address of the computer on which the license server for the OpenScape Desktop Client is installed.

You have configured the OpenScape Desktop Client as your SIP softphone.

4.2.2.4 How to Configure the Microsoft Outlook Integration

The Microsoft Outlook Integration feature extends the Microsoft Outlook client by features of the OpenScape Personal Edition.

> ***NOTICE:*** To use the Microsoft Outlook Integration you need to add the **SQLite Provider** module to the OpenScape Desktop Client configuration. A guide to adding or removing modules is given in the setup manual of OpenScape Personal Edition.

> ***NOTICE:*** To use the Microsoft Outlook Integration, a Microsoft Outlook client must have been installed and started on the user computer.

To configure the Microsoft Outlook Integration, proceed as follows:

Step by Step

1) In the main menu of the Microsoft Outlook client, select in case of

- Microsoft Outlook 2003/2007 **Tools > Options > OpenScape Desktop Client** or
- in case of Microsoft Outlook 2010 **File > Outlook Options > Add-Ins > OpenScape Desktop Client > Add-in Options**.

The **Add-in Options** dialog opens.

2) Specify under **Contact folder options** the private contact folders to be used by the Microsoft Outlook Integration:

- If you wish to use all private contact folders, activate the **Read all private folders** option.
- If you wish to use only selected private contact folders, activate the **Read all private folders, except** option.

3) If you opt for the **Read all private folders, except** option, click on the **Add** and **Remove** buttons to specify all private contact folders not to be used.

4) Determine the public contact folders to be used by the Microsoft Outlook Integration by activating the **Read public folders** option.

5) Then, using **Add** and **Remove**, pick all public contact folders to be used.

6) Confirm with a click on **OK**.

The Microsoft Outlook Integration has been configured and is ready for use.

4.3 Overview of the User Interface

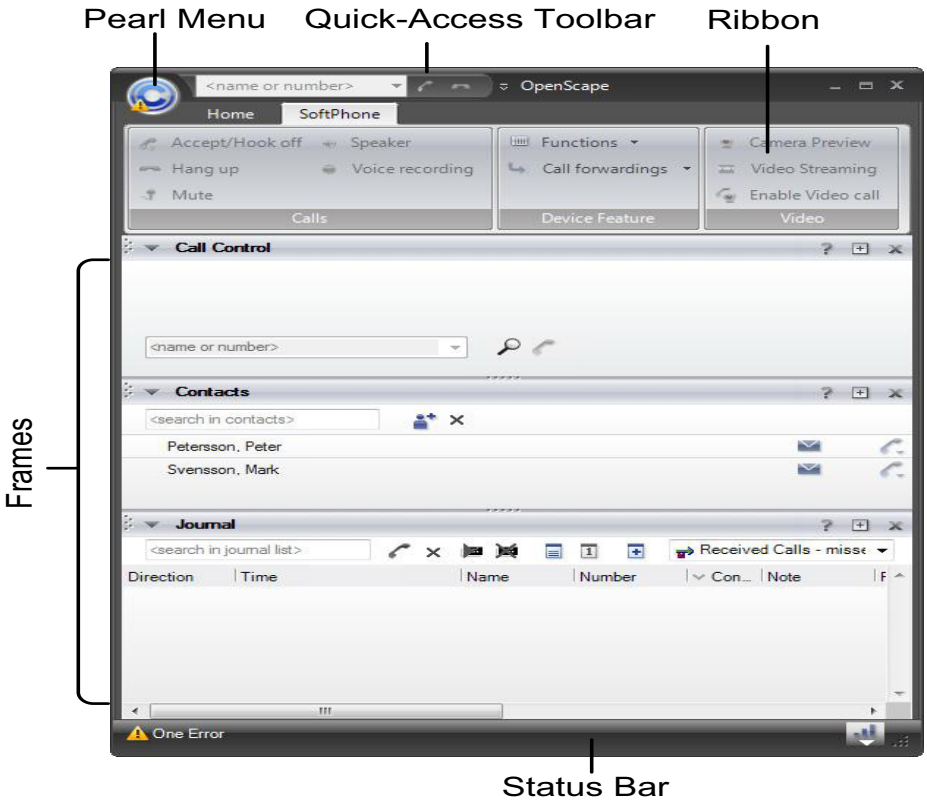
The OpenScape Desktop Client user interface comprises the following controls:

Main bar

The main bar allows operating the program quickly with minimum screen usage. You can dock the main bar to the top margin of the desktop or only display it in its area when you move the mouse pointer.

Main window

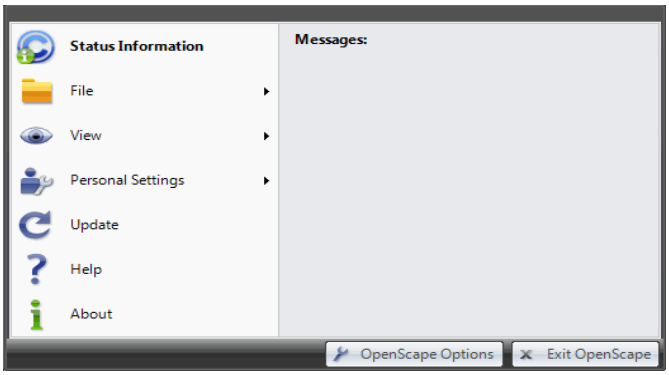
After you have successfully logged in at the system, the program's main window opens.



In the OpenScape Desktop Client main bar you find the following elements from top to bottom:

Pearl menu

This is an application menu icon for accessing the basic OpenScape Desktop Client features.



Quick-access toolbar

A toolbar that provides quick access to functions you have placed in this bar.

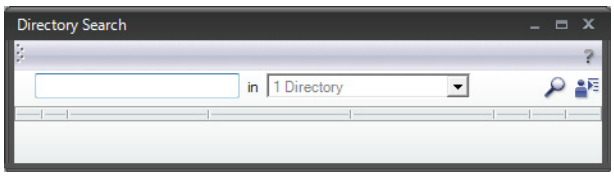
Ribbon

This is a bar that contains the following elements:

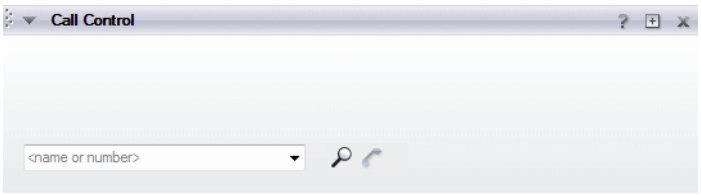
- Tabs organize controls in the ribbon around core scenarios and tasks the users perform with the OpenScape Desktop Client.
- Groups within each tab show related controls together.
- Controls within each group provide OpenScape Desktop Client click-to-action functions.

Frame

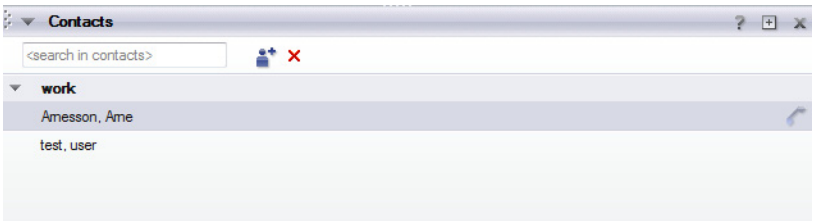
You can customize the main view of the OpenScape Desktop Client by adding or removing frames. The following frames are available via **Pearl menu > View**:



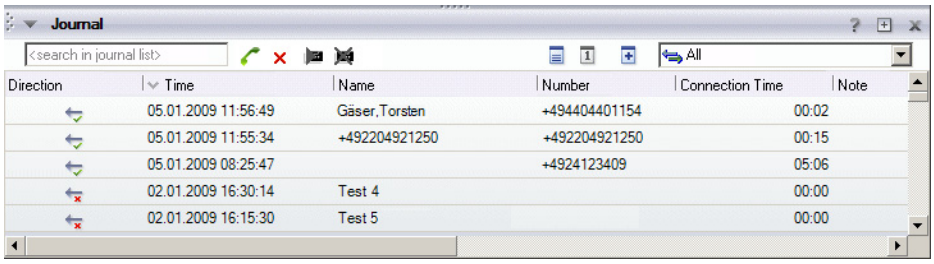
- **Call Control**
  The **call control** lets you look for and call a contact, shows information about in- and outbound calls and provides telephony features during an active call.



