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Client Applications Guide

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MOBILITY   PRESENCE   MESSAGING

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Client Applications Guide

Client Applications Guide is an end user guide designed to educate typical users who will be adapting a single or suite of TOL (Office-LinX) applications. From desktop client application to mobile apps, Client Application Guide thoroughly covers each topic from installation to usage.

Client applications within the TOL system are designed with an intuitive user interface which allows the users to learn as you go. The various types of client applications also share a common core, allowing desktop application users to adapt to web or mobile versions without any difficulty.

While using these client applications is simple, you may end up missing out on convenient features and shortcuts which are embedded within all applications to make your life easier. In order to familiarize yourself with the platform, and to ensure that your productivity is at its maximum, please take the time to review this guide in detail.

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1   UC Client Manager

Chapter Summary

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UC Client Manager

Introduction

UC Client Manager is an all-in-one messaging & communication tool that is designed to aid the users' experience in all aspects of their communication. From E-mails to phone calls, UC Client Manager offers a one stop solution where virtually all possible methods of business communication can be managed through a single easy-to-use interface.

UC Client Manager also offers ubiquity through seamless integration to vital business applications (Microsoft Outlook, Google Apps, etc.) and also through the mobile UC Client Manager software which are supported by the major mobile operating systems out there (Symbian (through Java), Microsoft Windows Mobile, RIM Blackberry, Apple iPhone, Google Android).

You can access your personal & company contacts, find anyone within the same company/organization and initiate conversation with any of them through the various methods of communication supported by UC Client Manager.

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Logging In

Simplified Interface

Authentication

You have several choices when it comes to connecting to the UC server. From the drop down menu at the top, you will have following choices:

Automatic configuration: This setting will obtain your Company, Mailbox and Password information through your Windows login credentials.

Automatic with alternative: This setting is similar to the one above, but will allow you to customize the fields under **Authentication** section for redundancy purpose. If the Windows credentials fail, UC Client Manager will use the values manually entered on the Authentication section.

Manual configuration: This setting is used to manually configure your login information. You will not be able to use your Windows login credentials under manual configuration.

For your convenience, you may also enable the **Save password** check box so that you do not have to enter your password every time you log in.

Credentials Discovery

This field allows you to use your Windows login information to directly log into the UC server. Your Windows login user ID can be tied to your UC mailbox so that you can log into the UC server using the same credentials. This feature will only be available if it has been enabled by your system administrator.

Default credentials: Enable this check box to use the current Windows login information (the credentials used when you logged into your current Windows session) to log into the UC server.

Windows user: Enter the Windows login user name associated with your UC mailbox.

Domain: Enter the domain your Windows login user name belongs to.

Password: Enter the password for your Windows login user name.

For your convenience, you may also enable the **Save password** check box so that you do not have to enter your password every time you log in.

🚫   **Warning**: Using the Save password feature in a public computer may lead to security issues. Please use this feature at your own discretion.

☑   **Note**: If you cannot log into your UC Client Manager you may have to configure the server settings by clicking on the **More Options** link from the simplified interface.

More options: Click on this link to specify server related settings. Refer to **Advanced Interface (More Options) on page 18** for more information.

Login: Click on this button to log into your UC Client Manager.

Exit: Click on this button to exit the UC Client Manager software.

UI Language: Use this option to change the language of UC Client Manager.

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Advanced Interface (More Options)

If this is the first time you are logging into your UC Client Manager, you may have to specify server related settings. From the drop down menu at the top, select one of the following options:

Automatic configuration: This option will automatically set both the **Server** and **Port** number for you.

Automatic with alternate: This option can be used for redundancy purpose. If the UC Client Manager cannot automatically find the server and port number, it will use the value which you have entered in the **Server** and **Port** fields. This will be the ideal option for laptop computers which will be in and out of your organization's internal network.

Manual configuration: This option will only use the values you assign to connect to the UC server.

> **Server**: Enter your UC server's address. This address may be a **URL** (e.g. user.server.com) or an **IP** address (e.g. 123.123.123.123).
>
> **Port**: Enter the port number used by your UC server for client application communication.

☑   **Note**: If you cannot configure these fields properly please contact your system administrator for the required values.

Login: Click on this button to log into your UC Client Manager.

Exit: Click on this button to exit the UC Client Manager software.

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Main Window

From the main UC Client Manager window you will be able to quickly find the person you wish to communicate with either through **Contacts**, **Groups** or the **Search** function.

You may initiate contact with these people through various methods depending on your own settings and the recipient's. You also have the option of changing your presence settings from here as well.

Please select a topic from below for detailed information.

Dial-Out Extension

UC Client Manager allows you to change the source of your outgoing calls when you are initiating the calls through the various methods available in the UC Client. The numbers available under this menu will be derived from your personal numbers associated with your mailbox.

Alternatively, you may select the **Custom** option and manually enter the source number in the window shown here. When you initiate a call using an external number as the source, the UC server will call you on the selected source number **first**. When you answer your phone, the UC server will start to dial the desired party then connect the two together.

The advantage of this method is being able to control your calls using the UC Client Manager wherever you're located. Also, no matter which external number you may be using, the receiver of the call will only see the number associated with the UC server, which will usually be the number of your office. This allows you to maintain high level of privacy regardless of your work location.

If you are making long distance calls, this method may prove to be a cost efficient solution as well. Since most companies have much more competitive rates for long distance plans than a typical cellphone or home long distance plans, having the UC server dial both you and the desired party will allow you to take advantage of the company's plans and prevent your external number from directly using long distance minutes.

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Search

The built in search window in the UC Client Manager allows you to search through your personal contacts, public contacts and your company directory for a specific person. There are a few rules that you should keep in mind when searching for someone:

When searching for a name, type **First_Name"space"Last_Name** (e.g. John Doe) or **Last_Name,First_Name** (e.g. Doe,John).

john doe
🔍 Search: first name contains ''john'' and last name contains ''doe''

doe, john
🔍 Search: first name contains ''john'' and last name contains ''doe''

☑ **Note**: If the person has a space in between the first name, we recommend that you use the **Last_Name,First_Name** format.

☑ **Note**: You can easily initiate mass LanTalk messages through the Send the text (LanTalk) option available during search. Simply type the message you wish to send on the search box then select the LanTalk action along with destination (either broadcast to entire company or one of your work groups). A LanTalk message window will open automatically with the message content and destination already specified.

The search will keep a record of previous searches, up to a point. When you start typing a search string the UC server will display some recommendations but this list may not be the complete matching list. For accurate results, always press the **Enter key** after typing the search string.

You can directly initiate conversation through the search results as well. Click on the icon located on the right side of the searched result to open up the interaction menu.

☑ **Note**: The menu will vary depending on contact information available for the searched contact. (i.e. if the contact only has e-mail address specified, you will only have the option for e-mail/text message).

☑ **Note**: For details on each individual interaction actions, refer to **Groups on page 21**.

Specifying Search Options

If your database is vast, you may find searching through all the entries on your server to be too broad. You can minimize results by specifying exactly where UC Client Manager will be searching. However, since most contact information is stored on the server by default (including your private contacts on UC mailbox), it is best to leave this as the default value of **Server-side search**.

Server-side search: UC Client Manager will search for the entered string on the server's contact and directory database.

Search locally: UC Client Manager will search for the entered string on your desktop computer.

Cached results and actions: UC Client Manager will search through cached searched results from previous searches and actions performed by you through UC Client Manager.

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Groups

UC Client Manager supports group organization which is an easy and convenient tools for managing contacts for members in your company. You will by able to create groups and add anyone in the company directory so that you can easily keep track of their presence & availability. If you need to contact certain people in your company frequently, it will be a good idea to add them to your group so that you can initiate conversation through phone, e-mail, text message and LanTalk with a click of a button.

☑   **Note**: The groups are tied to your own mailbox and will not affect anyone else. You can freely add or remove people from your company directory without affecting other people's contacts or groups.

You can initiate actions with a chosen contact within a group through one of two ways. First is through the status panel which pops up when you hover over the contact which is shown below on the left. This panel allows you to view the details of the contact's status before initiating an action with them through the numerous buttons. For information regarding the actions available on the panel, please click on the responding buttons below. The second method will be through a more comprehensive menu shown below on the right. This menu becomes available when you click on the arrow button on the far right side of the entry. Through this menu, you will be able to choose from a range of actions available for the chosen contact.

☑   **Note**: Some of these actions may also be available to members in your organization even if they are not accessed them from your group (e.g. through directory or search).

Add Group

To create a group, simply click on the [Add group] button on the main menu then fill out the following window with a desired name.

When you have the groups created, search for contacts either through the search function or the company directory. Click on the contact icon to bring up the following interaction menu and select the group you wish for that person to be included in as shown below.

Phone Call

You may initiate conversation with the contacts in your group through numerous methods. Some options will have additional menu items available depending on contact's configuration.

From the **Phone Call** menu, you will be able to call any of the numbers associated with the contact (both internal & external).

Call and Record

If you wish to keep a recording of your conversation, you may initiate conversation with the contacts in your group through Call and record. Once your conversation is over with the chosen contact, a voice message will be automatically sent to your inbox.

From the **Call and record** menu, you will be able to call any of the numbers associated with the contact (both internal & external).

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E-Mail

From the **E-Mail** menu, you will be able to compose e-mail messages to any of the e-mail address associated with the contact.

Text Messaging

From the **Text Messaging** menu, you will be able to send text messages to e-mail addresses or external phone numbers associated with the contact.

LanTalk

From the LanTalk menu, you will be able to send instant text messages to the contact as long as they are online.

Remove Member

If you wish to remove a contact from the group, simply open up the menu from the group list, then select Remove Member as shown below.

Notifications

Rather than relying on the UC Client main window to learn about your colleague's status, you may also setup Notification flags for the contacts as well. You may choose any combination of different flags to keep track of the contacts in your group.

Online/Offline: Select this option to be notified whenever the contact comes online / goes offline.

Phone: Select this option to be notified whenever the contact is on the phone / gets off the phone.

Location: Select this option to be notified when the contact's location setting changes.

When the contact you have flagged performs any one of the selected option, you will see the notification window pop up on the right bottom corner of your screen.

Move to Group

From the Move to Group menu, you will be able to move the selected contact to another group. This option is only available if you have more than one groups. To move a contact, simply select the new group you wish to associate the contact with from the available list.

Search Related Documents

Search Related Documents allows you to check your documents (primarily e-mails) for entries that are relevant to the contact in question. Refer to **Search Related Document on page 37** for more information.

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Call Manager

UC Client Manager is able to control phone calls through the Call Manager interfaces right from your desktop. When you receive a phone call through a device that is integrated with the UC server, you will see a small section added to the bottom of your UC Client Manager Main Window. Whenever you hover the mouse over a call entry, you will see the call control actions as shown here.

☑ **Note**: The Call Manager may be accessed from a separate window as well. Please refer to the settings section to configure this feature.

☑ **Note**: The Call Manager may be enabled for outbound calls as well. Please refer to **Settings on page 32** to configure this feature.

☑ **Note**: You can control more than one phone call via the Call Manager simultaneously.

☑ **Note**: Actions available during call control may vary depending on your site's settings.

From the Call Manager, you will have access to the following options **before answering a call**.

Answer: Select this option to answer the selected call. You may specify a device to answer the phone call from if you have more than one device defined in your current location's address.

Answer and record: Select this option to answer the call and start recording right away.

Take Message: Select this option to send the caller to voicemail.

Hold: Select this option to put the selected call on hold.

Transfer: Select this option to transfer the selected call.

Remove: Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

From the Call Manager, you will have access to the following options **after answering a call or making a call**.

Hangup: Select this option to end the selected call.

Hold: Select this option to put the selected call on hold.

Transfer: Select this option to transfer the selected call.

Call Handoff: Select this option to handoff the call to another device.

☑ **Note**: Call Handoff may not be available depending on mailbox configuration. Please consult your system administrator for more information.

Start Record: Select this option to start recording the selected call.

Remove: Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

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Buttons / Icons

	Incoming Call: This icon represents an incoming call.
	Answered Call: This icon represents an answered call that is currently ongoing.
	Finished Call: This icon represents a finished call or Hang up action.
	Answer: Click on this button to answer the incoming call. You may also define the device in which you will answer as well.
	Answer and Record: Click on this button to answer the incoming call and start recording the conversation. You may also define the device in which you will answer as well.
	Take Message: Click on this button to send the caller to voicemail.
	Hold: Click on this button to put the call on hold.
	Remove: Click on this button to remove the selected call from the Call Manager. This will not impact the call itself.
	Start Record: Click on this button to start recording your conversation.
	Pause Record: Click on this button to pause the recording.
	Stop Record: Click on this button to stop the recording. The recorded voice message will be sent to your mailbox.
	Transfer: Click on this button to transfer the call to another person or device.
	Call Handoff: Click on this button to handoff the call to another device seamlessly.
	Call Back: Click on this button to call back the person that the call entry you're viewing is associated with.

Hold

When you are receiving a call, or when you have already answered the call, you will be able to put that call on hold. When a call is placed on hold, you will have access to the following options.

Stop Hold: Select this option to end the hold and re-initiate the conversation or let the call ring again.

Transfer to...: Select this option to transfer the call on hold to another location of your choice. Please refer to Transfer on page 25 for detailed explanation.

Transfer to #: Select this option to transfer the call to one of the numbers defined in your mailbox account.

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Transfer

When you are transferring a call through the Call Manager, you can either transfer to one of the predefined numbers associated with your mailbox account or a manually defined location.

Transfer to...

The Transfer to... option allows you to transfer a call to a manually defined location. This location can be selected from a Mailbox, Phone Number or from one of your presence Locations.

Mailbox

When you choose to use the Mailbox option, you can find the destination mailbox by clicking on the Find button from the Transfer to... window. You can find a mailbox through the name associated with the mailbox or by the mailbox number.

Phone

When you choose to use the Phone option, you can define the destination phone number by clicking on the Build button from the Transfer to... window. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the correct number(s) then click on the OK button.

Location

When you choose to use the Location option, simply select one of your pre-define locations from the drop down menu. The call will be transferred to the default number associated with the chosen location.

Record

When you start to record a call, the menu available through the Call Manager will change to the above. You may freely pause and resume recording in middle of the call. When you stop the recording, or when the call ends, the recorded conversation will be sent to your mailbox as a voice message.

Continue Record: Select this option to resume the recording. This option is only available when recording is paused.

Pause Record: Select this option to pause the recording. Click on Continue record to resume at any time.

Stop Record: Select this option to stop the recording. The recording will be sent to your mailbox.

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Handoff

Call handoff allows you to seamlessly transfer your call to another device (e.g. from desktop phone to cellphone). Unlike typical transfers, call handoff will not prompt the person on the other end. When you initiate a handoff, the chosen device will start to ring. When you answer, your previous device will be disconnected automatically and the call will be connected to the new device right away. You will be able to handoff the call multiple times as long as you have the Call Manager window available to you.

☑ **Note**: Call Handoff may not be available depending on mailbox configuration. Please consult your system administrator for more information.

Transfer to...

The Transfer to... option allows you to handoff a call to a manually defined location. This location can be selected from a Mailbox, Phone Number or from one of your presence Locations.

Mailbox

When you choose to use the Mailbox option, you can find the destination mailbox by clicking on the Find button from the Transfer to... window. You can find a mailbox through the name associated with the mailbox or by the mailbox number.

Phone

When you choose to use the Phone option, you can define the destination phone number by clicking on the Build button from the Transfer to... window. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the correct number(s) then click on the OK button.

Location

When you choose to use the Location option, simply select one of your pre-define locations from the drop down menu. The call will be handoff-ed to the default number associated with the chosen location.

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Separate Window

If you have to manage high volume of calls, the main window of UC Client Manager may be insufficient for you to conveniently manage all your calls. To remedy such scenarios, you may opt to separate the Call Manager window so that all your calls can be easily managed through a spacious window along with oversized buttons for easier user experience. The behavior of the call control will remain exactly identical as the integrated Call Manager window.

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Main Menu

You can access the main window menu by clicking on the large Link button.

☑   **Note**: This exact menu is also accessible from the Taskbar icon when you right click.

All of your personal settings may be managed from this menu. Your presence, along with the core UC Client Manager configuration are all available under this menu.

Set current locations: This option gives you access to classic location modification window.

Add Group: This option allows you to add a new personal group.

Web Client: This option launch the Web Client on your browser and log in automatically using your credentials.

LanTalk: This option allows you to LanTalk members in your organization.

Company Directory: This option allows you to view the directory of your organization.

Call Manager: This option gives you access to the call manger window where you will be able to view and control your current calls.

Call History: This option allows you to view the call history associated with your mailbox.

Event history: This option allows you to view the events that have occurred on your mailbox.

Settings: This option gives you access to the settings menu where most of the configurations are done.

Help: This option gives you access to miscellaneous features and the help file you're currently viewing.

Logout: Select this option to log out of UC Client Manager.

Exit: Select this option to log out and close the UC Client Manager.

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Set Current Location

Set Current Location allows you to view and modify your current location in detail. Please keep in mind that you can also change your location from the main UC Client Manager window through the shortcut icons.

To use the location currently define on your calendar, choose the **Use my locations calendar** radio button. To manually define a custom location, choose the **Override my locations calendar** radio button then configure the below fields as required.

Current Location: From the drop down menu, select the desired location.

Phone Number: From the drop down menu, select the phone number you wish to use. The list of available phone number will depend on the location that is currently chosen.

Availability: From the drop down menu, select your availability.

Appear unavailable if no caller ID: Enable this check box to appear unavailable if the system can not detect a caller ID from an incoming call.

Override Availability Filters: Enable this check box if you want the availability you specify on this screen to override any filters configured for the chosen location.

I will be at this location

Until I change my location: Select this radio button to make the current location setting permanent until you manually change it again.

Until the next scheduled activity or the beginning/end of working hours: Select this radio button to be at the currently chosen location until an event in the calendar changes your location or until the end of your working hours defined in the calendar. Your location will revert to the calendar schedule after either of the conditions are met.

Till: Select this radio button to specify the exact time and date for your current location to be effective for. Your location will revert to the calendar schedule after the time is reached.

Edit my locations...: Click on this button to open your Web Client interface where you will be able to manage your locations.

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LanTalk

The LanTalk feature allows you to initiate instant messaging session with anyone that is currently online in the same UC system as you (i.e. those who are in the same company). LanTalk is an easy to use alternative to phone conversation when you wish to leave a short message or get in contact with someone while they are already on the phone.

To send a message simply type in the desired message in the text field at the bottom then press the **Enter** key on your keyboard or click the **Send** button on the LanTalk window.

Save: Click on this button to save the current LanTalk conversation as a text file. When you click on the window, the Save File As... window will open, allowing you to choose the location and the name of the file that is to be saved.

Clear: Click on this button to clear all conversation history within the current LanTalk window.

Kind: If the recipient of your message has SMS address defined on their mailbox, you will be able to use this drop down menu to select between **LanTalk Only** and **LanTalk/ SMS**. LanTalk/SMS option will send a LanTalk message and also send the same message to the recipient's SMS address, allowing you to increase the chance of your message being noticed.

LanTalk Broadcast

The Lantalk Broadcast feature allows you to send a Lantalk message to everyone who is currently logged into the UC Client Manager (within your company). Please use caution when using this feature since the message will be instantly delivered to everyone on the system.

If a user replies to your LanTalk Broadcast message, a new LanTalk window will open for that individual user as if that user is initiating an individual LanTalk session with you. This means that if you have a large user base in your company, and everyone who receives the message replies to you, there will be a significant number of LanTalk window that will be opened simultaneously. Please consider these factors when utilizing the LanTalk Broadcast feature.

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Company Directory

The company directory allows you to view other mailbox accounts associated with the same Company as your mailbox.

The company directory will usually be divided by different departments so that you can easily find all the necessary members in the relevant field. Right clicking on a mailbox account will open the menu shown here.

From this menu you will have the option to directly get in contact with the person or add them to your personal group. For more information regarding your personal group please click here. To obtain information regarding each individual menu choices, please refer to the **Interaction on page 37**.

History

Call History

Call history keeps track of all incoming, outgoing and missed calls. When you click on the telephone icon in each of the entries you will be able to see detailed information regarding that particular call.

Call Information

By clicking on the phone icon within a call history entry, you will be able to view the details of the selected phone call. If the entry is not a missed call, you will also be able to view the duration of the call here.

☑ **Note**: If the **Missed Call History** is not cleared, you will receive a notification for an event when you log into UC Client Manger. Only the **Missed Call History** will be cleared if click on the **Clear History** button while viewing the missed calls only.

You also have the option of calling back anyone on the call history (assuming that their Caller ID information is available).

Clicking on the arrow icon will open up a menu that gives you the option to call the person or remove their individual entry from the history list. If you wish to clear the entire history, you may do so by clicking on the **Clear History** button on top of the window. You will have the option of clearing all **incoming** or **outgoing** message as shown here.

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Event History

Event History keeps track of most actions that are performed under the UC Client Manager. Your log in sessions, outgoing and incoming conversations, message notifications will all be recorded under the event history. If you wish to recall the details of a past event, Event History will prove to be a valuable tool.

You may also organize the Event History periodically by using the buttons available at the top.

Remove history record: Click this button to remove the selected history.

Clear History: Click this button to delete all entries in the Event History.

Settings

From the settings, you will be able to configure the core settings related to the UC Client Manager. Please refer to the different sections of the settings to learn more about what each setting does.

General

UI language: From the drop down menu, select the language you prefer to use.

Automatically start when I log onto Windows: Enable this check box to automatically start UC Client Manager when Windows starts up.

Auto-login: Enable this check box to automatically log into the UC Client Manager when the program is launched. You must save your password in order for this feature to function.

Auto-reconnect: Enable this check box to automatically reconnect to to the UC Client Manager when you become logged out through methods other than directly logging out on purpose.

Single messaging window: Enable this check box to combine all LanTalk windows into a single, tabbed, window as opposed to having one window opened per contact.

Default search engine: From the drop down menu, select the default engine that will be used when searching for related documents.

Change Password: Click on this button to change your mailbox password.

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Call Manager

Separate Call Manager window: Enable this check box to allow call manager to be accessible from a separate window.

Close if no more calls: Enable this check box to automatically close the separate call manager window when your calls are finished.

Record all incoming calls: Enable this check box to make a recording of all incoming calls to your extension.

Outbound call control: Enable this check box to have the Call Manager feature available even during outbound calls.

Save dial-out Extension: Enable this check box to save the last used custom dial-out extension. The settings will be kept as long as you do not change it.

Call popup: From the drop down menu, select the way in which you wish to notified regarding the incoming calls.

> **Off**: Forego asking an incoming caller his/her ID (number) if unrecognized by the system; similarly, to refrain from displaying it in a screen popup.
>
> **Ask**: Prompt an unidentified caller to enter his/her phone number using a touch tone keypad.
>
> **Pop**: Display an incoming caller's phone number.
>
> **Ask** & Pop: Ask an unrecognized caller to enter his/her phone number and to display that number in a screen popup.

