

OPENScape UNIFIED COMMUNICATION (UC) WEB CLIENT USER GUIDE

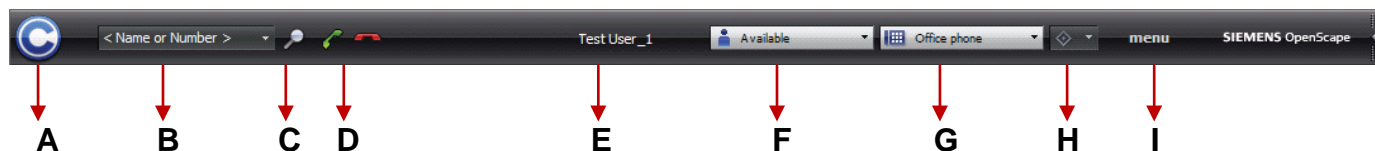
The UNIFY OpenScape Unified Communication (UC) Application allows users to easily communicate with contacts, create conference calls, create web collaborations (profile permitting), redirect incoming calls to a preferred device, view personal call journal, and access voicemail from a convenient desktop view. Whether working in the office, from home or traveling, the application will allow callers to easily reach users by utilizing "One Number Service" (ONS).

LOG ON

- Open your **Web Browser**
- Enter the following address: <https://voipuc.kennesaw.edu/tweb/portal/req?loadOpenScape>
- Press **ENTER**

LOG OFF










- Close the Application by selecting the **X** from the right corner of the screen





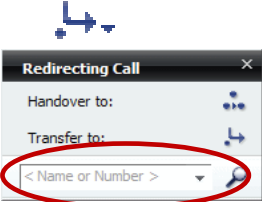








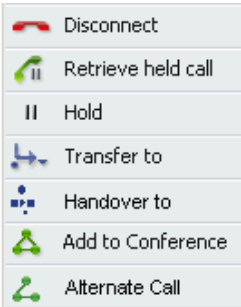



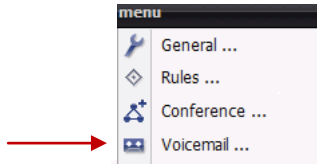
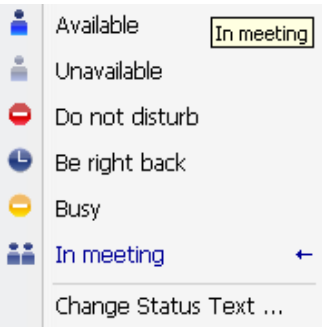
The Menu Bar consists of

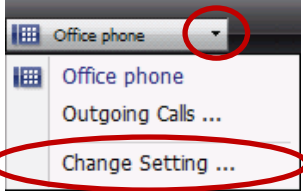
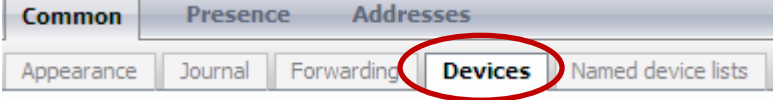
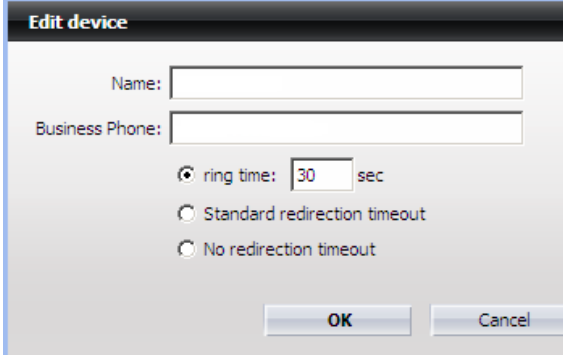
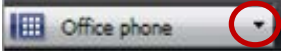

