MITEL

Inter-Tel Unified Communicator®

User Guide

NOTICE

This Inter-Tel® Unified Communicator User Guide is released by Inter-Tel, Inc. as a guide for end-users. It provides information necessary to use the Inter-Tel Unified Communicator software. The contents of this user guide, which reflect current Inter-Tel standards, are subject to revision or change without notice. Some features or applications mentioned may require a future release and are not available in the initial release. Future product features and applications are subject to availability and cost. Some features or applications may require additional hardware and/or specific software.

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tech_pubs@mitel.com

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INTRODUCTION

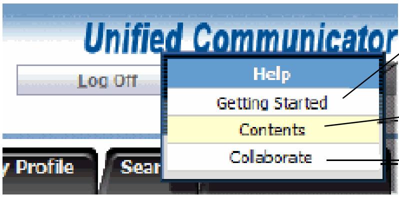
The Inter-Tel Unified Communicator® (UC) product provides presence management and call handling features allowing you to prioritize how, when, where, and from whom you receive incoming calls. With UC, you can:

- Use the Web Conferencing functionality to create online collaborative meetings.
- Route calls to specific locations, including desktop and mobile endpoints, and voice mail.
- Inform callers regarding availability and status through customized greetings that can be personalized based on the calling party.
- Implement routing rules to efficiently handle incoming calls based on who is calling, when they are calling, and the user's current availability and location.
- Direct calls to available staff to address urgent needs.
- Reduce distractions by redirecting lower priority calls to voice mail or personal assistants.

If you are using the WAP Web Client, refer to the WAP Web Client online help that is on the client itself for the latest usage information.

This UC User Guide is intended to get you started with some basic UC tasks. The online Help provides additional information, including the procedures discussed here and other UC product functionality. The online Help contains two sections, a Tutorial that you can access within the main Help and Collaborate help. The Collaborate online Help explains how to use the Web Conferencing and Remote Support features.

To access the user online help within the UC Web Client, click **Help** and select one of the user help files. The user online help consists of three help files: (1) **Getting Started**, (2) **Contents** and (3) **Collaborate**.



(1) For first time users. It tells how to set up your account and how to access the most common UC features

(2) This is the main user help. It contains the UC user Tutorial.

(3)This is the Web Conferencing and Remote Support (WCRS) online help.

NOTE	For optimal UC viewing, it is recommended that you set your screen resolution to 1024 x 768.

New Features and Enhancements

If you are familiar with the previous version of UC, this version (v5.0) includes these changes:

- Windows® Vista® and Internet Explorer® 8 support for the Web client software.
- The Web Collaboration client is Windows based and provides faster connections for Web Conferencing.
- Web Collaboration enhancements:
  - — Full-screen videoconferencing when you undock the Video tab from the Host Console.
  - — Microsoft® Office® 2003 and Microsoft Office 2007 integration and support for Desktop shortcuts, calendar invitations, and reminders.
- Remote Support enhancements:
  - — Unattended support after reboot and reconnect allows an Agent to login remotely to the Client's computer without requiring further user intervention for the duration of the session.
  - — Multiple support sessions allows an Agent to more than one Client at a time.
  - — Auto scaling-Viewer adjust to fit the Agent’s monitor resolution when connected remotely to the Client’s desktop.
- UC Web client enhancement:

  When the Web client is open, the Active Calls tab page appears whenever you place a call or receive a call. When the **Automatically show Active Calls tab**: option is disabled (default), the Active Calls tab blinks instead of automatically displaying the page.

For additional information about these enhancements, refer to the online Help for the component.

Hardware and Software Requirements

This table lists the minimum user hardware and software requirements to use the UC features such as the UC Web Client, UC Tray Client, Web Conferencing Host and Attendee, Remote Support Agent and Client.

COMPONENT	REQUIREMENTS
Processor	1 GHz or higher with 512 MB RAM or higher These are minimum requirements for the application to run on your computer. Performance may decline as you open more applications and run them in conjunction with UC.
Operating system	• Microsoft Windows 2003 with Service Pack 3 (SP3) or later • Microsoft Windows XP Home/Professional/Media Center with SP2 or later • Microsoft Windows Vista Ultimate/Enterprise/Business/Home Premium/Home Basic
Compatible browser	Microsoft Internet Explorer (IE) 6 or later
Network connection	A 256 kbps broadband network connection with 64 kbps connectivity is required (DSL, cable, or T1).

Creating an Account

The New Account Wizard allows you to create a UC account. UC manages all aspects of this account, including all interactions with the system.

IMPORTANT	New users must create an account, which includes a Web Conferencing account. Older UC account information is then migrated to UC automatically, but the user may need to create a Web Conferencing account if they did not have one previously. Always exit the Tray Client before upgrading. If the Tray Client is running when a new version is downloaded and installed, UC will attempt to close the Tray Client. If UC cannot close the Tray Client, you are prompted to exit the Tray Client before the download and installation continues. After your account has been created, the first time you log on a corresponding Web Conferencing Remote Support (WCRS) account is created. If, at that time, an account exists with the same UserID as the account to be created, the account creation fails. This only occurs if you try to bypass UC to create your Web Conferencing userid. If your UC server has been upgraded to use Remote Support, contact your WCRS administrator to give your Web Conferencing userid Remote Support privileges.

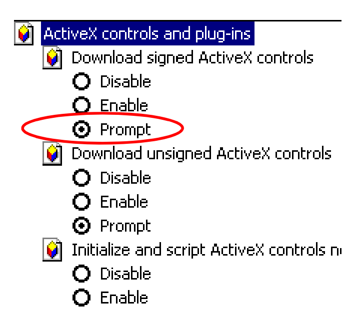
To create an account:

1. Check the system tray at the bottom-right corner of your monitor. If the Tray Client is running, right-click the client and select **Exit**. If applicable, respond to the prompt that appears. The exit prompt only appears if the setting “Prompt for confirmation on exit” is enabled in Tray Client properties.

Exit Tray Client

NOTE	If you are using Vista and the Tray Client does not install, see “Installing the Clients on Vista” on page 12.

2. Navigate to the **http://<*server_name*>/UC/**, where <*server_name*> is the UC server computer. A Security Warning appears, and you are prompted to download an ActiveX control. This control contains the information required to run the Web Client.



IE browser Security tab settings

3. If this is not the first time running the Web client, go to step 9 on page 9. If this is the first time running the Web client, the preferences screen appears.

NOTE	If this was not the first time the Web client has run on this computer, you would have been taken directly to the logon screen.

Select from the following options:

— Web Client Preferences

- **Add shortcut on desktop**: Adds a shortcut to the Web client on the desktop. When you run this shortcut, it launches a Web browser and automatically navigates to the Web client Web address.
- **Add shortcut to favorites**: Adds the Web address for the Web Client to the browser favorites list.
- **Launch automatically with Windows**: Adds a shortcut to the Web Client in the Windows startup folder. Every time Windows starts, it will launch the Web browser and automatically navigate to the Web address for the Web client. If, at a later time, you do not want the Web Client to launch automatically when Windows starts, navigate to the startup folder on your computer and remove the Unified Communicator Web Client shortcut.

— Tray Client Preferences

- **Add shortcut on desktop**: Adds a shortcut to the Tray Client on the desktop. When you run this shortcut, it launches the UC Tray Client application.
- **Launch Automatically with Windows**: Adds a shortcut to the Windows start-up folder so that when Windows starts, the Tray client launches automatically.
- **Launch now**: When this option is checked, clicking Next launches the Tray Client automatically.

Once shortcuts are installed, they are automatically updated with any changes to the UC Web address. Consider the following example: You run the Web client for the first time from the Web address http://<*server_name*>/uc/, and the preferences screen appears. You choose to install one or more shortcuts. Later, an administrator decides to change the computer name or IP address of the UC server computer. UC is now hosted at http://<*new_server_name*>/uc/. The first time you navigate to this new Web address, the Web client recognizes that the Web address has changed, and it automatically updates all of the shortcuts that you chose to install during your first session. Shortcuts will always point to the correct Web address. All installed shortcuts are removed if you choose to remove the Web client from your computer.

Click **Next**.

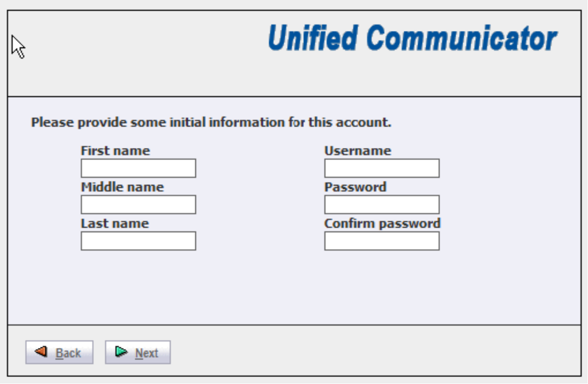
The required components are automatically downloaded and installed. Shortcuts are automatically created (to the Web client and the Tray Client) in Start – Programs– Inter-Tel – Unified Communicator and on the desktop.

The UC logon screen appears. If the controls have been downloaded and installed during a previous session, they will not be downloaded again unless a newer version is available.

4. Check that the browser settings are set to prompt for signed ActiveX controls, as indicated in the illustration on the previous page. The path from the Internet Explorer browser menu is Tools – Options – Security tab – **Custom Level**.

5. At the UC logon screen, Click the **Create New Account** link. If another logon dialog window opens on top of the logon screen, close the dialog window.

6. Provide initial account information. This information allows UC to identify this account and to provide you access to the account information.



   a. Enter a **First**, **Middle**, and/or **Last** name for this account. All three fields cannot be blank; at a minimum, one field must be filled in.

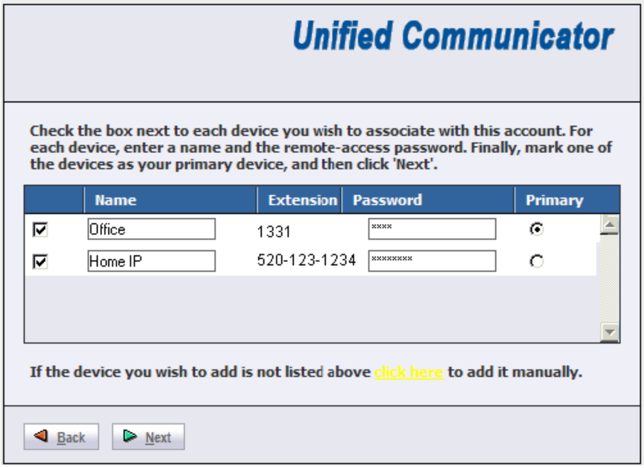
b. Enter a **Username** and **Password** for this account. Enter the password again to confirm. This is the username and password you will use to log in to the Web Client.

The username cannot be blank, and it cannot match any existing usernames already on the system either alphanumerically or numerically. In reference to numerically, these are the digits you would press on a dial pad to spell your username. When entering a username on the dialpad, you can simply press the digit corresponding to each letter of your username (for example, to enter “johnsmith” you would press “564676484”). If you use this mechanism to enter your username when logging on to the TUI/VUI Client, UC checks that all usernames are numerically unique. For example, if an existing account has a username of “johnsmith,”a user could not create a new account with a username of “logosmith” because someone could enter that same username from the dial pad. As such, all usernames must be unique; there cannot be two accounts with the username “johnsmith” or numeric equivalent.

c. *If there is more than one tenant group configured in the system*, select the tenant from the drop-down list. Your account is created in this tenant group.

If there is only the default tenant group, or one tenant group in the system, you will not be prompted.

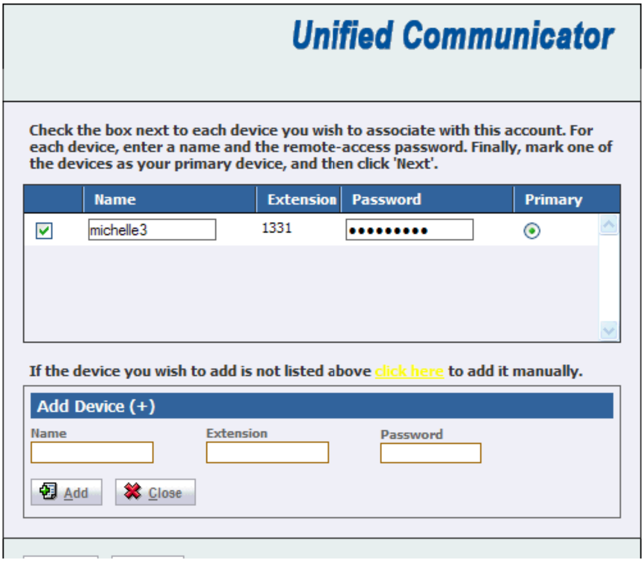
d. Click **Next**. The screen below appears.