Auto-search: Enable this check box to automatically display a list of e-mail that are related to the incoming caller. This feature requires integration with Google Desktop or Microsoft Search (aka. Microsoft Desktop Search).

Auto-cleanup old calls (days): Enter the number of days that the call history will be kept for.

Default action: From the drop down menu, select the action that the UC Client Manager will automatically respond with when a call comes in.

> **No Action**: The UC Client Manager will not perform any action when a call comes in.
>
> **Take Call**: The UC Client Manager will automatically answer the call, regardless of the presence of the user.
>
> **Take Message**: The UC Client Manager will automatically send the caller to voice mail.
>
> **Transfer**: The UC Client Manager will automatically forward the call to the destination defined below.

Transfer not selected as default action: This option will reflect the settings related to the Default Action: Transfer. When Transfer is selected from above, you will be able to define 1 of 3 choices for your forward destination by clicking on the Set/Check button.

> **Mailbox**: Select this radio button to forward the caller to another mailbox in the system.
>
> **Phone**: Select this radio button to forward the caller to a specific phone number (including external numbers).
>
> **Location**: Select this radio button to forward the caller according to the location settings that you have defined for the chosen location.

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Events & Notifications

Diable notification if unavailable: Enable this check box to disable all sound notifications if the availability is set to Not Available.

New message sounds from active chat window: Enable this check box to receive sound notification even on an active LanTalk chat window.

New message notification: Enable this check box to receive a popup notification when a message (text, voice, fax) arrives in the mailbox.

Record beep: Enable this check box to play the record beep when you barge in. This feature notifies you when the barge in is successful by playing the record beep file.

Tray animation: Enable this check box to turn on the animated icon on the Windows Taskbar whenever there is an unchecked event.

Sounds

Turn sounds off: Enable this check box to disable all sounds within UC Client Manager.

Connected: Define the sound that will be played when you log into the UC Client Manager.

Disconnected: Define the sound that will be played when you disconnect from the UC Client Manager.

Incoming Call: Define the sound that will be played when you receive an incoming call.

Record Started: Define the sound that will be played when the call recording starts.

LanTalk Message: Define the sound that will be played when you receive a Lantalk message.

New Message: Define the sound that will be played when you receive a new message (text, voice, fax) in your mailbox.

User Online: Define the sound that will be played when a tracked user comes online.

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1

Plug-ins

You may enable various UC Client Manager plug-ins from this section.

Configure: Click this button to configure the settings of the selected plug-in.

On/Off: Click this button to activate/deactivate the selected plug-in. The status of the plug-in will change to reflect the status.

Refresh: Click this button to refresh the status of all the plug-ins.

For details regarding each plug-in please refer to **UC Client Manager Plugins on page 41**.

Help

About: Select this option to view the version information regarding UC Client Manager.

Documentation: Select this option to view the UC Client Manager help file.

Collaborate: Select this option to start the collaborate service. This has to be configured by your system administrator in order to function properly. When configured, you will be automatically taken to the collaboration web site that your company uses.

Show Log: Select this option to display all activity logs for UC Client Manager. This information is used for troubleshooting by the technicians.

Locations

Locations allow you to easily change your presence settings. By default, the UC Client Manager comes with a set of typical locations, but you may also add or modify your locations any way you want through the Web Client interface by clicking on the Manage Locations option.

☑ **Note**: The location may also be changed through the main menu Set Current Location option.

In most cases your location will be automatically managed through your locations calendar. But you may also need to manually change your location depending on how your day is going. You might be going on your lunch a little later than usual or may be called into a meeting with short notice. The locations menu from the UC Client Manager allows your locations to become flexible on demand.

To change your current locations, simply select the location you desire from the menu. The location you have manually defined here will be used until the next scheduled event comes up in your calendar (e.g. if you are currently **In Office** at 12:05 PM and manually change the location to **At Lunch** and have a **Meeting** coming up at 12:30 PM, your location will automatically change to **Meeting** at 12:30 PM by default).

You also have the option of manually defining the time period as well through the schedule feature. Once you use the schedule feature along with your locations, the next manual locations change that you make will follow the previous schedule that you have selected for your convenience.

1

Schedule

Schedule feature allows you to further customize the locations feature by modifying the time frame with the selected location. By default, the schedule will follow your locations calendar which can be configured from the Web Client.

After selecting the desired location from the locations menu, select one of the following options to manually define the time frame:

Follow calendar: Select this option to ignore the manually selected location and use the calendar defined location.

Until next scheduled: Select this option to keep the manually selected location setting until the next event in the calendar come up.

Until I change: Select this option to keep the manually selected location setting until you manually change it again.

For next 5 minutes: Select this option to keep the manually selected location setting for 5 minutes. The location will follow the calendar afterwards.

For next 10 minutes: Select this option to keep the manually selected location setting for 10 minutes. The location will follow the calendar afterwards.

For next 15 minutes: Select this option to keep the manually selected location setting for 15 minutes. The location will follow the calendar afterwards.

For next 30 minutes: Select this option to keep the manually selected location setting for 30 minutes. The location will follow the calendar afterwards.

For next 1 hour: Select this option to keep the manually selected location setting for 1 hour. The location will follow the calendar afterwards.

For next 2 hour: Select this option to keep the manually selected location setting for 2 hour. The location will follow the calendar afterwards.

For next 4 hour: Select this option to keep the manually selected location setting for 4 hour. The location will follow the calendar afterwards.

Till tomorrow: Select this option to keep the manually selected location setting for the duration of the current day. The location will follow the calendar afterwards.

Availability

While the availability is mostly controlled through your locations, you also have the option of defining it manually. When you manually choose an availability related setting here, it will override the availability settings associated with your current location.

Available: Select this option to be shown as available to everyone.

Unavailable: Select this option to be shown as unavailable to everyone.

Appear unavailable if no caller ID: Select this option to be shown as unavailable to callers that do not have a Caller ID information (e.g. unknown or private numbers).

Override availability filters: Select this option to override any availability filter that may be associated with the current location. When this option is on, you will either be Available to everyone or Unavailable to everyone with no specific rules.

Extensions

If you have multiple extensions/phone numbers defined to a single location, you can choose your preferred number from this menu. Doing so will force the callers to find you through the selected number first, regardless of the preference configured in the location itself.

For example, if you have the Find Me/Follow Me configured, the UC server will try to locate you first through the selected number, then try other methods if there is no answer.

1

Sub Menus

Interaction

The interaction menu allows you to initiate a conversation with a chosen contact through any available method. The menu that you will see will vary from contact to contact since they will have different combinations of address available to them. For example, if a contact only has external phone numbers assigned, you will only be able to place a phone call and/or send a text message. If the contact is someone within your company under the same UC server, you will have the option to utilize the LanTalk instant messaging function, and so on.

☑   **Note**: Some of these options may not be available depending on the contact information, how & where you are accessing the menu from and your own system settings.

Please select one of the following to view specific help file associated with these interaction options.

Phone Call on page 21

Call and Record on page 21

E-Mail on page 22

Text Messaging on page 22

LanTalk on page 22

Add Group on page 21

Remove Member on page 22

Notifications on page 22

Move to Group on page 22

Search Related Documents on page 22

Search Related Document

The **Search Related Documents** option is available if you have either **Google Desktop** or **Windows Search** installed on your computer. This option will be added to all interaction menu available throughout the UC Client Manager.

☑   **Note**: In order for this integration to function properly you must install the **Google Desktop** or **Windows Search** **before** you install the UC Client Manager. If Google Desktop or Windows Search is installed afterwards, you should reinstall the UC Client Manager to obtain the functionality.

When you select this option, UC Client Manager will use either program to search through your e-mail and find entries that are related to the contact in question as shown below.

This function may also be automated through the Call Manager settings, by enabling Auto Search. When this option becomes active, the UC Client Manager will automatically cross reference the incoming call's Caller ID with a contact then search for all messages related to that contact.
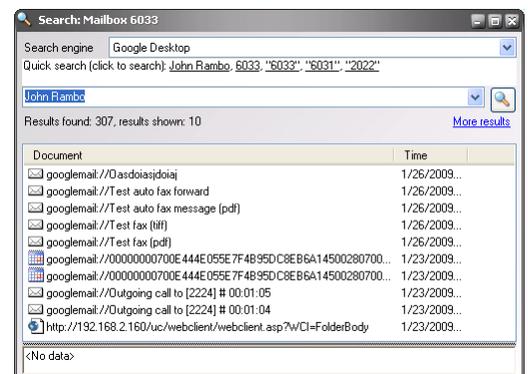
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Installing UC Client Manager

Please refer to this chapter when you install the UC Client Manager on your computer. In order to ensure proper functioning of the program please read over and follow all the steps on this guide.

Requirements

Minimum

Hardware/Software Requirements	
PC	Intel Pentium 4 (2.0GHz) 512 MB of RAM + 256MB RAM for Outlook
Operating System	Windows XP
Browser	Internet Explorer 6.0+ Mozilla Firefox 3.0+ Apple Safari 4.0+ Google Chrome 3.0+

Download and Install

Installing .net framework from Microsoft

Before you install the UC Client Manager you should make sure that the .net framework installed on your computer is greater than or equal to version **2.0 SP1**. The UC Client Manager may crash during or post installation if your .net framework version is lower or doesn't exist on your system.

Downloading UC Client Manager

Before you can install UC Client Manager, you must download the software from the Web Client login page. Click on the UC Client Manager link shown here then either choose the save the file to your computer then run it or choose to open it right away.
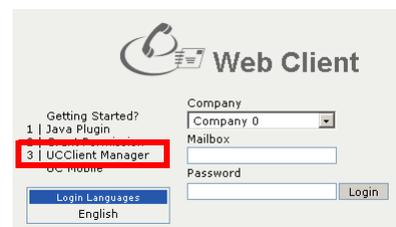
Installing UC Client Manager

When you run the installation file you will see the following window. Click Next to continue with the installation.

☑ **Note:** If you have other programs running (e.g. Microsoft Outlook, Lotus Notes, etc.) on the background, please close them before you continue with the installation.
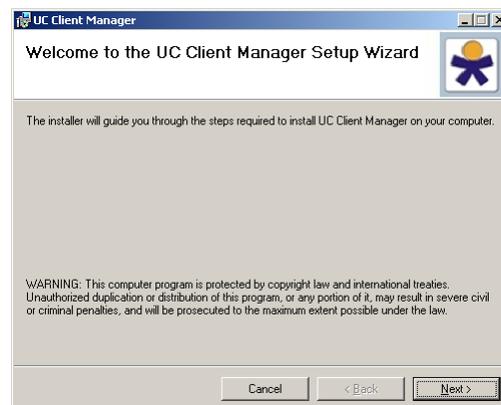
1

The installer will ask you for the install destination folder. You may leave the value as default or click on the **Browse** button to customize the installation location. When you're ready, click **Next** to continue.
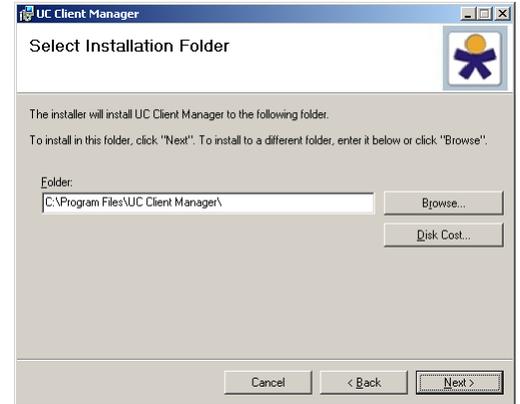
The final confirmation will appear. Click **Next** to begin the installation.
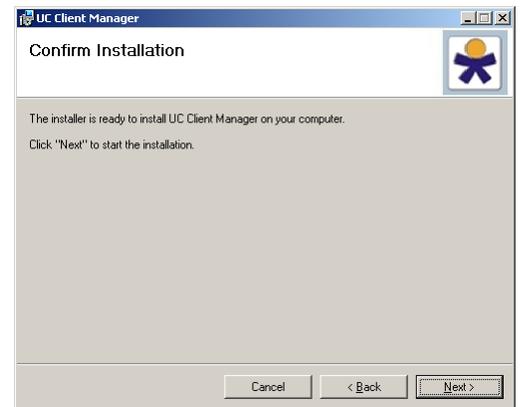
The necessary files will be copied & registered by the installer.

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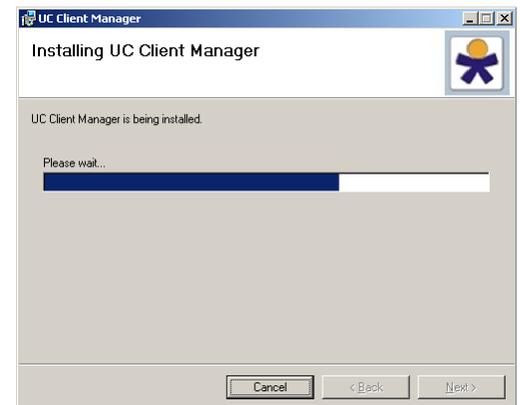
1

When the installation is complete, click on the **Close** button to close the installer. The UC Client Manager should now be running on your computer.

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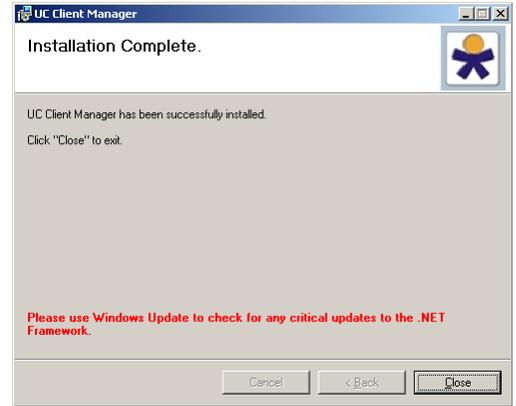
2   UC Client Manager Plugins

Chapter Summary

2

UC Client Manager Plugins

Introduction

UC Client Manager has a wide range of plugins available to make your UC experience as efficient as possible. You will be able to integrate your current system with various online and desktop applications to streamline the way you manage your daily routine through Unified Communications.

Settings

You may enable various UC Client Manager plug-ins from the plug-in section of UCCM settings.

Configure: Click this button to configure the settings of the selected plug-in.

On/Off: Click this button to activate/deactivate the selected plug-in. The status of the plug-in will change to reflect the status.

Refresh: Click this button to refresh the status of all the plug-ins.
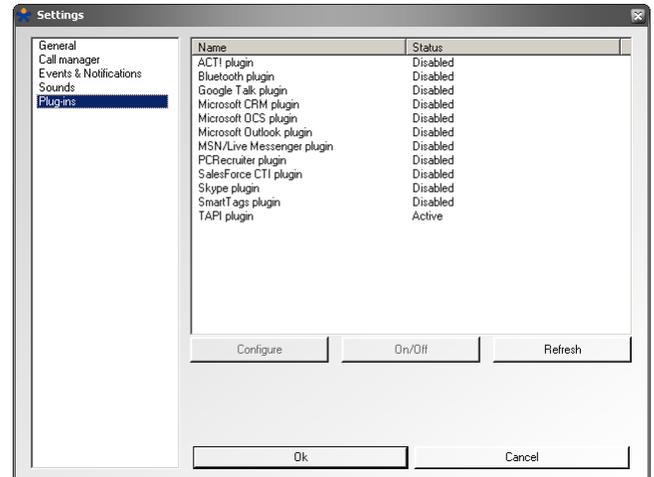
The following is the list of plug-ins available by default on the UC Client Manager:

ACT!

UC Client Manager is able to interact with the ACT! CRM solution. When the UC Client Manager detects an incoming call, the caller ID information is cross referenced with contact information within your ACT! account. If there is a match, UC Client Manager will open the contact information. If there is no match, UC Client Manager will either create a new entry for you or simply display the blank search results depending on your settings.

Configure

Add new record if not found: Enable this check box if you wish to automatically move to a create new entry page if the current caller's information cannot be matched with any existing entry.

2

Bluetooth

The UC Client Manager is able to integrate with a bluetooth device to keep track of your physical location and reflect it upon your UC Client Manager locations. However, this feature requires a plug & play bluetooth dongle as a requirement. If the bluetooth equipment on the computer requires a specific driver to function, the UC Client Manager may not be able to integrate with a device that you are pairing to keep track of your location.

Configure

The Bluetooth feature may be utilized with virtually any Bluetooth device. In most cases, you should use this function with a Bluetooth enabled cell phone since it is an item that you are most likely to carry with you at all times. When the phone that is tracked by the UC Client Manager plugin goes out of range, it will perform the action that you define on the configuration section here.

Defice: From the drop down menu, select the Bluetooth device that you will be using to track your physical location.
If the device is in range then...: Select the action that UC Client Manager will take when the device is detected. You may choose to do nothing, use your location calendar or set your location to a specific location from the drop down menu.

If the device is out of range then...: Select the action that UC Client Manager will take when the device becomes undetected (out of range or turned off). You may choose to do nothing, use your location calendar or set your location to a specific location from the drop down menu.

In range first: Enable this check box have the out of range action only occur if the device was detected (in range) initially.
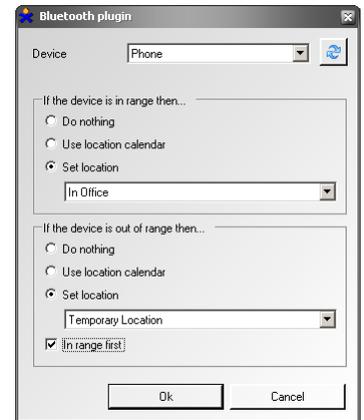
Google Talk

The UC Client Manager is able to integrate with the Google Talk messaging system. Your UC Client Manager location, extension and availability will be reflected on the Google Talk. You will also be able to change the availability at both locations and have them applied to the other side as well.

Configure

Google user: Enter your Google Talk user name. You must enter the full e-mail address and not just the prefix.

Password: Enter the password for the above user ID.

Test connection: Click on this button to test the credentials that you have entered above.

Use Google Talk status: Enable this check box to reflect the availability from Google Talk on UC Client Manager (e.g. Beeing Busy on Google Talk will toggle your availability to Unavailable in UC Client Manager).

Use Client Manager availability: Enable this check box to reflect the availability from UC Client Manager on Google Talk (e.g. Beeing Unavailable on UC Client Manager will toggle your status to Busy in Google Talk).

Show Client Manager location: Enable this check box to reflect the name of your UC Client Manager location on Google Talk.

Show Client Manager extension: Enable this check box to reflect the extension number from UC Client Manager on Google Talk.

Show if Client Manager is on the phone: Enable this check box to reflect the "on the phone" status of UC Client Manager on Google Talk as well.

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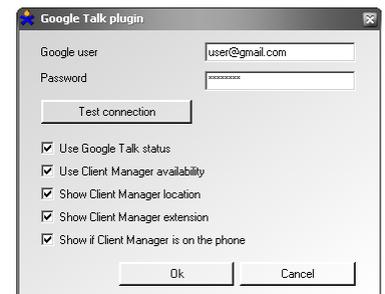
Microsoft CRM

UC Client Manager is able to interact with the Microsoft CRM solution. When the UC Client Manager detects an incoming call, the caller ID information is cross referenced with contact information within your Microsoft CRM account. If there is a match, UC Client Manager will open the contact information. If there is no match, UC Client Manager will either create a new entry for you or simply display the blank search results depending on your settings.

Configure

CRM server: Enter the domain name/IP address of your Microsoft CRM server.

CRM version: From the drop down menu, select the version of Microsoft CRM which your organization utilizes.

Organization: Use this field to define the Organization for your CRM server. Only applicable to CRM 3 & 4.

User: Enter the user name of your Microsoft CRM server.

Password: Enter the password for the above user name.

Domain: Enter the domain that the user name above belongs to.

Use default credentials: Enable this check box to use a generic credential to connect to the Microsoft CRM server.

Create new contact if not found: Enable this check box if you wish to automatically move to a create new entry page if the current caller's information cannot be matched with any existing entry.

Microsoft OCS

UC Client Manager is able to integrate with the OCS clients that are running on the same machine. Your availability will be reflected on the OCS side when they change in the UC Client Manager and vice versa. Since OCS has numerous types of status available, they may simply show up as Available or Unavailable on the UC end.

Microsoft Outlook

UC Client Manager is able to interact with the contact entries within your Microsoft Outlook. When the UC Client Manager detects an incoming call, the caller ID information is cross referenced with contact information within your Outlook account. If there is a match, UC Client Manager will open the contact information for your reference.

MSN Live Messenger

UC Client Manager is able to integrate with the MSN Messenger messaging system. Your availability will be reflected on the MSN Messenger when they change in the UC Client Manager and vice versa.

PCRecruiter

UC Client Manager is able to interact with the PCRecruiter recruiting/staffing solution. When the UC Client Manager detects an incoming call, the caller ID information is cross referenced with contact information within your PCRecruiter account. If there is a match, UC Client Manager will open the contact information for your reference.

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SalesForce CTI

The UC Client Manager is able to integrate with the SalesForce CRM system. You will have access to call control which allows you to control and keep track of both incoming and outgoing calls. When you receive an incoming call, the Caller ID will be cross referenced with the database in your SaleForce account through the built in PIM feature, which will open a new web page to show you all the information regarding that caller. If the caller does not exist in the database, you will be taken to the New Contact page where you can create a new entry for the caller.

Skype

UC Client Manager is able to integrate with the Skype VoIP & messaging system. Your UC Client Manager location, extension and availability will be reflected on the Skype personal message section. You will also be able to change the availability at both locations and have them applied to the other side as well.

Configure

Use Skype status: Enable this check box to automatically change your availability in UC Client Manager when the availability in Skype changes.

Expose availability: Enable this check box to automatically change your availability in Skype when the availability in UC Client Manager changes.

Expose extension: Enable this check box to display your extension number in UC Client Manager on Skype.

Only if available: Enable this check box to display your extension number in UC Client Manager on Skype only if your availability is set to available.

Expose location: Enable this check box to display the name of your location in UC Client Manager on Skype.

Expose phone activity: Enable this check box to reflect the "on the phone" status of UC Client Manager on Skype as well.

Search Skype contacts: Enable this check box to allow UC Client Manager to use Skype contacts, along with typical database, during a contact search.

Smart Tags

The smart tag plug-in allows the UC Client Manager to detect extension/phone numbers by monitoring the clip board. When the user cuts/copies a number string, they will be given the below pop up to initiate a call with that number right away. From the pop up window the users will have the choice to call, call & record or send SMS message.

TAPI

The TAPI plug-in enables other applications to perform dialing through UC Client Manager. This plug-in is also used by the Outlook Snap-In through IP Dialer on page 48.