- A. **Pearl Menu** – Information Icon - Status (*rotates on missed calls, presence requests, and new voicemail messages*) and access to View, Personal Settings, Help (*pdf guide for application*)
- B. **Dial Field** – To place calls via your desktop - includes drop down arrow to access Redial options
- C. **Search** – To find / contact another employee utilizing the Corporate Directory
- D. **Answer / Disconnect** –Telephone Controls
- E. **OpenScape User Name**
- F. **Presence Status** – Your current Presence Status viewable by OpenScape users (*customizable*)
- G. **Device** – Active Device utilized to accept incoming calls (*ex: cell phone*)
- H. **Rules Options** – Settings for rule profiles and routing rules
- I. **Menu** – Provides options to perform basic UC settings and functions
(*General, Rules, Conference, Voicemail, Home Page*)



















TELEPHONE FEATURES




































FEATURE	INSTRUCTIONS
<p>PLACING A CALL</p> <p><i>The Name or Number Field will allow a user to place a call via their desktop and activate their current device. If the device is their OpenStage Telephone, the system will automatically place the call via the speakerphone.</i></p> <p><i>NOTE: It is not necessary to dial a "9" before placing a call, or a "1" for long distance, but the system will accept it.</i></p>	<ul style="list-style-type: none"> ■ From the MENU BAR, click the < Name or Number > field <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;"> < Name or Number > </div> <ul style="list-style-type: none"> ■ Enter the telephone number, press ENTER <p style="margin-left: 20px;"><i>(or click the GREEN  telephone icon)</i></p> <ul style="list-style-type: none"> ■ Call is instantly placed on your SPEAKERPHONE! <p style="margin-left: 20px;"><i>(if your office telephone is your preferred device)</i></p>
<p>SEARCH AND CALL</p> <p><i>Quickly locate a person from your pre-programmed Contacts to dial.</i></p> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;"> < Name or Number > </div>	<ul style="list-style-type: none"> • From the MENU BAR, click the < Name or Number > field • Enter the NAME of the Contact to reach <i>(or first three letters)</i> • Once the name is recognized, it will appear as a selection from the Name or Number drop down option • Select the Name from drop-down and press ENTER
<p>OPTIONS DURING INCOMING CALL</p> <p><i>Answer or Deflect a call using the icons in the Call Control Window</i></p>	<p>Accept – While telephone is ringing, click the GREEN  TELEPHONE icon</p> <p>Deflect – While telephone is ringing, click the BLUE  TRANSFER icon, type the desired destination number and press ENTER to Redirect incoming call</p> <p>Deflect to Voicemail – While telephone is ringing, click the RED  TELEPHONE Icon</p>
<p>ANSWERING A CALL</p>	<ul style="list-style-type: none"> • While telephone is ringing, click the GREEN  TELEPHONE icon <p style="margin-left: 20px;"><i>(located either on menu bar or incoming call notification pop-up)</i></p>
<p>DISCONNECTING A CALL</p> <p><i>To terminate the connection</i></p>	<p>While connected to the caller</p> <ul style="list-style-type: none"> • Click the RED  TELEPHONE icon <p>While the caller is on hold</p> <p>From the Call Control Window, click the RED  TELEPHONE icon</p>
<p>LAST NUMBER REDIAL</p> <p><i>Enables user to REDIAL the last number dialed (internal or external)</i></p>	<ul style="list-style-type: none"> • From the < Name or Number > field, click on the ARROW DOWN icon • Click on a number to redial from the drop-down list <p style="margin-left: 20px;"><i>(stores last twenty numbers)</i></p> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;"> < Name or Number >  </div>
<p>MISSED CALL</p> <p><i>Pearl Icon will rotate to signal user to check Pearl Menu for notifications</i></p>	<ul style="list-style-type: none"> • Click on the Pearl Icon <div style="text-align: center; margin: 5px 0;">  </div> <ul style="list-style-type: none"> • Click on Missed Calls area <i>(this will open the Missed Call List to view)</i> • Close the list by clicking the X in the top corner of Missed Call List