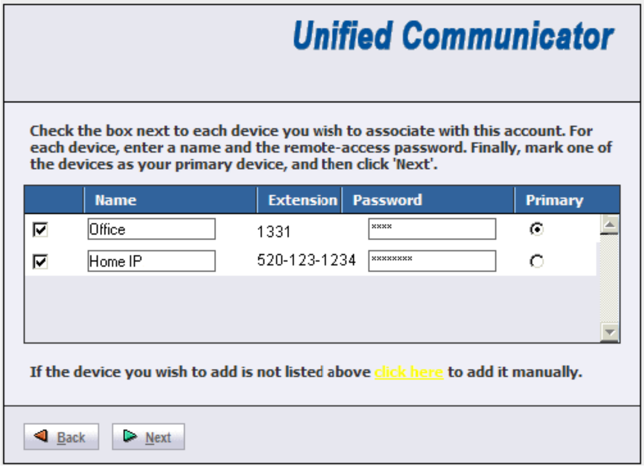
e. Select the check box next to each device you want to include in your account. UC searches for all devices programmed with a similar description or username, and displays the results to you. You can then select each device you want to associate with your account. You can always add devices later through the Web Client (see “My Profile Tab” on page 45). Only endpoints can be added as devices.

IMPORTANT	If you have not associated a device with your account, a warning appears. You can complete the wizard, but the new account will initially be disabled and you will not be able to log on. This is a security measure to prevent people from creating a vast number of accounts on the system. Users who associate at least one device with their account have provided a remote-access password for the device to authenticate themselves as the device user. If you do not have any devices, UC will still function, however, an administrator must enable your account prior to use. When you receive this warning, you have a choice to go back and add a device or continue with the wizard.

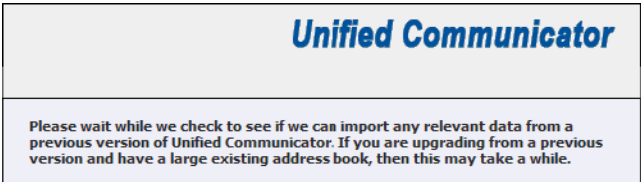
7. For each device you have added to your account, provide the remote-access password for that device. An error prompt appears if you provide the wrong password.
8. Click the button next to the device you want to designate as your primary device.
9. If one of your endpoints does not appear in the list, select **click here** to add the device manually.
10. To add a device, enter the Name, Extensions and Password (optional). Click **Add** to enter the device.



11. When finished adding devices, click **Close**. You return to the screen below.

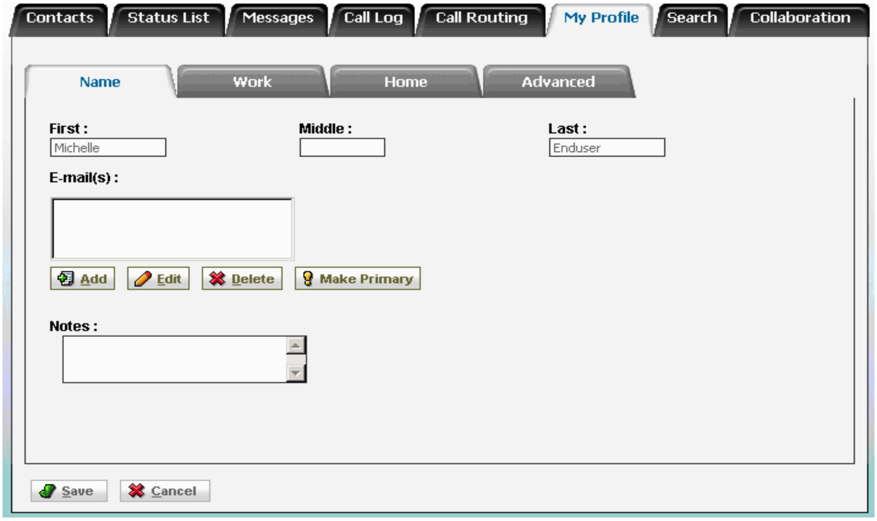


12. Click **Next**. The message screen below appears.



If errors occur during the import process or if a device cannot be located, a prompt appears. Click **OK** to acknowledge the prompt and continue, or check to see that the device is connected to the system and either run the wizard again or add the device later. The screen shown on the next page appears after UC checks for devices and imports any previous UC information (if a previous UC version exists). Click **OK**.

13. Enter or edit account information.



After your account is created, UC takes you to the My Profile tab where you can edit account information. If account data was imported from a prior UC installation, the above fields contain information based on the imported data. The wizard also prepopulates the work number (Primary field) with your primary device extension. You can later edit this information from the Web Client interface (refer to “Collaboration Tab” on page 54).

14. Click **Next** to begin using the Web Client. The Getting Started help screen appears. Close this window to return to the Web Client. If you have associated at least one device with your account, you are automatically logged on. If you have no devices associated, you are informed that your account is disabled and you return to the logon screen. The system administrator is always informed, through a system message, whenever new accounts are added.

INSTALLING THE CLIENTS ON VISTA

Vista operating systems obtain additional security features by default which, include a Protected Browser Mode and User Account Control (UAC) settings. These security settings do not allow the UC Web Client and Tray Client installation to complete properly. You must temporarily disable these settings for this installation.

After you complete the installation, you can these settings back to their original configuration. You must restart your computer for the changes to take affect.

To disable UAC:

1. Open Control Panel
2. Under User Account and Family Settings click **Add or remove user account**.
3. Click on your user account and under the account information, click the **Go to the main User Account page** link.
4. Under Make changes to your user account, click the **Change security settings** link.
5. Under Turn on User Account Control (UAC) to make your computer more secure, click **Use User Account Control (UAC) to help protect your computer** to clear the setting.
6. Click **OK**.
7. You are prompted to restart your computer. The change does not take affect until after you computer restarts.

To disable Protected Mode:

1. Open an Internet Explorer browser window.
2. Select **Tools/Internet Options** from the menu bar.
3. Click the **Security** tab.
4. Clear the **Enable Protected Browser Mode Settings** checkbox.
5. Click **Apply**, and then click **OK**.
6. Close the browser window.
7. Open a new browser window and verify Protected Mode is set to Off.

SETTING TRAY CLIENT PREFERENCES

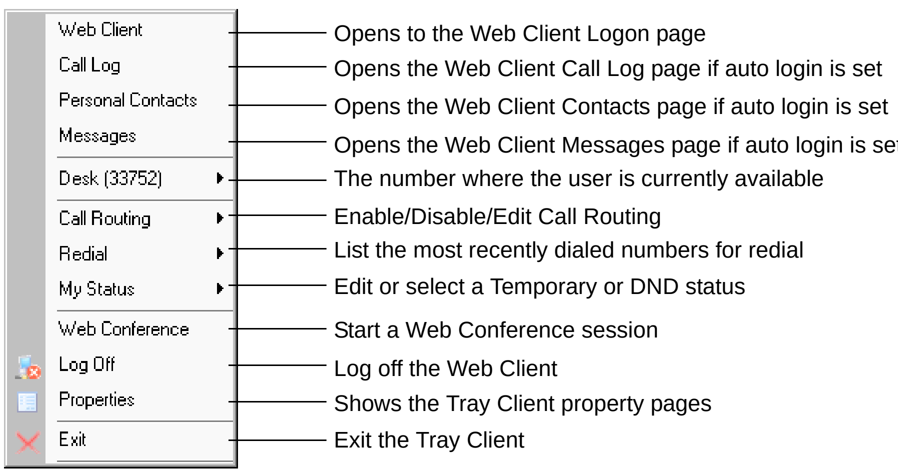
The Web Client and Tray Client are tightly integrated to provide greater usability. Setting Tray Client properties allows continued, seamless functionality.

To change your account Tray Client preferences:

1. Open a Web browser and enter the UC computer URL. The UC computer stores your account information.

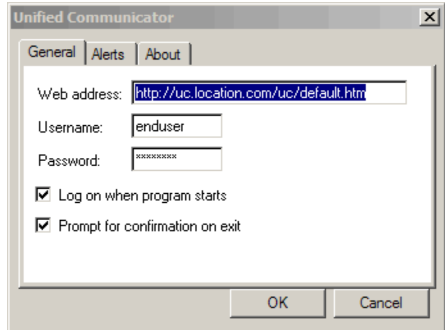
   If this was not the first time the Web Client has run on this computer, you are taken directly to the logon screen. You can also set additional Tray Client preferences through the Properties option on the Tray Client menu.

   If you select the **Automatically log me on each time** on the Login page, when you log in, then your ID and Password will be remembered. This allows you to select and directly access any of the Web Client page options listed in the Tray Client (Call Log, Personal Contacts or Messages) without having to enter your ID or Password.



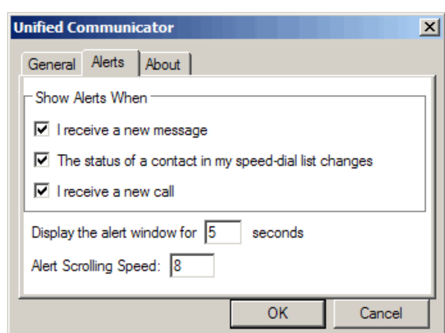
2. At the logon screen, enter your username and password.
3. Check **Automatically log me in each time** to indicate you want your login information saved so you can log on automatically each time. Click **Log on**.
4. Upon logging on, right-click the Tray Client, and select **Properties** from the menu.

5. Set or change the following General tab options:



- **Web address**: No change is required. It specifies the UC Web address (`http://<server_name>/UC`). The Web Client configures this field automatically during the Tray Client installation. The Tray Client uses this Web address to retrieve configuration information including settings that allow it to connect to the UC server computer.
- **Username**: Stores your username when the Tray Client is configured to automatically log on. If this field is blank, the Tray Client prompts you for a username and password.
- **Password**: Stores your password when the Tray Client is configured to automatically log on.
- **Log on when program starts**: (Recommended) Specify whether or not you want the Tray Client to automatically log on every time the Tray Client launches. It is recommended you fill in your username and password and enable this option. This allows for seamless integration between the Tray Client and the Web Client.
- **Prompt for confirmation on exit**: Specify whether or not you want the Tray Client to prompt for confirmation when you exit the application.

6. Click the Alerts tab, and then set or edit the following options:



- **Show Alerts When**:
  - — *I receive a new message*: You receive an alert when any of the devices owned by your account receives a new station or voice mail message.
  - — *The status of a contact in my Speed Dial list changes*: You receive an alert when the account status or device DND of one of the contacts in your Speed Dial list changes.
  - — *I receive a new call*: You receive an alert when an incoming call rings in to one of your devices.

- **Display the alert window for <*n*> seconds**, where <*n*> is the number of seconds each alert is visible before disappearing. Enter a value between 1 and 60. Default is 5.
- **Alert Scrolling Speed <*n*>**: Controls the scrolling speed, between 4 and 30, for the alert window. The higher the number, the faster it scrolls. Default is 8.

7. Click **OK**.

THE UNIFIED COMMUNICATOR INTERFACE

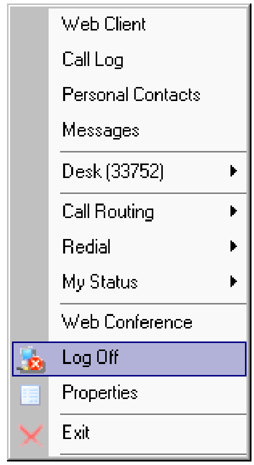
The Unified Communicator Client consist of two parts, the Web Client and the Tray Client.

- The Web Client interface allows you to do everyday UC tasks and advanced UC user configuration options.
- The Tray Client, accessed through the icon in the system tray, allows quick access to the most commonly used features of UC.

The first time you log into UC, you must log into the Web Client. The Web Client checks to see if you have a Tray Client. If the UC Tray Client does not exist on your machine, UC installs the Tray Client on your machine.

The UC Web Client interface consists of three parts: Status Panel, Quick Links and the UC Work Area which will be referenced throughout this guide.