2

Outlook Snap-In

If you have Microsoft Outlook installed on your computer, the UC Client Manager is able to integrate into the main Outlook program so that you can conveniently access all the UC Client Manager features together with the voice message control support.
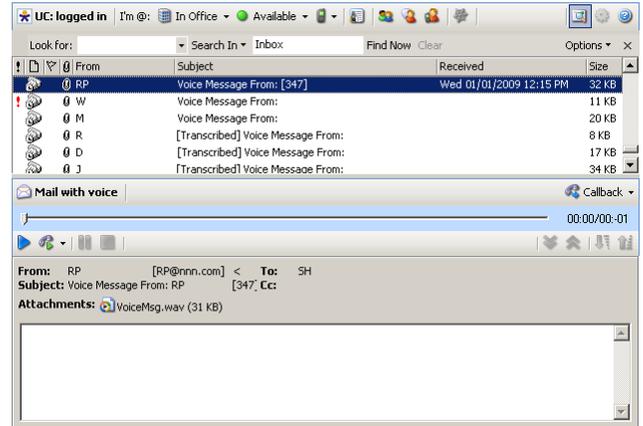
Menu Items

UC: logged in	Status: Refer to this section to see if you are logged into the UC Client Manager.
In Office	Locations: Click on this button to change your location settings.
Available	Availability: Click on this button to change your availability.
	Extension: Click on this button to define your preferred device for accepting calls.
	New Voice Message: Click on this button to create a new e-mail message with a voice file attachment.
	Company Directory: Click on this button to open the company directory.
	LanTalk: Click on this button to initiate a LanTalk with desired party.
	SMS: Click on this button to send a SMS message to the desired party.
	Web Client: Click on this button to launch the Web Client.
	Preview: Click on this button to enable/disable voice message preview.
	Settings: Click on this button to modify the UC Client Manager settings.
	About: Click on this button to access the about information for UC Client Manager Outlook Snap-In

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Voice Message Control

UC Client Manager Outlook Snap-In is able to automatically detect voice messages. The voice messages will have the above menu available in addition to regular e-mail controls.
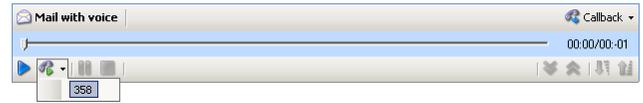
Through the Voice Message Control options you will be able to directly call the person who left the message using the **Callback** button. You may also play the message through your computer speaker by clicking on the **Play** button or play it using another device such as your telephone set.

You can also create new voice messages by using the same interface. Simply click on the **Record** button to start recording your voice message then **Stop** when you're done. The recorded message will be shown as an attachment on your e-mail message. Messages can be recorded through your computer's mic or through an integrated telephone.

☑ **Note**: If you are using Microsoft Office 2003, having Microsoft Word as your default email editor/composer will disable the record function.

Calendar Management

UC Client Manager Outlook Snap-In is able to apply UC location settings to a calendar entry, allowing you to easily customize each of your calendar events to include a UC location information. For example, you can associate your meeting entries in your calendar with the Meeting UC location, allowing your availability and extension to be also changed accordingly when the calendar event occurs.

To apply a UC location to a calendar event, simply select a UC location either from the **Appointments** bar or the **Outlook ribbon**. You may also specify the availability settings as well, if you do not wish to use the location's default value.
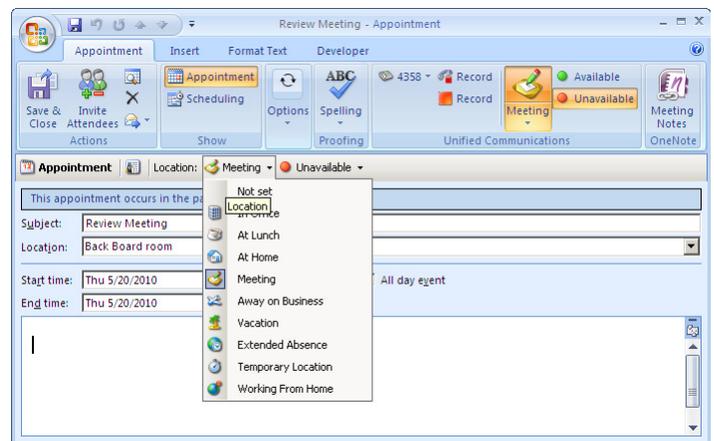
☑ **Note**: You can append UC location information to existing or new calendar entries. However, you cannot manually assign a UC location to reoccurring events. Reoccurring events will be flagged as "Meeting" UC location by default.

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IP Dialer

The IP Dialer offers the convenience of dialing phone numbers from any application that supports a modem. UC Client Manager receives events from IP dialer to take the phone off hook, dial the number and replace, passing them on to the server to take proper action.

The IP Soft Dialer is supported on the Windows XP and 2003 Professional operating systems.

☑ **Note:** UC Client Manager must be running in order to successfully dial phone numbers using IP Dialer.

☑ **Note:** IP Dialer is _**not**_ supported in a Citrix environment.

Placing a Call Through IP Dialer

The IP Dialer can be used with any application that supports a modem. Some applications include ACT!, Outlook and Goldmine. Refer to your third-party software for modem support details.

This example demonstrates how the IP Dialer is used in Microsoft Outlook.

When you right click on a contact entry from Outlook, you will notice the **Call Contact** option. This option is available throughout the Microsoft Outlook interface when dealing with a contact entry.
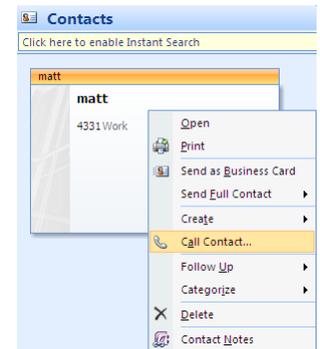
When you select this option, you will see the following window. The contact to be called and their number will be automatically filled out for you. If desired, you may manually enter a different number to dial as well.

If this is the first time you're using IP dialer, you must ensure that you have the correct device selected for the action. Click on the **Dialing Options** button.
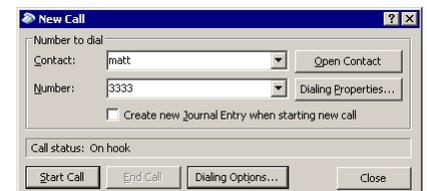
From the **Connect using line** drop down menu, select **UC Line**, then click **OK**. You do not have to repeat this process every time. Once you have selected the entry, it will be used during subsequent dial actions.

When you're back on the New Call window, click **Start Call**. Your call status will change to connected, and the UC server will automatically dial out using your integrated workstation phone. If your dial out number on the UC Client Manager is set to an external number or an unintegrated phone, the UC server will first call you at your dial out number. When you answer the call, UC server will call the contact's number and bridge the call between your device and your destination.
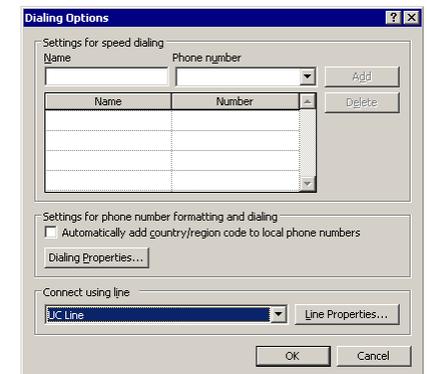
When your call is finished, simply hangup the phone then click on the **End Call** button.

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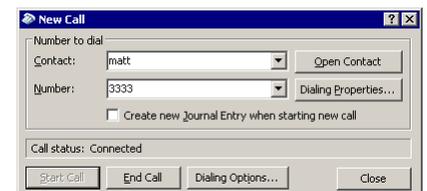
3 UC Client Gadgets

Chapter Summary

3

UC Client Gadgets

Introduction

UC Client Gadgets allows you to take advantage of UC functionality no matter where you are. Since the gadgets are able to function without any application installation, you will be able to utilize all features and functions as long as you have a web browser with internet connectivity.

The gadgets are also designed to integrate into existing Google solutions, allowing you to easily access UC features on a already familiar platform. From Google Mail to iGoogle start pages, the Web Gadget can easily be added for your conveninence.

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UC Client Manager On Google Web Gadgets

The Google Web Gadgets may be accessed at three different places. One is on your Google Apps startpages (i.e. iGoogle). The other is through the menu section of your Google Apps mail (i.e. Gmail) interface. The last is to directly visit the Google Gadget web page on your UC server.

☑   **Note**: In order for the web gadgets to save your settings, you must allow your web browser to **accept 3rd party cookies**. Some browsers may reject 3rd party cookies either as a default setting or through organization policy.

Google Web Gadget On Gmail

To add a UC Client Manager Web Gadget to the Gmail interface, start by logging into your Gmail account then open the **Labs** tab under your **Settings**.

Scroll down to the last entry "**Add any gadget by URL**". Enable this option then click **Save Changes**.

A new tab called **Gadgets** will now appear under your settings. From here, enter the URL: http://**USER.YOUR_SERVER.COM** /ucwebaccess/gadget.aspx.

Replace USER.YOUR_SERVER.COM with the address of your own UC server. When you're done, click on the **Add** button.
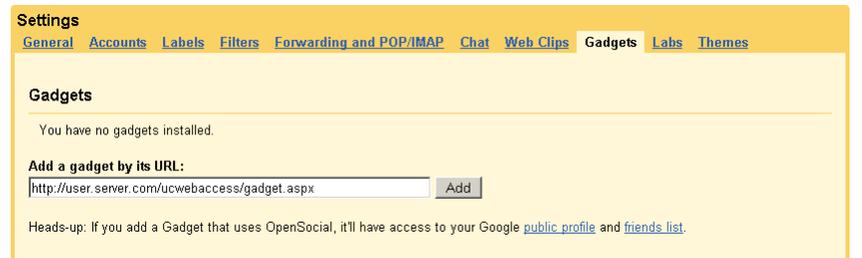
The gadget will now be listed on the **Gadgets** tab.
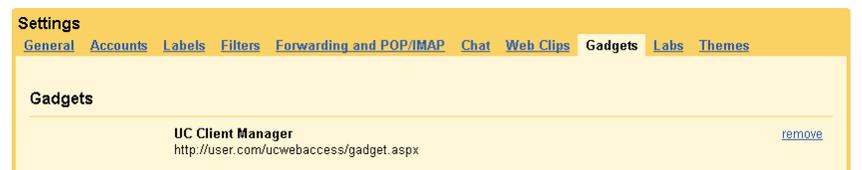
The UC Client Manager gadget will now be available on your Gmail menu interface. Click on **Configure** to enter the necessary login information.

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Enter the company number (which is 1 in most cases) then your mailbox number along with your password. Click **Save** when you're done.

You will now be logged into the UC server.

3
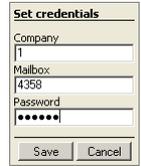
Google Web Gadget On iGoogle (Start Page)

To add a UC Client Manager Web Gadget to the iGoogle interface, start by logging into your Google account then click on the **Add Stuff** link from the main page.
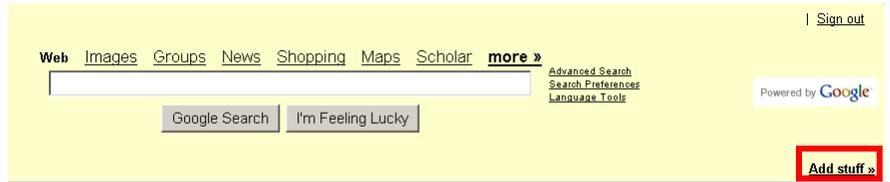
From the gadgets page, click on the **Add by URL** link.

Manually enter the URL for the gadget which will be http://**USER.YOUR_SERVER.COM**/ucwebaccess/gadget.aspx.

Replace USER.YOUR_SERVER.COM with the address of your own UC server. When you're done, click on the **Add** button.

Click **OK** to confirm your action.

The UC Client Manager gadget will now be available on your iGoogle page as a gadget. Click on **Configure** to enter the necessary login information.
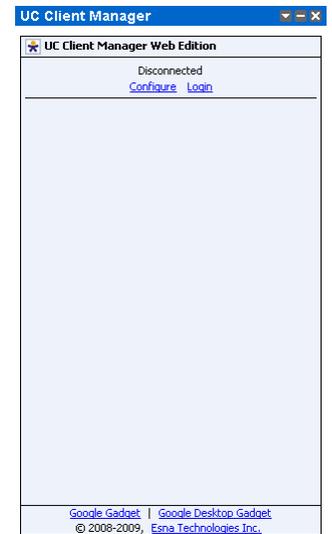
☑ **Note**: In order for the web gadgets to save your settings, you must allow your web browser to **accept 3rd party cookies**. Some browsers may reject 3rd party cookies either as a default setting or through organization policy.

Enter the company number (which is 1 in most cases) then your mailbox number along with your password. Click **Save** when you're done.

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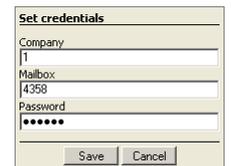
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You will now be logged into the UC server.

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Web Gadget From UC Server

Even if you do not have a Google Apps account, you can still take advantage of the web based UC Client Manager. To access the Web Gadget directly from your UC server, simply type in the following address from your web browser.

http://**USER.YOUR_SERVER.COM**/ucwebaccess/

Replace USER.YOUR_SERVER.COM with the address of your own UC server. When you visit the page, you will see the page shown here. The functionality of the web based UC Client Manager is identical to the Google Web Gadget variations.

☑ **Note**: In order for the web gadgets to save your settings, you must allow your web browser to **accept 3rd party cookies**. Some browsers may reject 3rd party cookies either as a default setting or through organization policy.

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Using UC Web Gadgets

→ **Logging In**

When you first access the gadget, you will have to configure your credentials in order to log in.

When you click on Configure a dialogue window will appear. Enter all the necessary login information here.

Company: Enter the company number that your mailbox is associated with.

Mailbox: Enter your mailbox number.

Password: Enter the password for your mailbox.

Click **Save** to save your settings and log in.

→ **Checking Messages**

When you log into the web gadget, you will receive a quick summary of messages available in your UC mailbox account. Each icon represents Voice Mail, E-mail and Fax messages available. The number represents the number of unread messages for each type of messages. Clicking on any entry will send you to the Web Client where you will be able to directly access the messages.

→ **Locations. Availability & Extensions**

You can change your locations, availability and the extension you can be reached at from this portion of the gadget. In order to change something, simply click on the text of the entry that you wish to change.

❖ **Set Locations/Availability/Extensions**

Location, Availability and Extensions are managed through a single window. To change an entry, simply select the desired value from the drop down menu then click **Save**. Your chosen settings will be reflected on the UC system right away.

When choosing a location, your Availability and Extension will change accordingly to the default values configured for the chosen location.

☑ **Note**: If you wish to define a custom extension number, set your location to **Temporary** first.

❖ **Follow Calendar / Override Calendar (Locked)**

When you change any location related fields, your status will automatically be changed to **Overriding calendar** to indicate that your current setting does not reflect your locations calendar settings. If you wish to follow your calendar again, simply click on the **Overriding calendar** text link. This will change your setting back to **Following calendar** and will adjust your Location, Availability and Extension settings accordingly.

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◆   **Google Talk Presence**

UC Web Gadget has the ability to directly link with your Google Talk credentials, allowing you to reflect your UC status on Google Talk automatically. To take advantage of this feature simply fill out the following information:

Enable plugin: Enable this check box to turn on this plugin.

User Name: Enter your Google Talk user name.

Password: Enter your password for the above user name.

Publish availability: Enable this check box to publish UC availability information to Google Talk.

Publish location: Enable this check box to publish UC location information to Google Talk.

Publish extension: Enable this check box to publish UC extension information to Google Talk.

Once all the configuration is complete click **Save**. The plugin will confirm the credentials if you have chosen to activate it. When the credentials are confirmed, the Google Talk Presence will be set to **connected**. From this point, current and future changes to your UC status will be reflected on the assigned Google Talk account.

☑   **Note**: The plugin will only be active as long as the Web Gadget itself is active.

→   **Work Groups & Directory Search**

You will be able to access your personal work groups and the entire company directory right from the Web Gadget interface.

◆   **Work Group**

To access the work groups, simply click on the work group you wish to view. You will see a popup window with the work group entries as shown here.

The icons located on the left side of the names indicate the individual's location and status. For example, group member on the screen shot shown is "In Office" and is also available from that location, indicated by the green status dot.

◆   **Directory Search**

You may search your entire company directory by entering a mailbox number or name then clicking on the **Search Directory** text link. All relevant matches will be displayed in a popup window identical to the work group window.

◆   **Initiating Interaction**

You will be able to access further information of your group members or directory search results by clicking on the individuals entries within the list. From this window, you can place a call to the person in question by clicking on the Call link or initiate instant messaging via LanTalk link.

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→ **Dialing & Call Control**

Using the call control gadget, you will be able to initiate phone calls simply by entering the phone number in the provided field then clicking on **Dial**. The call will be placed by the UC system by using the extension that you currently have defined under your settings.

You can also control your calls through the Web Gadget as long as your system supports the functionality. For both incoming and outgoing calls, you will see a list of icons under a call as shown in the screen shot. Please refer to the list below to learn about which call actions are available under the Web Gadget.

Answer Call: Click on this button to accept the incoming call from the current default extension.

Hangup Call: Click on this button to terminate the current ongoing call.

Hold Call: Click on this button to place the caller on hold.

Transfer Call: Click on this button to transfer the current call.

Call Handoff: Click on this button to handoff the current call.

Record Call: Click on this button to record current conversation.

Cancel Hold: Click on this button to retrieve a call from hold.

→ **LanTalk**

When you receive or initiate LanTalk while logged into UC Web Gadget, an entry will appear as shown here at the bottom of the main UC Web Gadget window. Exclamation on the icon means that you have received a new LanTalk message while regular text bubbles indicate a LanTalk entry which you can open.

When you click on either entry, you will see the main LanTalk communication window, where you will be able to view and send LanTalk messages. To send a message from this window, simply enter the text you wish to send at the text box at the bottom then click **Send**. Clicking on **Clear** will erase all LanTalk messages within the open window. When you're done with the LanTalk, click **Close** to go back to your main UC Web Gadget windows.

Please keep in mind that logging out or closing the browser will also clear the LanTalk entries.

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UC Client Google Desktop Gadget

By integrating the UC Client Manager with Google Desktop & Google Talk, you will be able to manage most features of all three applications from a single interface and also have access to convenient synchronization features.

In order to achive a full integration, you must ensure that all the necessary gadgets & plugins are installed and configured. UC Client Manager will use your Google Talk credentials to synchronize the status between the UC server and the Google Talk server, so it is vital that you update the password or any other information that you change.

Another important point is to have the UC Client Manager running and logged in on the background. The Google Desktop gadgets can access the UC Client Manager features when the program is running on the background.

Here is an overview of the necessary configuration:

* Install UC Client Manager gadgets to Google Desktop
* UC Client Manager Plug-in Settings for Google Talk

Installation

The UC Client Google Desktop Gadget file can be downloaded directly from your UC server through the web version of UC Client Manager shown here. Simply click on the Google Desktop Gadget link at the bottom to start the download.

☑ **Note**: Typical path for the UCCM Web Edition will be http://your_server.com/ucwebaccess/.

When prompted by your browser, choose to open the file.
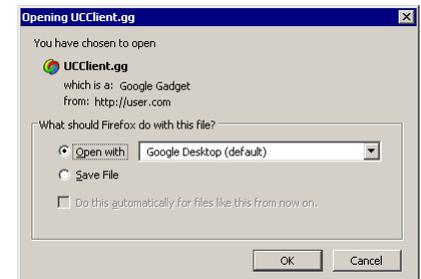
The gadget will automatically be installed on Google Desktop.

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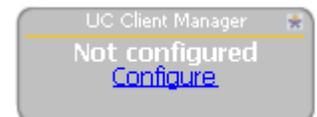
Using UC Desktop Gadgets

→ **Logging In**

When you first install the gadget, the only option that you will be given would be to configure. Click on the Configure link within the gadget.

A dialogue window will appear. Enter all the necessary login information here.

UC Server: Enter the address of your UC server.

Company: Enter the company number that your mailbox is associated with.

Mailbox: Enter your mailbox number.

Password: Enter the password for your mailbox.

Enable sounds: Enable this check box to allow sounds to play whenever an event occurs (e.g. play a sound when you receive a new LanTalk message).

Click **OK** to save your settings and log in.
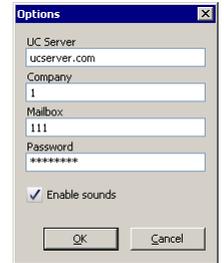
→ **Locations. Availability & Extensions**

You can change your locations, availability and the extension you can be reached at from this gadget. In order to change something, simply click on the text of the entry that you wish to change.

- ◆ **Locations:**

When you click on the text for locations (e.g. In Office), the following window will appear. To change your current location, simply select the entry that you desire.

When you select a location, the availability will also change to the chosen location's default.

- ◆ **Availability:**

When you click on the text for availability, the following window will appear. To change your current availability, simply select the entry that you desire. Your greetings and any other availability related settings will now honor this choice.

- ◆ **Extensions:**

When you click on the text for extensions (e.g. 888), the following window will appear. To change your current extension, simply select the entry that you desire. All calls that are directed to you will now ring at the chosen extension.
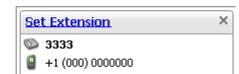
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→ **Dialing & Call Control**

Using the call control gadget, you will be able to initiate phone calls simply by entering the phone number in the provided field then clicking on the telephone icon. The call will be placed by the UC system by using the extension that you currently have defined under your settings.
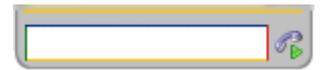
Once the call is made, the number you have dialed, or a contact name that matches the number you have dialed, will appear on top of the call control gadget. The same behavior will occur for incoming calls as well. As long as the Caller ID information is available, either the phone number itself or the contact name will appear on top of the gadget, allowing you to easily confirm the party you're talking to.

When you click on the phone number or the name of the contact on top of the gadget, you will gain access to detailed information and some of the basic call control features. These call control actions are only a portion of what is fully available under the UC Client Manager. This means that if you require additional functionality, you should open up your UC Client Manager call control instead.

☑ **Note**: The only call control available for outbound calls is the Hangup action.

Answer Call: Click on this button to accept the incoming call from the current default extension.

Hangup Call: Click on this button to terminate the current ongoing call.

Hold Call: Click on this button to place the caller on hold.

Cancel Hold: Click on this button to retrieve a call from hold.

→ **Work Groups & Directory Search**

♦ **Work Group**

The icons located on the left side of the names indicate the individual's location and status. For example, group member on the screen shot shown is "In Office" and is also available from that location, indicated by the green status dot.

♦ **Directory Search**

When you type in the name you wish to search then press enter (or click on the search button), the results will be shown in a list as shown here. The search results will behave exactly the same as entries in your work group.

♦ **Initiating Interaction**

You will be able to access further information of your group members or directory search results by clicking on the individuals entries within the list. From this window, you can place a call to the person in question by clicking on the dial icon or initiate instant messaging via LanTalk icon.

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4   UC Client Manager for Mac

Chapter Summary

4

UC Client Manager for Mac

Introduction

UC Client Manager is an all-in-one messaging & communication tool that is designed to aid the users' experience in all aspects of their communication. From E-mails to phone calls, UC Client Manager offers a one stop solution where virtually all possible methods of business communication can be managed through a single easy-to-use interface.