- **Contacts**
  The **Contacts** frame represents your private contact list. You can add single contacts to this contact list manually or import such contacts from various directories and then group them in the list to suit your own requirements. You can also directly call single contacts, edit and remove existing contact data as well as send e-mails from the contact list.



- **Journal**
  In the **Journal** frame OpenScape Desktop Client logs all in- and outgoing calls locally on the computer as long as the OpenScape Desktop Client is started. Furthermore, you can initiate connections to logged communication partners from the **Journal**.



- **Directory search**
  OpenScape Desktop Client supports the integration of several directories. You can search these directories for specific contacts and get in touch with them directly by e-mail or phone as well as integrate these contacts in your private contact list.
- **Lines**
  The **Lines** frame lists all lines configured in the OpenScape Desktop Client and activated for display. This includes the stati of the various lines.

- **Status Bar**
  The status bar enables volume setting and displays errors.

4.4 Settings-related Actions

You can perform the following individual settings for each user:

4.4.1 How to Change the Language

The language in which the controls and the online help of the OpenScape Desktop Client are represented is defined during the default login. How to change the language:

Step by Step

1) Shut the OpenScape Desktop Client down.

2) Reboot the OpenScape Desktop Client.

3) Select the **Language** you want to set from the language list in the Logon dialog.

4) Then click on **OK**.

The Logon dialog closes. The language change has been saved and the program starts.

The currently configured language is used for representing the user interface and the online help.

4.4.2 How to Add an Audio Scheme

NOTICE: You can configure a new audio scheme in the **Settings** dialog while logging on to the program as well as during operation.

How to proceed when you operate the OpenScape Desktop Client at an SIP or HiPath communications system and wish to add an audio scheme to the program configuration:

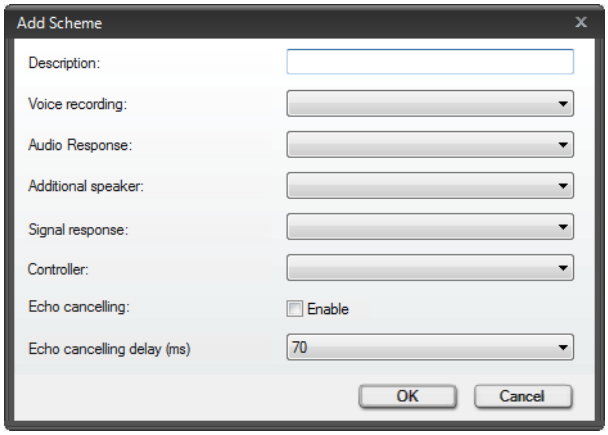
Step by Step

1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Click on the **Add** button.

The **Add Scheme** dialog opens.



3) Assign a name to the new audio scheme in the **Description** field.

4) In the **Voice recording** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice recording.

5) In the **Audio Response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice playback.

6) In the **Additional speaker** combo box select an additional speaker for voice output if required. If an additional speaker has been selected here and this audio scheme is active, the **SoftPhone > Calls** tab, the main toolbar and the Softphone toolbar of the **Video** window display the icon for the *open listening* feature.

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

7) In the **Signal response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for ringtone output.

8) Select the audio hardware of the user computer to be used for controlling special hardware in the **Controller** field.

9) Activate the **Echo cancelling** option.

10) Select the value suitable for your system under **Echo cancelling delay (ms)**.

11) Confirm the settings of the new audio scheme with **OK**.

The **Add Scheme** dialog closes.

The newly defined audio scheme appears as first entry in the list of the configured audio schemes on the **Audio Schemes** tab.

4.4.3 How to Edit an Audio Scheme

NOTICE: You can configure a new audio scheme in the **Settings** dialog while logging on to the program as well as during operation.

How to proceed when you operate the OpenScape Desktop Client at an SIP or HiPath communications system and wish to change the configuration of an audio scheme:

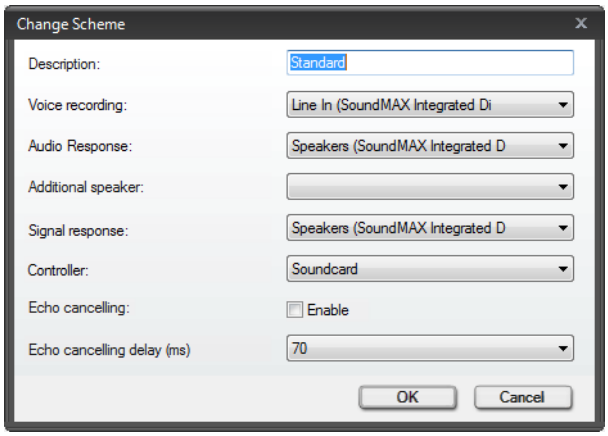
Step by Step

1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Click on the **Change...** button.

The **Change Scheme** dialog opens.



3) Perform the desired modifications.

4) Confirm the changes with **OK**.

The **Change Scheme** dialog closes. Your settings are saved.

4.4.4 How to React to Automatic Audio Device Detection

Under certain circumstances, OpenScape Desktop Client can detect new audio devices as soon as you connect them to the computer.

When OpenScape Desktop Client is operating and you connect your computer with an audio device for which Windows has the required drivers, the main and status bar of OpenScape Desktop Client display the **New Audio Device** icon.

How to configure a new audio scheme for the automatically detected device and add it subsequently:

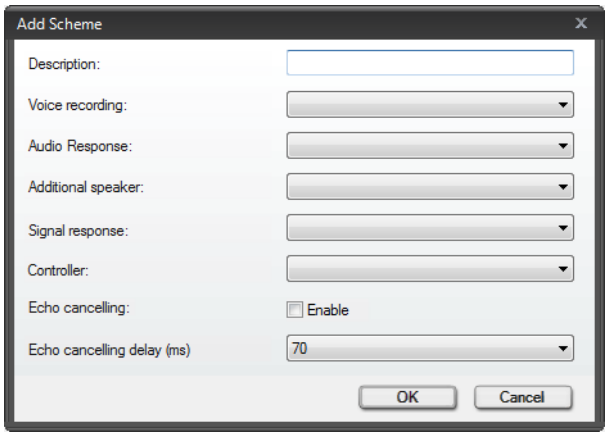
Step by Step

1) Click on the freshly displayed icon.

A message appears, informing you that a new audio device has been detected.

2) Click on **Yes** in this message.

The **Add Scheme** dialog opens.



3) Assign a name to the new audio scheme in the **Description** field.

4) In the **Voice recording** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice recording.

5) In the **Audio Response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for voice playback.

6) In the **Additional speaker** combo box select an additional speaker for voice output if required. If an additional speaker has been selected here and this audio scheme is active, the **SoftPhone > Calls** tab, the main toolbar and the

Softphone toolbar of the **Video** window display the icon for the *open listening* feature.

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

7) In the **Signal response** combo box select the audio hardware of the user computer to be used by OpenScape Desktop Client for ringtone output.

8) Select the audio hardware of the user computer to be used for controlling special hardware in the **Controller** field.

9) Activate the **Echo cancelling** option.

10) Select the value suitable for your system under **Echo cancelling delay (ms)**.

11) Confirm the settings of the new audio scheme with **OK**.

You have now added and configured a new audio scheme for the automatically detected audio device. The **Add Scheme** dialog closes. The newly defined audio scheme appears as first entry in the list of the configured audio schemes on the **Audio Schemes** tab.