Right-click the Tray Client icon  in the system tray to see this menu:

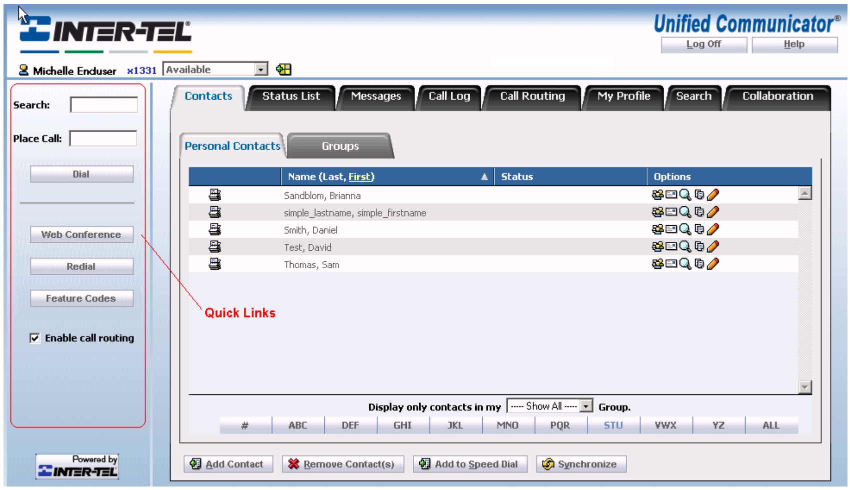


To log off of your account or exit, do any of the following:

- Click the **Log Off** link at the top right corner of the browser window. This returns you to the logon screen.
- Close the browser window.
- Navigate to a different Web address.

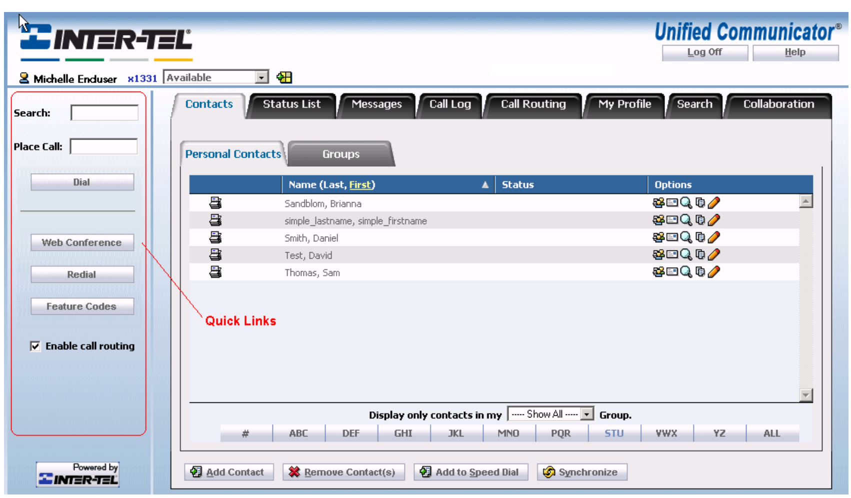
PLACING CALLS

You can place calls from UC within the Quick Links search results, using the Place Call field, or from accessing the last five calls placed using the Redial button. You can also place calls from the Contacts List, Speed Dial list, and Call Log.



From Quick Links

There are several ways you can quickly place calls from the Web Client Quick Links panel.



Place Call Field

To place a call:

1. Enter a number in the **Place Call** field.
2. Click **Dial** or press **ENTER** to place the call.

   The Call List view automatically appears, allowing you to control the call. The number you entered into the Place Call field remains.

Search Results

To place calls from search results:

1. From the Quick Links panel, begin typing the first few characters of the contact. The type-ahead search function automatically updates the search panel with results as you type. You can also enter the entire name or device extension.
2. If there are too many results, type additional characters or click **display all** to display all entries found with the search string you entered.

   The search results include all matching contacts in your contacts list, all matching accounts, and all matching devices in the system. The search function tries to automatically eliminate duplicate results from the list. If the search matches an account, as well as one or more devices owned by the account, the search results will only display the matching account.

   All search results are displayed in a table containing four columns: Type/Icon Status, Name, Source, and Features. You can sort the results in the table by clicking either the first or last name links in the Name column, clicking the Name column or by clicking the Source column.
3. Click the  icon to open a menu listing all numbers for this search result. Click on one of the numbers in the list to call the contact at the specified number. This icon is not present if the search result has no numbers.

Redial Button

To place a call using the redial button:

1. Click **Redial** on the Quick Links panel.
2. From the list of the last five outgoing calls from the call log, select a number from the list. Each menu item includes the date/time and the caller or called party.

From the Contact List

To place a call from the contact list:

1. Select the Contact tab. Highlight the contact you want to call.
2. Click  to open a popup menu listing the numbers for the selected contact. This icon does not appear if number a number does not exist for example, a simple contact where the number field was left blank.
3. Click one of the numbers in the list to initiate a call to that number.

From the Speed Dial

To place a call from the Speed Dial list:

1. Click on a Speed Dial button from the panel.
2. From the popup window that appears, click one of the numbers in the list to call the contact at the specified number.

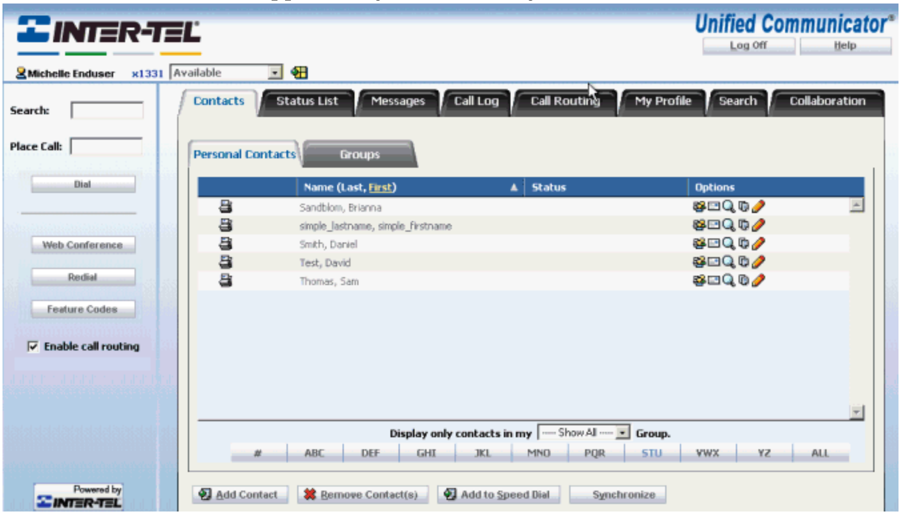
From the Call Log

To place a call from the call log:

1. Click Call Log tab to open the Call Log view.
2. Click the hyperlink to place a call to the specified number.

CONTACTS TAB

You can add contacts to your contact list through the type-ahead search feature or through the advanced search view. You can also add simple contact information. If you manually edit a linked contact in your contact list, you will not receive automatic updates for that contact when the actual account user in the system updates their account information. This applies only to the fields you edited.



Using Type-Ahead Search

To add a linked contact using type-ahead search:

1. From the Quick Links panel, begin typing the first few characters of the contact. The type-ahead search function automatically updates the search panel with results as you type. You can also enter the entire name or device extension.
2. If there are too many results, type additional characters or click **display all** to display all entries found with the search string you entered.
3. Do one of the following:
   - *To add a range of contacts*: Click a contact, and then SHIFT-click a name above or below it. Depending on the second click you made, all names in between the two selections are highlighted.
   - *To add multiple contacts*: Click a contact, and then CTRL-click entries you want to add.
4. Click **Add Contact**. The selected items are added as linked accounts and linked devices.
5. Repeat steps 1 to 4 to add additional linked contacts.

Using Advanced Search View

To add a linked contact using Search:

1. Select the Search tab.
2. In the **Search for** field, enter a contact name or partial name or other character string.

3. Enable the following sources you want to include. Choices are:

   - **Local**: Searches the following local sources:
     - — System Speed Dial
     - — Devices
     - — My Personal Contacts list
     - — Accounts
   - **Remote**: Searches all configured remote devices.

4. Click **Search**. The Results tab displays the search results.

5. Do one of the following:

   - *To add a range of contacts*: Click a contact, and then SHIFT-click a name above or below. Depending on the second click you made, all names between the two selections are highlighted.
   - *To add multiple contacts*: Click a contact, and then CTRL-click contacts and/or devices you want to add.

6. Click **Add to Personal Contacts**.

Adding Simple Contacts

To add simple contacts:

1. Select Contacts tab. The contact list appears. The list will appear empty if no contacts have been added.

2. Click **Add Contact**. Enter the following information for this contact:

   - **Name**: The Name tab includes the following fields.

FIELD	CHARACTER LIMIT
First, Middle, and Last	64
E-mail(s) Displays a list of all the contact's e-mail addresses. When in edit mode, click **Add** to add an entry to the list. Select an entry and click **Edit** to change an entry in the list, or click **Delete** to remove the entry from the list. Selecting an entry and clicking **Make Primary** will move that entry to the top of the list and make it the primary e-mail address. Some contact managers such as Microsoft Outlook distinguish between the primary and secondary e-mail addresses.	256
Notes Add any additional information you want to save with this contact information.	4096

- **Work**: The Work tab includes the following fields.

FIELD	CHARACTER LIMIT
Company	64 Any characters are accepted. Alpha characters, or other symbols, within a number field are stripped during the call.
Title	
Department	
Work Street Address	
Work Primary Phone	
Work Secondary Phone	
Work Mobile Number	
Work Fax Number	
Work IP Phone	
Work Pager Number	
Work Web Page Include “http://” at the beginning of the Web address.	2048

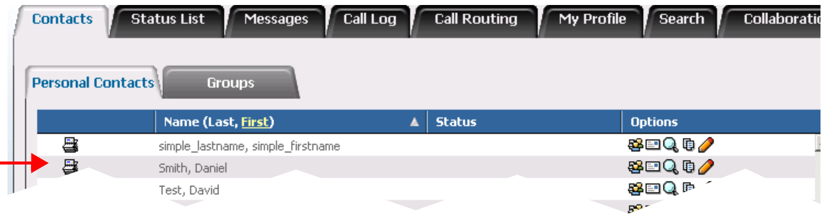
- **Home**: The Home tab includes the following fields.

FIELD	CHARACTER LIMIT
Home Street Address	64 Any characters are accepted. Alpha characters within a number field are stripped out during the call.
Home Primary Phone	
Home Secondary Phone	
Home Mobile Number	
Home Fax Number	
Home Pager Number	
Home IP Phone	
Home Web Page Include “http://” at the beginning of the Web address.	2048

- **Advanced**: Click **Make contact private** to mark the selected contact as private. Private contacts are visible only in your Personal Contacts list. They are not visible to other users or administrators.

3. Click **Save**. The information is saved for your Personal Contacts list only and the newly added simple contact appears in the contacts list, as shown in the example below.

Simple contacts are indicated with this icon:



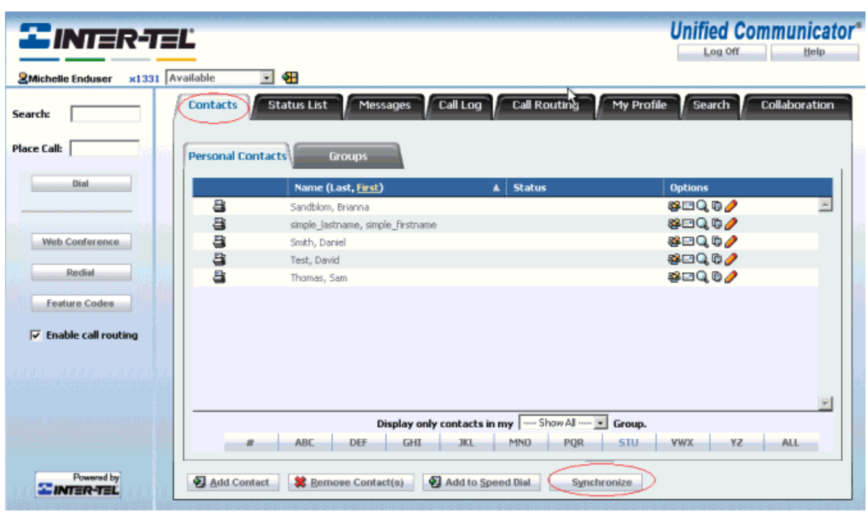
If you change views while in edit mode, the add attempt is canceled. Filling out only the Work tab information results in adding a simple company contact. The icon changes from this simple contact icon to this icon.

4. Repeat step 2 on page 21 to step 3 to add more contacts. To have your contacts stay up-to-date, use the Advanced Search (page 20) or the Type-ahead search (page 20) options.