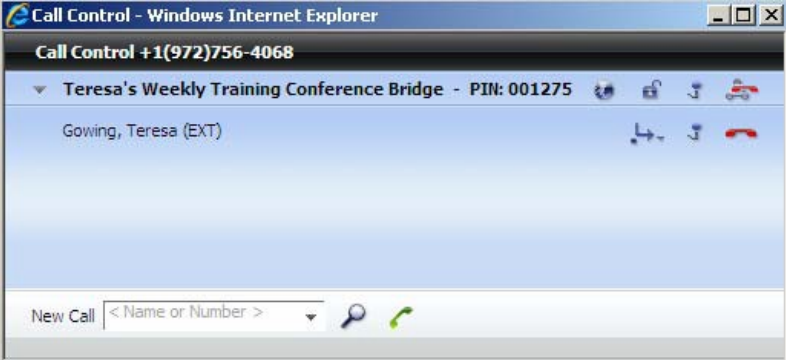
FEATURE	INSTRUCTIONS
<p>HOLD </p> <p>Place a caller on hold at your extension, retrievable only by user</p>	<ul style="list-style-type: none"> During a call, click on the HOLD icon located in the Call Control Window  <p>(The HOLD icon will appear next to the telephone icon indicating held call)</p> <p>To take the call OFF of HOLD</p> <ul style="list-style-type: none"> Click the Retrieve held call icon 
<p>TRANSFER</p> <p>Transfer a call to another party</p> <p>Warm Transfer (Announced)</p>  <p>Blind Transfer (Unannounced)</p> 	<p>WARM TRANSFER</p> <ul style="list-style-type: none"> During a call, enter the number of the second party in the < name or number > field Press ENTER (caller is placed on hold) Announce the call Click the GREEN TRANSFER icon  (this completes the transfer) <p>If the party does not answer or does not want the call</p> <ul style="list-style-type: none"> Click the RED Disconnect icon  from the Active Call Control Window (this disconnects current connection and immediately reconnects to held call) <p>BLIND TRANSFER</p> <ul style="list-style-type: none"> During a call, click the BLUE TRANSFER to icon  (NOTE: You are still connected to the caller at this point) Enter the number of the second party in the < name or number > field of Redirecting Call Box Click the BLUE Transfer to icon Call is immediately transferred
<p>CONFERENCE</p>  <p>Create a quick Conference call</p>	<ul style="list-style-type: none"> During a call, enter the number of the second party in the < name or number > field Press ENTER (caller is placed on hold) Announce the conference call Click the CONFERENCE icon from Call Control Window to join all callers <p>If the party does not answer or does not want to join</p> <ul style="list-style-type: none"> Click the RED Disconnect icon  from the Active Call Control Window
<p>CONSULT</p> <p>To place a second call from your extension and Consult privately with party while first party is on hold</p> <p>NOTE</p> <p>The HELD party will always have a WHITE background shown as WAITING CALL</p> <p>The CONNECTED party will always have a BLUE background shown as ACTIVE CALL</p>	<ul style="list-style-type: none"> During a call, enter the number of the second party in the < name or number > field (or click telephone icon on Contact to Speed Dial) Press ENTER (caller is placed on hold) <p>OR</p> <ul style="list-style-type: none"> Select a number from the Redial drop-down list Once party answers, the Call Control Icons provide options to handle the call (transfer, alternate, conference, hold, disconnect) 