With the introduction of version 8.0 UC Client Manager now also supports Mac OSX environments natively. While the feature sets are not identical to the Windows version of UC Client Manager, the Mac version offers all the vital components of UC Client Manager ranging from Call Control to LanTalk. For a comprehensive list of features available on different platforms, please refer to the chart below.

Client Feature Comparison

Features	For Mac OSX	For MS Windows	Web Based Client
Call Manager	YES	YES	YES
LanTalk	YES	YES	YES
Company Directory	YES	YES	Search Only
Contact Search	YES	YES	YES
Directory Search	YES	YES	NO
UC Location Management	YES	YES	YES
Event & Call Logs	YES	YES	NO
Plug-ins	NO	YES	NO
Outlook Snap-In	NO	YES	NO

☑ **Note**: If you require a cross platform solution, or if you're using an operating system which is not supported by UC Client Manager desktop version, you should consider **UC Client Gadgets on page 49** as an alternative.

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Logging In

Simplified Interface

Authentication

You have several choices when it comes to connecting to the UC server. From the drop down menu at the top, you will have following choices:

Automatic configuration: This setting will obtain your Company, Mailbox and Password information through your Windows login credentials.

Automatic with alternative: This setting is similar to the one above, but will allow you to customize the fields under **Authentication** section for redundancy purpose. If the Windows credentials fail, UC Client Manager will use the values manually entered on the Authentication section.

Manual configuration: This setting is used to manually configure your login information. You will not be able to use your Windows login credentials under manual configuration.

For your convenience, you may also enable the **Save password** check box so that you do not have to enter your password every time you log in.

Credentials Discovery

This field allows you to use your Windows login information to directly log into the UC server. Your Windows login user ID can be tied to your UC mailbox so that you can log into the UC server using the same credentials. This feature will only be available if it has been enabled by your system administrator.

Windows user: Enter the Windows login user name associated with your UC mailbox.

Domain: Enter the domain your Windows login user name belongs to.

Password: Enter the password for your Windows login user name.

For your convenience, you may also enable the **Save password** check box so that you do not have to enter your password every time you log in.

🚫 **Warning**: Using the Save password feature in a public computer may lead to security issues. Please use this feature at your own discretion.

☑ **Note**: If you cannot log into your UC Client Manager you may have to configure the server settings by clicking on the **More Options** link from the simplified interface.

More options: Click on this link to specify server related settings. Refer to **Advanced Interface (More Options) on page 66** for more information.

Login: Click on this button to log into your UC Client Manager.

Exit: Click on this button to exit the UC Client Manager software.

UI Language: Use this option to change the language of UC Client Manager.

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Advanced Interface (More Options)

If this is the first time you are logging into your UC Client Manager, you may have to specify server related settings.

Server: Enter your UC server's address. This address may be a **URL** (e.g. user.server.com) or an **IP** address (e.g. 123.123.123.123).

Port: Enter the port number used by your UC server for client application communication.

☑   **Note**: If you cannot configure these fields properly please contact your system administrator for the required values.

Login: Click on this button to log into your UC Client Manager.

Exit: Click on this button to exit the UC Client Manager software.

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Main Window

From the main UC Client Manager window you will be able to quickly find the person you wish to communicate with either through **Contacts**, **Groups** or the **Search** function.

You may initiate contact with these people through various methods depending on your own settings and the recipient's. You also have the option of changing your presence settings from here as well.

Please select a topic from below for detailed information.

Dial-Out Extension

UC Client Manager allows you to change the source of your outgoing calls when you are initiating the calls through the various methods available in the UC Client. The numbers available under this menu will be derived from your personal numbers associated with your mailbox.

Alternatively, you may select the **Custom** option and manually enter the source number in the window shown here. When you initiate a call using an external number as the source, the UC server will call you on the selected source number **first**. When you answer your phone, the UC server will start to dial the desired party then connect the two together.

The advantage of this method is being able to control your calls using the UC Client Manager wherever you're located. Also, no matter which external number you may be using, the receiver of the call will only see the number associated with the UC server, which will usually be the number of your office. This allows you to maintain high level of privacy regardless of your work location.

If you are making long distance calls, this method may prove to be a cost efficient solution as well. Since most companies have much more competitive rates for long distance plans than a typical cellphone or home long distance plans, having the UC server dial both you and the desired party will allow you to take advantage of the company's plans and prevent your external number from directly using long distance minutes.

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Search

The built in search window in the UC Client Manager allows you to search through your personal contacts, public contacts and your company directory for a specific person. There are a few rules that you should keep in mind when searching for someone:

When searching for a name, type **First_Name"space"Last_Name** (e.g. John Doe) or **Last_Name,First_Name** (e.g. Doe,John).

☑ **Note**: If the person has a space in between the first name, we recommend that you use the **Last_Name,First_Name** format.

☑ **Note**: You can easily initiate mass LanTalk messages through the Send the text (LanTalk) option available during search. Simply type the message you wish to send on the search box then select the LanTalk action along with destination (either broadcast to entire company or one of your work groups). A LanTalk message window will open automatically with the message content and destination already specified.

The search will keep a record of previous searches, up to a point. When you start typing a search string the UC server will display some recommendations but this list may not be the complete matching list. For accurate results, always press the **Enter key** after typing the search string.

You can directly initiate conversation through the search results as well. Click on the icon located on the right side of the searched result to open up the interaction menu.

☑ **Note**: The menu will vary depending on contact information available for the searched contact. (i.e. if the contact only has e-mail address specified, you will only have the option for e-mail/text message).

☑ **Note**: For details on each individual interaction actions, refer to **Groups on page 69**.

Specifying Search Options

If your database is vast, you may find searching through all the entries on your server to be too broad. You can minimize results by specifying exactly where UC Client Manager will be searching. However, since most contact information is stored on the server by default (including your private contacts on UC mailbox), it is best to leave this as the default value of **Server-side search**.

Server-side search: UC Client Manager will search for the entered string on the server's contact and directory database.

Search locally: UC Client Manager will search for the entered string on your desktop computer.

Cached results and actions: UC Client Manager will search through cached searched results from previous searches and actions performed by you through UC Client Manager.

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Groups

UC Client Manager supports group organization which is an easy and convenient tools for managing contacts for members in your company. You will by able to create groups and add anyone in the company directory so that you can easily keep track of their presence & availability. If you need to contact certain people in your company frequently, it will be a good idea to add them to your group so that you can initiate conversation through phone, e-mail, text message and LanTalk with a click of a button.

☑   **Note**: The groups are tied to your own mailbox and will not affect anyone else. You can freely add or remove people from your company directory without affecting other people's contacts or groups.

You can initiate actions with a chosen contact within a group through one of two ways. First is through the status panel which pops up when you hover over the contact which is shown below on the left. This panel allows you to view the details of the contact's status before initiating an action with them through the numerous buttons. For information regarding the actions available on the panel, please click on the responding buttons below. The second method will be through a more comprehensive menu shown below on the right. This menu becomes available when you click on the arrow button on the far right side of the entry. Through this menu, you will be able to choose from a range of actions available for the chosen contact.

☑   **Note**: Some of these actions may also be available to members in your organization even if they are not accessed them from your group (e.g. through directory or search).

Add Group

To create a group, simply click on the [Add group] button on the main menu then fill out the following window with a desired name.

When you have the groups created, search for contacts either through the search function or the company directory. Click on the contact icon to bring up the following interaction menu and select the group you wish for that person to be included in as shown below.

Phone Call

You may initiate conversation with the contacts in your group through numerous methods. Some options will have additional menu items available depending on contact's configuration.

From the **Phone Call** menu, you will be able to call any of the numbers associated with the contact (both internal & external).

Call and Record

If you wish to keep a recording of your conversation, you may initiate conversation with the contacts in your group through Call and record. Once your conversation is over with the chosen contact, a voice message will be automatically sent to your inbox.

From the **Call and record** menu, you will be able to call any of the numbers associated with the contact (both internal & external).

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E-Mail

From the **E-Mail** menu, you will be able to compose e-mail messages to any of the e-mail address associated with the contact.

Text Messaging

From the **Text Messaging** menu, you will be able to send text messages to e-mail addresses or external phone numbers associated with the contact.

LanTalk

From the LanTalk menu, you will be able to send instant text messages to the contact as long as they are online.

Remove Member

If you wish to remove a contact from the group, simply open up the menu from the group list, then select Remove Member as shown below.

Notifications

Rather than relying on the UC Client main window to learn about your colleague's status, you may also setup Notification flags for the contacts as well. You may choose any combination of different flags to keep track of the contacts in your group.

Online/Offline: Select this option to be notified whenever the contact comes online / goes offline.

Phone: Select this option to be notified whenever the contact is on the phone / gets off the phone.

Location: Select this option to be notified when the contact's location setting changes.

When the contact you have flagged performs any one of the selected option, you will see the notification window pop up on the right bottom corner of your screen.

Move to Group

From the Move to Group menu, you will be able to move the selected contact to another group. This option is only available if you have more than one groups. To move a contact, simply select the new group you wish to associate the contact with from the available list.

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Call Manager

UC Client Manager is able to control phone calls through the Call Manager interfaces right from your desktop. When you receive a phone call through a device that is integrated with the UC server, you will see a small section added to the bottom of your UC Client Manager Main Window. Whenever you hover the mouse over a call entry, you will see the call control actions as shown here.

☑ **Note**: The Call Manager may be accessed from a separate window as well. Please refer to the settings section to configure this feature.

☑ **Note**: The Call Manager may be enabled for outbound calls as well. Please refer to **Settings on page 81** to configure this feature.

☑ **Note**: You can control more than one phone call via the Call Manager simultaneously.

☑ **Note**: Actions available during call control may vary depending on your site's settings.

From the Call Manager, you will have access to the following options **before answering a call**.

Answer: Select this option to answer the selected call. You may specify a device to answer the phone call from if you have more than one device defined in your current location's address.

Answer and record: Select this option to answer the call and start recording right away.

Take Message: Select this option to send the caller to voicemail.

Hold: Select this option to put the selected call on hold.

Transfer: Select this option to transfer the selected call.

Remove: Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

From the Call Manager, you will have access to the following options **after answering a call or making a call**.

Hangup: Select this option to end the selected call.

Hold: Select this option to put the selected call on hold.

Transfer: Select this option to transfer the selected call.

Call Handoff: Select this option to handoff the call to another device.

☑ **Note**: Call Handoff may not be available depending on mailbox configuration. Please consult your system administrator for more information.

Start Record: Select this option to start recording the selected call.

Remove: Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

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Buttons / Icons

	Incoming Call: This icon represents an incoming call.
	Answered Call: This icon represents an answered call that is currently ongoing.
	Finished Call: This icon represents a finished call or Hang up action.
	Answer: Click on this button to answer the incoming call. You may also define the device in which you will answer as well.
	Answer and Record: Click on this button to answer the incoming call and start recording the conversation. You may also define the device in which you will answer as well.
	Take Message: Click on this button to send the caller to voicemail.
	Hold: Click on this button to put the call on hold.
	Remove: Click on this button to remove the selected call from the Call Manager. This will not impact the call itself.
	Start Record: Click on this button to start recording your conversation.
	Pause Record: Click on this button to pause the recording.
	Stop Record: Click on this button to stop the recording. The recorded voice message will be sent to your mailbox.
	Transfer: Click on this button to transfer the call to another person or device.
	Call Handoff: Click on this button to handoff the call to another device seamlessly.
	Call Back: Click on this button to call back the person that the call entry you're viewing is associated with.

Hold

When you are receiving a call, or when you have already answered the call, you will be able to put that call on hold. When a call is placed on hold, you will have access to the following options.

Stop Hold: Select this option to end the hold and re-initiate the conversation or let the call ring again.

Transfer to...: Select this option to transfer the call on hold to another location of your choice. Please refer to Transfer on page 73 for detailed explanation.

Transfer to #: Select this option to transfer the call to one of the numbers defined in your mailbox account.

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Transfer

When you are transferring a call through the Call Manager, you can either transfer to one of the predefined numbers associated with your mailbox account or a manually defined location.

Transfer to...

The Transfer to... option allows you to transfer a call to a manually defined location. This location can be selected from a Mailbox, Phone Number or from one of your presence Locations.

Mailbox

When you choose to use the Mailbox option, you can find the destination mailbox by clicking on the Find button from the Transfer to... window. You can find a mailbox through the name associated with the mailbox or by the mailbox number.

Phone

When you choose to use the Phone option, you can define the destination phone number by clicking on the Build button from the Transfer to... window. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the correct number(s) then click on the OK button.

Location

When you choose to use the Location option, simply select one of your pre-define locations from the drop down menu. The call will be transferred to the default number associated with the chosen location.

Record

When you start to record a call, the menu available through the Call Manager will change to the above. You may freely pause and resume recording in middle of the call. When you stop the recording, or when the call ends, the recorded conversation will be sent to your mailbox as a voice message.

Continue Record: Select this option to resume the recording. This option is only available when recording is paused.

Pause Record: Select this option to pause the recording. Click on Continue record to resume at any time.

Stop Record: Select this option to stop the recording. The recording will be sent to your mailbox.

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Handoff

Call handoff allows you to seamlessly transfer your call to another device
(e.g. from desktop phone to cellphone). Unlike typical transfers, call handoff
will not prompt the person on the other end. When you initiate a handoff, the
chosen device will start to ring. When you answer, your previous device will
be disconnected automatically and the call will be connected to the new
device right away. You will be able to handoff the call multiple times as long as you have the Call Manager window
available to you.

☑ **Note**: Call Handoff may not be available depending on mailbox configuration. Please consult your system
administrator for more information.

Handoff to...

The Transfer to... option allows you to handoff a call to a manually
defined location. This location can be selected from a Mailbox, Phone
Number or from one of your presence Locations.

Mailbox

When you choose to use the Mailbox option, you can find the destination
mailbox by clicking on the Find button from the Transfer to... window. You
can find a mailbox through the name associated with the mailbox or by the
mailbox number.

Phone

When you choose to use the Phone option, you can
define the destination phone number by clicking on the
Build button from the Transfer to... window. After
selecting the type of phone number (internal extension
or an external number) fill in the boxes with the
correct number(s) then click on the OK button.

Location

When you choose to use the Location option, simply select one of your pre-define locations from the drop down
menu. The call will be handoff-ed to the default number associated with the chosen location.

4

Separate Window

If you have to manage high volume of calls, the main window of UC Client Manager may be insufficient for you to conveniently manage all your calls. To remedy such scenarios, you may opt to separate the Call Manager window so that all your calls can be easily managed through a spacious window along with oversized buttons for easier user experience. The behavior of the call control will remain exactly identical as the integrated Call Manager window.

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Main Menu

You can access the main window menu by clicking on the large Link button.

☑ **Note**: This exact menu is also accessible from the Taskbar icon when you right click.

All of your personal settings may be managed from this menu. Your presence, along with the core UC Client Manager configuration are all available under this menu.

Set current locations: This option gives you access to classic location modification window.

Add Group: This option allows you to add a new personal group.

Web Client: This option launch the Web Client on your browser and log in automatically using your credentials.

LanTalk: This option allows you to LanTalk members in your organization.

Company Directory: This option allows you to view the directory of your organization.

Call Manager: This option gives you access to the call manger window where you will be able to view and control your current calls.

Call History: This option allows you to view the call history associated with your mailbox.

Event history: This option allows you to view the events that have occurred on your mailbox.

Settings: This option gives you access to the settings menu where most of the configurations are done.

Help: This option gives you access to miscellaneous features and the help file you're currently viewing.

Logout: Select this option to log out of UC Client Manager.

Exit: Select this option to log out and close the UC Client Manager.

4

Set Current Location

Set Current Location allows you to view and modify your current location in detail. Please keep in mind that you can also change your location from the main UC Client Manager window through the shortcut icons.

To use the location currently define on your calendar, choose the **Use my locations calendar** radio button. To manually define a custom location, choose the **Override my locations calendar** radio button then configure the below fields as required.

Current Location: From the drop down menu, select the desired location.

Phone Number: From the drop down menu, select the phone number you wish to use. The list of available phone number will depend on the location that is currently chosen.

Availability: From the drop down menu, select your availability.

Appear unavailable if no caller ID: Enable this check box to appear unavailable if the system can not detect a caller ID from an incoming call.

Override Availability Filters: Enable this check box if you want the availability you specify on this screen to override any filters configured for the chosen location.

I will be at this location

Until I change my location: Select this radio button to make the current location setting permanent until you manually change it again.

Until the next scheduled activity or the beginning/end of working hours: Select this radio button to be at the currently chosen location until an event in the calendar changes your location or until the end of your working hours defined in the calendar. Your location will revert to the calendar schedule after either of the conditions are met.

Till: Select this radio button to specify the exact time and date for your current location to be effective for. Your location will revert to the calendar schedule after the time is reached.

Edit my locations...: Click on this button to open your Web Client interface where you will be able to manage your locations.

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LanTalk

The LanTalk feature allows you to initiate instant messaging session with anyone that is currently online in the same UC system as you (i.e. those who are in the same company). LanTalk is an easy to use alternative to phone conversation when you wish to leave a short message or get in contact with someone while they are already on the phone.

To send a message simply type in the desired message in the text field at the bottom then press the **Enter** key on your keyboard or click the **Send** button on the LanTalk window.

Save: Click on this button to save the current LanTalk conversation as a text file. When you click on the window, the Save File As... window will open, allowing you to choose the location and the name of the file that is to be saved.

Clear: Click on this button to clear all conversation history within the current LanTalk window.

Kind: If the recipient of your message has SMS address defined on their mailbox, you will be able to use this drop down menu to select between **LanTalk Only** and **LanTalk/SMS**. LanTalk/SMS option will send a LanTalk message and also send the same message to the recipient's SMS address, allowing you to increase the chance of your message being noticed.

LanTalk Broadcast

The Lantalk Broadcast feature allows you to send a Lantalk message to everyone who is currently logged into the UC Client Manager (within your company). Please use caution when using this feature since the message will be instantly delivered to everyone on the system.

If a user replies to your LanTalk Broadcast message, a new LanTalk window will open for that individual user as if that user is initiating an individual LanTalk session with you. This means that if you have a large user base in your company, and everyone who receives the message replies to you, there will be a significant number of LanTalk window that will be opened simultaneously. Please consider these factors when utilizing the LanTalk Broadcast feature.

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Company Directory

The company directory allows you to view other mailbox accounts associated with the same Company as your mailbox.

The company directory will usually be divided by different departments so that you can easily find all the necessary members in the relevant field. Right clicking on a mailbox account will open the menu shown here.

From this menu you will have the option to directly get in contact with the person or add them to your personal group. For more information regarding your personal group please click here. To obtain information regarding each individual menu choices, please refer to the **Interaction on page 85**.

History

Call History

Call history keeps track of all incoming, outgoing and missed calls. When you click on the telephone icon in each of the entries you will be able to see detailed information regarding that particular call.

Call Information

By clicking on the phone icon within a call history entry, you will be able to view the details of the selected phone call. If the entry is not a missed call, you will also be able to view the duration of the call here.

☑   **Note**: If the **Missed Call History** is not cleared, you will receive a notification for an event when you log into UC Client Manger. Only the **Missed Call History** will be cleared if click on the **Clear History** button while viewing the missed calls only.

You also have the option of calling back anyone on the call history (assuming that their Caller ID information is available).

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Clicking on the arrow icon will open up a menu that gives you the option to call the person or remove their individual entry from the history list. If you wish to clear the entire history, you may do so by clicking on the **Clear History** button on top of the window. You will have the option of clearing all **incoming** or **outgoing** message as shown here.

Event History

Event History keeps track of most actions that are performed under the UC Client Manager. Your log in sessions, outgoing and incoming conversations, message notifications will all be recorded under the event history. If you wish to recall the details of a past event, Event History will prove to be a valuable tool.

You may also organize the Event History periodically by using the buttons available at the top.

Remove history record: Click this button to remove the selected history.

Clear History: Click this button to delete all entries in the Event History.

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Settings

From the settings, you will be able to configure the core settings related to the UC Client Manager. Please refer to the different sections of the settings to learn more about what each setting does.

General on page 81

Call Manager on page 81

Events & Notifications on page 82

Sounds on page 83

General

UI language: From the drop down menu, select the language you prefer to use.

Automatically start when I log onto Windows: Enable this check box to automatically start UC Client Manager when Windows starts up.

Auto-login: Enable this check box to automatically log into the UC Client Manager when the program is launched. You must save your password in order for this feature to function.

Auto-reconnect: Enable this check box to automatically reconnect to to the UC Client Manager when you become logged out through methods other than directly logging out on purpose.

Single messaging window: Enable this check box to combine all LanTalk windows into a single, tabbed, window as opposed to having one window opened per contact.

Default search engine: From the drop down menu, select the default engine that will be used when searching for related documents.

Change Password: Click on this button to change your mailbox password.

Call Manager

Separate Call Manager window: Enable this check box to allow call manager to be accessible from a separate window.

Close if no more calls: Enable this check box to automatically close the separate call manager window when your calls are finished.

Record all incoming calls: Enable this check box to make a recording of all incoming calls to your extension.

Outbound call control: Enable this check box to have the Call Manager feature available even during outbound calls.

Save dial-out Extension: Enable this check box to save the last used custom dial-out extension. The settings will be kept as long as you do not change it.

Call popup: From the drop down menu, select the way in which you wish to notified regarding the incoming calls.

Off: Forego asking an incoming caller his/her ID (number) if unrecognized by the system; similarly, to refrain from displaying it in a screen popup.

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Ask: Prompt an unidentified caller to enter his/her phone number using a touch tone keypad.

Pop: Display an incoming caller's phone number.

Ask & Pop: Ask an unrecognized caller to enter his/her phone number and to display that number in a screen popup.

Auto-search: Enable this check box to automatically display a list of e-mail that are related to the incoming caller. This feature requires integration with Google Desktop or Microsoft Search (aka. Microsoft Desktop Search).

Auto-cleanup old calls (days): Enter the number of days that the call history will be kept for.

Default action: From the drop down menu, select the action that the UC Client Manager will automatically respond with when a call comes in.

No Action: The UC Client Manager will not perform any action when a call comes in.

Take Call: The UC Client Manager will automatically answer the call, regardless of the presence of the user.

Take Message: The UC Client Manager will automatically send the caller to voice mail.

Transfer: The UC Client Manager will automatically forward the call to the destination defined below.

Transfer not selected as default action: This option will reflect the settings related to the Default Action: Transfer. When Transfer is selected from above, you will be able to define 1 of 3 choices for your forward destination by clicking on the Set/Check button.

Mailbox: Select this radio button to forward the caller to another mailbox in the system.

Phone: Select this radio button to forward the caller to a specific phone number (including external numbers).

Location: Select this radio button to forward the caller according to the location settings that you have defined for the chosen location.

Events & Notifications

Diable notification if unavailable: Enable this check box to disable all sound notifications if the availability is set to Not Available.

New message sounds from active chat window: Enable this check box to receive sound notification even on an active LanTalk chat window.

New message notification: Enable this check box to receive a popup notification when a message (text, voice, fax) arrives in the mailbox.