4.4.5 How to Add a Video Scheme

Prerequisites

- You operate the OpenScape Desktop Client at an SIP communications system.
- The **SIP Service Provider** module is active.

> ***NOTICE:*** You can configure a new video scheme only in the **Settings** dialog while logging on to the program.

How to add a new video scheme to the OpenScape Desktop Client configuration:

Step by Step

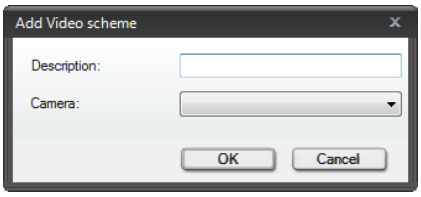
1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Switch to the tab **Advanced > [Virtual] SIP Service Provider > Video schemes**.

3) Click on the **Add** button.

The **Add Video scheme** dialog opens.



4) Assign a name to the new video scheme in the **Description** field.

5) In the **Camera** combo box select the video hardware of the user computer to be used by OpenScape Desktop Client for sending video signals.

6) Confirm your settings with **OK**.

   The **Add Video scheme** dialog closes. The new video scheme appears on the **Advanced** tab in the list of configured video schemes.

7) Perform the settings for your **default video configuration**:

   a) Select the default view for your video screen under **Layout**.

   b) Select the setting for the camera preview (own video image) under **Preview**.

   c) Activate or disable the **Mirrored** option to determine whether or not your own image shall be displayed mirrored in the **Video** screen.

Configuring the video scheme and the default video configuration is now complete.

4.4.6 How to Edit a Video Scheme

Prerequisites

- You operate the OpenScape Desktop Client at an SIP communications system.
- The **[Virtual] SIP Service Provider** module is active.

> ***NOTICE:*** You can change the configuration of an audio scheme only in the **Settings** dialog while logging on to the program.

How to change the configuration of a video scheme:

Step by Step

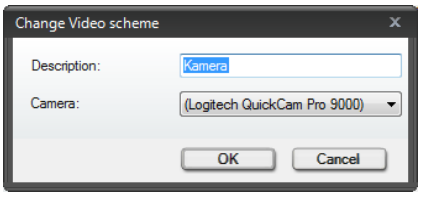
1) Click on the **Manage** button in the **Logon** dialog and select **Settings**.

   The **Settings** dialog opens. The **Audio Schemes** tab is displayed by default.

2) Switch to the tab **Advanced > [Virtual] SIP Service Provider > Video schemes**.

3) Click on the **Change...** button.

   The **Change Video scheme** dialog opens



4) Perform the desired modifications.

5) Confirm your settings with **OK**.

The **Change Video scheme** dialog closes. Your modifications are saved.

6) Perform changes to the **default video configuration** if required.

4.4.7 How to React to Automatic Video Device Detection

Under certain circumstances, OpenScape Desktop Client can detect new video devices as soon as you connect them to the computer.

When OpenScape Desktop Client is operating and you connect your computer with a video device for which Windows has the required drivers, the main and status bar of OpenScape Desktop Client display the **New Video Device** icon.

How to configure a new video scheme for the automatically detected device and add it subsequently:

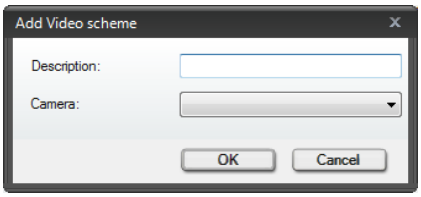
Step by Step

1) Click on the freshly displayed icon.

A message appears, informing you that a new video device has been detected.

2) Click on **Yes** in this message.

The **Add Video scheme** dialog opens.



3) Assign a name to the new video scheme in the **Description** field.

4) In the **Camera** combo box select the video hardware of the user computer to be used by OpenScape Desktop Client for sending video signals.

5) Confirm your settings with **OK**.

The **Add Video scheme** dialog closes. The new video scheme appears on the **Advanced** tab under **SIP Service Provider > Video schemes** in the list of configured video schemes.

6) Perform the settings for your **default video configuration** there:

   a) Select the default view for your video screen under **Layout**.

   b) Select the setting for the camera preview (own video image) under **Preview**.

   c) Activate or disable the **Mirrored** option to determine whether or not your own image shall be displayed mirrored in the **Video** screen.

You have now added and configured a new video scheme for the automatically detected video device and completed the default video configuration.

4.4.8 How to Add a Call Forwarding

After you have configured call forwardings on the **SoftPhone** tab in the **ribbon** of *OpenScape Desktop Client* you can quickly rerout incoming calls at a later date.

How to configure a new call forwarding:

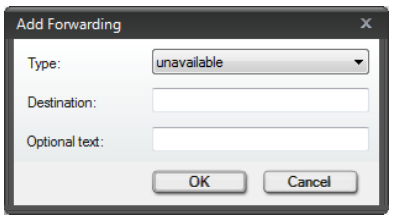
Step by Step

1) In the **ribbon > SoftPhone tab > Device Feature group** click on **Call forwardings**.

   A combo box opens.

2) Select **Add call forwarding**.

   The **Add Forwarding** dialog opens.



3) Select the type of the new forwarding in the **Type** combo box.

4) Enter the phone number to serve as rerouting target in the **Destination** field.

5) If you wish to assign a short description to the new forwarding, make a corresponding entry in the **Optional text** field. This description will later be displayed in the forwarding menu for selection.

6) Click on **OK**.

   The **Add Forwarding** dialog closes.

The new call forwarding has been created.

4.4.9 How to Activate a Call Forwarding

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You must have previously configured at least one call forwarding.

The forwarding menu in the main bar of OpenScape Desktop Client lets you rerout your telephone fast and easily.

How to activate a previously defined call forwarding:

Step by Step

1) Click on in the main bar.

The list of configured call forwardings is displayed.

> ***NOTICE:*** Call forwardings already active are displayed highlighted in the forwarding menu. Forwardings set but not available any more are faded gray.

2) Select the desired list entry.

The selected call forwarding has become active.

4.4.10 How to Disable a Call Forwarding

How to disable an active call forwarding:

Step by Step

1) Click on in the main bar.

The list of configured call forwardings is displayed.

> ***NOTICE:*** Call forwardings already active are displayed highlighted in the forwarding menu. Forwardings set but not available any more are faded gray.

2) Select the list entry of the active call forwarding.

The call forwarding is disabled.

4.4.11 How to Configure an individual Ring Tone

NOTICE: You can edit the settings for the individual ring tone in the **Settings** dialog during the program start as well as during live operation. Click on the **Manage** button in the Logon dialog or select in the **Pearl menu > Personal Settings > Ring Tones**. You can perform these settings at an SIP as well as at a HiPath communications system.

NOTICE: The settings you perform for the individual ring tone at an SIP communications system are identical to the settings for the individual ring tone at a HiPath communications system. You reach them in the **Settings** dialog on the **Advanced** tab under the **[Virtual] SIP Service Provider > Ring tones** or **HiPath Provider > Ring tones** option.

How to select an individual ring tone for signaling incoming connection requests at an SIP or HitPath communications system while operating OpenScape Desktop Client:

Step by Step

1) Open the Pearl menu.

2) Select the **Personal Settings > Ring tones** option.

The **Settings** dialog opens. The **Advanced** tab with option **[Virtual] SIP Service Provider > Ring tones** or **HiPath Provider > Ring tones** is displayed.

3) Activate the **Use individual ring tones** check box.

4) Click the **...** button.

The **Open** window is displayed.

5) In the **Open** window switch to the folder that contains the desired `WAV` or `MP3` file.

6) Select the desired file.

7) Click the **Open** button.

The **Open** dialog is closed.

The selected audio file has been adopted as the ring tone of your OpenScape Desktop Client.

4.4.12 How to Change the Default Ring Tone (HiPath Provider)

NOTICE: These settings are only available while the OpenScape Desktop Client is active, you are logged in and no individual ring tone has been configured.