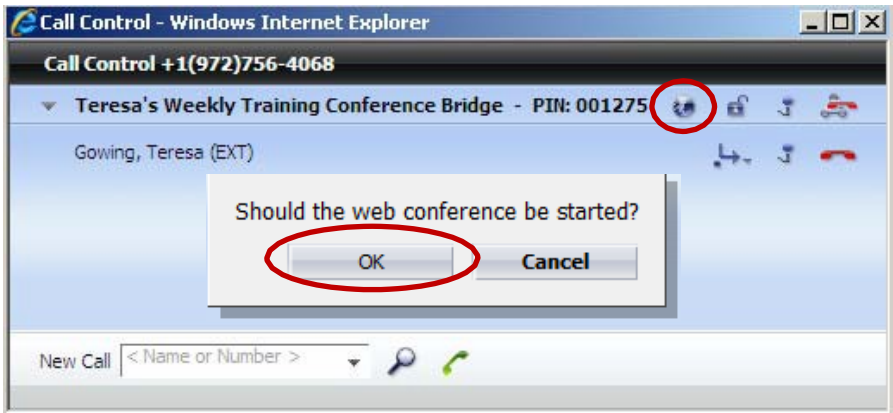
FEATURE	INSTRUCTIONS
<p>CALL CONTROL ICONS Provides quick access to telephone functions</p> 	<ul style="list-style-type: none"> • During a call, the Call Control Window will provide the telephone features available at that time via Call Control Icons <ul style="list-style-type: none"> ○ Disconnect (drops current connection) ○ Retrieve held call (drops current connection and returns to held call) ○ Hold (places current connection on Hold) ○ Transfer to (allows transfer of current connection) ○ Handover to (passes call to preprogrammed device) ○ Add to Conference (joins all parties together) ○ Alternate Call (toggles between calls)
<p>CALL WAITING</p>  <p>To accept a second incoming call while on the telephone</p>	<ul style="list-style-type: none"> • During a call, if a second party is calling, a beep tone is heard, the Caller ID of second party is displayed in the bottom half of the Call Control window. • To answer the second call, click the GREEN  TELEPHONE icon (first call is automatically placed on HOLD) • To end the second call and return to the first, click the RED  Disconnect icon from the Active Call Control Window <p>OR</p> <ul style="list-style-type: none"> • Utilize the Call Control Icons to transfer, conference, alternate, etc.
<p>WEB ASSISTANT Manage your voicemail settings via Web pages</p> 	<ul style="list-style-type: none"> • From the Menu Bar, select MENU > Voicemail From the left panel, select: <ul style="list-style-type: none"> • User Data (modify mailbox redirection and email notification) • Voicemail system (modify telephone PIN, keypad shortcuts, referral extension, prompt level, urgent message setting, trusted number access, greeting mode, mobility number and message filters) • Forward Access (set up personal call processing menus for greeting types) • Groups (create groups for voicemail message distribution of voicemail messages) • Time Profiles (manage your voicemail personal business hours along with greeting assignment) • Recordings (manage all of your mailbox recordings)
<p>PRESENCE (PERSONAL STATUS)</p> <p>This notification icon is shown if you appear as a contact to your coworkers who are utilizing OpenScape</p> 	<p>AVAILABLE Indicator to other <i>OpenScape</i> users that you can be reached at your workstation</p> <p>UNAVAILABLE Indicator to other <i>OpenScape</i> users that you CANNOT be reached at your workstation (or logged off UC)</p> <p>DO NOT DISTURB Indicator to the other <i>OpenScape</i> users that you are at your workstation but do not want to be disturbed</p> <p>BE RIGHT BACK Indicator to the other <i>OpenScape</i> users that you have temporarily left your workstation</p> <p>BUSY Indicator to the other <i>OpenScape</i> users that you can be reached at your workstation but only want to be disturbed in urgent cases</p> <p>IN MEETING Indicator to the other <i>OpenScape</i> users that you are currently in a meeting and cannot be reached</p> <p>(Arrow next to option indicates CURRENT status)</p> <p>Change Status Text = Provides additional information to Status Field</p>