Record beep: Enable this check box to play the record beep when you barge in. This feature notifies you when the barge in is successful by playing the record beep file.

Tray animation: Enable this check box to turn on the animated icon on the Windows Taskbar whenever there is an unchecked event.

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Sounds

Turn sounds off: Enable this check box to disable all sounds within UC Client Manager.

Connected: Define the sound that will be played when you log into the UC Client Manager.

Disconnected: Define the sound that will be played when you disconnect from the UC Client Manager.

Incoming Call: Define the sound that will be played when you receive an incoming call.

Record Started: Define the sound that will be played when the call recording starts.

LanTalk Message: Define the sound that will be played when you receive a Lantalk message.

New Message: Define the sound that will be played when you receive a new message (text, voice, fax) in your mailbox.

User Online: Define the sound that will be played when a tracked user comes online.

Help

About: Select this option to view the version information regarding UC Client Manager.

Documentation: Select this option to view the UC Client Manager help file.

Collaborate: Select this option to start the collaborate service. This has to be configured by your system administrator in order to function properly. When configured, you will be automatically taken to the collaboration web site that your company uses.

Show Log: Select this option to display all activity logs for UC Client Manager. This information is used for troubleshooting by the technicians.

Locations

Locations allow you to easily change your presence settings. By default, the UC Client Manager comes with a set of typical locations, but you may also add or modify your locations any way you want through the Web Client interface by clicking on the Manage Locations option.

☑ **Note**: The location may also be changed through the main menu Set Current Location option.

In most cases your location will be automatically managed through your locations calendar. But you may also need to manually change your location depending on how your day is going. You might be going on your lunch a little later than usual or may be called into a meeting with short notice. The locations menu from the UC Client Manager allows your locations to become flexible on demand.

To change your current locations, simply select the location you desire from the menu. The location you have manually defined here will be used until the next scheduled event comes up in your calendar (e.g. if you are currently **In Office** at 12:05 PM and manually change the location to **At Lunch** and have a **Meeting** coming up at 12:30 PM, your location will automatically change to **Meeting** at 12:30 PM by default).

You also have the option of manually defining the time period as well through the schedule feature. Once you use the schedule feature along with your locations, the next manual locations change that you make will follow the previous schedule that you have selected for your convenience.

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Schedule

Schedule feature allows you to further customize the locations feature by modifying the time frame with the selected location. By default, the schedule will follow your locations calendar which can be configured from the Web Client.

After selecting the desired location from the locations menu, select one of the following options to manually define the time frame:

Follow calendar: Select this option to ignore the manually selected location and use the calendar defined location.

Until next scheduled: Select this option to keep the manually selected location setting until the next event in the calendar come up.

Until I change: Select this option to keep the manually selected location setting until you manually change it again.

For next 5 minutes: Select this option to keep the manually selected location setting for 5 minutes. The location will follow the calendar afterwards.

For next 10 minutes: Select this option to keep the manually selected location setting for 10 minutes. The location will follow the calendar afterwards.

For next 15 minutes: Select this option to keep the manually selected location setting for 15 minutes. The location will follow the calendar afterwards.

For next 30 minutes: Select this option to keep the manually selected location setting for 30 minutes. The location will follow the calendar afterwards.

For next 1 hour: Select this option to keep the manually selected location setting for 1 hour. The location will follow the calendar afterwards.

For next 2 hour: Select this option to keep the manually selected location setting for 2 hour. The location will follow the calendar afterwards.

For next 4 hour: Select this option to keep the manually selected location setting for 4 hour. The location will follow the calendar afterwards.

Till tomorrow: Select this option to keep the manually selected location setting for the duration of the current day. The location will follow the calendar afterwards.

Availability

While the availability is mostly controlled through your locations, you also have the option of defining it manually. When you manually choose an availability related setting here, it will override the availability settings associated with your current location.

Available: Select this option to be shown as available to everyone.

Unavailable: Select this option to be shown as unavailable to everyone.

Appear unavailable if no caller ID: Select this option to be shown as unavailable to callers that do not have a Caller ID information (e.g. unknown or private numbers).

Override availability filters: Select this option to override any availability filter that may be associated with the current location. When this option is on, you will either be Available to everyone or Unavailable to everyone with no specific rules.

Extensions

If you have multiple extensions/phone numbers defined to a single location, you can choose your preferred number from this menu. Doing so will force the callers to find you through the selected number first, regardless of the preference configured in the location itself.

For example, if you have the Find Me/Follow Me configured, the UC server will try to locate you first through the selected number, then try other methods if there is no answer.

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Sub Menus

Interaction

The interaction menu allows you to initiate a conversation with a chosen contact through any available method. The menu that you will see will vary from contact to contact since they will have different combinations of address available to them. For example, if a contact only has external phone numbers assigned, you will only be able to place a phone call and/or send a text message. If the contact is someone within your company under the same UC server, you will have the option to utilize the LanTalk instant messaging function, and so on.

☑ **Note**: Some of these options may not be available depending on the contact information, how & where you are accessing the menu from and your own system settings.

Please select one of the following to view specific help file associated with these interaction options.

Phone Call on page 69

Call and Record on page 69

E-Mail on page 70

Text Messaging on page 70

LanTalk on page 70

Add Group on page 69

Remove Member on page 70

Notifications on page 70

Move to Group on page 70

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Installing UC Client Manager

Please refer to this chapter when you install the UC Client Manager on your computer. In order to ensure proper functioning of the program please read over and follow all the steps on this guide.

Requirements

Recommended

Hardware/Software Requirements	
CPU	Intel CPU, Dual Core or higher
Operating System	OSX 10.5, 10.6
Browser	Safari 4.0+ Firefox 3.5+

Download and Install

Installing Mono framework

If you do not already have the necessary framework to run UC Client Manager on your Mac environment, you must install the Mono framework to ensure compatibility and functionality. Please visit the following URL to download and install the Mono framework.

http://www.mono-project.com/Mono:OSX

☑ **Note**: UC Client Manager is compatible with Mono framework version 2.6.4.

Downloading & Installing UC Client Manager

UC Client Manager can be downloaded from your organization's Web Client page. To start the download, open your web browser and type in the domain name or IP address of your server with **/uc/** at the end as shown here. If the address is correct, it will open the portal page of your organization.

Click on **User Portal** link to access Web Client.

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Click on the **UC Client Manager** link on the left side of the web page.
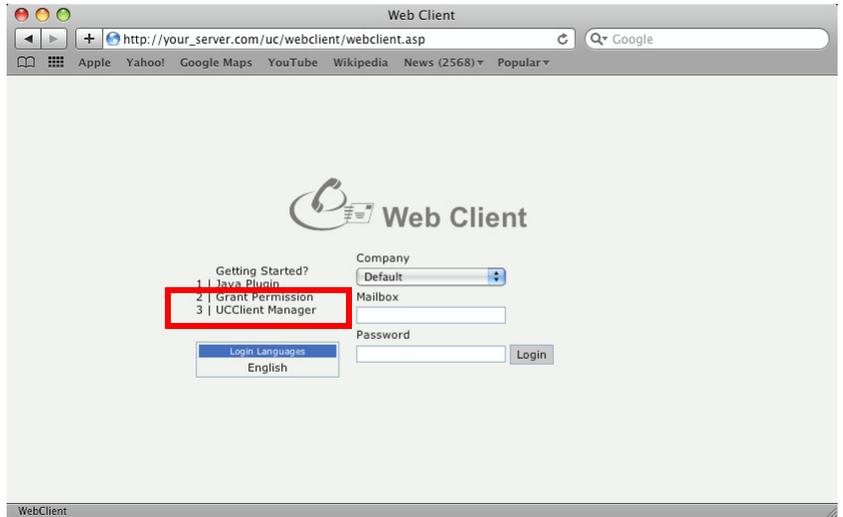
Your browser will start to download the UC Client Manager package file.
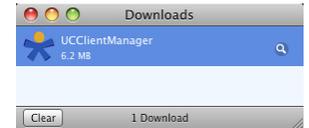
When you open the downloaded package file, you will see the following window. Click and drag the UC Client Manager application file to your Applications folder to install the application.

You can now run UC Client Manager through the icon here. You may also include this icon in your dock for easy access.

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5 Web Client

Chapter Summary

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Web Client

Introduction

Web Client is a web-based application that gives each user on a UC system the ability to maintain all aspects of communication along with personal schedule management.

Logging In

In order to log into your Web Client account, you must provide your mailbox number & mailbox password.

Fill in the following fields as required:

Company: From the drop down menu, select the company that you belong to.

Mailbox: Enter your mailbox number (must be numeric).

Password: Enter your password for the mailbox above.

☑ **NOTE**: After a reasonable period of inactivity, you will be automatically logged out of Web Client and returned to this login screen for security purpose.

Languages

You will also have the option of selecting a language for the Web Client if the server has the appropriate language pack installed. Simply click on the language that you desire and the entire interface will adapt to the chosen language.

Downloads

You will also be able to download the programs which are required by the Web Client for full functionality.

Java Plugin: This download allows you to run Java applications from your web browser. This is a required component of the Web Client experience.

Grant Permission: This download allows some Java applications to perform advanced tasks. This is a required component of the Web Client experience.

UC Client Manager, UC Mobile: You may download the client software that you require to access the UC Client server through other means than the Web Client.

Logging Off

When you are finished with your Web Client session, you should always log off for security purpose. Simply click on the Log Off button at the bottom of the menu then confirm OK when the dialogue appears.

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Navigation

Web Client consists of four major sections. **My Messages**, **Main Settings**, **General Settings** and **Other Features**. The following are the typical menu items that will be available under each section.
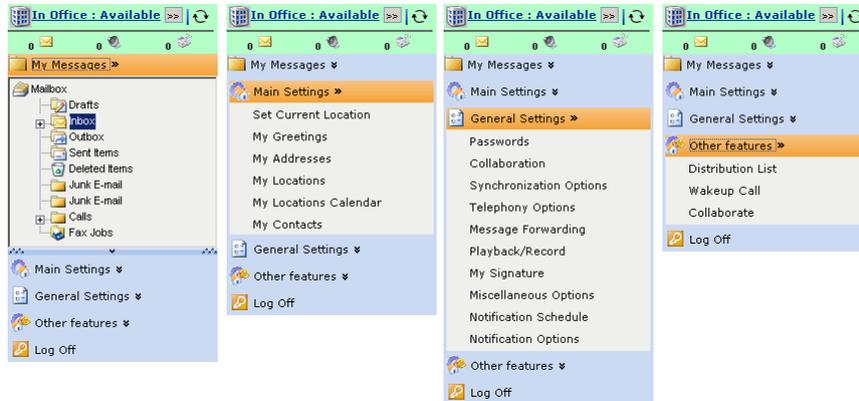
Please refer to the individual sections for detailed information.

My Messages on page 92

Main Settings on page 98

General Settings on page 116

Other Features on page 126

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My Messages

My messages allows you to navigate through your message folders and also manage the individual messages that are located within the folders. Aside from message and folder management, you will also be able to compose numerous types of messages and send them through the convenient web interface which eliminated the dependency on e-mail or other client software to send messages. Please click on the respective topics for more information.
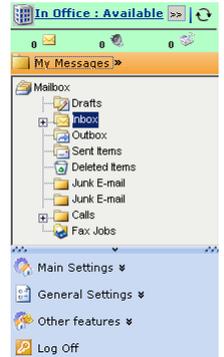
Inbox Toolbar

The following buttons allow you to perform various tasks within your Inbox:

Button	Name	Function
New	New	This button allows you to compose a new message or contact.
Reply	Reply	This button allows you to reply to a selected message.
Reply to All	Reply to All	This button allows you to reply to all those that are involved in the selected message.
Forward	Forward	This button allows you to forward the selected message.
Copy	Copy	This button allows you to copy the selected message(s).
Move	Move	This button allows you to move the selected messages(s).
Delete	Delete	This button allows you to delete the selected message(s).
Empty Deleted Folder	Empty Deleted Folder	This button allows you to empty your Deleted Items folder.
Refresh	Refresh	This button allows you to refresh/reload the current page.
Views	Views	This button allows you to select which type of messages will be shown.
Help	Help	This button allows you to Provides access to a help content related to the page that you're currently in.

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Reading a Message

To read an e-mail, click on the **From** link of the e-mail that you wish to read. If you wish to perform an action on a mail entry without going into the content, simply select the message(s) by using the check boxes on the left most side of the message list, then click on the desired action such as move.
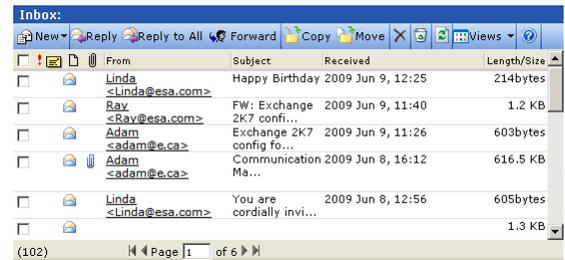
Message Icons

The following nine (9) message icons are used to represent information about each message in your inbox:

Icon	Name	Function
	New Voice	Indicates a voice message that you have not yet listened to
	Old Voice	Indicates a voice message that you have listened to
	Unread Email	Indicates an email that you have not yet read
	Read Email	Indicates an email that you have read
	Fax	Indicates a fax message
	Urgent	Indicates an urgent message
	Confidential	Indicates a new (unread) confidential message
	Read Confidential	Indicates a read confidential message
	Attachment	Indicates that an attachment accompanies the message

Scroll Buttons

The following buttons allow you to scroll through your messages:

Button	Name	Function
	First page of messages	Scrolls to the first page of messages in your Inbox
	Previous page of messages	Scrolls to the previous page of messages in your Inbox
	Next page of messages	Scrolls to the next page of messages in your Inbox
	Last page of messages	Scrolls to the last page of messages in your Inbox

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Opening a Voice Message

Web Client has the built in ability to play voice messages. When you open a voice message (an e-mail with a voice file attachment), Web Client will allow you to play the message through the interface shown above.

☑ **Note**: If there is more than one attachment, click on the Attachments tab and select the voice message you want to hear from the list of attachments.

Opening a Fax Message

When you receive a fax message, you will be able to open the fax attachments from the Web Client through the default Microsoft Windows Fax viewer. You may choose to either save the file to your local computer and then open it or simply open it on the fly.

☑ **Note**: If there is more than one attachment, click on the Attachments tab and select the fax message that you want to view from the list of attachments.

Composing a Message

Creating a Text Message

Composing a text message is identical to most e-mail clients that are out there. Simply define the recipients then enter the subject and body text. If required, you may also attach a file from the attachments tab. The following fields may also be defined when sending a message.

Importance: Select how the recipient should consider the message: Normal or Urgent.

Sensitivity: Select whether the message is going to be marked as Confidential or Normal.

Mark Certified-Request read receipt: Select this option if you want to receive a return system message when the recipient has opened the message.
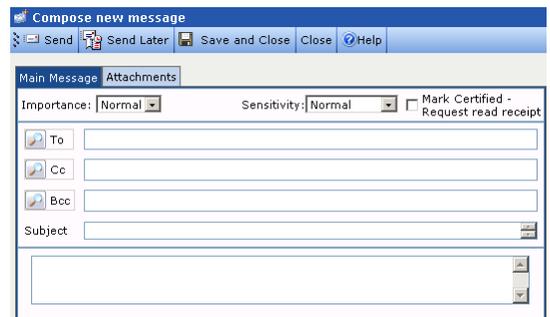
Creating a Voice Message

If you have a microphone attached to the computer you are currently using (if you are at your workstation, you may also use your integrated telephone to record a message, refer to Playback / Record settings for more information), you will be able to compose voice messages from the Web Client interface using the recording tool shown above. To start recording, click on the red record button then stop once you are done. The voice messages created this way will be added as a voice file attachment to your message.

☑ **Note**: If you get an 'Error Loading Sound Library (103)' error, you will have to log out of Web Client and run Grant Permissions available under downloads.

☑ **Note**: Refer to Creating a Text Message section for detailed information regarding the message composer interface.

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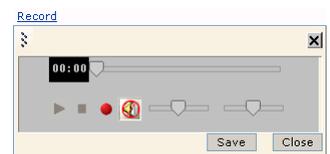
Creating a Fax Message

The Web Client interface allows you to compose and send a fax message. However, the fax content itself must have been produced from elsewhere, using the supported format (**.tif** or **.fax** files). When you have the fax content ready, compose a fax message and attach the file using the **Browse...** button at the bottom of the message screen.

☑ **Note**: You may send non .tif or .fax files (e.g. pdf, doc, etc.) as a fax message if your server has been configured accordingly.
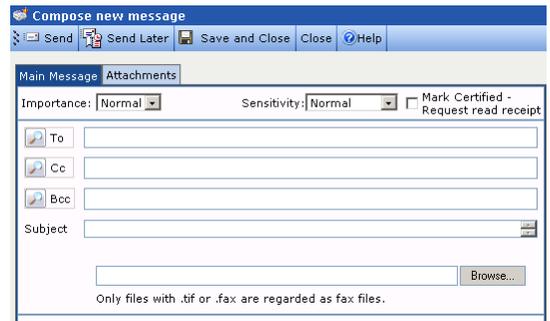
Adding Attachments to a Message

Aside from the attachments that are generated for you (i.e. fax & voice messages), you can also attach other files within your message through the attachment tab. To attach a file, click on the **Add** button. You will have four choices when you do so as shown here:

File: Click on Browse button to select a file you wish to attach. Click on the Upload button once you have made your selection to attach the file to your message.

New Text: A simple text editor will appear. Compose the text then click save. The text file will be created and will become automatically attached to your message.

New Voice: A recording tool will appear. When you record the message, a voice file will become automatically attached to your message.

Fax File: Click on Browse button to select a file you wish to attach. Click on the Upload button once you have made your selection to attach the file to your message.

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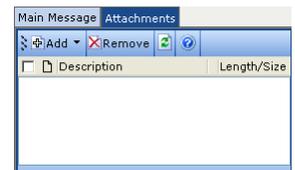
Folders

The following are the default folders that are built into the Web Client system:

Draft: Message(s) that you are currently composing will be temporarily stored here until it is sent or deleted.

Inbox: This is the default folder where all the messages will come in.

Outbox: Message(s) that you are going to send out will be temporarily stored here until the server sends the message(s).

Sent: This folder will archive a copy of every message you send.

Deleted Items: All deleted messages from any folder will be placed in here until it is recovered or permanently deleted.

Calls: This folder contains the call logs (both incoming and outgoing calls) of your integrated telephone.

Fax Jobs: This folder contains the outgoing fax logs (both ongoing and completed).

☑   **Note**: You may create and manage as many folders as you wish for your organization, but please keep in mind that the default folders cannot be modified.

When you right click on the folder area (or when you right click on a folder), you will see a folder menu similar to the one shown here. Please refer to the respective sections below to learn more about each action.
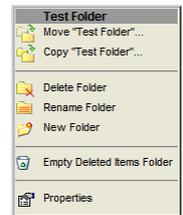
Move Folder on page 96

Copy Folder on page 96

Delete Folder on page 96

Rename Folder on page 97

New Folder / Properties on page 97

Emptying the Deleted Items Folder on page 97

Recovering Deleted Messages on page 97

Move Folder

When you wish to move a folder, right click on the folder you wish to move, then select **Move Folder**. Select the destination then click **OK**.

☑   **Note**: You can **not** move the default folders (Inbox, Outbox, etc.).

Copy Folder

When you wish to copy a folder, right click on the folder you wish to copy, then select **Copy Folder**. Select the destination then click **OK**.

☑   **Note**: You can **not** copy the default folders (Inbox, Outbox, etc.).

Delete Folder

When you wish to delete a folder, right click on the folder you wish to delete, then select **Delete Folder**.

⊘   **Warning**: Deleting a folder deletes the contents of that folder, including all sub-folders.

☑   **Note**: You can **not** delete the default folders (Inbox, Outbox, etc.).

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Rename Folder

When you wish to rename a folder, right click on the folder you wish to move, then select **Rename Folder**. Enter the new name that you desire then click OK.

☑ **Note**: You can **not** rename the default folders (Inbox, Outbox, etc.).

New Folder / Properties

When you create a new folder or view the properties of an existing folder, you will be able to assign or change the name and also determine the order of the messages.

Default: Select this radio button to follow the sort order configured at **Playback / Record** settings.

FIFO (First In, First Out):Select this radio button to display the oldest message first, newest message last.

LIFO (Last In, First Out): Select this radio button to display the newest message first, oldest message last.

Emptying the Deleted Items Folder

The deleted messages and folders will be moved to the **Deleted Items** folder. If you wish to permanently remove the deleted messages and folders, select **Empty Deleted Items Folder** option from the folder menu.

🚫 **Warning**: Once you empty the **Deleted Items** folder, you can **not** recover the deleted items.

Recovering Deleted Messages

The deleted messages and folders will be moved to the **Deleted Items** folder. This means that you are free to recover the items as long as you didn't empty the Deleted Items folder. To recover an item, simply move the messages or folder back to their original location or any other location that isn't under the Delete Items folder.

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Main Settings

Main Settings allow you to configure the specific features related to the Web Client such as greetings, locations and addresses. Please click on the respective topics for more information.

Setting Your Current Location

To change your current location manually, first select the **Override my locations calendar and set my current location** radio button. Afterwards, configure the remaining fields as necessary, then click **Save**.

Current Location: From the drop down menu, select the location you wish to use.

Availability at Current Location: From the drop down menu, select the availability that you wish to display.

Number: Enter a number that you wish to display and use at the chosen location. When entering, please select the correct **Type** and enter the full **Number** including country & area code where necessary. Alternatively, you may also choose from the numbers that area associated with the location that you'll be using.

☑   **Note**: **Availability at Current Location** and **Number** should automatically change to the selected location's default value when you initially select the location.

Override Availability Filters: Enable this check box to override the availability filters configured for the chosen location.

Appear unavailable if no caller ID: Enable this check box to appear unavailable if there is no caller ID available from the caller.

I will be at this location

Select one of the following radio buttons to define how long your manually chosen location is going to be effective for.

Until I change my location: The newly chosen location will be used until it is manually changed again.

Until the next scheduled activity or the end or the beginning of working hours: The newly chosen location will be used until the next event in the calendar is reached.

Till: The newly chosen location will be used until the defined time and will revert to the calendar schedule when it expires.

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My Greetings

My Default Greeting

It is very important that you fully customize the default greetings so that you can easily convey your message to your callers. Unless there is a specific location or custom greetings defined at the moment, all callers will be exposed to the default greetings depending on your availability and where the caller is calling from (internal or external).

☑ **Note**: For recording and playing back a greeting, please refer to **Playing & Recording a Greeting**.

Name Greeting

The name greeting literally refers to your name. By default, this greeting will usually be generated by the system using the TTS (text to speech) engine. But since the TTS is limited in its ability to pronounce, it will be easier for the callers to recognize you if you record your name using your own voice.

Internal Personal Greeting

Internal Personal Greeting is played when an internal number calls you and you do not answer the call.

External Personal Greeting

External Personal Greeting is played when an External number calls you and you do not answer the call.