If you operate your OpenScape Desktop Client at a HiPath communications system and use the default ring tones of the system, you can change the pitch in the following way:

Step by Step

1) Open the Pearl menu.

2) Click on the **OpenScape Options** button.

The **Settings** dialog opens.

3) Switch to the tab **Advanced > HiPath Provider > Operation settings**.

4) Click the **Change Ring Tone** button.

A dialog is displayed and the current ring tone sounds.

5) Click on **Next Ring Tone** or **Previous Ring Tone** to select the desired ring tone.

6) Click the **Close** button to complete the setting.

The selected setting is immediately active.

4.4.13 How to Add a new Internet Page

If you want to open an internet page you visit frequently directly in the web browser of the OpenScape Desktop Client, you must previously define this page in the following way:

Step by Step

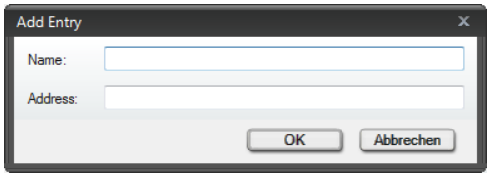
1) Open the Pearl menu and click on the **OpenScape Options** button.

The **Settings** dialog opens.

2) Switch to the tab **Advanced > Webbrowser > Internet pages**.

3) Click on the **Add...** button.

The following dialog opens.



4) Then enter the desired **Name** and **Address** (URL).

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

The new internet page appears with **Name** and **Address** in the last position of the configured internet pages list.

4.4.14 How to Change an Internet Page

How to change the settings of an already configured internet page:

Step by Step

1) Open the Pearl menu and click on the **OpenScape Options** button.

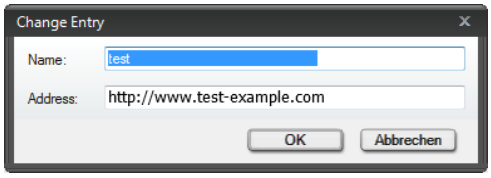
The **Settings** dialog opens.

2) Switch to the tab **Advanced > Webbrowser > Internet pages**.

3) Mark the desired entry in the list of configured internet pages.

4) Then click on the **Change** button.

The following dialog opens.



5) Change the **Name** and/or the **Address** (URL).

6) Click on **OK**.

The **Change Entry** dialog closes and your modifications are saved.

4.4.15 How to Delete an Internet Page

How to delete an already configured internet page from the list:

Step by Step

1) Open the Pearl menu and click on the **OpenScape Options** button.

The **Settings** dialog opens.

2) Switch to the tab **Advanced > Webbrowser > Internet pages**.

3) Mark the desired entry in the list of configured internet pages.

4) Then click on the **Delete** button.

The selected list entry has been removed from the list of configured internet pages.

4.4.16 How to Configure a new SIP Additional Line

How to configure a new additional line:

Step by Step

1) Start the OpenScape Desktop Client.

2) Click on the **Manage** button in the Logon dialog.

A selection menu opens.

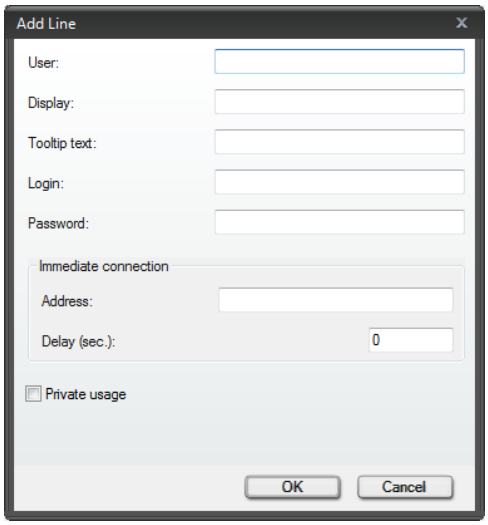
3) Select the **Settings** menu option.

The **Settings** dialog opens.

4) Select on the tab **Advanced > [Virtual] SIP Service Provider > Additional lines**.

5) Click the **Add...** button.

The following dialog opens.



6) Enter the unique OpenScape Desktop Client phone number/user address in the **User** field.

7) Enter an expressive text in the **Display** field.

8) Enter the text to be displayed as tooltip in the **Tooltip text** field.

9) Enter your **login**.

10) If the authentication was configured on the server, enter your **Password** in addition.

NOTICE: Further details can be obtained from the system administrator.

---

11) Confirm your entries with **OK**.

The dialog for configuring a new SIP additional line closes. The new line entry appears in the list of configured additional lines.

4.4.17 How to Change an SIP Additional Line

How to change the settings of an already configured SIP additional line:

Step by Step

1) Start the OpenScape Desktop Client.

2) Click on the **Manage** button in the Logon dialog.

A selection menu opens.

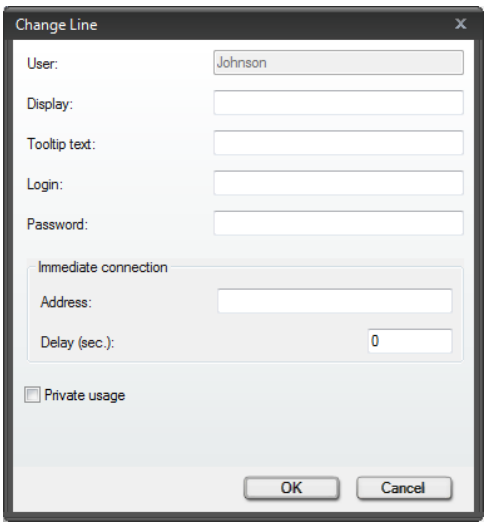
3) Select the **Settings** menu option.

The **Settings** dialog opens.

4) Select on the tab **Advanced > [Virtual] SIP Service Provider > Additional lines**.

5) Click on the **Change...** button.

The following dialog opens.



6) Perform the desired modifications.

NOTICE: You cannot edit the **User** entry field.

7) Confirm your changes with **OK**.

The dialog for editing an existing SIP additional line closes.

4.4.18 How to Delete an SIP Additional Line

How to delete an SIP additional line already configured:

Step by Step

1) Start the OpenScape Desktop Client.

2) Click on the **Manage** button in the Logon dialog.

A selection menu opens.

3) Select the **Settings** menu option.

The **Settings** dialog opens.

4) Select on the tab **Advanced > [Virtual] SIP Service Provider > Additional lines**.

5) Select the line entry you want to delete in the list of configured additional lines.

6) Click on the **Delete** button.

The line entry has been removed from the list of configured SIP additional lines.

4.5 Contact Management

The following features are available for managing the contacts in your OpenScape contact list.

4.5.1 How to Create a new Contact

Prerequisites

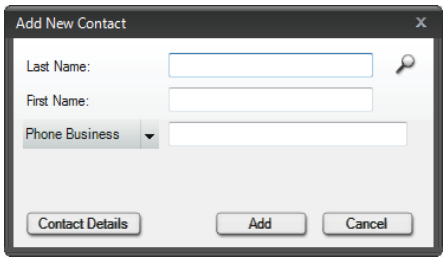
- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to add a new contact to your OpenScape contact list:

Step by Step

1) Click on in the **Contacts** frame.

The following dialog opens.



2) Enter the First Name and Last Name of the new contact in the respective input fields.

3) Click on the small triangle of the combo box and select the contact information that you want to add, for example the business phone number of the contact or his/her business e-mail address.

4) Click on **Add** to confirm you entries.

   The **Add New Contact** dialog closes.

Your entries are saved and the new contact entry appears in the contact list.

4.5.2 How to Add a Contact from a Directory

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to search a directory for a contact and add him/her to your contact list:

Step by Step

1) Open the **Directory Search** frame by selecting **Pearl menu > View > Directory Search**.

   The **Directory Search** window opens.

2) Enter the first or second name of the person you look for in the **<search address books>** input field.

3) Click on .

   The dialog with the search results from different directories opens.

4) Click on the desired contact entry to select it.