Synchronizing With or Importing From Contacts

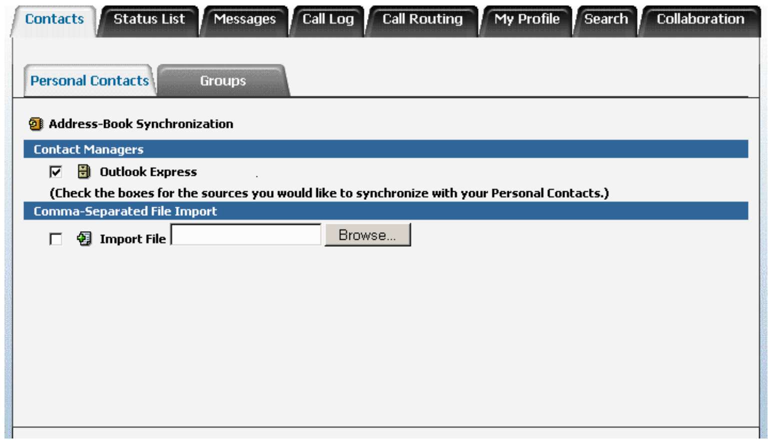
To synchronize with or import from your Personal Contacts list:

1. Select the Contacts tab. The contact list with your contact information appears.



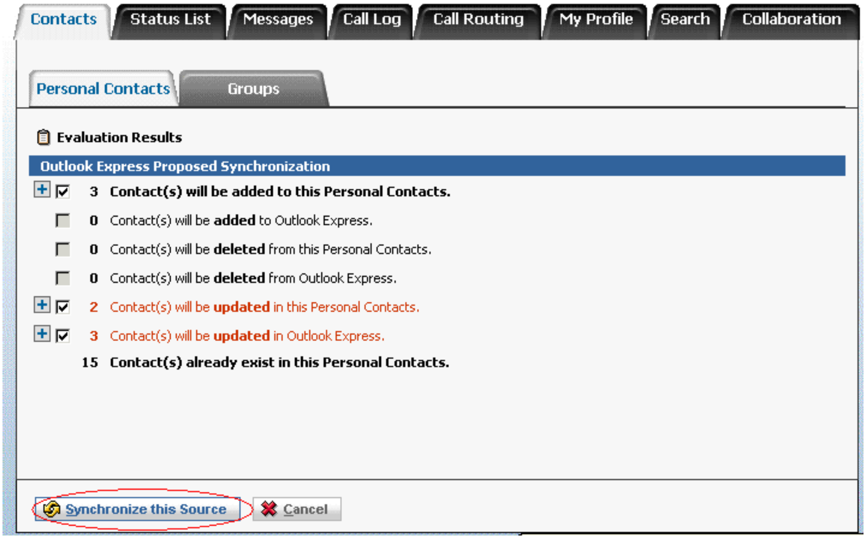
2. Click **Synchronize**. The synchronization wizard appears.

3. Select from any or all of the following sources to which you want to synchronize your Personal Contacts list:
   - **Microsoft Outlook**: Select the check box to synchronize your Personal Contacts list with Microsoft Outlook.
   - **Outlook Express**: Select the check box to synchronize your Personal Contacts list with Outlook Express.



   - **Import File**: Select the check box, click **Browse** and navigate to the location where the CSV file exists. You can import contacts from a comma-separated values (CSV) file from Outlook, ACT!, or GoldMine®. Microsoft Outlook and Outlook Express appear only if these applications are installed on your computer.
4. Click **Start Synchronization**. If no conflicts exist, the Personal Contacts list is synchronized and you return to the Contacts view. If one or more conflicts exist, you are presented with the following options for resolving the conflicts:
   - **Skip ALL conflicts**: Leaves all conflicting contacts unchanged in both your Personal Contacts list and the other address book.
   - **Save ALL conflicts with Address Book data**: Resolves all conflicting contacts using the data from the given UC contact. The conflicting UC contacts will remain unchanged, while the external contacts will be overwritten to match the UC contacts.
   - **Save ALL conflicts with imported data**: Resolves all conflicting contacts using the data from the given external contact. The conflicting external contacts will remain unchanged, while the UC contacts will be overwritten to match the external contacts.
   - **Manually merge ALL**: Allows you to manually merge each of the conflicting contacts.
5. Select the synchronization operations to perform, and which type of conflict res-

olution to use (if any conflicts exist), and then click **Synchronize this Source** to proceed with the synchronization. If conflicts exist, proceed to step 6 on page 25.



6. If conflicts exist and you have chosen **Manually Merge ALL** (conflicting contacts), you are presented with the conflicting contacts one-by-one and prompted to perform the manual merge. At the bottom of the display, a drop-down list allows you to specify how you would like to proceed with the given contact. You have the following options:

   - **Save this conflict with form data**: Saves the contact (to both your Personal Contacts list and the other address book) with the information displayed in the HTML form on the left side of the merge display.
   - **Skip merging this conflict**: Skips the current contact, leaving the contact unchanged in both your Personal Contacts list and the other address book.
   - **Save this conflict as separate contacts**: Saves the conflicting contact as two separate contacts in the Personal Contacts list. The contact from the UC contacts list is added as a new contact to the external address book, and the contact from the external address book is added as a new contact to the UC contacts list.

- **Save this conflict with Address Book data**: Saves the contact using the data from the UC contact. The conflicting UC contact remains unchanged, while the external contact is overwritten to match the UC contact.
- **Save this conflict with imported data**: Saves the contact using the data from the external contact. The conflicting external contact remains unchanged, while the UC contact is overwritten to match the external contact.

7. After choosing how you want to handle the conflict resolution, click **Save** to save and proceed, or click **Cancel** to return to the summary screen and change your initial selections. After conflicts have been resolved, the synchronization proceeds. The following table shows which UC fields and the corresponding Outlook field are synched. It also shows which UC fields are not synched.

UC FIELD	OUTLOOK FIELDS
Work Primary	Business1
Work Secondary	Bussiness2
Work Mobile	Not Synched
Work IP Phone	ISDN
Home Primary	Home1
Home Secondary	Home2
Home Mobile	Mobile
Home IP Phone	Not Synched

Building the Speed Dial List and Other Groups

A Speed Dial group was installed automatically when you created your account. If there are no contacts in your Speed Dial group, Speed Dial buttons do not appear at the bottom of the browser window. Either of these procedures adds a contact to the Speed Dial list in addition to adding Speed Dial buttons.

You can add contacts to the Speed Dial list from your Personal Contacts list or from the search results panel.

From the Personal Contacts list

To add a contact to the Speed Dial list from the contact list:

1. Select the Contacts tab.

   The list appears empty if no contacts have been added. To add contacts, refer to “Adding Simple Contacts” on page 21.

2. *To add a range of contacts*: Click a contact, and then SHIFT-click a name above or below the contact. Depending on the second click you made, all names between the two selections are highlighted. Click **Add to Speed Dial**.

   To add multiple contacts: Click a contact, and then CTRL-click contacts you want to add. Click **Add to Speed Dial**.

   To add using drag and drop: Click and drag the icon, located to the left of the contact name, from the Personal Contacts list view to the Speed Dial area.

From the Search Results Panel

To add a contact to the Speed Dial list from the search results panel:

1. From the list of search results, select the contact you want to add to the Speed Dial list.

2. *To add a range of contacts*: Click a contact, and then SHIFT-click a name above or below the contact. Depending on the second click you made, all names between the two selections are highlighted. Click **Add to Speed Dial**.

   To add multiple contacts: Click a contact, and then CTRL-click contacts you want to add. Click **Add to Speed Dial**.

   When adding contacts from the Search Results panel, clicking **Add to Speed Dia**l also adds the contact to the Personal Contacts list.

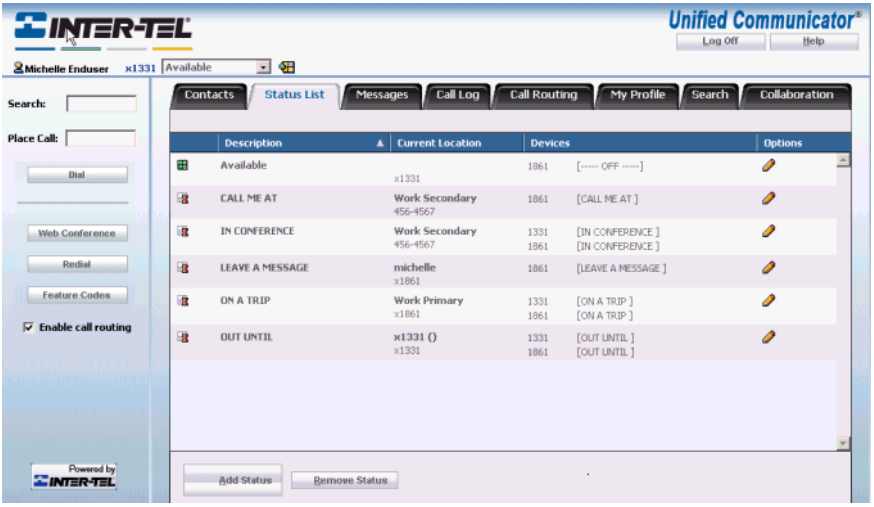
Creating Groups

To add a group:

1. Click the Groups tab in the UC Work Area to open the Groups view.
2. Click **Add New Group**. A prompt appears.
3. Enter the name of the new group. A group name cannot be empty and it cannot match the name of an existing group.
4. Add contacts to your group using either of the following methods:
   - Drag and drop a contact from your Personal Contacts list into the group folder. A contact can belong to more than one group. You can also select multiple contacts in the Personal Contacts list area, and then click and drag those contacts into a group.
   - Select contact(s) in the Personal Contacts list area.
     a. Click **Add Contact(s) to Group**. A dialog appears prompting you to select to which group you would like to add the contacts.
     b. Select the desired group from a drop-down box, and then click **OK**.

Status Tab

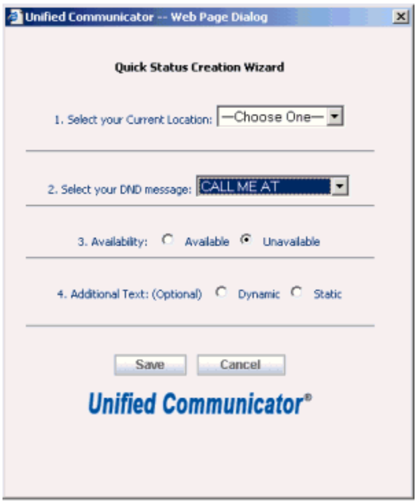
If the user account is created with the New Account Wizard, the account is created with one status called Available. Additional statuses can be added.



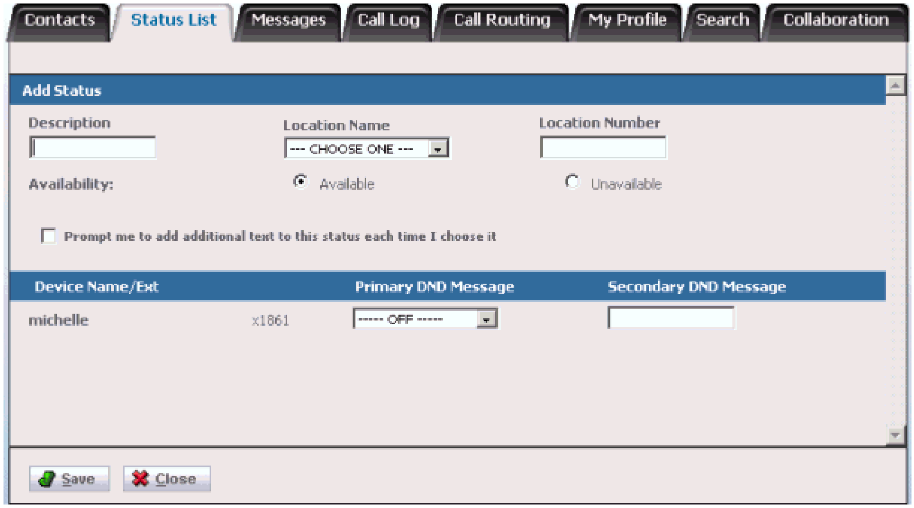
Availability refers to the true/false state of availability for an account. An account is either available or not available. It is important to not confuse availability with the Do-Not-Disturb (DND) status supported by devices on the system. A DND status is associated with a device, and you can have multiple devices associated with your account. By contrast, an account has only one availability status. If call routing is enabled in the Quick Links panel, you will receive calls while in DND. To avoid receiving calls while in DND, create a routing rule so that calls are sent to a specific location (for example, voice mail) when your device is in DND. You can also disable call routing or create routing rules combined with greetings to mirror your frequently used DND statuses.

There are two ways to add a status:

- Click the Quick Status Wizard icon , located to the right of your UC userid.



- Click the **Add Status** button , located at the bottom of the Status List page.



Each status is displayed in a table with the following columns: Availability, Description, Location, Devices, and Options.