FEATURE	INSTRUCTIONS
<p>CREATE A DEVICE</p> <p>Create additional DEVICES that will be utilized to redirect your inbound calls. Your OpenStage telephone is the default device.</p> <p>(Device examples: cell phone, voicemail, alternate office telephone)</p> <p>Outgoing Calls do not need to be defined at this time. Outbound calls will utilize the assigned device.</p>	<ul style="list-style-type: none"> Select the arrow down option from Devices Field  <ul style="list-style-type: none"> Select: Change Setting This will take you to the Forwarding Tab to view which device is currently active, click on the DEVICES tab  <ul style="list-style-type: none"> Select NEW  <ul style="list-style-type: none"> Enter the NAME for device (<i>cell, home phone, voicemail, etc.</i>) Enter the NUMBER for device (<i>enter +1 area code telephone number, no spaces or dashes</i>) Select the RING TIME for device (<i>3 sec = voicemail, 15 sec = cell phones, Standard = OS Voice</i>) <p><i>NOTE: The RING TIME is the amount of time a call will ring at a device before forwarding to the office voicemail. You will want to set the Ring Time to a cell phone or home phone shorter than the Standard time to avoid the caller being sent to that respective devices voicemail.</i></p> <ul style="list-style-type: none"> Select OK when finished
<p>UTILIZING DEVICES</p> <p>To redirect your calls to an alternate location</p>	<ul style="list-style-type: none"> Select the arrow down option from Devices Field  <ul style="list-style-type: none"> Select the NEW DEVICE from the drop down options All calls will be routed to the new device <p>When placing outbound calls from the UC Web Client, the system will first call the new device. Once answered, it will place the call. This utilizes One Number Service (ONS).</p>
<p>DIRECTORY</p>  <p>Quick SEARCH engine to locate coworkers listed in the company Directory</p>	<ul style="list-style-type: none"> From the DIRECTORY layout, type the first three letters of employees LAST name in the field Click the SEARCH icon (<i>or press enter</i>) Contact information found in external directory Presence can be requested Once found, you may either ADD employee to your contacts or CALL employee by clicking on telephone icon next to their name