5) Click on . The **Add Contact** dialog with available contact data opens. If desired, you can complete the contact data here.

6) Click on **Add** to confirm your entries.

   The **Add Contacts** dialog closes.

Your entries are saved and the new contact entry appears in the contact list.

4.5.3 How to Edit Contact Data

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to edit the contact information of an already configured contact:

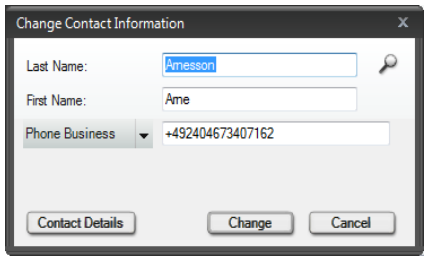
Step by Step

1) Rightclick the name of a contact in the **Contacts** frame.

The context menu of the contact opens.

2) Select the **Edit contact** option.

The following dialog with the available contact data opens.



3) Perform the desired modifications.

> ***NOTICE:*** Click on the **Contact Details** button to edit further information for the selected contact entry in the **Change Contact** dialog. With a click on **OK** you can save the modifications and close the **Change Contact** dialog.

4) Click the **Change** button.

Your modifications have become valid and the **Change Contact Information** dialog closes.

4.5.4 How to Create a new Group

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to add a new group to your contact list:

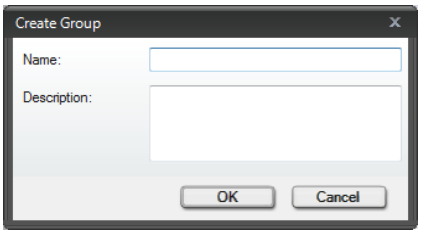
Step by Step

1) Rightclick in the **Contacts** frame.

The context menu of the **Contacts** frame opens.

2) Select the **Create group...** context menu option.

The following dialog opens.



3) Enter a unique name for the group in the **Name** field. This is a required field.

4) Enter a description that is meaningful to you in the **Description** field. This entry is optional.

5) Click on **OK**.

The **Create Group** dialog is closed.

The newly created group is displayed in the **contacts** frame.

4.5.5 How to Add a Contact to a Group

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You have already created a group in your contact list.

How to add a contact from your contact list to a group:

Step by Step

1) Rightclick the name of a group in the **Contacts** frame.

The context menu of a contact opens.

2) Select the **Add Contact...** context menu option.

The **Add New Contact** dialog opens.

3) Enter the **First** and **Last Name** of the new contact in the respective entry fields.

4) Click on the small triangle of the combo box and select the contact information that you want to add, for example the business phone number of the contact or his/her business e-mail address.

5) Click on **Add** to confirm you entries.

The **Add New Contact** dialog closes.

The new contact appears in the contact list as group entry.

4.5.6 How to Add Contacts to a Group

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You have already created a group in your contact list.

How to add specific contacts from your contact list to a group:

Step by Step

1) Select the contacts you want to integrate in a group from the contact list.

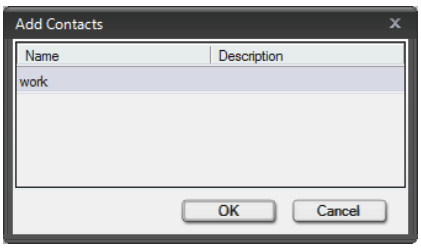
> ***NOTICE:*** To select several contact entries at the same time, keep the **[Ctrl]** key pushed while you click on the names of the desired contacts.

2) Rightclick the name of a group in the **Contacts** frame.

The context menu of a group opens.

3) Select the **Add Contacts to Group...** option.

The following dialog opens:



4) Select one of the groups in the **Add Contacts** dialog.

5) Click on **OK**.

The **Add Contacts** dialog closes.

The selected contacts are displayed in the desired group. They are thus itemized in the contact list twice.

4.5.7 How to Move Contacts to a Group

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You have created at least two groups.

How to move specific contacts to a group:

Step by Step

1) Select the contacts you want to integrate in a group from the contact list.

> ***NOTICE:*** You can move contacts from your contact list to a group, or from one group to another.

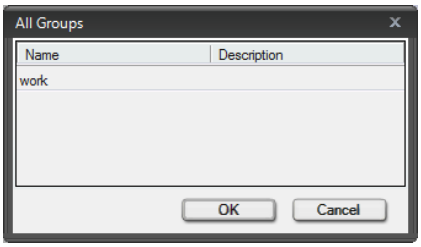
> ***NOTICE:*** To select several contact entries at the same time, keep the **[Ctrl]** key pushed while you click on the names of the desired contacts.

2) Rightclick the name of a group in the **Contacts** frame.

The context menu of a group opens.

3) Select the **Move Contacts to Group...** option.

The following dialog opens:



4) Select the desired group in the **All Groups** dialog.

5) Click on **OK**.

The **All Groups** dialog closes.

The contact(s) is/are integrated in the selected group.

4.5.8 How to Import Contacts from a File

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You have created a backup copy of your OpenScape or Microsoft Outlook contact list in the `XML` or `CSV` format.

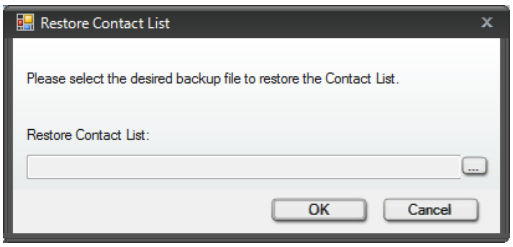
How to integrate your Microsoft Outlook contact list in the OpenScape contact list or restore your OpenScape contact list after e.g. a reinstallation of the program:

Step by Step

1) Open the Pearl menu and select the **File** option.

2) Click on **Import Contacts from file** in the right-hand section of the Pearl menu.

The following dialog opens:



3) Click on the **...** button and select the memory location of the contact list file you want to import.

4) Click on **OK**.

The **Restore Contact List** dialog closes.

The **Contacts** frame displays your imported contact information.

4.5.9 How to Export Contacts to a File

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

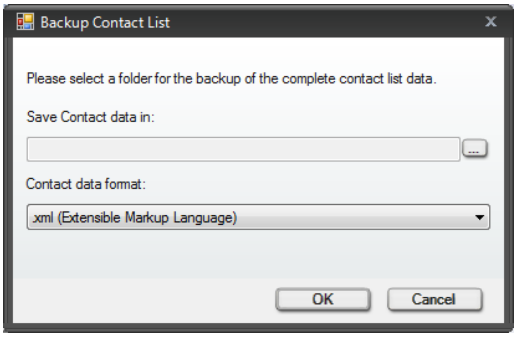
How to create a backup copy of your contact list:

Step by Step

1) Open the Pearl menu and select the **File** option.

2) Click on **Export Contacts to file** in the right-hand section of the Pearl menu.

The following dialog opens:



3) Select the memory location where you wish to store the contact list data and click on the **...** button.

4) Select in the **Contact data format** combo box the file type (`.xml` or `.csv`).

5) Click on **OK**.

The **Backup Contact List** dialog closes.

The backup file of your contact list has been created. A confirmation dialog opens, which also states the storage location. A click on **OK** closes the confirmation dialog.

4.6 Communicating with your Contacts

The following features are available for communicating with other subscribers:

4.6.1 How to Call a Contact

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to call a contact from your contact list with OpenScape Desktop Client:

Step by Step

› Click in the **Contacts** frame in the row of the desired contact entry.

NOTICE: If more than one number is specified for the contact, click on to select the desired one.

The connection is established and displayed in the **Call Control** frame.

4.6.2 How to Dial a Phone Number

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to set up a connection to any phone number:

Step by Step

1) Click on the telephone display in the main bar.

The OpenScape Desktop Client keypad is displayed.

2) Enter the desired phone number via the telephone keypad.

3) Then push the **return key**.

The call is initiated and listed in the **Call Control** frame.