- **Availability**: Displays an icon that represents the availability of the given status. The availability icon will be one of the following:

 Available

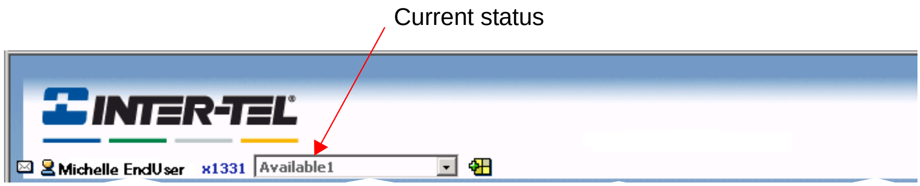
 Any other status, which you add, will use this icon

- **Description**: Displays the description that you have assigned to the status.
- **Location**: Displays the location of the given status. The column displays the name and number of the location. Location refers to the number at which you can be reached, when you are using this status.
- **Devices**: Displays the DND setting for each of the devices associated with your account. The extension of each device is indicated, and the DND is shown in parenthesis. On a separate line, the Windows Messenger status is indicated. When you change to this status, the DND on each of your devices is set to these specified values.
- **Options**: Click the Edit icon to make changes to the status. You can also double-click a status to edit it.

Viewing or Setting Status

To view or set status:

From the Status panel at the top of the browser window, select a status from the drop-down list.



Setting a Temporary Status

To set temporary status:

1. Click the temporary status icon, to the right of the current status drop-down list (shown above).
2. Enter a number and indicate your status as Available or Unavailable.
3. Click **Create Status**.

Adding or Modifying a Status

To add or modify a status:

1. Click the Status tab in the UC Work Area to open the Status list view.
2. Do either of the following:
   - *To add a status*, click **Add Status** below the status table to add a new status.
   - *To edit a status*, click the icon next to an exiting status, or double-click the status.
3. Enter or modify this status.
   - Enter or modify the status description.
   - Choose the location name from a drop-down list that contains all of your devices, your personal information numbers, and a Custom option.

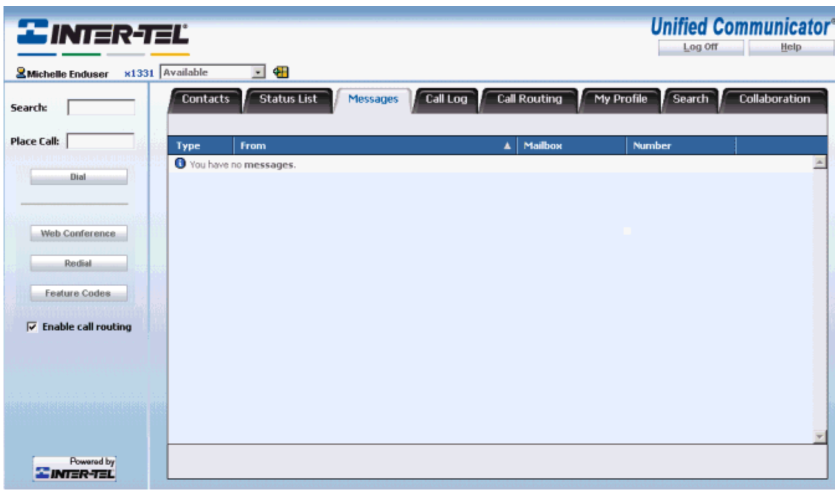
   If you choose anything except Custom from this drop-down list, the location-number field automatically contains the appropriate number. It is also disabled so you cannot edit it.

   If you choose a location of **Custom**, enter the custom number in the **Location Number** field. If you do not enter a location number, you receive an error message when you attempt to save the status.

4. Select the availability. Option buttons allow you to specify whether the status represents available or unavailable.
5. Specify the DND setting for each of your devices. You can choose the DND message from the drop-down list, and optionally enter a secondary message for each device.
6. Click **Save**.

MESSAGES TAB

Messages View displays a list of unread voice mail messages, station messages, and system messages.



The following icons indicate message types available:

Station Message: Click the link to call the originating station or device.

Voice Mail Message: Click the link to call voice mail. You cannot delete voice mail messages through the UC interface. You must delete them through the voice mail system at your endpoint.

System Message: The system message text is displayed. Click this icon to view additional information and/or instructions on what to do, if applicable. Messages sent from administrators do not appear in the Messages view.

To delete a station message:

1. Select the Messages tab to open the Messages view.
2. Select one or more station and/or system messages and click **Remove Message(s)**.

To delete a voice mail message:

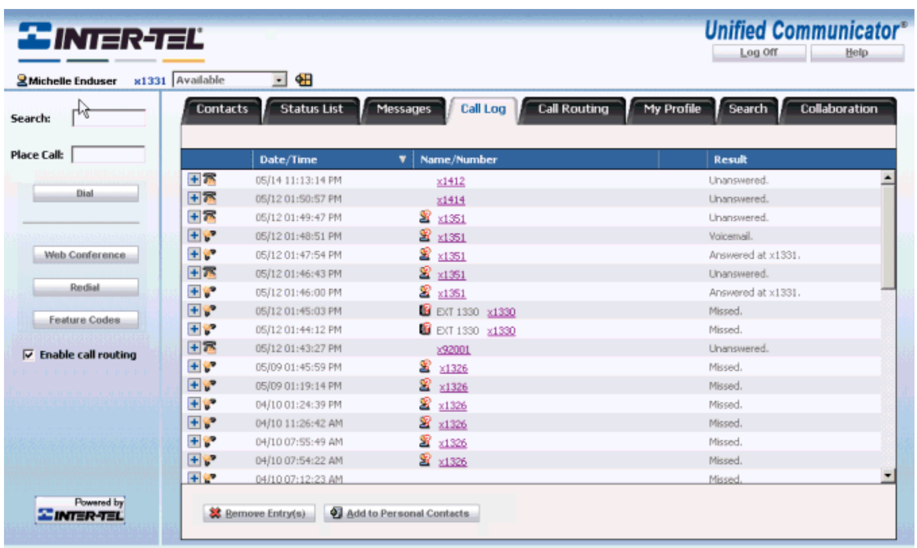
Voice mail messages must be deleted using the voice mail system. If you attempt to delete a voice mail message, an error message appears, and the voice mail message remains in the list.

To sort messages:

1. Select the Messages tab to open the Messages view.
2. Click one of the column headers. Messages can be sorted by type, mail box, or number.

CALL LOG TAB

The Call Log tab allows you to review recent calls. Your recent calls are displayed in a table sorted from most recent to oldest. The maximum number of calls that can appear in the call log is determined by a system-wide setting set by your administrator.



Viewing Call Details

To view call details:

1. Select the Call Log tab to open the Call Log view.
2. Click the “+” icon next to the call log entry to expand the entry and view call details. When a call is expanded, click “-” to collapse the call log entry.

   When a call log entry is expanded, one or more lines appear below the entry showing every step the call went through before it terminated. Each step indicates the date/time at which the step occurred, and it indicates what action the step took (for example, CONNECTED).

Associating Number with Contacts in Personal Contacts List

When you receive a call from an unknown number and UC matches the number to an entry in your Personal Contacts list through the use of positive caller ID, UC flags the call log entry to indicate to you that the system identified the number as belonging to a contact in your Personal Contacts list.

To associate a call log number with a contact in the Personal Contacts list:

1. Select the Call Log tab to open the Call Log view, and then click to launch a wizard that allows you to add the number to the identified contact. The wizard informs you as to which contact the positive caller ID is matched.
2. Choose the number field where you want to store the number. If you choose a field that does not already contain a number, the new number is added to the field. If you choose a field that currently contains a number, the new number replaces the existing number in the field.

NOTE	UC relies on Caller ID to correctly route incoming calls. Therefore, it is important to update your Personal Contacts list as you receive new numbers to ensure calls are routed properly.

Returning a Call

The number in each call log entry appears as a hyperlink.

To return a call:

1. Select the Call Log tab to open the Call Log view.
2. Click the hyperlink to place a call to the specified number.

Adding a Call Log Entry to the Personal Contacts List

To add a call log entry to the contact list:

1. Select the Call Log tab to open the Call Log view.
2. Select one or more entries from the call log table and click **Add to Personal Contacts** to create contacts in your contacts list for the given entries. This automatically creates a contact for each call log entry, using the name, company, and number included in the entry.

   Entries that have no name, company, or number are ignored and will not be added to the Personal Contacts list.
3. If you click **Add to Personal Contacts** without first selecting one or more call log entries, an error message appears. UC attempts to determine whether the call log entries indicate devices or accounts on the system. UC then adds those entries to the Personal Contacts list as linked devices and linked accounts, when possible.

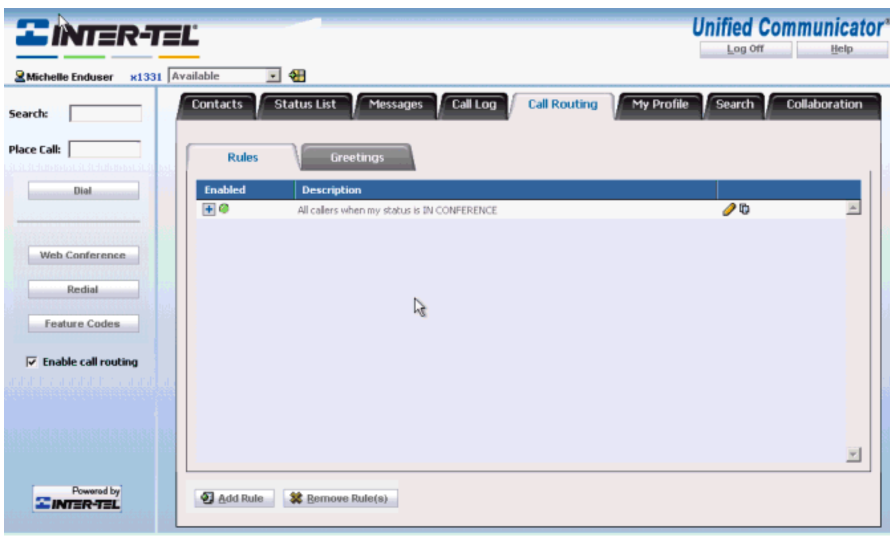
Call Routing Tab

Call Routing rules help you control how specific calls are handled. You can also create custom greetings to accompany the routing rule and provide a personal touch to an incoming call.

A default routing rule is established with the creation of a new account. Call Routing is enabled by default. The default rule sends an incoming call to your current location for 15 seconds and then forwards unanswered calls to the voice mail.

Simple users do not need to add additional rules. They can specify their current location for example, a cell phone, and their availability status. The system routes the calls automatically.

If you choose to be available at a particular location, for example a cell phone, all your calls would be routed there. Advanced users can edit, disable or delete these rules.



NOTE By default, call routing is enabled. If you do not want to receive calls while in DND or when your status is set to “unavailable,” create a rule for internal callers and create a rule for external callers so that your calls are routed appropriately. To see an example of routing to voice mail, see “Using Greetings with Call Routing and Status” on page 41

Adding and Editing Routing Rules

To add or edit a routing rule:

1. Click the **Call Routing Tab** to open the Call Routing view.
2. Select the **Rules Tab**, and then click **Add Rule** at the bottom of the view. A panel appears and consists of three tabs: Who, When, and What.
3. From the Who tab, specify to whom the rule applies.
   - All callers
   - External callers
   - Internal callers
   - Any caller in my <*group name*> group
   - Calls received from the following contact, system account, or device
   - Calls from this number

- *If you select **Calls received from the following contact, system account, or device***, a panel appears prompting you to enter the name of the person to whom the rule applies. This panel functions the same as the type-ahead search described in the Quick Links section.

  Type the first few letters of the name, and then select a matching contact, account, or device. An icon to the left of the contact indicates the type of contact and may be one of the following:

   An account in your Personal Contacts list

   A device in your Personal Contacts list

   A company contact in your Personal Contacts list

   A simple contact in your Personal Contacts list

   An account not in your Personal Contacts list

   A device not in your Personal Contacts list

  When you select a contact, the name appears below the specific-caller option button on the Who tab. At any time, you can use the search field to find and specify a different person. To create a routing rule based on a specific caller, that caller must be a contact in your Personal Contacts list. If you search for and specify an account or device that is not in your Personal Contacts list, UC prompts you to add the person to your Personal Contacts list before continuing.

- *If you select **Calls from this number***, enter the number in an edit box to the right of the Specific Phone Number button.
- *If you select **Any caller in my group***, choose the group from the drop-down list to the right of the option button. This drop-down list contains the names of all your groups.

4. Click the When tab, and specify when the rule applies. Select one of the following:

    — When my availability is XXX

    — When my status is XXX

    — Anytime

   Additionally, you can select a time period during which the rule applies within each of these categories.