Internal Busy Greeting

Internal Personal Greeting is played when an Internal number calls you and you are already on the phone.

External Busy Greeting

External Personal Greeting is played when an External number calls you and you are already on the phone.

Internal Unavailable Greeting

Internal Unavailable Greeting is played when an Internal number calls you and your availability is set to unavailable.

External Unavailable Greeting

External Unavailable Greeting is played when an External number calls you and your availability is set to unavailable.

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Location Greeting

You will be able to review and manage all your location-bound greetings from here. In order to manage a location greeting from here, you must first record a greeting under the My Locations section. Once you do so, you will be able to re-record, play and delete the greeting from this menu.
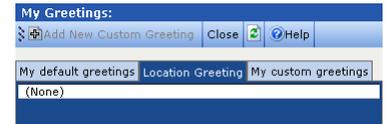
My Custom Greeting

The custom greetings are designed to be attached to a specific contact or contacts. When assigned, regardless of what your status, availability or location is, this custom greeting will be played for the caller as long as their caller ID information matches what is assigned.

Add New Custom Greeting

To create a new custom greeting, click on the **Add New Custom Greeting** button at the top of the screen. Afterwards, assign a **Number** and a **Description** for the greeting. The **Number** is required by the system to organize and assign the greeting while the **Description** is for your reference. After you fill out the above information, record the greeting as you normally would then click **Save**.

☑   **Note**: You can also assign a custom greeting to a contact when managing the contacts from **My Contacts**.
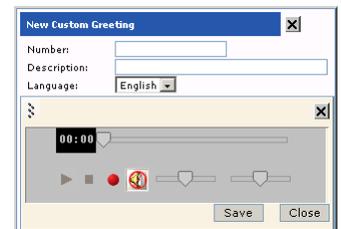
Assigning a Greeting to a Specific Contact

To assign a greeting to a specific contact(s), click on the **Assign To:** link from the custom greeting section. First, click on the **Select From** drop down menu to select either private or public contacts. When you make a choice, you will see a list of contacts that belong in the group you have chosen in the top portion.

From the list, select the contact(s) you wish to add by clicking on the check box the clicking on the **Add** button. When all the contacts are added, click on the **Save and Close** button at the top of the screen.

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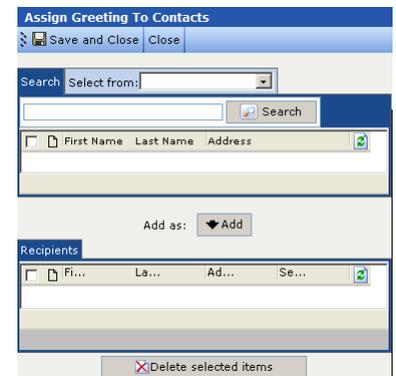
Playing & Recording a Greeting

From My Greetings, you will be able to record greetings and listen to them for review. To record a greeting, simply click on the **Record** link under the type of greeting that you wish to record. If this is the first greeting for the category, you will have to click on the **Add Greeting** link instead to create the first entry. When the greetings are available, click on the **Play** link to review them.

Playing a Greeting

The playback interface for the greetings is very simple. To start playing, click on the triangle play button. To stop the playback, click on the square stop button. You may also skip to the section of your choice using the progress bar and also control the volume using the volume bar.

Recording a Greeting

☑ **Note**: You will require a functional microphone on the computer that you are accessing Web Client from in order to record a greeting from the Web Client interface. Alternatively, you may record using a integrated telephone if you are at your work station by configuring **Playback / Record**.

The record interface is also very simple. To start recording, click on the red record button. After you're done, click stop. When the recording has stopped, you will be able to playback the greeting to verify it. When you are satisfied with your recording, click on **Save** button to save the greeting.

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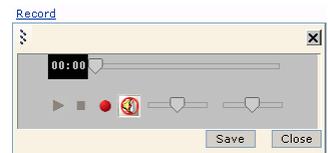
My Addresses

The following are the various type of addresses that you may associate with your mailbox.

Phone Address on page 102

E-mail Address on page 103

Fax Address on page 103

Beeper / Pager Address on page 104

SMS Address on page 104

WAP Address on page 105

Other Address on page 105

Phone Address

Phone address may either be an internal or external number. Please refer to the below sections for detailed information regarding each type of phone address.

☑ **Note**: To quickly change your default address, select the radio button beside the address entry to flag it as the default. You may only have one default address per each type of address.

Internal

Defining an internal number is very simple. Enter your extension on the **Number** field then click **Save** to add an internal number to your address.

Set as Default: Enable this check box to use this number as the default phone address.

Trusted: Enable this check box to flag this number as a trusted number. Trusted number may be a requirement of your voice verification feature which allows you to log into the system using your voice as opposed to entering your password on the phone.

External

When defining an external number, it is always best to include as much information as possible. When you click on the expand button (>>), you will see the window below where you will be able to select the country for country code and enter both the area/city code and the phone number itself separately. In either simplified or expanded mode, click on **Save** after you're done to add the number to your phone address.

Set as Default: Enable this check box to use this number as the default phone address.

Trusted: Enable this check box to flag this number as a trusted number. Trusted number may be a requirement of your voice verification feature which allows you to log into the system using your voice as opposed to entering your password on the phone.

☑ **Note**: When you enter a full string of phone number including both country and area code (e.g. 14163332222) in the simplified interface, the Web Client will automatically parse the data and distinguish the country and area code within the number.

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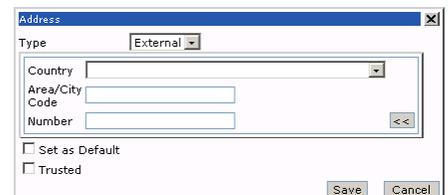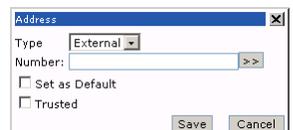
E-mail Address

The e-mail address defined here will primarily be used by the UC system to send you notifications. The default e-mail address here will be where the e-mail notifications are sent to, unless you specify otherwise.

☑ **Note**: To quickly change your default address, select the radio button beside the address entry to flag it as the default. You may only have one default address per each type of address.

To add an e-mail address, simply type the entire address on the field provided then click **Save**.

Set as Default: Enable this check box to use this e-mail as the default e-mail address.

Fax Address

If you have a fax machine, you can opt to receive fax messages through your machine as opposed to getting the fax through your e-mail. When a fax is sent to your mailbox, the system will automatically convert the fax message into an e-mail address and deliver it to your account. But if you have a fax address defined and is currently available, the system will attempt to forward the fax to your machine first then deliver the message as e-mail if the forwarding fails. Fax address may also be an internal or external number, similar to the phone address.

☑ **Note**: To quickly change your default address, select the radio button beside the address entry to flag it as the default. You may only have one default address per each type of address.

Internal

Defining an internal number is very simple. Enter your extension on the **Number** field then click **Save** to add an internal number to your address.

Set as Default: Enable this check box to use this number as the default fax address.

External

When defining an external number, it is always best to include as much information as possible. When you click on the expand button (>>), you will see the window below where you will be able to select the country for country code and enter both the area/city code and the number itself separately. In either simplified or expanded mode, click on **Save** after you're done to add the number to your fax address.

Set as Default: Enable this check box to use this number as the default fax address.

☑ **Note**: When you enter a full string of number including both country and area code (e.g. 14163332222) in the simplified interface, the Web Client will automatically parse the data and distinguish the country and area code within the number.

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Beeper / Pager Address

The beeper address defined here will be used by the system for notification and for other paging purpose such as pre-transfer paging. The beeper number you define must be an external number.

When defining an external number, it is always best to include as much information as possible. When you click on the expand button (>>), you will see the window below where you will be able to select the country for country code and enter both the area/city code and the number itself separately. In either simplified or expanded mode, click on **Save** after you're done to add the number to your beeper address.

Set as Default: Enable this check box to use this number as the default beeper address.

☑ **Note**: When you enter a full string of number including both country and area code (e.g. 14163332222) in the simplified interface, the Web Client will automatically parse the data and distinguish the country and area code within the number.

SMS Address

The SMS address will primarily be used for notification and text messaging, which includes messaging from the Lan Talk function in the UC Client Manager. You may define an e-mail address or a SMS capable phone (e.g. cell phones) as your SMS address.

E-mail

To add a SMS e-mail address, simply type the entire address on the field provided then click **Save**.

Set as Default: Enable this check box to use this e-mail as the default SMS address.

External Number

When defining an external number, it is always best to include as much information as possible. When you click on the expand button (>>), you will see the window below where you will be able to select the country for country code and enter both the area/city code and the number itself separately. In either simplified or expanded mode, click on **Save** after you're done to add the number to your SMS address.

Set as Default: Enable this check box to use this number as the default SMS address.

☑ **Note**: When you enter a full string of number including both country and area code (e.g. 14163332222) in the simplified interface, the Web Client will automatically parse the data and distinguish the country and area code within the number.

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WAP Address

Wide area paging address is similar to the beeper address but is more specific to an enterprise usage. The WAP number you define must be an external number.

When defining an external number, it is always best to include as much information as possible. When you click on the expand button (>>), you will see the window below where you will be able to select the country for country code and enter both the area/city code and the number itself separately. In either simplified or expanded mode, click on Save after you're done to add the number to your WAP address.

Set as Default: Enable this check box to use this number as the default WAP address.

☑ **Note**: When you enter a full string of number including both country and area code (e.g. 14163332222) in the simplified interface, the Web Client will automatically parse the data and distinguish the country and area code within the number.

Other Address

This is where you will have to specify your VPIM and Reply To addresses. Unlike other addresses, you may only have 1 VPIM and 1 Reply To address at any given moment.

VPIM address is automatically assigned to you by the server and cannot be modified. It will usually be in the format of **MailboxNumber@Server.com**. This is the address that the system will use to receive your message. If you have any type of message synchronization configured (e.g. IMAPTSE synchronization with Microsoft Exchange e-mail server), this will be the account that becomes synchronized with the dedicated e-mail server.

Reply To address can be any e-mail address that you use. This address will be the default address that the messages will be sent out from, which means that this address will be the "Reply To" address to those who are replying to your message. To change your reply to address, click on the e-mail address to invoke the interface shown below. Type in the desired e-mail address then click **Save**.

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My Locations

Locations are the central element of your Web Client environment. Your current status will be defined through your current location throughout the UC system. All your calls, messages and other Unified Communications interaction may be enhanced through the custom rules configured in each location. Web Client offers you a wide range of locations by default and you may also create any number of custom locations for your purpose.

Adding / Modifying a Location

When you are adding or modifying a location, you will have five different sections to edit.

General: You can assign numbers to a location from here, along with basic settings such as availability and displayed icon.

Location Greeting: You will be able to specify a greeting for current location and also configure related rules for callers.

Availability Filters: You will be able to configure a fully customized availability rule for the current location.

Find Me Rules: If you have more than one number available under a location, you will be able to define the rules that the system will follow when connecting you with an incoming call to your mailbox

Assign Calls: You can automatically transfer your calls to another number depending on who is calling. You will be able to define the exact conditions of transfer to a single or group of callers.

General

Name: Enter a name for the location you are creating.

Local location (within same time zone): Enable this check box if the location you are creating is one of your home locations (i.e. you are not "on the road").

Default availability: From the drop down menu, select the default availability for the location you are creating.

Icon: From the drop down menu, select the icon that will be associated with the location you are creating.
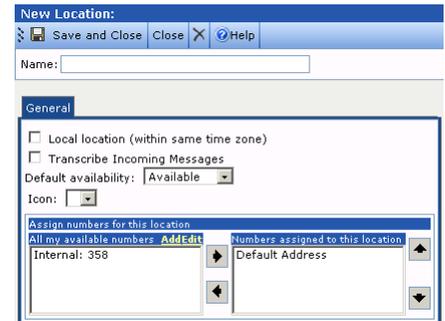
Assign numbers for this location

All my available numbers: This section will list all the phone numbers defined in your **My Address** section. To associate a specific number to a location, select the number from list then click on the right arrow button.

Numbers assigned to this location: This section will list all the phone numbers defined to the current location. By default, your default address (default phone number) will be listed here.

☑ **Note**: You can have more than one number associated to a location. For example, in the office you may have access to both the telephone at your workstation and a cellular phone.

☑ **Note**: Click **Add** to add new phone addresses or **Edit** to edit existing ones.

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Location Greeting

Play default greeting: Select this radio button to play the default greeting.

Automated Name and Location greeting: Select this radio button to have a standard location and name greeting played.

Play this greeting: Select this radio button to play the location greeting of your choice. Clicking on **Add Greeting** will take you to **My Greetings** section, where you will be able to record a new greeting.

Options

Do not allow callers to skip the greeting: Enable this check box if you want to force the callers to listen to the entire greeting.

Do not allow callers to leave messages and send them to the main company greeting: Enable this check box if you do not want callers to be directed to your voice mail. Callers will be sent to the main company voice menu instead.

Availability Filters

When I am available at the current location

Appear available to everyone: Select this radio button to appear available to everyone.

Appear unavailable to: Select this radio button to appear unavailable to one or more of in-office calls, out-of-office calls and calls from members of your contacts list. You may also add an exception for each selection so that some people will see you as available even if they belong in the groups you have chosen.

Appear available only to this list: Select this radio button to appear available only to members of a specific contact list. Clicking on the link (names None by default) beside to create or edit the list. This list will be unique to this particular location & scenario.

When I am unavailable at the current location

Appear unavailable to everyone: Select this radio button to appear unavailable to everyone.

Appear available to: Select this radio button to appear available to one or more of **in-office calls**, **out-of-office calls** and **calls from members of your contacts list**. You may also add an exception for each selection so that some people will see you as unavailable even if they belong in the groups you have chosen.

Appear unavailable only to this list: Select this radio button to appear unavailable only to members of a specific contact list. Clicking on the link (names **None** by default) beside to create or edit the list. This list will be unique to this particular location & scenario.

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Find me rules

Select one of the following radio buttons:

Only call me at the first number assigned to this location: Select this radio button to have the system call you only the first number assigned to this location.

Call me at each of the numbers assigned to this location sequentially: Select this radio button to have the system call you on each of the numbers assigned to this location in top to bottom sequence. You may also configure additional settings when you choose this options. Please refer to **Find Me Options & Exceptions** section below.

Call me at all assigned numbers at the same time: Select this radio button to have the system call all of the numbers assigned to the location at the same time. You may also configure additional settings when you choose this options. Please refer to **Find Me Options & Exceptions** section below.

☑ **Note**: Call queuing will be automatically disabled on locations where find me rules are active.

Find Me Options

If you selected the option to have the caller find you, you will have the option to specify additional options for further customization.

Automatically find me: Select this radio button to have the system find you by default when a call come in.

Ask the caller to find me: Select this radio button to have the system ask the caller whether they want to find you.

Exceptions

Instead of using the same Find Me Rules for everyone, you can specify how different contacts will have access to this function. You can simply turn off the follow me options for some or assign a different behavior for others. To add an exception click on the **New Rule** link. Afterwards, assign a name for the exception rule, selected the specific behavior for this rule then add the contacts that will be affected by the rule by adding them to the **Who Will Find Me** list.

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Assign Calls

Assign my calls to: Enable this check box if you want your calls assigned to another number or user account. In the field provided, enter the number/account to which you want your calls assigned.

☑ **Note**: Click on the Address Book button to select the user from a pre-defined list. Click on the Check Names button to have the system check what you entered and, if recognized, express it in the proper format.

Play a greeting before assigning the calls: Enable this check box if you want the system to play a greeting before assigning each call. You now have two options:

Play my Name followed by the name of the person the call is assigned to - if you select this radio button, the pre-assignment greeting will be your name followed by the name of the person to whom the call is being assigned.

Play this greeting - if you select this greeting, you can have a specific greeting play before calls are assigned. Select your greeting and the language of the greeting from the accompanying drop down menu.

Exception List

New Rule: Click on this link to create **Exception Rules**. When a new window appears, name and setup the exception, then Save. For detailed information, refer to Assign Calls From.

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My Locations Calendar

A locations calendar is a schedule that displays exactly where you are at any given time. If you have reoccurring event or a set schedule, setting up a location calendar will prove to be convenient since you will not have to individually change your location every time. Your status on the UC system will automatically change according to schedule.

Adding / Modifying a Locations Calendar on page 110

Scheduling a Location to a Calendar on page 110

Changing Your Active Locations Calendar on page 111

Changing the Time Zone on page 112

Changing the Working Hours on page 112

Adding / Modifying a Locations Calendar

Name: Enter a name for the calendar.

Time Zone: From the drop down menu, select the default time zone for current calendar.

Default Working Hours

Define the working hours by selecting a **Start Time** and the **End Time**.

Copy local locations from existing calendar: Enable this check box and select an existing calendar from the drop down menu. The local location information will be copied to the current calendar from the chosen calendar.

Scheduling a Location to a Calendar

Location: From the drop down menu, select the location you wish to schedule into the calendar.

Availability: From the drop down menu, select the default availability for this location.

Schedule description: Enter a description or name for the schedule you are creating.

Start Time/End Time: Specify the start & end time of the schedule (e.g. 9:00 to 18:00 for typical business hours). You may enable the All day (24h) check box to make the schedule affect the entire day.

Enable Recurrence

Recurrence saves you the trouble of setting up a location repetitively. You can create a location schedule that spans out through multiple days and define the exact time frame that it will be valid for during those days. You can also choose the days of the week separately, so that you can configure a schedule for your entire working week and so on.

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Recurrence Pattern

You must first choose one of the following radio buttons:

Daily: You will be able to choose every weekday or define it as every X days. Entering 1 as the X will make the schedule occur everyday while 2 will make the schedule occur every other day.

Weekly: You will be able to choose the days of the week and define the pattern of every X weeks. Entering 1 as the X will make the schedule occur every week while 2 will make the schedule occur every other week.

Monthly: You will be able to choose a single day from the month. When using the first radio button, define the day it self (e.g. 1st or 15th of the month by entering only the number) then X months. Entering 1 as the X will make the schedule occur every month while 2 will make the schedule occur every other month.

The second option will allow you to be more dynamic in your choices. For example, you will be able to choose **First Friday** of every **1** month. Doing so will trigger the schedule on the first Friday of every month.

Yearly: You will be able to choose a single day of the year by selecting the specific month and the date. You also have a more dynamic choice of selecting a yearly date. For example, you will be able to choose **First Friday** of every **January**. Doing so will trigger the schedule on the first Friday of January every year.

🚫   **Warning**: You cannot choose February 29th as your yearly recurring date. However, if a dynamic schedule happens to be on that date (e.g. Last Sunday of February is the 29th), the schedule will occur normally.

Range of Recurrence

Range of Recurrence defines the period in which the recurrence pattern will stay active. The recurrence pattern will repeat itself as long as the range of recurrence is valid. Select one of the following radio buttons and define the fields that may be necessary. No matter which radio button you choose, you must **always** select a start date and time first.

No end date: Select this radio button to keep the current schedule indefinitely starting from the start date/time.

End after X occurrences: Select this radio button to have the schedule expire after it has occurred X number of times.

End by: Select this radio button to define an exact end date for the recurrence.

Changing Your Active Locations Calendar

The UC system allows you to keep multiple calendars, but only one maybe active at a time. To designate a calendar to be active, simply select the radio button that is located beside the calendar that you wish to use.

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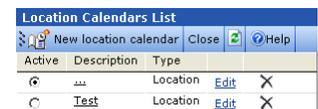
Changing the Time Zone

If you are traveling or have relocated to another time zone, you should change the time zone of the calendar so that your calendar is properly aligned with the local time.

From the **Option** menu available on your calendar, select **Change Time Zone**. Above menu will appear. Select the desired time zone from the drop down menu then click **OK**. The current calendar will now be aligned with the newly assigned time zone.

Changing the Working Hours

If you have a set working hour, you can define it so that your calendar is only available during the defined hours. This will make it easier for you to manage your calendar since the schedule will be more compact.

From the **Option** menu available on your calendar, select **Change Working Hour**. Above menu will appear. Simply select the **Start Time** and the **End Time**. Your current calendar will now reflect your working schedule.

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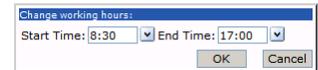
My Contacts

Using Web Client, you can add and/or import as many contacts as desired. These are your personal contacts that will only be available to you.

Adding / Modifying a Contact on page 114

Search for Contacts on page 115

Importing a Contact on page 115

Speech Enable Contacts on page 115

Live Reply (Dialing) on page 115

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Adding / Modifying a Contact

Web Client lets you create unlimited number of private contacts. Please refer to the section below for detailed explanation of each fields in a contact entry.

Full Name: Enter the contact's full name.

☑ **Note**: Click on the **Full Name** link if you want to specify a title, first name, middle name, last name and/or suffix for your contact. For example, you may have a contact named Dr. Thurston Harvey Spencer III. Clicking on the **Full Name** link brings up a dialogue box wherein you may specify this contact's title (Dr.), first name (Thurston), middle name (Harvey), last name (Spencer) and suffix (III).

Mailing Address: Enter the contact's full mailing address.

☑ **Note**: Click on the **Mailing Address** link if you want to specify the contact's street, city, state/province, zip/postal code and/or country.

Company Name: Enter the name of your contact's company.

Job Title: Enter your contact's official job title.

Department: Enter your contact's department in the company.

Phone: Enter the contact's primary telephone number.

☑ **Note**: Click on the **123** button to have the system apply proper system formatting to the number entered in the field.

☑ **Note**: Click on the **ellipsis (...)** button to specify your information in a separate dialogue box.

Phone2: Enter the contact's secondary telephone number (e.g. cell phone, additional extension).

Fax: Enter the contact's fax number.

Mobile: Enter the contact's mobile phone number.

Beeper: Enter the contact's beeper number.

Email: Enter the contact's e-mail address.

Web Site: Enter the contact's web site.

Birth Date: Enter the contact's birth date. Alternatively, select the date using the calendar button.

Gender: Select the contact's gender from the drop down menu.

Speech enable this contact: Enable this check box to turn on the feature to dial this contact by speaking the name.

Play this greeting: From the drop down menu, select the greeting that will play whenever this contact calls your mailbox.

Language to play: From the drop down menu, select the language of the greeting (if applicable).

Comments: Enter any comments you may have regarding your contact for your reference.

Other addresses: From this tab, you can specify a personal and an alternate address for your contact.

Attachments: From this tab, you can affix an attachments to the contact.

☑ **Note**: Affixing attachments to a contact allows you to organize all materials you maintain in your inbox, in folders and at your workstation. By attaching items such as photos, resumes/CVs and other assorted documents (emails, faxes, phone call transcripts, etc), you can realize a one-stop resource for all materials associated with your contact. In doing so, you can organize your work environment and email inbox.

Custom Fields: From this tab, you can add extra information about your contact. You will be able to create your own fields and fill them out to your requirement.

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Search for Contacts

If you have numerous number of contacts, it will be difficult to find an individual by looking at the entire list. Instead, use the search function shown here to find the specific contact.