4.6.2.1 How to Dial a Phone Number Using Copy & Paste

You can use the copy & paste method in the OpenScape Desktop Client to set up a connection to a phone number you have entered in another application (for example a word processing program).

Step by Step

1) Select the phone number in the application (for example in a word processing program).

2) Copy the selected number to the clipboard by pushing the keys **[Ctrl] + [C]** simultaneously or using the functions provided by the application.

3) Paste the phone number with one of the following hotkeys from the clipboard in the display field of the integrated telephone in the main bar:

- **Shift key + [Ins]** without office code
- **[Ctrl] + [V]** with office code.

NOTICE: Dialing by copy and paste is only supported for phone numbers fully specified (FQTN) according to E.164.

NOTICE: Alternatively, you can paste the phone number to be dialed in the display field of the free phone.

The phone number is shown in the display. The connection is immediately set up and listed in the **Call Control** frame.

4.6.2.2 How to Dial a Number Using "Drag&Drop"

You can use the *drag&drop* method in OpenScape Desktop Client the to set up a connection to a phone number you have entered in another application (for example in a word processing program, web browser etc.):

Step by Step

1) Select the phone number in the application (for example in a word processing program).

2) Drag the selected phone number into the display field of the integrated telephone in the main bar with the left mousebutton kept pressed**.**

3) Release the mouse button.

The phone number appears in the display field of the integrated telephone in the main bar.

NOTICE: Alternatively, you can paste the phone number to be dialed in the display field of the free phone.

The connection is immediately set up and listed in the **Call Control** frame.

4.6.3 How to Accept a Call

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to accept an icoming call displayed in the **Call Control** frame:

Step by Step

› Click on in the **Call Control** frame.

You are connected to your connection partner. The **Call Control** frame shows call control features.

4.6.4 How to Transfer a Call to a Device/Subscriber

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to transfer the control of an incoming call to another device:

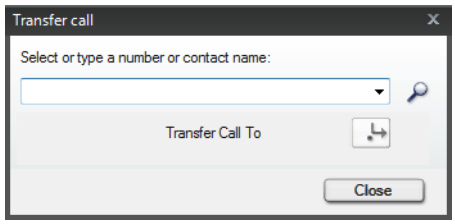
Step by Step

1) Rightclick in the area of the call displayed in the **Call Control** frame.

A context menu opens.

2) Select **Transfer to** in the context menu.

The following dialog opens.



3) Enter the phone number of the device you want to transfer the incoming call to.

4) Click on the **Transfer Call To** icon in the **Transfer call** dialog.

The **Transfer call** dialog closes.

You can accept the call on another device.

> ***NOTICE:*** If you operate the OpenScape Desktop Client at a OpenScape 4000, the **on-hold** option is unavailable.

4.6.5 How to Change the Device during an active Call

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.

How to change the device during an active call while keeping the call control:

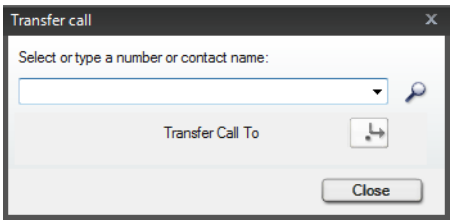
Step by Step

1) Rightclick the area of the displayed active call in the **Call Control** frame.

A context menu opens.

2) Select **Transfer to** in the context menu.

The following dialog opens.



3) Enter the phone number of the device you want to transfer the incoming call to.

4) Click on the **Transfer Call To** icon in the **Transfer call** dialog.

The dialog closes.

You can accept the call on another device.

4.6.6 How to Hold a Call

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You are conducting a call, which is displayed in the **Call Control** frame.

How to set an active call to on-hold:

Step by Step

› In the **Call Control** frame click on ⏸.

Your connection is being held. The conversational partner hears music-on-hold.

NOTICE: If you operate the OpenScape Desktop Client at a OpenScape 4000, the ⏸ **on-hold** option is unavailable.

4.6.7 How to Retrieve a Held Call

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- Your active call is being held and displayed in the **Call Control** frame.

Step by Step

› Click in the **Call Control** frame on 📞⏸ in the area of the held call.

Your held call is released.

NOTICE: If you operate the OpenScape Desktop Client at a OpenScape 4000, the 📞⏸ **back to waiting** option is unavailable.

4.6.8 How to Make a Consultation Call

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You are conducting a call.

How to consult another subscriber during an active call:

Step by Step

1) Enter the phone number of the subscriber who you want to consult in the **<Name or Number>** combo box of the **Call Control** frame.

2) Click on 📞 to the right of the **<Name or Number>** field to initiate the call.

The connection to the first conversational partner is automatically being held and he/she hears music(-on-hold). You can now talk to the consultation-call subscriber.

4.6.9 How to Toggle

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You are being connected to two conversational partners. One of these calls has been set to on-hold because you are conducting a consultation call.

How to toggle calls during a consultation:

Step by Step

1) Rightclick in the **Call Control** frame in the area of the held call.

A context menu opens.

2) Select the **Toggle** option.

The held call becomes active again and you can talk to the original subscriber. The connection to the consultation-call subscriber is held.

4.6.10 How to Transfer a Call to a new Subscriber

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- You are conducting an active consultation call.

How to connect the original caller to the consultation call subscriber during a consultation call:

Step by Step

1) Rightclick in the **Call Control** frame in the area of the held call.

A context menu opens.

2) Select the **Transfer** option.

Your connection is automatically closed. The other two subscribers can talk to each other.

4.6.11 How to Activate the "Completion of Calls to Busy Subscriber" (CCBS) Feature

This feature enables you to automate a connection setup to a previously busy subscriber in the PBX. When you initiate a call and receive a busy signal from the target subscriber, you can activate or use the callback feature as follows:

Step by Step

1) Rightclick the area of the displayed connection in the **Call Control** window.

The context menu of an active call opens.

2) Select the **Callback** option.

A greeting informs you that the callback function is active. Thereafter, the connection is cleared. You are then available to other callers again and you can make calls.

If the previously busy target subscriber becomes available again, the OpenScape Desktop Client is informed by the PBX accordingly. The program then lets you know by a call in the **Call Control** frame that the target subscriber is no longer busy.

3) Accept the call with a click on in the **Call Control** frame.

The PBX calls the target subscriber again.

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

4.6.12 How to Activate the "Completion of Calls on no Reply" (CCNR) Feature

This feature enables you to automate a connection setup to a subscriber who does not answer the phone in the PBX. If the target subscriber is available but does not answer the phone, you can activate the callback feature as follows:

Step by Step

1) Rightclick the area of the displayed connection in the **Call Control** window.

The context menu of an active call opens.

2) Select the **Callback** option.

A greeting informs you that the callback function is active.

When the target subscriber hangs up the next time, the PBX informs the OpenScape Desktop Client accordingly. The program then lets you know by a call in the **Call Control** frame that the target subscriber is available.

3) Accept the call with a click on in the **Call Control** frame.

The PBX reconnects you to the target subscriber.

NOTICE: When you use the softphone, the free phone or the integrated phone of the Personal Edition, the callback request is shown in the telephone display. With a click on (softphone) or ✓ (free or integrated phone), the callback function becomes active. To be automatically reconnected to the subscriber who has become available or is present

again, click in the softphone on or , or on in the integrated or free phone.

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

4.6.13 How to Terminate a Call

How to clear a connection listed in the **Call Control** frame:

Step by Step

› Click in the **Call Control** frame on in the area of the active call.

The connection is cleared and does no longer appear in the **Call Control** frame.

4.6.14 How to Send an E-Mail to a Contact

Prerequisites

- OpenScape Desktop Client is correctly configured and you are logged in at the communications system.
- An e-mail address has been configured for the contact under the contact information.

How to send an e-mail to a contact from the contact list:

Step by Step

1) Click on in the **Contacts** frame in the row of the desired contact.

Your preconfigured default e-mail application starts.

2) Write and send the e-mail message as usual.

The window of the e-mail application closes. The e-mail was sent.