   - *If you select **When my status is XXX***, select one of your statuses from the drop-down list to the right of the option button. If you do not have any statuses, this option is disabled.
   - *If you select* **Anytime**, the rule applies regardless of your current availability or status. If you select Anytime, you can still specify a time period as discussed in the next step

5. If desired, specify a time period during which the rule applies There are three possible choices:

   - **Between these hours**: Specify a starting time and an ending time for when the rule applies.
   - **On these days**: Select on which days the rule applies. Check boxes for Monday through Sunday allow you to select the specific day or days on which the rule applies.
   - **Between these dates**: Choose a starting date and an ending date that defines the range of time in which the rule is valid.

     Time and date ranges specified in the **When** portion of a rule apply from the starting time/date to (on or before) the ending time/date. The range includes the ending time/date. For example, if you create a rule that applies between 4/28/08 and 4/29/08, the rule is in effect on 4/28/08 and 4/29/08. Similarly, if you create a rule that applies from 9am to 10am, the rule is in effect starting at 9AM and ending at 10:01AM.

6. Click the What tab, and define what the rule does. This tab displays a table that lists the steps of the rule in order. For each step, the table displays a description of the step. A rule must have at least one step defined in the What tab.

- **To create a new step:** Click **Add Step**. New steps are added at the end of the list. Next to each step, you can click the edit button  to edit the step, or you can double-click a step to edit it.
- **To add an additional step:** Click **Next Step**. Select a step, and then click **Next Step if you want to add another step to this rule.** If you have added the final step, click **Save Rule**.
- **To delete a step:** Select a step(s), and then click **Remove Step(s)**. If you click on the remove button with no steps selected, an error message appears.
- **To edit a step:** The Add/Modify Step panel appears in place of the step table. This panel allows you to specify what the individual step does.
  a. Select one of the following actions for the step:
     — Play this greeting
     — Send the call to my current location
     — Send the call to this location
     — Send the call to the following contact, system account, or device
     — Send the call to my voice mail
     — Hang up
  b. If you choose **Send the call to my current location**, **Send the call to this location**, or **Send the call to the following contact, system account, or device**, you must specify how long the incoming call rings at the given destination before proceeding to the next step. Specify the number of seconds to delay before proceeding to the next step, or choose to specify that this is the last step in the rule and the call should ring at this destination indefinitely. To add a greeting, refer to "Working With Greetings" on page 44.
- **To play a greeting to the caller:** Select the greeting to play from a drop-down list of all your greetings that appears to the right of the option button. If you do not have any greetings, this option is disabled. Playing a greeting cannot be a final WHAT step in a rule. You must choose one of the following choices for a final WHAT step before you can **Save Rule**.
  – Let the call ring indefinitely
  – Hang up after the indicated duration
  – Send the call to my voice mail after the indicated duration
- **To send the call to a specific location:** Specify the name and number of the location from the drop-down list and edit box. These controls work the same as they do when creating a status, allowing you to choose a location from your devices, personal information, and/or enter a custom number.

- **To send the call to a specific contact, system account, or device:** From the panel that appears,
    a. Enter the name of the person or device. This panel works the same as the type-ahead search panel.
    b. Type the first few letters of the name, and then select a matching contact, account, or device. Upon selecting a search item, the name of the person or device appears in a box below the option button on the step dialog.
- **To change the specified person or device:** Enter a different name in the search field and click on a selection from the results.
    — *If the item selected is an account or a contact*, using the drop-down box to the right of the selected name, specify to which number you would like to send the call (since a contact can have more than one number).
    — *If the item is an account*, the drop-down list to the right of the selected name also includes the option **Find me** which specifies that the step will transfer control of the incoming call to the specified account's routing rules. This is considered a terminating step and the call is then handled by the rules of the specified account. You can send the call to another UC user and still maintain control over the call in your own call routing rule by sending it to one of the account numbers instead of selecting **Find me**.

7. When you have completed creating or editing the routing rule step, do either of the following:
    - Click **Previous** to go to the previous step (if any).
    - Click **Next** to go to the next step. If you click Next while on the last step, this creates a new step and allows you to edit it.
    - Click **Save** to save the step and return to the step table. When editing steps, the current step number appears in the upper-right corner so you can keep track of which step you are on. The final step must be a terminating step otherwise UC cannot save the rule.
    - Click **Cancel** to cancel the current step and return to the step table.
8. Click **Save Rule** to save your changes and close the routing rule panel and return to the routing rule table.
9. Select the **Enable call routing** check box in the Quick Links panel to enable call routing. Unless this option is enabled, rules will not run even though they may be enabled.

Using Greetings with Call Routing and Status

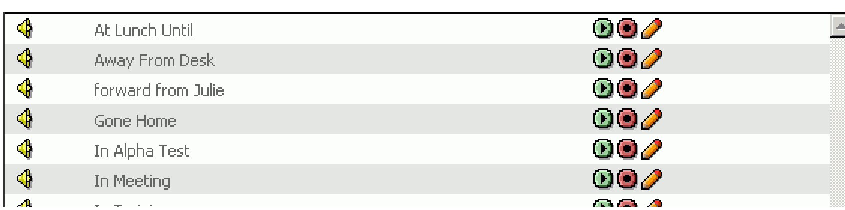
When using DND in UC, you can choose to use the standard DND messages and turn off call routing. Your endpoint functions as it does when you go into DND before using UC. Users can either leave a station message or leave voice mail upon seeing your DND state.

With call routing enabled in UC, and you go into DND, the call will ring through to your device (this is as designed). This is because UC is a presence management tool and designed to reach you no matter where you are, provided you “allow” it to. This is a very powerful feature because you can determine how you want UC to handle calls tailored to status and how you use routing rules. With call routing enabled, you do not miss important calls and can quickly route calls wherever your location is at that moment.

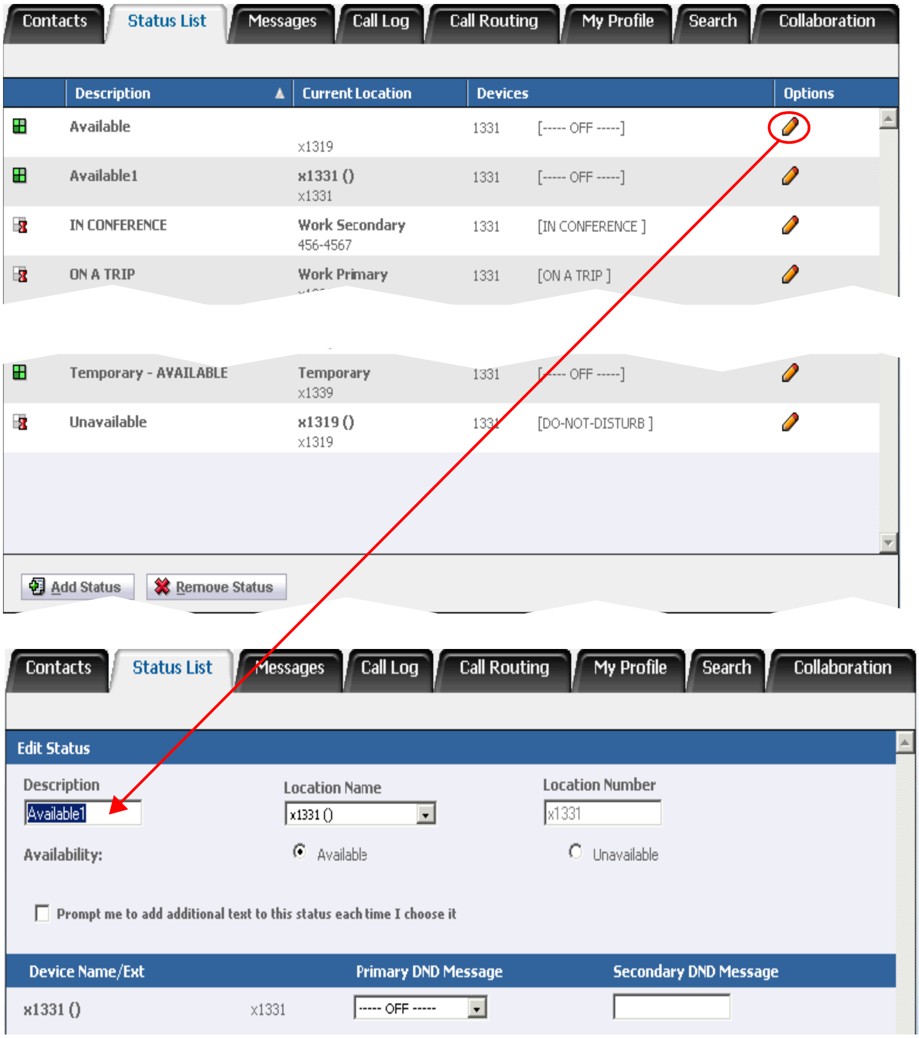
With call routing enabled, callers with a display endpoint can see that you are in a given DND state. If someone calls and they do not have a display endpoint, they will not see your DND state or status. You can create greetings, statuses and routing rules so that all callers can hear your DND state and they can be directed to either voice mail or to your current location.

When call routing is enabled and you want callers to know your DND state, do the following:

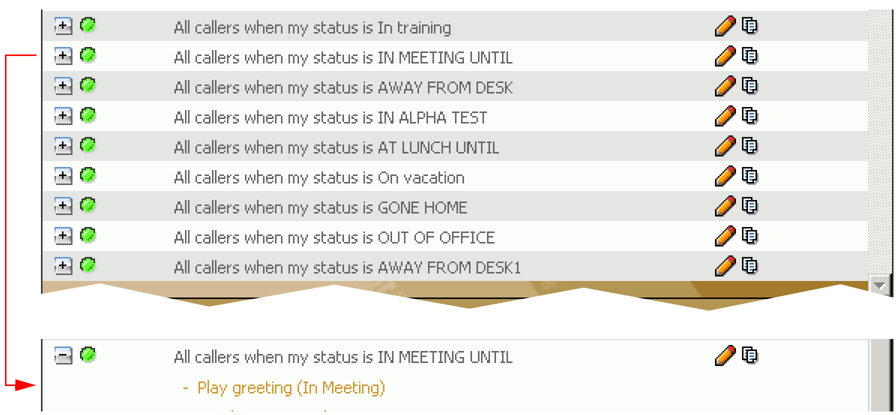
1. Create greetings, using the tools in UC, that mirror the DND messages you use. To create or edit a greeting, click the Call Routing tab. To create a greeting, click the **Add Greeting** button. To edit a greeting, click the pencil icon of the greeting to update. If you usually enter additional text for your DND messages, you now simply re-record your greeting each time you use it, just as you would re-enter text for secondary DND messages each time you use them. Your greetings can simply state what the DND is as shown in this example.



2. To create or edit a DND, click the Status List tab. To create statuses, click the **Add Status** button. To edit a status, click the pencil icon of the status to update. An Edit of a DND status is shown in the example below.



3. To create call routing rules for each DND type, click the Call Routing tab and then click the **Rules** tab. Under the Rules tabs, there are three tabs (Who, When and What) to describe under what conditions this rule applies.



In this example, each routing rule is set up using the status and greeting you created, and then it goes to voice mail. You can, however, route the call based on several other criteria. Upon calling your extension, callers hear your status as a greeting, and then they go to your voice mail or to another routing option. You may want to alter your voice mail greeting to something generic so that they hear your status, and then they hear a quick message before going to voice mail. Enabled rules are shown with green radio buttons . Disabled rules are shown with red square buttons .

Working With Greetings

The greetings view allows you to manage a list of custom greetings that are available for use in call-routing rules.

Adding a Greeting

To add a greeting:

1. Click the Call Routing tab.
2. Click the Greetings tab.
3. Click **Add Greeting** at the bottom of the table.
4. From the panel that expands, enter a name or description for the greeting.
5. Click **Add**.

   A call is placed to your current location. When you answer the call, voice prompts walk you through the process of recording the new greeting, giving you the opportunity to say the greeting.
6. When prompted, say or enter one of the following options:
   - Say "**Save**" or press **#** to save the greeting. If you choose to save the greeting, the call completes and the new greeting is saved and appears in the greetings table.
   - Say "**Replay**" or press **1** to hear the greeting you created.
   - Say "**Append**" or press **2** to append additional information to a greeting.