Importing a Contact

If you have a list of contact from another platform, you will be able to import that data by exporting it as a comma-delimited file. When you select the contact file then click **Next**, you will be able to define which section of the text files represents which field on the contacts, so that the data will be automatically imported to the correct fields. After verifying all the fields, click **Import** and all the contacts will now be added to your list of private contacts.

Speech Enable Contacts

You can specify a contact to be speech enabled so that you can speak the contact's name to select that person when you're connected to the UC system over a phone. However, please keep in mind that the number of contacts you can speech enable is limited. Please consult your system administrator for more information.
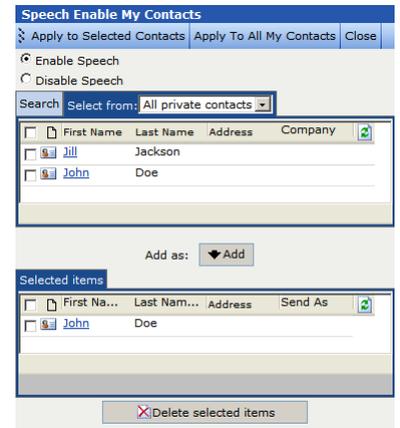
Live Reply (Dialing)

Web Client allows you to initiate a call from the server, connecting your current chosen phone number with the contact you have selected.

Phone Number of My current location: Select the phone number you wish to use to talk to your contact. UC server will first call you at this number then dial the contact when you have answered the call, which creates a seamless bridged call between you and your contact.

Type: From the drop down menu, select the type of phone number of your contact, **Internal** or **External**.

Number: Enter the number of your contact to be dialed.

Dial: Click on this button to start the call.

Cancel: Click on this button to close the Live Reply window without dialing.

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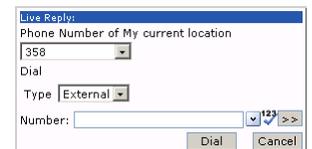
General Settings

General settings will allow you to customize both your Web Client and UC Client Manager usage. You may also delve into automated features such as forwarding or notification from here. Please click on the respective topics for more information.

Passwords on page 116

Collaboration on page 116

Synchronization Options on page 117

Telephony Options on page 118

Message Forwarding on page 120

Playback / Record on page 121

My Signature on page 121

Miscellaneous Options on page 122

Notification Schedule & Address on page 123

Notification Options on page 125
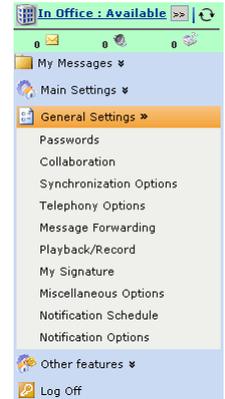
Passwords

You will be able to change your Web Client password here. You may also define the password of your POP3/IMAP4 e-mail account here as well.

Numeric Password

Password: Enter your newly desired password for your mailbox.

Confirm Password: Re-enter your newly desired password for your mailbox.

☑   **Note**: You must click **Save and Close** in order for you to apply your password. This password will affect both Web Client and UC Client Manager.

POP3 / IMAP4

User Name: This field will display your e-mail account name assigned to you by your administrator. This account is only available if you are using the UC server as your e-mail server.

Password: Enter your newly desired password for your e-mail account.

Confirm Password: Re-enter your newly desired password for your e-mail account.

Collaboration

Active Collaboration Service: From the drop down menu, select the collaboration service that you wish to use as default. The default collaboration service will be launched when you click on the collaboration option from both the Web Client and the UC Client Manager.

User Defined Services: If you choose a user defined service instead of the predefined services available, enter the entire URL of the service that you wish to use on the field that is provided below.

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Synchronization Options

Locked: This check box will become enabled when your IMAP credentials are refused by the server when performing IMAPTSE synchronization. If the check box is enabled, obtain the correct IMAP credentials, enter the information below then disable the check box to continue using synchronized e-mail.

User Name: Enter the user name for your IMAP e-mail account.

☑ **Note**: Passwords may not be required in some situations. For example, if your company is using a Super User system with synchronization, you will only need to enter the user name.

Password: Enter the password for your IMAP e-mail account.

Confirm Password: Confirm the password for your IMAP e-mail account.

Voice Format: From the drop down menu, select the type of compression which will be used on your outbound voice message. You should ensure that the voice format chosen here is compatible with the destination. It is recommended that you leave this field as default unless you are specifically instructed to change it.

Last Synchronization Time: This field displays the last time in which your Message, Contact or Calendar has been synchronized. Checking this field will allow you to easily confirm the sync status of your mailbox.

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Telephony Options

You may configure the settings related to your integrated telephone from here.
Some of these settings will overlap with the settings available in the UC Client
Manager.

Telephony Options

Caller ID: From the drop down menu, select the way in which you will be notified
when you receive a call in the UC Client Manager. The following at the different
type of settings available.

- ◆ **None**: Forego asking an incoming caller his/her ID (number) if unrecognized
  by the system; similarly, to refrain from displaying it in a screen popup.
- ◆ **Ask**: Prompt an unidentified caller to enter his/her phone number using a
  touch tone keypad.
- ◆ **Pop**: Display an incoming caller's phone number.
- ◆ **Ask & Pop**: Ask an unrecognized caller to enter his/her phone number and to
  display that number in a screen popup.

Personal Operator: Select the personal operator that you want the call to be
transferred to. When you define a personal operator, it will override the default
operator for your mailbox.

Voice Menu Default Greeting: From the drop down menu, select the default
greeting for the personal voice menu that you are currently using.

Long distance access code: Enter the long distance access code of your
company.

Camp On: Enable this check box to give the caller the option to be notified when your line is free (assuming that
your line was busy at the time of the call).

Call Screening: Enable this check box to force the callers to provide their name.

Call Queuing: Enable this check box to place callers in a queue when your line is busy. If queued, callers will be
informed of their position in the hold queue and asked to either continue holding or leave a voice message.

⊘ **Warning**: Call Screening and Call Queueing are available only on telephone systems that provide a busy tone.
Most telephone sets with multiple extension appearances do not produce busy tones.

☑ **Note**: Call Screening and Call Queueing are mutually exclusive. You may choose one or the other, but not
both.

Record all incoming calls: Enable this check box to record all incoming calls. The recorded calls will be sent to
your inbox as a voice message.

Call Forwarding Enable: Enable the check box to forward your call to the number defined in the field below. You
may only forward your calls to an internal number (another mailbox).

Re-route Options for CTI Integrations

If you have a telephone system that utilizes CTI integration, you can configure it so that the system will
automatically change the settings depending on your phone's status.

When DND is set on my phone

Select the action that will occur when you set your phone to DND

Nothing: Select this radio button to associate no action with the phone's DND button.

Change my availability to Unavailable: Select this radio button to change your availability to unavailable when
you set your phone to DND status.

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Set my location to: Select this radio button and define the **Location** and **Availability**. Your location and availability will automatically change to the ones defined here when you push the DND button on your phone.

When Forward to Voice Mail Group

Select the action that will occur when you forward your phone.

Nothing: Select this radio button to associate no action when the phone is forwarded.

Change my availability to Unavailable: Select this radio button to change your availability to unavailable when your phone is forwarded.

Set my location to: Select this radio button and define the **Location** and **Availability**. Your location and availability will automatically change to the ones defined here when you forward your phone.

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Message Forwarding

If you have another primary e-mail address that you use, or simply wish to archive your messages on another account for backup purpose, you can forward your messages from the Web Client to any e-mail address of your choice. You will be able to configure multiple forward addressed, but only one maybe active at a time.
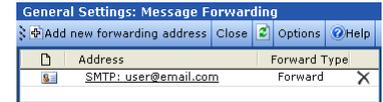
Adding / Modifying a Forward Address

To add or modify an existing Forwarding Address, please refer to the below fields:

Disable: Enable this check box to disable current forwarding address.

Forward Destination

You will be able to select one of three destinations for forwarding from the following radio buttons:

Send to specified destination: Select this radio button to enter the address to which you would like your messages forwarded.

Print to server's default printer:

Print to fax:
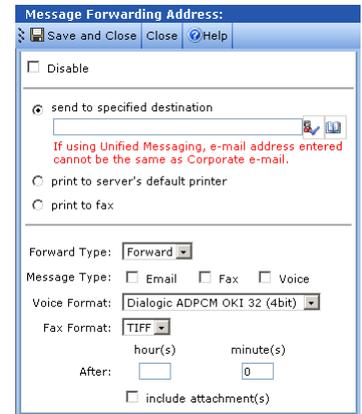
Forward Details

Forward Type: From the drop down menu, select the forward type. Forward will keep a copy in the original account while Relay will remove the message from the original account.

Message Type: Select the type of messages that will be forwarded by enabling the desired check box(es).

Voice Format: Select the audio encoding format that will be used to handle voice messages.

Fax Format: Select the fax file format that will be used to handle fax messages.

After: The messages may be forwarded after a predetermined delay. In order to add a delay to your forwarded messages, enter the desired time in hour(s) and minutes(s). Entering 0 minutes and no hours will instantly forward the message as it is received.

Include Attachment(s): Enable this check box to include the attachments in the forwarded messages.

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Playback / Record

Telephony Options

Sort Order

LIFO (Last In, First Out): Select this radio button to play the newest message first, oldest message last. When viewing messages from Web Client, newest messages will be on top of the list.

FIFO (First In, First Out):Select this radio button to play the oldest message first, newest message last. When viewing messages from Web Client, newest messages will be on bottom of the list.

Say Envelope Information: Enable this check box to always hear the envelope information (e.g sender's name, date, etc.) of a message.

Web Client Options

Play Back Device: From the drop down menu, select the device that will be used to play messages and greetings.

Record Device: From the drop down menu, select the device that will be used to record messages and greetings.

☑ **Note**: When you choose **Phone** as your device for both or any one of play back and record, please keep in mind that you have to have access to your integrated phone to play or record messages. This means that if you're using Web Client from a remote location, you will not be able to listen to or record messages unless you change the device to PC. PC settings will by default use the devices attached to the current computer that you're using.

My Signature

A signature may be attached at the end of your messages to provide the recipients with the details of your contact information. This feature is also called an e-business card since it mimics the functionality of a typical business card. If you wish to automatically attach your signature to all outgoing messages, please refer to the Miscellaneous Options.

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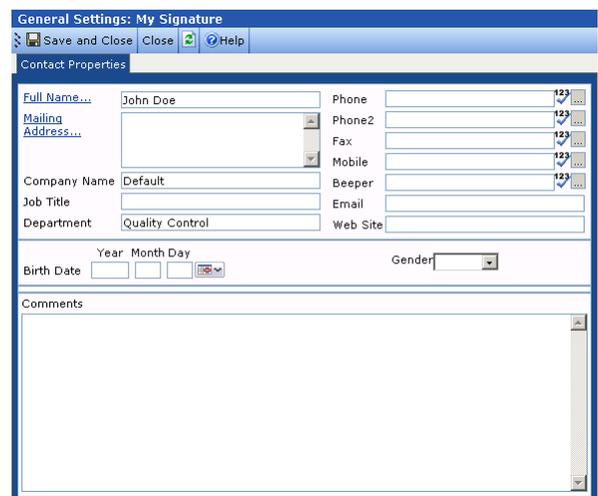
Miscellaneous Options

Date Format: From the drop down menu, specify a date format for that will be used throughout your account.

Windows Account Name: From the drop down menu, select the level of security.

Include all my private contacts when I initiate a voice search for a contact: Enable this check box to include all private contacts in a voice search.

Include my company's public contacts when I initiate a voice search for a contact: Enable this check box to include the company's public contacts in a voice search.

Automatically include my signature or attach an electronic business card to outgoing messages: Enable this check box to send your signature or an e-business card along with all outgoing messages.

Show Hints: Enable this check box to display the summarized help for most of the Web Client pages at the top of the screen.

Show Getting Started: Enable this check box to access the Getting Started tutorial. The tutorial will be accessible under Main Settings.

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Notification Schedule & Address

When you are away from your desk or out of the office, you may not have any way of knowing if you have received an important message. To resolve this issue, Web Client can notify you whenever you receive a message. For example, if you have received a voice message in your office inbox, Web Client can be instructed to e-mail you, call your cell or home phone to notify you of the message arrival.

Web Client allows you to specify phone and e-mail addresses that will be used to contact you when you have a message. After specifying your contact methods, you can also assign a schedule to a particular notification address. Please refer to the below settings to learn more about configuring the notification addresses and schedule.

Since getting notified for every single message can be overwhelming, you will be able to configure the exact conditions for notification from **Notification Options**.

Address: From the drop down menu, select the address you want the notifications to be sent to.

Number of retries: Enter the number of times that the system will attempt to notify you (only for phones or pagers, notifications to e-mail and SMS are simply sent from the server once).

Minutes between retries when line is busy: Enter the number of minutes that the system will wait between notifications when the address defined above is busy (only for phones or pagers).

Minutes between retries when there is no answer: Enter the number of minutes that the system will wait between notifications when the address defined above is not answering (only for phones or pagers).

Schedule description: Enter a name or description for the current notification schedule for your reference.

Diable Recurrence: By default, the notification schedule will have the recurrence enabled. If you decide to disable the recurrence, the notification will always be on during the defined time. For example, if the Start Time is set to January 01, 2009, 1:00 and the End Time is set to December 31, 2009, 23:00, you will be notified for the entire year even during the night. All day (24hr) option will have no effect since the schedule already covers the 24 hour period in a day.

Start Time and **End Time**: From the drop down list, specify a time range for the notification schedule. For example, if you want this schedule to be in effect from 9 AM to 5 PM, select **9:00** from the **Start Time** drop down menu and **17:00** from the **End Time** drop down menu.
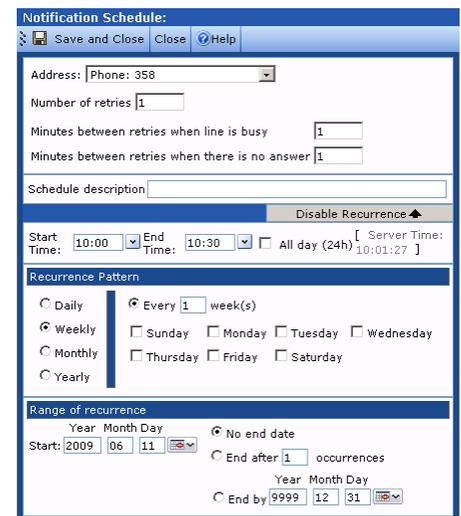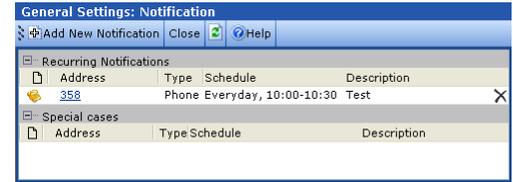
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Recurrence

Recurrence saves you the trouble of setting up a location repetitively. You can create a location schedule that spans out through multiple days and define the exact time frame that it will be valid for during those days. You can also choose the days of the week separately, so that you can configure a schedule for your entire working week and so on.

Recurrence Pattern

You must first choose one of the following radio buttons:

Daily: You will be able to choose every weekday or define it as every X days. Entering 1 as the X will make the schedule occur everyday while 2 will make the schedule occur every other day.

Weekly:You will be able to choose the days of the week and define the pattern of every X weeks. Entering 1 as the X will make the schedule occur every week while 2 will make the schedule occur every other week.

Monthly: You will be able to choose a single day from the month. When using the first radio button, define the day it self (e.g. 1st or 15th of the month by entering only the number) then X months. Entering 1 as the X will make the schedule occur every month while 2 will make the schedule occur every other month.

The second option will allow you to be more dynamic in your choices. For example, you will be able to choose **First Friday** of every **1** month. Doing so will trigger the schedule on the first Friday of every month.

Yearly: You will be able to choose a single day of the year by selecting the specific month and the date. You also have a more dynamic choice of selecting a yearly date. For example, you will be able to choose **First Friday** of every **January**. Doing so will trigger the schedule on the first Friday of January every year.

⊘   **Warning**: You cannot choose February 29th as your yearly recurring date. However, if a dynamic schedule happens to be on that date (e.g. Last Sunday of February is the 29th), the schedule will occur normally.

Range of Recurrence

Range of Recurrence defines the period in which the recurrence pattern will stay active. The recurrence pattern will repeat itself as long as the range of recurrence is valid. Select one of the following radio buttons and define the fields that may be necessary. No matter which radio button you choose, you must **always** select a start date and time first.

No end date: Select this radio button to keep the current schedule indefinitely starting from the start date/time.

End after X occurrences: Select this radio button to have the schedule expire after it has occurred X number of times.

End by: Select this radio button to define an exact end date for the recurrence.

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Notification Options

When you are away from your desk or out of the office, you may not have any way of knowing if you have received an important message. To resolve this issue, Web Client can notify you whenever you receive a message. For example, if you have received a voice message in your office inbox, Web Client can be instructed to e-mail you, call your cell or home phone to notify you of the message arrival.

Since getting notified for every single message can be overwhelming, you will be able to configure the exact conditions for notification from Notification Options. Please refer to the below settings on how to configure your options.

Web Client allows you to specify phone and e-mail addresses that will be used to contact you when you have a message. After specifying your contact methods, you can also assign a schedule to a particular notification address. To learn more about configuring the notification addresses and schedule, please refer to **Notification Schedule & Address on page 123**.

☑ **Note**: There is no limit to the number of notification addresses that you can add.

Notification Filters

For new voice messages select:

> **All**: Notify for all voice messages
>
> OR
>
> **Certified**: Notify for certified voice messages
>
> **Internal**: Notify for voice messages of internal origin
>
> **Urgent**: Notify for voice messages marked 'urgent' or 'high importance'
>
> **Private**: Notify for voice messages marked 'private' or 'confidential'
>
> **External**: Notify for voice messages of external origin
>
> **With Caller ID**: Notify for voice messages with caller ID

For new text messages select:

> **All**: Notify for all text messages
>
> OR
>
> **Certified**: Notify for certified text messages
>
> **Internal**: Notify for text messages of internal origin
>
> **Urgent**: Notify for text messages marked 'urgent' or 'high importance'
>
> **Private**: Notify for text messages marked 'private' or 'confidential'
>
> **External**: Notify for text messages of external origin

Notify me for Fax messages: Enable this check box to be alerted when a fax message has arrived.

Telephony Options

Before transferring: Enable this check box to have the system page you before transferring a call.

After transferring: Enable this check box to have the system page you after transferring a call.

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Other Features

Other features includes below sections:

Distribution List on page 126

Wake-up Call on page 127

Collaborate on page 127

Distribution List

Distribution lists provide you with an easy way to send messages to a group of people. For example, if you frequently send voice mail to the Sales department, you can create a distribution list called "Sales" containing the names of everyone in the department.

The system can send all unread messages to all members of a **private** distribution list.

☑ **Note**: **Public** distribution lists are created by the System Administrator.

Adding / Modifying a distribution list:

When creating or editing a distribution list, please refer to below explanations.

Save and Close: When you have created or edited the list to your satisfaction, click on this button to save your list.

Close: Click on this button to close the list without saving.

List Number: Enter the list number that you will allow you to access the distribution list from a phone.

☑ **Note**: For more information on accessing a distribution list from your phone, refer to the Telephone User Guide.

List Name: Enter a name for the distribution list for your own reference.

Select from: From the drop down menu, select a category that you will be searching to find a contact to add to the distribution list:

 ◆ **All colleagues**: Select from anyone within your company.

 ◆ **All private contacts**: Select from anyone in your private contacts.

 ◆ **All public contacts**: Select from anyone in the public contacts.

 ◆ **Department**: Select from anyone in the company department.

 ◆ **E-mail**: Manually enter an e-mail address of the recipient.

 ◆ **Remote Sites**:Manually enter an e-mail address, then choose the domain that is pre-configured from the remote sites on the server.

 ◆ **Fax** Number: Manually enter the fax number.

 ◆ **SMS**: Email: Manually enter an e-mail address.

 ◆ **SMS**: Phone: Manually enter a SMS capable phone number.

Search: Instead of browsing the categories, you may also search the entire database for a contact. Type in the necessary information then click on the Search button to find all the matching contacts.

Add: Click on this button to add the selected contacts from the **Search** box to **Recipients** box.

Delete selected items: Click on this button to delete the selected items from the **Recipients** box.

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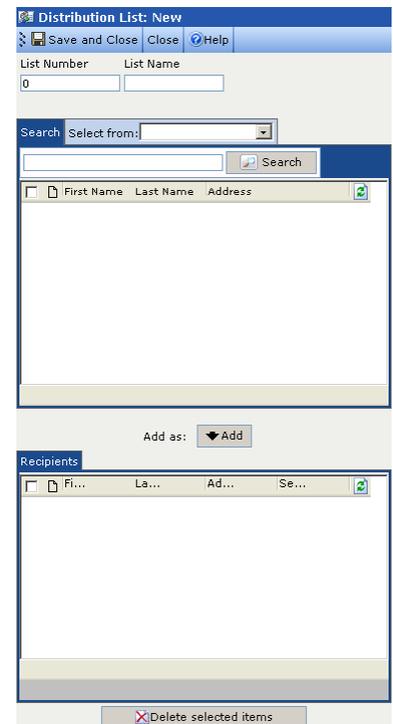
Wake-up Call

You can use Web Client as your own personal alarm clock simply by creating a wake-up call. From the wake-up call page, fill out the following information.

Number: Enter the number that you wish to receive the wake-up call from. Alternatively, you may select a number from the drop down menu which will list all your phone address.

Date: Enter the date in which the wake-up call will be made. Alternatively, click on the calendar button to select a date.

Time (hour) and Time (min): Enter the exact time in which the wake-up call will be made.

☑ **Note**: The time you specify must be in 24-hour format. To set a 9:45 PM flight to New York and you need 1 hour to get to the airport. If you wanted to set a wakeup call for 8:15 PM on Monday, September 12, 2010, you would select 'September 12' from the **Date** drop down menu, then type in '20' and '15' in the **Time** fields.

☑ **Note**: You may also configure a wake-up call through the TUI (Telephone User Interface) after logging into your mailbox. The wake-up call entry is shared between Web Client and the TUI. There can only be one wake-up call configured at once.

Collaborate

Collaborate is a functionality that links you with your desired Collaboration/Meeting services. Once you have defined the Collaboration service in your User Settings, click the Collaborate button. A new window will open and connect you to the defined Collaboration service.

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6 Outbound Fax Services

Chapter Summary

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Outbound Fax Services

Introduction

While most business interactions occur digitally, faxing still remains to be a required feature for many end users. Such is especially true when one has to send out faxes to another person due to the tenical limitation or legality involved. Rather than having to purchase a fax machine for such occurences, UC users can conviniently send faxes right from their computer's desktop digitally through the Office-LinX server which has the proper license and features enabled.

Requirements

The fax may be sent out from your computer through the below methods:

1. **Through Windows Fax Services**: The advantage of this method is being able to send virtually any item as a fax. As long as the software that you're currently using to view the document/image supports the print function, you will be able to send any content as a fax by printing it through the fax services which will be integrated with your Office-LinX server. However, this method requires a configuration process that is complicated.