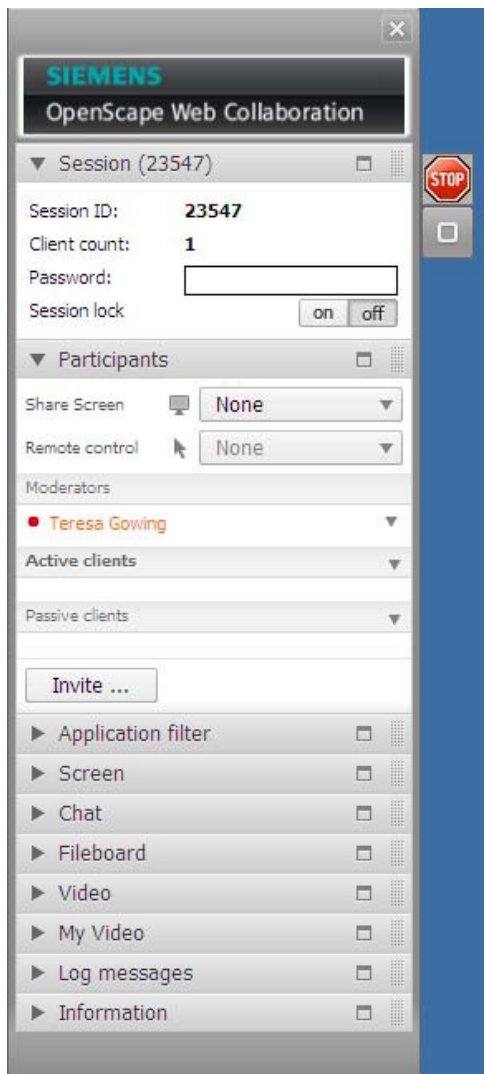
FEATURE	INSTRUCTIONS
<p>GROUPS</p> <p>Create a <i>GROUP</i> to organize your <i>Contacts</i></p>	<ul style="list-style-type: none"> • Select MENU > General > Addresses > Address Groups OR From the <i>Contacts</i> panel, select Edit from the group drop-down options • Select the New Group button • Enter the Group Name for the list of contacts • Select the OK button <p><i>NOTE: When adding a contact, this group will now appear as an option when the pencil icon is selected from the Address Group area.</i></p>
<p>CREATE A CONTACT</p> <p>Contacts can be employees or external numbers. If your contact is an employee utilizing <i>OpenScape</i>, you may request to view their <i>Presence</i></p> <div data-bbox="232 913 329 1001" style="text-align: center;">  </div> <div data-bbox="82 1020 479 1140" style="border: 1px solid black; padding: 5px; text-align: center;"> <p>Notification of acceptance for viewing a user's status will appear via Pearl Menu Icon</p> </div>	<ul style="list-style-type: none"> • Select the Create a Contact Icon <div data-bbox="613 394 1117 489" style="text-align: center;">  <p>Create Contact</p> </div> <ul style="list-style-type: none"> • Enter ALL relevant information in the appropriate fields (<i>Last Name, First Name, Display Name, Telephone numbers, Email, etc.</i>) <div data-bbox="553 562 1352 804" style="border: 1px solid gray; padding: 5px;"> <p>Add entry to contact list</p> <p>Surname: <input type="text" value="Last Name"/> </p> <p>First name: <input type="text" value="First Name"/></p> <p>Display name: <input type="text"/></p> <p>Address group: <input type="text" value="Sales Engineers"/> </p> </div> <p>OR</p> <p>SEARCH for an OpenScape user by entering the first two or three letters of their last name and selecting the SEARCH icon. Once the contact has been located, you may import their information into your contact list by selecting the user and clicking the ADD button.</p> <ul style="list-style-type: none"> • To add the contact to an Address Group, select the pencil icon • Click on the box next to Group for contact or press + to create a New Group • Select OK when finished (<i>from the groups and add entry screens</i>) <p><i>Once a contact is added, the "Request Presence" option is automatically selected IF the user is an employee. The user's status icon remains white until viewing of status is accepted.</i></p>
<p>UTILIZING CONTACTS</p> <p>Quickly chat, email or call a contact</p> <p>View if <i>OpenScape</i> user is on telephone</p> <div data-bbox="183 1329 440 1381" style="text-align: center;">  <p>busy line indicator</p> </div>	<ul style="list-style-type: none"> • Select the appropriate icon next to the contact to reach (<i>chat, email, telephone</i>) • If the Telephone icon is selected, and the <i>OpenStage</i> telephone is your device, the system will activate your <i>OpenStage</i> SPEAKERPHONE. This will allow you to talk "hands free." • If you do not wish to utilize the speakerphone, simply lift the handset once the telephone icon has been selected <div data-bbox="553 1360 1409 1434" style="border: 1px solid gray; padding: 5px;"> <p><input type="checkbox"/>  Lance Serine +14078675309   </p> </div>
<p>CALL JOURNAL</p> <p>Displays the last 250 inbound, outbound, missed calls and conferences</p> <div data-bbox="94 1570 475 1770" style="margin-top: 10px;"> <p> (outbound/inbound connected)</p> <p> (outbound/inbound busy)</p> <p> (outbound/inbound missed)</p> <p> (outbound/inbound conference)</p> </div>	<ul style="list-style-type: none"> • User may return calls via the Call Journal  • User may add to contacts from the Call Journal  • Journal shows duration of call (<i>hover over posted call to display duration</i>) • Review Conference Call attendee information via the information icon  (<i>time/date, duration attendee was on call, name and number</i>) • Journal may be printed  • Time may be adjusted to reflect local or current time zone 