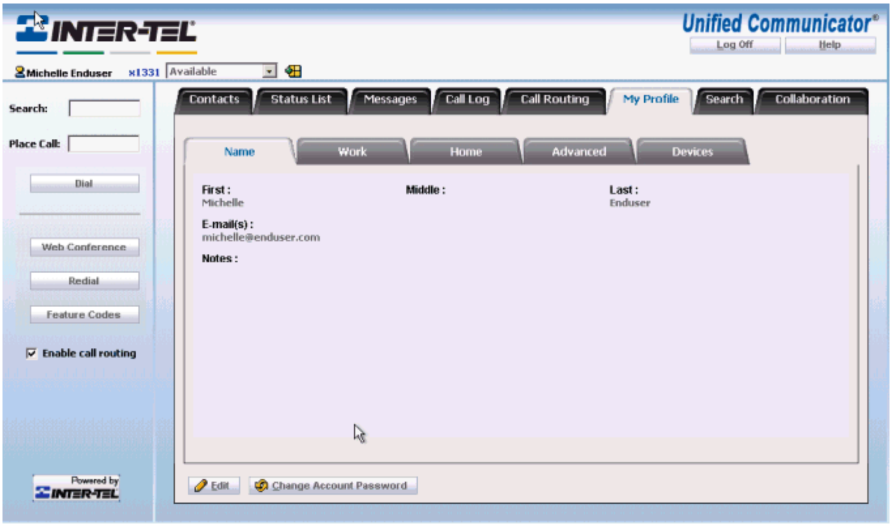
Re-recording a Greeting

To re-record a greeting:

1. Click the Call Routing tab.
2. Click the Greetings tab.
3. Click the re-record icon for the greeting you want to re-record.
4. Follow the prompts to re-record and save your greeting.

My Profile Tab

Use the following procedures to access or edit your account information.



To change your account password:

1. Select the My Profile tab.
2. Click **Change Account Password** button.
3. When prompted, enter your current password, and then enter the password again to change it.

To check or edit your account information:

1. Select the My Profile tab.
2. Do either of the following:
   - *To view information*, click the Name, Work, Home and Advanced tabs to view information in read-only mode.
   - *To edit information*, click **Edit** and edit or enter account information on the Name, Work, Home or Advanced tabs. You can enable or disable advanced tab options.

My Profile\Advanced Tab

When set (default), the **Autosave Settings** option automatically saves your changes if you select another page. If the feature is not set and you click another page after you edit information, you are prompted to save or discard all changes before the other page appears.

My Profile\Devices Tab

The Devices tab displays a list of all devices currently associated with your account. If you have more than one device, a option button next to each device allows you to specify a device as your primary device.

NOTE	It is possible that you may attempt to add a device that is already associated with another UC account on the system. If you enter the correct remote-access password for the device, an error message appears informing you that the device is already associated with another account.

 Show Feature Codes: Click to show your feature code list for this device.

 Set Voice-Mail Password: Click to change the voice mail password for this device.

 Delete Device: Click to remove the device from your profile.

Adding a Device

When you have more than one device, you can add it to associate the device with your UC account.

To add a device:

1. Select My Profile – **Devices** to open the Devices view.
2. Click **Add Device** at the bottom of the devices list. A new panel opens for you to enter information for the new device.
3. Enter the following information:
   - **Name**: Specify a descriptive name for the device. The name cannot be empty and it cannot match the name for any other existing device.
   - **Extension**: Specify the device extension. The extension must match a device on the telephone system that UC is monitoring, and the device must be enabled for UC use.
   - **Password**: Enter the device remote-access password.

NOTE	Before you can add a device, verify with your system administrator that the device you are adding is in the phone system and available for you.

4. Click **Save** to add the device.

   All of the device information you entered is validated, and you will receive an error message if any of the information is invalid. Possible failures include an invalid description (blank or in use), an invalid extension (not monitored or disabled), and an invalid remote-access password.

Specifying a Voice Mail Password

For security purposes when the password dialog box appears, the edit box is empty even if you had a password.

To specify a voice mail password:

1. Select My Profile – **Devices** to open the Devices view.
2. Click the padlock icon .
3. Enter the voice mail password. By specifying the voice mail password for a device, this enables the TUI/VUI Client to automatically log you on to the voice mail system when you are retrieving your messages. If you want to disable this functionality, click this icon and clear the password field.
4. Enter your password and click **OK**. The password is saved.

Changing the Device DND State

To change the device DND state:

1. Select the My Profile tab - Devices tab to open the Devices view.
2. For the device on which you want to change the DND state, select a new DND message from the drop-down list. The change takes place immediately.

   If desired, edit the secondary DND text in the edit box below the drop-down list. If you enter or modify the text in the secondary message, your change takes place after a short time-out period, or press the **ENTER** key to make the change take place immediately.

NOTE	For greater flexibility with status changes and call forwarding, use the status and call routing features instead of DND and device forwarding. Refer to “Status Tab” on page 28 for details.

Changing Device Forwarding

To change device forwarding:

1. Select the My Profile tab - Devices tab to open the Devices view.
2. From the device for which you want to change the forwarding, select a new forward type from the drop-down list. Choices are All, Busy, No Answer, and No Answer / Busy.
3. Edit the forward destination in the edit box below the drop-down list, and then press the **ENTER** key to enter the changes immediately. Otherwise, your changes take place after a short time-out period.

Disabling Manual Forwarding

To disable manual forwarding:

1. Select the My Profile tab - Devices tab to open the Devices view.
2. From the device for which you want to disable manual forwarding, select **NONE** from the drop-down list.

NOTE	If the time-out period expires and you have not entered a forwarding destination, an error message appears and the forwarding type reverts to NONE. If you enable manual forwarding on one of your devices, the device will still function as expected when calls are sent to it through call routing rules. A call sent to a forwarding device through a call routing rule is manually forwarded to the specified destination. The call remains under control of the call routing rule and can be pulled back from the forwarded destination if called for in the next step of the routing rule.

Setting a Primary Device

One of the devices you own must be set as the primary device for your account.

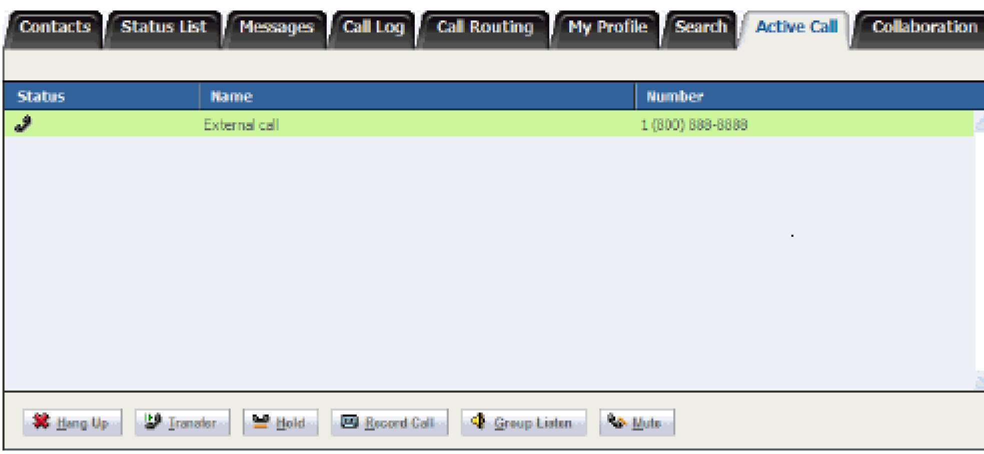
To designate a device as primary:

1. Select the My Profile tab - Devices tab to open the Devices view
2. From the device for which you want to set as the primary device, click **Primary** in the options column to designate it as the primary device.

ACTIVE CALLS TAB

The Active Call view appears only when you are in an active call. The Active Call options are **Hang Up**, **Transfer**, **Hold**, **Record Call**, **Group Listen**, and **Mute**.

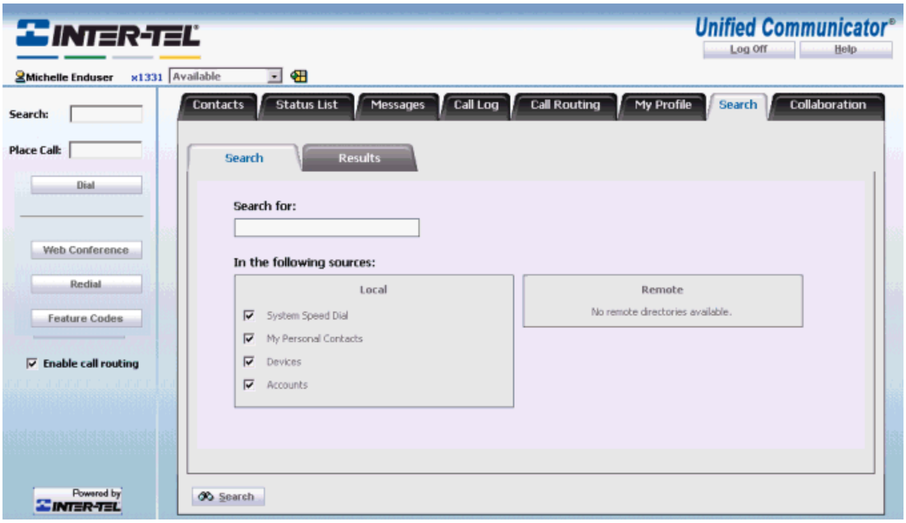
- **Hang Up** ends the call.
- **Transfer** allows you to forward the caller on to a different phone number.
- **Hold** allows you to put the caller in a wait state until you can continue your conversation.
- **Record Call** records the call and then sends the recording to your voice mail or wherever your phone system administrator chooses. Record Call requires additional setup by your phone system administrator. Because it puts a strain on your phone server, if there are too many Record Call users, it may adversely affect phone server traffic.
- **Group Listen** allows others in the room to listen to the conversation, while you continue talking into the handset.
- **Mute** disables your phone from transmitting sound to the other participant(s) in the call.



NOTE	The Active Calls tab automatically appears for all incoming and outgoing calls when the **Automatically show Active Calls tab** option is enabled. The default for this option is off. Go to My Profiles – **Advanced** to change the setting for this option.

SEARCH TAB

The Advanced Search view provides additional search options beyond those provided by the type-ahead search panel in the toolbar.



The Advanced Search view consists of two tabs: Search and Results. The Search tab allows you to specify the search criteria which includes the text for which you want to search and one or more locations to search. Possible locations include the system speed-dial list, your Personal Contacts list, the device list, the account list, and one or more remote directories.

If you have visibility into more than one tenant group, the Account option lists the individual tenant groups, allowing you to choose which tenant groups to search. If you have visibility only into your own tenant group, the Accounts option appears in place of the tenant-group list. Selecting this option searches the accounts in the tenant group to which you belong.

The remote directories that appear as search options (if any) depend on which directories your UC administrator has chosen to expose to the members of your tenant group.

To perform a search:

1. Select the Search tab.
2. Enter a search string in the **Search for** box.
3. Select from the following search source(s) and then click **Search**:
   - System Speed Dial
   - My Personal Contacts list
   - Accounts
   - Devices
   - Any remote devices (if present)
   - Other tenant groups (if present)

   The Search looks for your specified text in the following contact or device fields:
   - first name
   - middle name
   - last name
   - company
   - device username
   - device description
   - device extension

   Each search matches on the search text, if it appears anywhere within one of the above fields. For example, a search for “sc” would match on all of the following:
   - Contact with First Name: **Scott**
   - Contact with Last Name: **Prescott**
   - Contact with Middle Name: **Rosco**
   - Contact with Company: **Bill’s Scooters**

   The Results tab displays search results in a table sorted by name.
4. From the Results tab, click the sort arrow in the name column header to toggle the sort order between ascending and descending results.

   A Source column indicates the search sources from which the contact was found.

   Depending on the number of matching records, search results may be divided into several result sets. Numerical tabs appear below the search results to provide access to each page of results.
5. Click on the search result tabs (if provided) to view different result pages. You can also use the left and right arrow keys on the keyboard to move among result pages. Keys 1-9 on the keyboard navigate among the first nine pages.

6. With each search result, you can perform the following operations:

    - Click the Display the Contact List icon to open a pop-up menu listing all phone numbers for the given contact. Select one of the phone numbers in the list to call the contact at the specified number. This icon is not present if the contact does not have a number. If the contact is linked to an account, and the account has at least one device associated with it, the following additional options can appear in the menu:

        — **Web Conference**: Select this option to start a Web Conference online collaborative Web session. If the contact is a logged-in UC account, they will receive a popup notification on their screen. Otherwise, you can send an e-mail invitation from within the Web Conference console. This menu option is not displayed for devices (non-UC accounts).

        — **Find Me**: Select this option (if present) to place a call to the account's primary device, allowing the account's call-routing rules to take over and route the call to the appropriate location.

        If the contact is linked to an account with at least one device, or if the contact is linked to a device, there will be two additional options in the popup menu: Leave voice mail and Leave station message.

        — **Leave voice mail**: Select this option to call the voice mail of the person or device.