4.6.15 How to Call a IBM Notes Contact

How to initiate a call from your IBM Notes address book using the IBM Notes integration:

Step by Step

1) Switch to the address book of your IBM Notes client.

2) Select the desired contact.

3) Click on the **Dial** button in the IBM Notes toolbar.

4) If the selected contact includes several phone numbers, a selection dialog of OpenScape Desktop Client opens. Mark the phone number you wish to use for the call in this dialog.

5) Then click on the **Connect** button in the selection dialog.

The call is initiated and the selection dialog closed. The main window of OpenScape Desktop Client appears in the foreground. The connection is displayed in the **Call Control** frame.

4.6.16 How to Call a Microsoft Outlook Contact

How to initiate a call from your Microsoft Outlook address book using the Microsoft Outlook integration:

Step by Step

1) Switch to the address book of your Microsoft Outlook client.

2) Select the desired contact and click in the Microsoft Outlook toolbar on the **Dial** icon.

3) If the selected contact includes several phone numbers, a selection dialog of OpenScape Desktop Client opens. Mark the phone number you wish to use for the call in this dialog.

4) Then click on the **Connect** button in the selection dialog.

The call is initiated and the selection dialog closed. The main window of OpenScape Desktop Client appears in the foreground. The connection is displayed in the **Call Control** frame.

4.6.17 How to Call an E-Mail Originator with IBM Notes

To call the originator of an e-mail in the IBM Notes client proceed as follows:

Step by Step

1) Switch to the inbox of your IBM Notes client.

2) Select the relevant e-mail.

3) Click on the **Dial** button in the IBM Notes toolbar.

4) If the selected contact includes several phone numbers, a selection dialog of OpenScape Desktop Client opens. Mark the phone number you wish to use for the call in this dialog.

5) Then click on the **Connect** button in the selection dialog.

The call is initiated and the selection dialog closed. The main window of OpenScape Desktop Client appears in the foreground. The connection is displayed in the **Call Control** frame.

4.6.18 How to Call an E-Mail Originator with Microsoft Outlook

To call the originator of an e-mail in the Microsoft Outlook proceed as follows:

Step by Step

1) Switch to the inbox of your Microsoft Outlook client.

2) Select the relevant e-mail and click in the Microsoft Outlook toolbar on the **Dial** icon.

3) If the selected contact includes several phone numbers, a selection dialog of OpenScape Desktop Client opens. Mark the phone number you wish to use for the call in this dialog.

4) Then click on the **Connect** button in the selection dialog.

The call is initiated and the selection dialog closed. The main window of OpenScape Desktop Client appears in the foreground. The connection is displayed in the **Call Control** frame.

4.6.19 How to Sort your Journal Entries by Call Type

How to display only specific call types in the journal:

Step by Step

› Select the call type you wish to have displayed in the **Journal** in the combo box at the top right margin of the **Journal** frame.

The **Journal** function window lists only the calls of the selected call type.

4.6.20 How to Display your missed Calls

How to display a list of all missed calls in the **Journal** frame:

Step by Step

› Select in the combo box at the top right margin of the **Journal** frame.

The **Journal** displays the missed calls only.

4.6.21 How to Dial from the Journal

How to set up a phone connection from the **Journal** frame:

Step by Step

1) In the journal list select the entry of the subscriber you want to call.

2) Click on in the toolbar of the **Journal** frame.

The call is initiated and listed in the **Call Control** frame.

4.6.22 How to Initiate a Video Call (SIP only)

In the following you learn how to initiate a video call to a contact from your private contact list.

Prerequisites

- The OpenScape Desktop Client is connected to an OpenScape Voice V5 or later.
- You and your conversational partner have an installed and operable video camera (webcam).
- In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.
- The settings of the **Default video configuration** apply for the video scheme selected in the dialog **Settings > Advanced > [Virtual] SIP Service Provider > Video schemes**: the **Preview** is enabled (**On**) and **Mirrored**, the Layout is **In call**.
- A video-compatible device has been configured for the desired conversational partner, i.e. a phone number has been specified in the **Video Phone 1** input field of the contact entry form.

Proceed as follows to initiate a video call:

Step by Step

1) Switch to the **SoftPhone** tab in the ribbon.

2) In the **Video** group, click on the **Enable Video Call** option.

The Video Call feature becomes active.

3) Click in the **Contacts** frame in the row of the desired contact entry.

A list with the phone numbers configured for the contact is displayed.

4) Click on the list entry **Video Phone 1**.

When your conversational partner too has activated the icon, the video call is initiated and listed in the **Call Control**. The **Video** window opens automatically and shows your own image in a red frame and the image of your conversational partner.

> ***NOTICE:*** If the SIP communications system does not provide a sufficient amount of free bandwidth, no video call can be set up. A message will inform you about this fact.

4.6.23 How to Start Video Streaming

Prerequisites

- The OpenScape Desktop Client is connected to an OpenScape Voice V5 or later.
- You have an installed and operable video camera.
- The **Video Viewer** module is active.
- In the **SIP Service Provider** settings you have configured and selected a video scheme that uses your operable video camera.
- For the video scheme you have selected in the **Settings > Advanced > [Virtual] SIP Service Provider > Video schemes** dialog the **Preview** is disabled (**off**).

How to switch a video connection to an active call:

Step by Step

1) Click in the **ribbon > Softphone tab > Video group** on the **Camera image** button.

The **Video** window opens, showing your own image.

2) Click in the Softphone toolbar of the **Video** window on .

Your own image appears in a red frame. It is transmitted to the connection partner.

NOTICE: If your connection partner also has a video camera and switched his/her image to the conference in the same way, it appears automatically in your **Video** window. You cannot control or activate/deactivate receiving video images.

4.6.24 How to Stop Video Streaming

How to terminate transmitting your own video image:

Step by Step

› Click in the Softphone toolbar of the **Video** window on .

Your own image does no longer appear in a red frame.

NOTICE: The video image of your connection partner remains visible until he/she terminates the transmission or the connection is cleared.

Your video image is no longer being transmitted. It is, however, still visible in the **Video** window until you switch off the video camera via the **Camera image** button in the **ribbon > SoftPhone tab > Video group** or via in the Softphone toolbar of the **Video** window.

4.7 How to Collaborate with Contacts in a Conference

The OpenScape Desktop Client offers the following conference features for collaborating with other participants.

4.7.1 How to Start a Local Conference

How to combine two calls to a local conference:

Step by Step

1) Call one of the desired participants.

2) Rightclick the call displayed in the **Call Control** frame.

A context menu opens.

3) Select ♫ **Consultation to** in the open context menu.

The active call is being held. Your conversational partner listens to music-on-hold.

4) Enter the phone number of the subscriber who you want to consult in the <**Name or Number**> combo box of the **Call Control** frame.

   The **Consultation to** dialog opens.

5) Rightclick in the area of the newly set up connection in the **Call Control** frame.

   A context menu opens.

6) Select the **Initiate local conference** option.

All subscribers are connected to each other. No more participants can be added to the conference.

4.7.2 How to End a Local Conference

How to clear the connection to an active local conference:

Step by Step

› Click on in the area of the displayed conference connection in the **Call Control** frame.

You are no longer connected to the conference. As soon as every participant has hung up, the conference has ended.

4.7.3 How to Start a Local Video Conference

Prerequisites

- You operate the OpenScape Desktop Client at an OpenScape Voice V5 or later.
- You are taking part in an active local voice conference.
- All participants have an installed and operable video camera.
- For the video scheme you use in the **Settings > Advanced > [Virtual] SIP Service Provider > Video schemes** dialog the **Preview** is disabled (**off**).

How to switch a video connection to an active local conference connection:

Step by Step

1) Click in the **ribbon > Softphone tab > Video group** on the **Camera image** button.

   The **Video** window opens, showing your own image.

2) Click in the Softphone toolbar of the **Video** window on .

   Your own image appears in a red frame. It is transmitted to the connection partners.