FEATURE	INSTRUCTIONS												
<p>CHAT(Instant Message)</p>  <p>Quickly CHAT/IM with a contact by selecting the chat icon next to their name</p>	<ul style="list-style-type: none"> Click the CHAT icon next to the contact to reach The Instant Messaging window appears Enter the message text in lower left field Click SEND Transmissions times and sent texts are displayed in the upper area <p>NOTE: User must be in the ONLINE mode (Available or Busy) to conduct a chat</p>												
<p>CHAT /IM CONFERENCE</p>  <p>Create a chat session with multiple coworkers</p>	<ul style="list-style-type: none"> From your CONTACTS, select the desired attendees Click on MAKE CHAT CONFERENCE icon Enter the message text in lower left field Click SEND (all attendees receive message) 												
<p>ICON DEFINITIONS</p>	<table border="1"> <tr> <td data-bbox="553 577 613 741">   </td> <td data-bbox="630 604 1490 741"> <p>GREEN icon: Internal contact is idle (<i>OpenScape User</i>)</p> <p>GREEN icon: Internal contact with multiple destination options is idle (<i>OpenScape User</i>)</p> </td> </tr> <tr> <td data-bbox="553 741 613 905">   </td> <td data-bbox="630 772 1490 905"> <p>BLUE icon: Call an EXTERNAL contact</p> <p>BLUE icon: Call an External Number with multiple destination options</p> </td> </tr> <tr> <td data-bbox="553 905 613 1077">   </td> <td data-bbox="630 940 1490 1077"> <p>YELLOW icon: OpenScape User is currently on telephone</p> <p>YELLOW icon: OpenScape User can be reached via multiple numbers and is on telephone</p> </td> </tr> <tr> <td data-bbox="553 1077 613 1213">   </td> <td data-bbox="630 1108 1490 1213"> <p>BLUE Sound Out Balloon: IM Contact status is unknown</p> <p>GREEN Sound Out Balloon: IM contact is Online</p> </td> </tr> <tr> <td data-bbox="553 1213 613 1371">   </td> <td data-bbox="630 1234 1490 1371"> <p>ENVELOPE icon: EMAIL a Contact</p> <p>GLOBE icon: Initiates a WEB COLLABORATION SESSION (<i>profile permitting</i>)</p> </td> </tr> <tr> <td data-bbox="553 1371 613 1465">  </td> <td data-bbox="630 1402 1490 1465"> <p>Melissa May View coworkers PRESENCE (<i>Melissa is in a meeting</i>)</p> </td> </tr> </table>	 	<p>GREEN icon: Internal contact is idle (<i>OpenScape User</i>)</p> <p>GREEN icon: Internal contact with multiple destination options is idle (<i>OpenScape User</i>)</p>	 	<p>BLUE icon: Call an EXTERNAL contact</p> <p>BLUE icon: Call an External Number with multiple destination options</p>	 	<p>YELLOW icon: OpenScape User is currently on telephone</p> <p>YELLOW icon: OpenScape User can be reached via multiple numbers and is on telephone</p>	 	<p>BLUE Sound Out Balloon: IM Contact status is unknown</p> <p>GREEN Sound Out Balloon: IM contact is Online</p>	 	<p>ENVELOPE icon: EMAIL a Contact</p> <p>GLOBE icon: Initiates a WEB COLLABORATION SESSION (<i>profile permitting</i>)</p>		<p>Melissa May View coworkers PRESENCE (<i>Melissa is in a meeting</i>)</p>
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<p>TELL-ME-WHEN</p> <p>Request notification when a uses line status or presence changes to available</p>	<ul style="list-style-type: none"> From the Contacts List, left click on a Contact to highlight Select the »» icon Right click and select Set Tell-Me-When Select from the drop down the WHEN Status option (<i>Voice or Presence</i>) Select from the drop down the CHANGES TO option (<i>Unknown, Available, Busy Be Right Back, In a Meeting</i>) Select from the drop down the ACTION to perform (<i>place call, email, pop-up</i>) Select the EXPIRATION time for this request from drop down (<i>15 min, 30 min, 1 hour, 4 hours, 8hours, 1 day, until event happens</i>) Select OK to activate request 												