        — **Leave station message**: Select this option to leave a station message for the person or device. If you leave a station message for an account, the station message is left at whichever device is the account's current location, or it is left at the account's primary device if the account's current location is not a device.

    - Click the Display the E-mail List icon to open a popup menu listing all e-mail addresses for the contact. Click an e-mail address to initiate a new e-mail message using the e-mail program associated with your Web browser. This icon is present only if the search result has one or more e-mail addresses.
    - Click the View Contact icon to open a panel that displays the complete information for the contact in a read-only mode.

    Below the search results, you also have access to two buttons: **New Search** and **Add to Personal Contacts**.

7. Click **New Search** to return to the Search tab and perform a new search.

8. Select one or more search results and then click **Add to Personal Contacts list** to add the search result to your contacts list. If you click **Add to Personal Contacts** with no search results selected, an error message appears prompting you to select one or more results.

Collaboration Tab

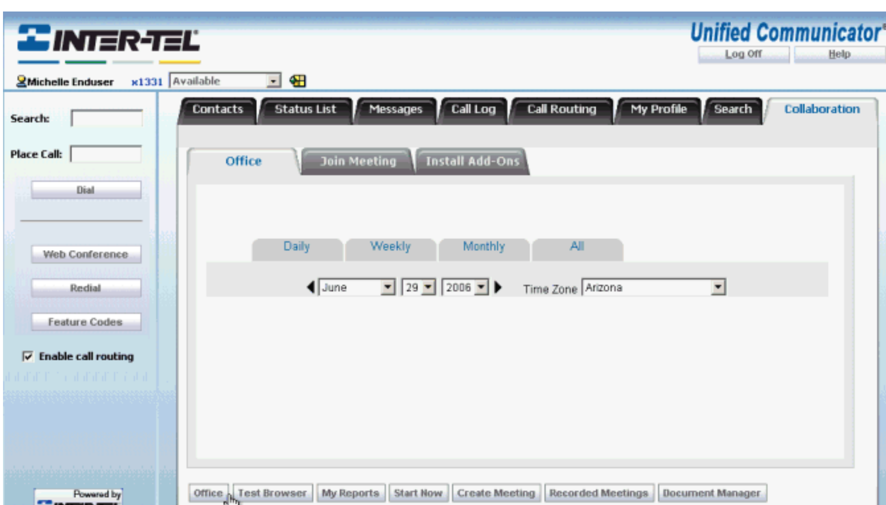
The Unified Communicator administrator controls who has access to the UC Web Collaboration feature. The Web Conference button in Quick Links and the Collaboration tab appear only for users that have been given access to Web Collaboration. Web Collaboration allows you to interact with participants in real time meetings. By default, Web Collaboration privileges are enabled for every new UC account.

NOTE	This section of the user guide provides only a brief overview of the Web Collaboration product. For detailed instructions and information about using Web Collaboration and Remote Support features, refer to the online Collaborate Help.

Collaboration Overview

The two types of UC Collaboration components are:

- **Web Conferencing**: This is a collaboration tool which allows a registered UC user to schedule a meeting as a host with one or more attendees immediately. You can also start a Web Conferencing meeting by selecting the *Web Conference* option.
- **Remote Support**: This is an optional collaboration tool that can be added to your collaboration tools set with a license upgrade. Remote Support is installable e-support and Remote Control software which is a Web-based, real-time, server side remote access and support software tool that provides a simple way for support professionals to quickly manage and resolve online PC support requests via remote access. Remote Support provides all the tools needed to manage a queue of online requests, communicate with customers online, monitor a remote PC and control a remote customer's PC to resolve issues.



The Collaboration tab has three sub-tabs: Office, Join Meeting, and Install Add-Ons

- **Office**: The office tab shows the meetings that you can access. You can view a list of **Daily**, **Weekly**, **Monthly** or **All** scheduled meetings that are occurring or will occur. The Collaboration Office tab page shows all the scheduled Web Conferencing meetings. If Remote Support is available on the server, the Remote Support tabbed pages will also appear here.
  - **Daily**: Shows all the meetings that you have access to for a specific day.
  - **Weekly**: Shows all the meetings that you have access to for a specific week.
  - **Monthly**: Shows all the meetings that you have access to for a specific month.
  - **All:** Shows all the meetings that you can access.
  - **Agents**: This tab is present only if Remote Support is available on the server. This page shows all the agents that are logged into Remote Support and waiting in a Queue for a customer call.
  - **Queues**: This tab is present only if Remote Support is available on the server. The administrator can set up different queues for different groups such as Sales or Technical Support.
- **Join Meeting:** If you are given a Web Conferencing session number, click this tab to enter the session number to join the Web Conferencing meeting.
- **Install Add-Ons**: The Add-Ons page contains additional Collaboration tools that you can install on your machine that optimize your Collaboration experience.
  - **Inter-Tel Collaboration Client**: For optimal performance, hosts and attendees should install the Inter-Tel Collaboration Client. This pre-installs all the required components for Web Conferencing and Remote Support sessions. Without this, attendees need to pass a browser test prior to joining a session.
  - **Inter-Tel Collaboration Player:** Stand-alone utility enables hosts and attendees to asynchronously watch recorded Web Conferencing and Remote Support sessions without the requirement of a live Internet connection (offline).
  - **Inter-Tel Toolbar Plug-ins**: Intended for Web Conferencing hosts and Remote Support agents, this enables one-click direct access to a collaboration or support session through icons on the Windows Desktop, Start menu, as well as Microsoft Outlook, Word, Excel, and Powerpoint.
  - **Microsoft Outlook® Conferencing Form**: Enables the host to create and schedule Web Conferencing meetings directly from Microsoft Outlook® Calendar. The host is able to preview attendee availability prior to sending invitations.

The following table shows the different features available in each of the Collaboration components.

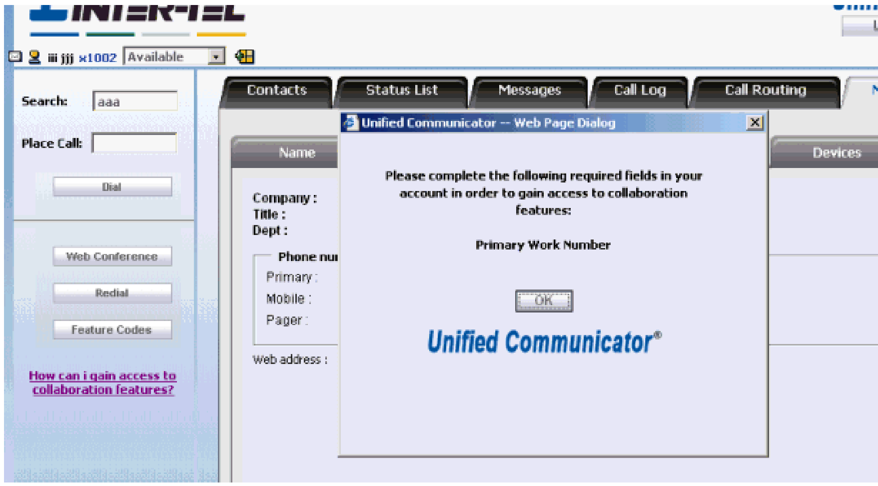
FEATURES	WEB CONFERENCING	REMOTE SUPPORT
Host Controls		
Desktop Sharing	●	●
Application Sharing	●	●
Co-Browse	●	●
Record and Playback	●	●
File Broadcast	●	●
Voice	●	●
Video Conferencing	●	●
Document Manager	●	●
User Polling	●	
Other Features		
24-bit color/16-bit color/256 color	●	●
Attendee list	●	●
Keyboard chat	●	●
Hand raising and answer indicators	●	●
Whiteboard and Transparency tools	●	●
Selectable video size, up to 30 fps	●	●
Outlook e-mail client integration	●	●
Outlook calendar integration	●	●
Ad-hoc meetings	●	●
Scheduled meetings	●	
Recurring meetings	●	
Meeting registration process	●	
Password protected meetings	●	
128-bit encryption	●	●

FEATURES	WEB CONFERENCING	REMOTE SUPPORT
Collaboration Client for attendees and host	●	●
Microsoft Office integration	●	
Hide/show desktop icons	●	●
Enable Attendee co-control	●	●
Enable remote presenter	●	
Transfer Host controls	●	
Viewport snapshot		●
View remote computer		●
Control remote computer		●
File transfer (bi-directional drag & drop)		●
Backup and restore		●
View remote computer information		●
Customer-initiated request queue		●
Agent-initiated 1:1 queue bypass		●
Permission-based remote access and control		●
Queue transfer and problem escalation		●
Third-party access for training and mentoring		●

The following are required before the Web Conferencing feature and the Collaboration folder are accessible:

- The UC administrator grants Web Conference privileges to your UC account.
- Your UC account profile must have information in all five of these fields:
  - First Name
  - Last Name
  - E-mail Address
  - Primary Work Number
  - Time Zone

The UC administrator can allow Web Conferencing access with your UC userid . However, if your UC profile is missing the Primary Work Number, when you try to use Web Conferencing, you will see the warning message, “How can I gain access to collaboration features?” in the Quick Links panel. Click **OK** on the warning message to see how to correct this problem.



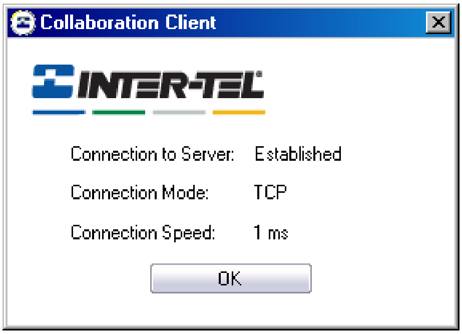
To access the video capabilities in Web Conferencing, the equipment you need consists of a video capture type device such as an Intel® or Logitech® Web cam, or a video camera in conjunction with a video-to-USB converter (for example, Belkin® or D-Link®). Some participants might use a Sony® Handicam or similar device in conjunction with a video-to-USB converter (as mentioned). In Windows, the device must appear under Control Panel – Multimedia – **Sounds and Audio Devices**. This path may be different depending on the Windows version you are using. For example, in Windows XP, navigate to the Hardware tab, and then look for legacy video capture devices.

Your system administrator or another person assigned to setting up equipment should set up your system for video use, provided you have the necessary equipment.

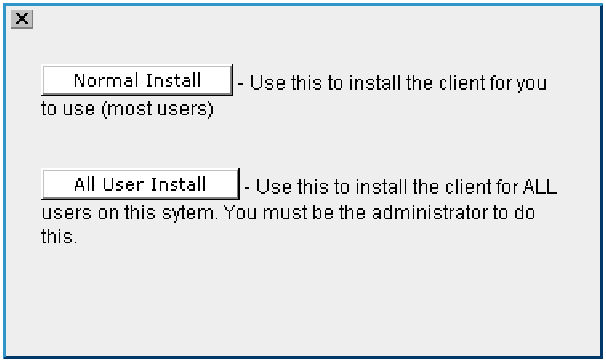
NOTE	The zoom features available during the Web Conferencing session rely on the zoom capabilities in the hardware (video camera).

Test Browser

The Test Browser is to used to verify connectivity to the Collaboration Server and to check that you have the latest version of the Collaboration Client installed on your computer. When you click **Test Browser** on the Collaboration Tab page or join a Web conference for the first time, the Collaboration Client installation automatically starts.



If the Collaboration Client fails to start automatically, you can select to install it manually from the Collaboration Tab page. Follow the instructions provided in the install wizard to complete the installation of the client.



NOTE You cannot use Web Collaboration if you do not have the Collaboration Client installed on your computer.

Web Conferencing Meeting

To start a Web Conferencing meeting immediately, click the **Web Conference** link. There are three ways to create a Web Conferencing meeting:

Click **Start Now** on the Collaboration page. This option allows you to start a Web Conference immediately, however, the only way for others to join this meeting is if they are given the meeting session number.

Click **Create Meeting** at the bottom of the Collaboration page. When you use this option, you can create and schedule a Web Conference to occur at a future date or time. This option provides additional features such as setting a meeting password.

Click **Web Conference**, which is accessible at all times in the Quick Links menu located on the left panel of the UC Web Client. When you use this option, it starts a Web Conferencing session immediately. The **Web Conference** button is available in the following places within UC:

- Quick Links Panel
- Personal Contacts List or Speed Dial List
- Within Search Results
- Tray Client
- Active Call Tab

Only one collaborative Web Conferencing session, from either the host or participant computer is allowed.

NOTE	If the security prompt appears for the ActiveX control download, accept the download, or the browser test fails. The ActiveX control must be accepted before you can use the Web Conferencing functionality. If the browser test fails, a list of passed and failed entries appears in a window.

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