NOTICE: If your connection partners also have a video camera and switched their image transmission to the conference in the same way, you can automatically see these images in your **Video** window. You cannot control or activate/deactivate receiving video images.

NOTICE: If you are the conference initiator, you see three images in your **Video** window: your own one in a red frame and the images of the other two connection partners.

NOTICE: If you are not the initiator of the local conference, you see two images in your **Video** window: your own one in a red frame and one that you receive. The latter one is mixed by the initiator in such a way that it shows the video image of the initiator and of the third participant in one video image.

4.7.4 How to End a Local Video Conference

How to terminate transmitting your own video image during a local video conference:

Step by Step

› Click in the Softphone toolbar of the **Video** window on .

Your own image does no longer appear in a red frame.

Your video image is no longer being transmitted. It is, however, still visible in the **Video** window until you switch off the video camera via the **Camera image** button in the **ribbon > SoftPhone tab > Video group** or via in the Softphone toolbar of the **Video** window.

If your are the initiator and switch off your video camera via the **Camera image** button, the other two participants do not receive a video image any more. The local video conference then turns into a normal local audio conference.

If you are a participant without initiator privileges and switch off your video camera via the **Camera image** button, the initiator only sees the image of the other participant and vice versa.

4.7.5 How to Start a Server-based Audio Conference

Prerequisites

- A connection to an OpenScape Voice has been set up.
- You have configured the correct **conference server URI** in the dialog **Settings > Advanced tab > [Virtual] SIP Service Provider > System functions**.

How to extend a consultation call to a server-based conference (participant-controlled conference):

Step by Step

1) Rightclick in the **Call Control** frame in the area of the held call.

A context menu opens.

2) Click on **Initiate server-based conference**.

A conference between the subscribers is being initiated. The caller, the callee and the consultation-call subscriber are then connected to each other. You can switch further participants to the conference.

NOTICE: As soon as every participant has hung up, the conference has ended.

4.7.6 How to Add further Participants to a Server-Based Conference

If you wish to add further participants to an active server-based audio conference (participant-controlled conference), proceed as follows:

Step by Step

1) Rightclick the conference entry in the **Call Control** frame.

A context menu opens.

2) Select the **Consultation to** option.

The **Consultation to** dialog opens.

3) Enter the phone number of the desired subscriber.

4) Confirm your entries with the **OK** button.

The new connection is established and listed in the **Call Control** frame.

5) Rightclick the new connection.

A context menu opens.

6) Select the **Enter Conference** option.

The desired participant has been added to the conference. Only the conference is now displayed in the **Call Control** frame.

4.7.7 How to Initiate a Phone Handover via DTMF Keys

How to change a device you use in a conference:

Step by Step

1) Push the jkl 5 key.

2) Enter the phone number of the device you want to switch to.

3) Complete entering the phone number with the # key.
The entered phone number is announced for you to check.

4) You are then prompted to continue with one of the following options:

- Push the 1 key to perform the handover,
- push the abc 2 key to abandon the process.

5 Communicating with Contacts

The contact list of the OpenScape Personal Edition is your private address book. It allows fast communication with your regular conversational partners.

5.1 Reaching a Contact from the Contact List by Telephone or E-mail

The icons to the right of a contact's name in the **Contacts** frame show you whether that person can be reached by phone or e-mail.

- - The contact can be reached via telephone.
- - The contact can be reached via telephone. There are at least two phone numbers configured for him/her.
- - This icon is always available when an e-mail address has been configured for the contact.

This information is also available in the form of a tool tip when you hover the cursor on the icon.

To call a contact from your contact list or to send him/her an e-mail, click the appropriate icon next to the contact's name in the **Contacts** frame.

Callback

If you cannot reach a contact by phone - he/she does not answer the phone or the line is busy - you can use the **Callback** feature. Rightclick the area of the displayed connection in the **Call Control** window. Select the **Callback** option in the displayed context menu.

NOTICE: So that you can use this feature you need to open the Settings dialog and select on the tab **Advanced > [Virtual] SIP Service Provider > Codes**. Then specify the required codes in the **Callback** area.

NOTICE: Only specific PBXs support the callback feature.

5.2 Calling any Contact

You can use the following options to call a subscriber who is not entered in your contact list of the *OpenScape Personal Edition*:

- Via the **main bar**
  Click on the telephone display in the **main bar**. Using the open keypad or your computer keyboard you can enter the desired number. Then click on ✓ or push the **return key**. The connection to the desired contact is established.

- Via the **quick-access toolbar**
  Enter the desired phone number in the **<name or number>** field and click on .
- Via the **ribbon**
  Enter the desired phone number in the **<name or number>** field of the tab **Home > Group Call Control** and click on the **Make Call** button.
- Via the **Call Control** frame
  Enter the desired phone number in the **<name or number>** field and click on .

5.3 The Bubble (Business Card)

The business card is shown when you hover the cursor over the name of a contact in the **Contacts** frame or in the **Journal**. It sticks on top of all windows when clicked, and it can be moved and deleted.

- The business card displays a picture you assigned to the contact when you added him/her to your contact list.
- In the business card you can see the contact's name.
- The business card shows the name and address of the contact's company as far as such information is available.
- The icon lets you invoke a default e-mail application (for example Microsoft Outlook) to send an e-mail to the contact.
- The or icon lets you set up a phone connection to the contact.

5.4 Collaboration in Conferences

With the OpenScape Personal Edition you can use two types of conference services:

- Local conference (three-party conference)
- Server-based voice conference

NOTICE: In the OpenScape Voice documentation the server-based audio conference is referred to as participant-controlled conference.

5.4.1 Local Conference (Three-Party Conference)

A local conference (three-party conference) is a spontaneous simplified telephone conference started by an initiator (participant who initiates the conference). Three participants can talk to each other on the phone at the same time, that is, each participant with each participant. This type of conference is realized by the device and no conference bridge is required. The participants must already be connected before the conference may be initiated. The difference for the initiator of a local conference is that the two other conversational partners must already be connected to him/her. The other two must either be put on hold or one must be on hold and the other one in an active call.

NOTICE: In a local conference the initiator cannot add more than two other participants to the conference.

5.4.2 Server-based Voice Conference

A server-based audio conference is a spontaneous conference initiated by a participant who asks other participants to join in on the basis of consultation calls.

NOTICE: In the OpenScape Voice documentation this type of conference is referred to as participant-controlled conference.

In contrast to a local conference (three-party conference) this type of conference is provided by a conference server. This enables it to connect up to 48 participants to each other.

NOTICE: Using this feature requires the system to support the *consultation call* feature, at least one active connection as well as a connection to an OpenScape Voice.

5.4.3 Controlling a Conference via Telephone

With OpenScape Desktop Client you can control a current local or server-based audio conference (participant-controlled conference) via the keys of the SoftPhone, integrated phone or free phone. The keys of one of these phones are used for transmitting control commands to the system by sending DTMF tones.

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

Activating the control menu

To control a conference via the keys of the SoftPhone, integrated phone or free phone you first need to activate the operating menu by pushing the * key. This prevents disruptions caused by a telephone key pushed inadvertently.

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

Control commands

In the OpenScape Desktop Client you can use the following key commands for controlling a conference:

- * **Prompt menu**
  The available menu options are announced to you.
- abc 2 **Lock/unlock conference**
  Once the conference has been locked, no further participants may dial in. Pushing this key once more undoes the restriction.

  NOTICE: In a local conference only the initiator can trigger this feature.

- def 3 **Mute self**
  Via this key you can temporarily deactivate the microphone of your telephone. The conference connection is maintained. Pushing this key once more reactivates the microphone.
- ghi 4 **Mute conference**
  This feature mutes all microphones of the conference participants. Only the voice signal of the conference participant who triggers this function is still transmitted to all conference participants.

  NOTICE: In a local conference only the initiator can trigger this feature. In case of a server-based audio conference (device-controlled conference), all conference participants can trigger this function and also cancel a muting by themselves.

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

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