FEATURE	INSTRUCTIONS
<p>AD-HOC CONFERENCE</p>  <p>Easily contact multiple people simultaneously for a last minute (Ad-Hoc) Conference Call</p>	<ul style="list-style-type: none"> From your Contacts, select the participants you wish to have on the Conference by clicking on box next to each participants name (or build from scratch by selecting conference icon first) Select the GREEN  CONFERENCE icon NAME the Conference Bridge Enter any additional attendees by entering their name or number in the Add participant dial field of Conference Screen and press ENTER (if additional information is needed for attendee, the Add participant pop-up will appear) Select START
<p>SCHEDULED CONFERENCE</p>  <p>(ex: weekly conference calls requiring a dial-in number and passcode/PIN)</p> <p>The CONFERENCE panel provides the following features:</p> <ul style="list-style-type: none">  Create NEW Conference  EDIT existing Conference  REMOVE/DELETE existing Conference  IDLE Conference  ACTIVE Conference 	<ul style="list-style-type: none"> From your Contacts, select the participants you wish to have on the Conference by clicking on box next to each participants name (or build from scratch by selecting conference icon first) Select the BLUE CONFERENCE icon NAME the Conference Bridge (max 30 characters) Enter any additional attendees in the dial field of Conference Screen To add additional participants, select Add a PARTICIPANT from the drop down options, search, or enter manually <p> - Icon denotes participant will call into the conference to join</p> <p> - Icon denotes system will call participant when conference is active to join</p> <p><i>NOTE: To allow participants to join from any telephone, create as an OPEN Conference</i></p> <ul style="list-style-type: none"> WEB CONFERENCE: Select Web Conference check box from the options if a Web Collaboration will be utilized (profile permitting) RELATED INFORMATION: Enter additional information Click APPLY The PIN & CONFERENCE NUMBERS are generated When finished, click OK <p><i>NOTE: To assign a different PIN, click the REGENERATE button</i></p>
<p>START Scheduled Conference</p>  <p>IDLE CONFERENCE</p> <p>To start a Conference call that appears in your Conference Journal, utilize the arrow drop-down. If a conference is active, the icon will be yellow but the same options will be available.</p>  ACTIVE CONFERENCE	<ul style="list-style-type: none"> From the Conference Journal, select the desired Conference Select Join to Conference drop down option Once the device is answered, the Conference is active 

FEATURE	INSTRUCTIONS
<p>WEB COLLABORATION</p> <p><i>During a Conference, initiate a Web Collaboration to share your screens, documents, applications, etc.</i></p> <p><i>(Web Session must have been selected during the Conference Creation for icon to display)</i></p>	<ul style="list-style-type: none"> From Call Control Window, select the WEB COLLABORATION icon   <ul style="list-style-type: none"> If a pop-up appears to start the Web Collaboration, select OK Select option to RUN the application <i>(if pop-up appears)</i> Select option to RUN FastViewer <i>(Web Collaboration if pop-up appears)</i>

OpenScape Web Collaboration Panel



Session ID - May be given to attendees if Web prompts to do so
Password - Additional security to join session is necessary

Click on the **STOP sign** to END the connection to the web session

Click on the **White Box** to minimize/maximize the panel

Session lock - when on, prevents additional attendees from joining session

Share Screen - Select a participant from drop down

Remote Control - Grant control to a participant of a Moderator or Active Client desktop or application

Moderator - Assign Participant Rights and control bridge
Active Clients - Allowed to Share Screen, Remote Control, Chat, Upload/Download files and share Video

Passive Clients - Observe only

Invite - Select to invite additional participants via email

Application filter - select which applications to share with participants

Screen - View what others will see when sharing your screen

Chat - Send a message to all or individual attendees

Fileboard - Upload or Download documents to share with attendees

Video - Share a video or camera view with attendees

My Video - View what others will see when sharing your video

Log messages - Itemization of web collaboration session

Information - Web Session information

VOICE CONFERENCE NOTES

- Active Ad Hoc conferences and saved conferences will appear in the **Conferences List/Tab**.
- **Moderator/Open Conference** Call Control Options during a conference call:



Mute/Unmute attendees



Lock/Unlock bridge - additional attendees cannot join if locked



Drop individual member from the call



Discontinue entire conference bridge - drops all attendees

If a user accidentally disconnects from the conference, they may **Redial** the conference bridge. The system will recognize their caller ID and prompt user to press "1" to rejoin conference (*no need to reenter the conference bridge information*).