Refer to **Fax via Windows Fax Services (Windows 7) on page 131 or Fax via Windows Fax Services (Windows XP) on page 136** to use this method.

2. **Through E-mail Client**: The advantage of this method is being able to send a fax from anywhere you have access to an e-mail client without having to configure anything. Whether it is a web-based or dedicated client, you will be able to send a fax through the Office-LinX server as long as you can send out an e-mail. But unlike the first method, you will be limited by the files that are supported by the server when sending a fax (i.e. if the server does not recognize a certain type of file, the fax request will fail).

Refer to **Fax via E-mail Client on page 141** to use this method.

3. **Through Fax Gadget**: This methos is virtually identical to the above E-mail client method but is streamlined for use with Web Client interface which can be accessed directly or through client applications such as UC Web Gadget.

Refer to **Sending a Fax through Fax Gadget on page 141** to use this method.

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Fax via Windows Fax Services (Windows 7)

Configuration

Please follow the below steps to configure your client machine with the Windows Fax services.

🚫 **Warning**: This configuration must take place **before** installing UC Client Manager. If UC Client Manager already exists on your desktop, remove the application, enable the fax services, then install the application again.

1. Launch the **Programs and Features** application within **Control Panel**.

☑ **Note**: Change your viewing style to icons to view the list of applications instead of categories.
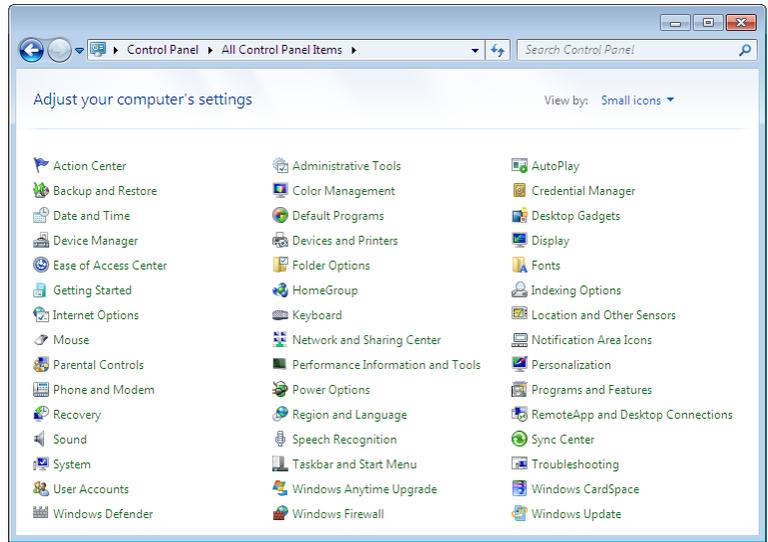
2. Click on the **Turn Windows features on or off** link on the left pane.

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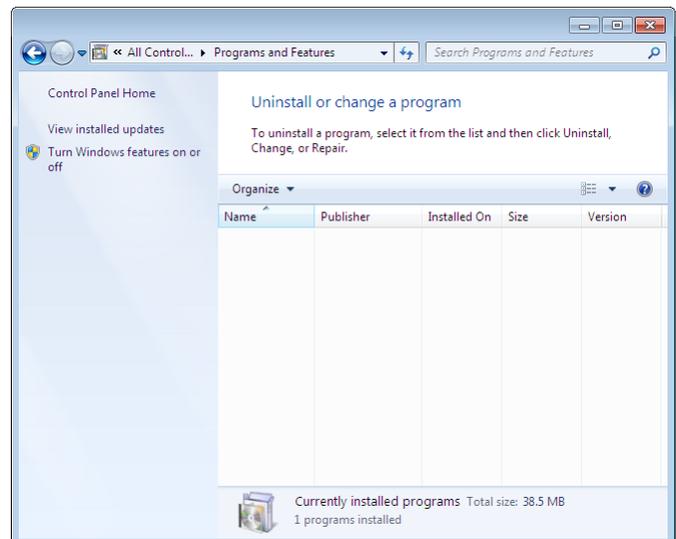
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3. From the feature window, enable the following features.

◆   Print and Document Services

  ◆   Internet Printing Client

  ◆   Windows Fax and Scan

Click **OK** when you're done.

☑   **Note**: If these services are already installed on your computer, please skip to Step 6.
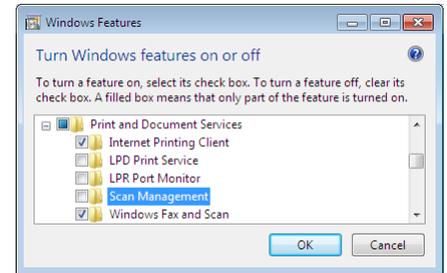
4. Windows will start to add all the selected components. This process may take a while.
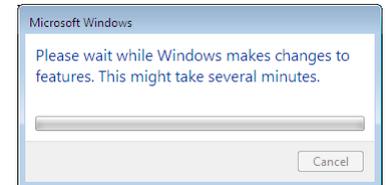
5. If you are asked to restart your computer, click **Restart Now** to reboot.

6. Once the computer finishes rebooting, install UC Client Manager on your computer. Please refer to **Installing UC Client Manager on page 38** for details on this process.
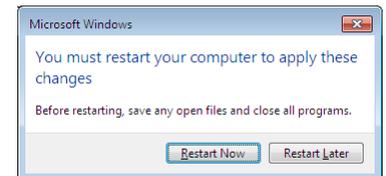
7. Once you are finished with UC Client Manager installation, launch **Windows Fax and Scan** application from your **Programs** folder within the **Start** menu.
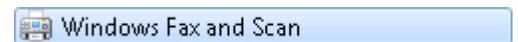
8. When the application launches, open **Tools > Fax Settings...** as shown.

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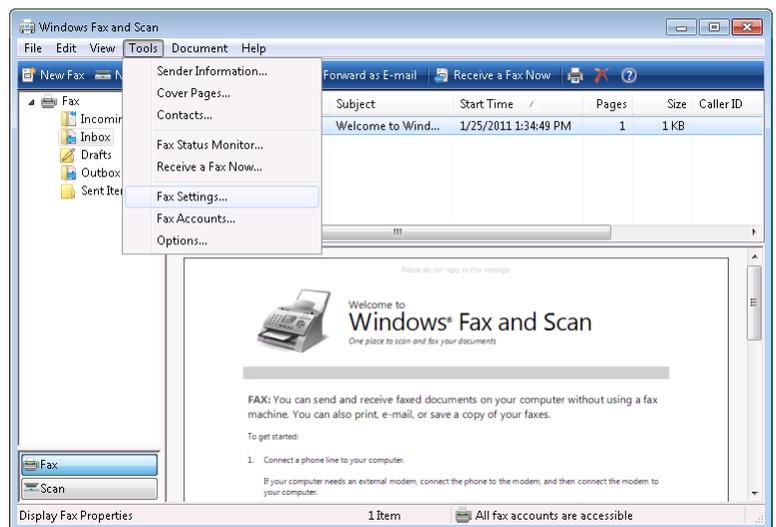
9. From the General tab, confirm that the Device name is **EEFSP** as shown here. If it is set to something different, select this device by clicking on the **Select fax device...** button.
    You must also make sure that **Allow this device to send faxes** check box is **enabled**. **Allow the device to receive fax calls** should be **disabled** since you will be receiving your faxes through the UC server. You should only enable this check box if you have a specific reason to do so.
    Click OK to save your changes.
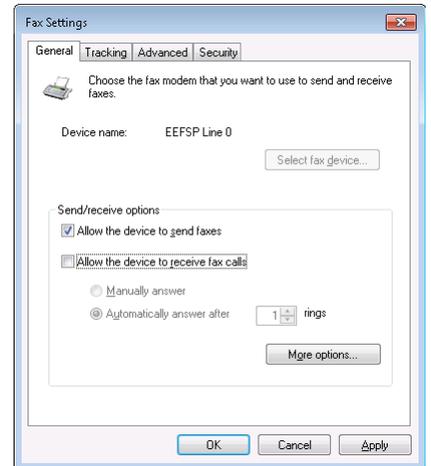
10. Open **Tools > Fax Accounts...** this time.
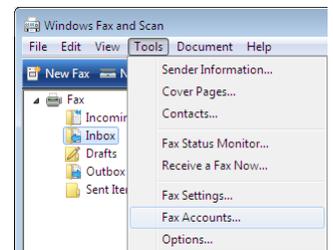
11. Click on the **Add..** button.
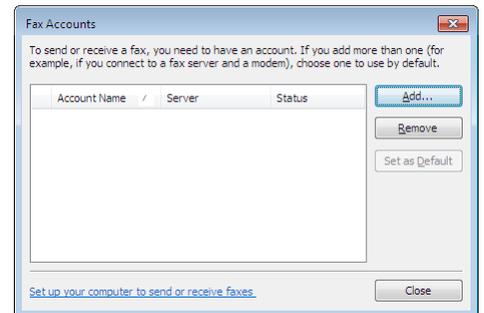
12. Select the **Connect to a fax modem** option.

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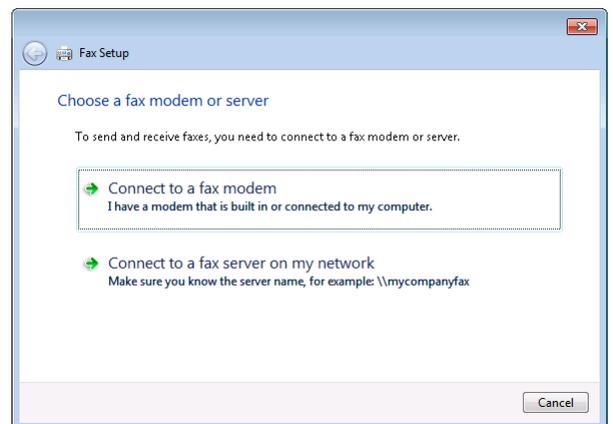
13. Define the name as necessary. You may leave it as the default value or rename it according to your preference. In most cases this item should be the only device configured on your computer. If not, please ensure that **Use by default for sending faxes** radio button is chosen before continuing. Click **Next** to continue.
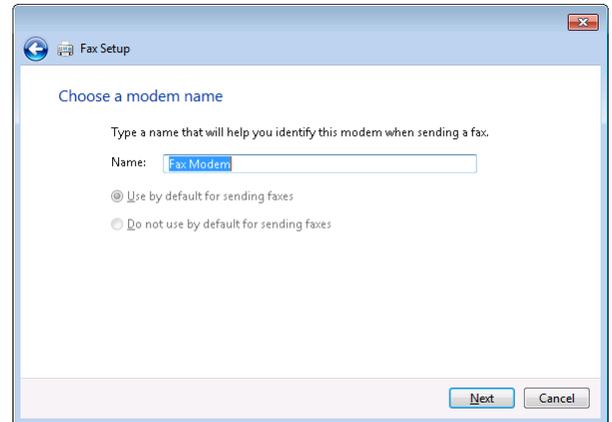
14. Choose **Answer automatically (recommended)** option.
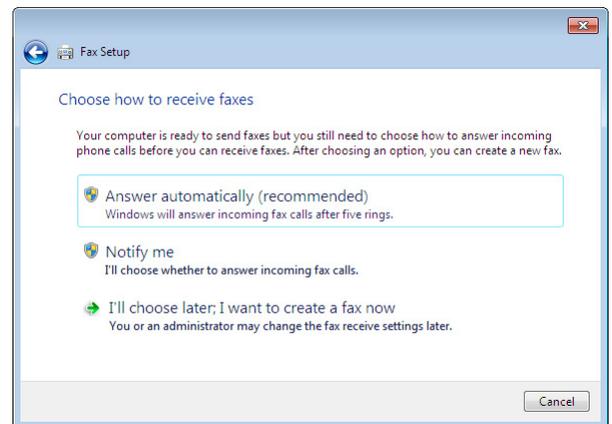
15. If you are prompted regarding your Firewall, click on the **Allow access** button at the bottom of the window.

16. Your computer is now ready to send fax messages. Please keep in mind that **you must be logged into UC Client Manager** in order to send faxes.

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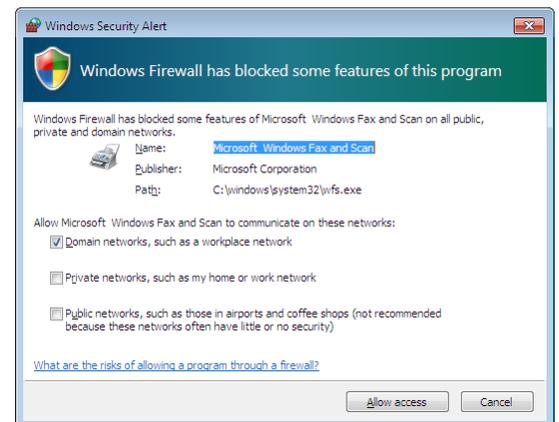
Sending Fax from Application

Once your computer is configured for faxing, you will be able to send faxes from virtually any application which can print using the default Windows print tool. To send a fax, simply select **Print** from the application of your choice (e.g. Microsoft Office Word, Adobe Acrobat). You will see a window similar to the one shown here.

Select **Fax** as your printer then click **Print** at the bottom of the window.

☑ **Note**: You must be logged into UC Client Manager in order to send fax messages.
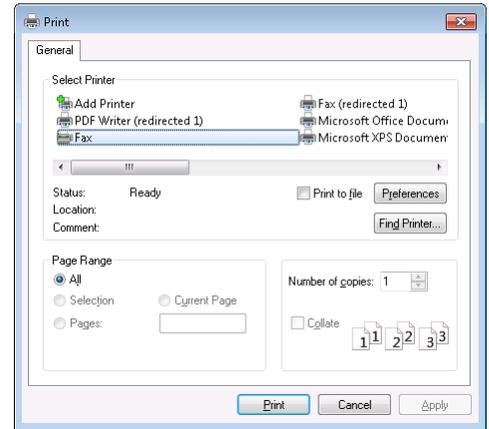
A new window will open so that you can define the destination and any other components of your fax message. The document you have chosen to send as fax will appear as an attachment as highlighted here.

Ensure that you enter the correct fax number on the **To:** field, and that the **Dialing rule** is set to **UC Location**.

All other fields, such as **Cover Page**, **Subject** and **Body** are optional fields which you can utilize to customize your fax message.

When you are ready to send the fax, click on the **Send** button.
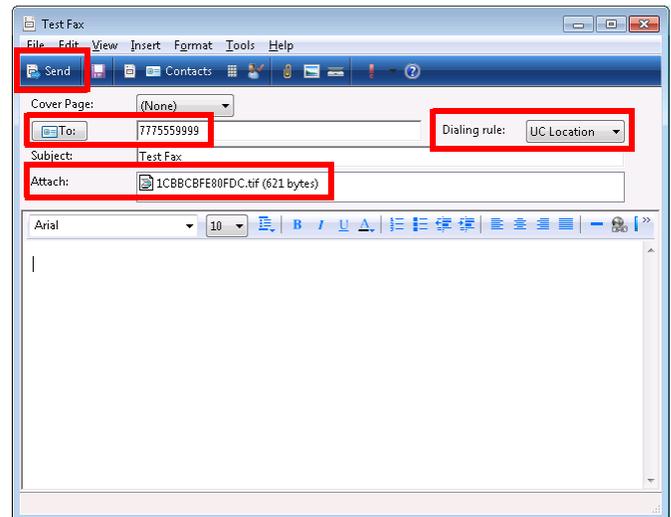
Fax status window will appear to notify you of your fax's current status. Once the fax is completed successfully, you will be informed as shown here.

If the fax fails for any reason, you will be notified of the reason of failure from this status window. Please consult your system administrator with this information if you are having trouble sending faxes.

☑ **Note**: You will be able to keep track of all your outgoing faxes and monitor them as necessary from **Windows Fax and Scan** application available on the **Start** menu.

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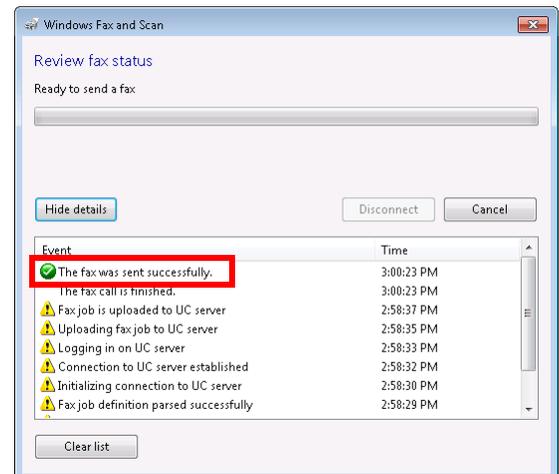
Fax via Windows Fax Services (Windows XP)

Configuration

Please follow the below steps to configure your client machine with the Windows Fax services.

⊘ **Warning**: This configuration must take place **before** installing UC Client Manager. If UC Client Manager already exists on your desktop, remove the application, enable the fax services, then install the application again.

1. Navigate to **Start > Settings > Control Panel > Add/Remove Programs**. Doubleclick on the icon. The following screen appears:
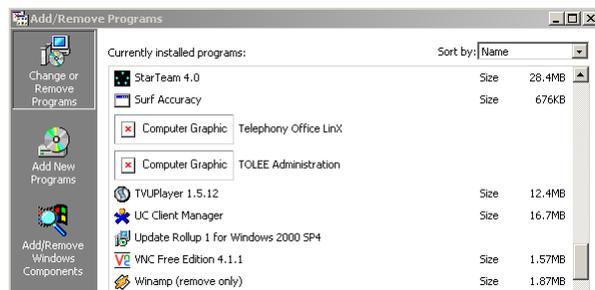
2. Select **Add/Remove Windows Components**. The Windows Components Wizard screen appears:
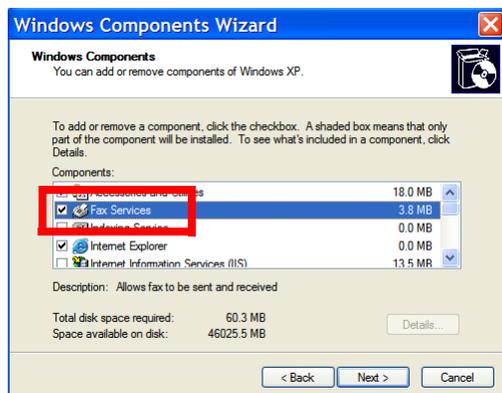
3. Select the **Fax Services** checkbox. Click **Next**.

4. You may be asked to provide a installation disc depending on your computer settings. Once the process is complete, you will have the ability to send faxes from your desktop.

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Sending Fax from Application

1. Open the document/image that will be sent as a fax from.
2. Select the Print action. This action is normally under the **File > Print** menu.
3. When the print dialogue appears, select fax as the printer then click **OK**.
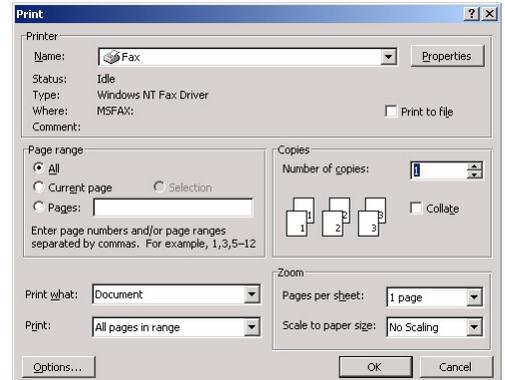
4. The **Send Fax Wizard** screen appears:

5. Click **Next**. The **Recipient Information** screen appears:
6. Specify the following:

◆ In the **To** field, specify the name of the intended recipient.

☒ **HINT**: Click on the **Address Book** button to select the recipient from your personal address book.

◆ From the **Location** dropdown list, select the location (country) of the intended recipient.

◆ In the **Fax number** fields, specify the fax area code and number for the intended recipient.

◆ Select the **Use dialing rules** checkbox if you want specific dialing rules to apply. Select the dialing rules from the accompanying dropdown list.
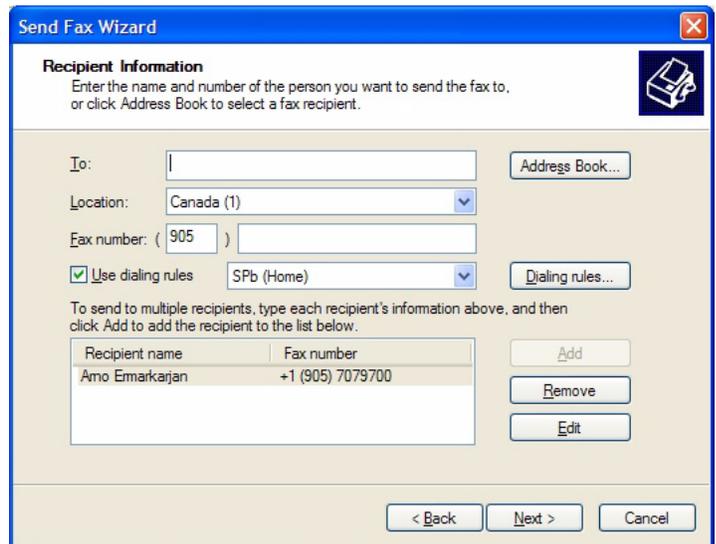
☑ **NOTE**: To create a new set of dialing rules, click on the **Dialing rules** button.

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7. Click on the **Add** button to add the recipient whose information you have just specified.

☑   **NOTE**: You can add as many recipients as you wish.

8. Click **Next** when you have added all desired recipients. The **Preparing the Cover Page** screen appears:

9. From the **Cover page template** dropdown list, select the cover page template you want to use.

10. In the **Subject line** field, enter subject text for the fax cover page.

11. In the **Note** box, enter message text for the fax cover page.

12. Click **Next**. The **Schedule** screen appears:

13. Select one of the **When do you want to send this fax?** radio buttons:

◆   **Now** - send the fax immediately

◆   **When discount rates apply** - send the fax the next time discount phone rates apply

◆   **Specific time in the next 24 hours** - send the fax at a specific time in the next 24 hours. If you select this radio button, you must then specify a time of day from the accompanying spin-box

14. Select one of the following **What is the fax priority?** radio buttons:

◆   **High** - high priority for sending fax

◆   **Normal** - normal priority for sending fax

◆   **Low** - low priority for sending fax

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15. Click **Next**. The following screen appears:

16. If you want to preview your fax, click on the **Preview Fax** button. Otherwise, click **Finish**. *To confirm that your fax was sent successfully, check the Sent Items folder of your Fax Console application.*

Viewing the Status of a Fax

1. Select **Start > All Programs > Accessories > Communications > Fax > Fax Console**.

2. In the left hand pane, click to expand **Fax** (if not already expanded). The following list describes the folders under Fax:

   - The **Incoming** folder contains faxes that are currently being received.
   - The **Inbox** folder contains faxes that have been received.
   - The **Outbox** folder contains faxes that are scheduled to be sent.
   - The **Sent Items** folder contains faxes that have been successfully sent.

3. In the left hand pane, highlight a folder.

4. In the right hand pane right click on the fax you want and select **Properties**.

5. On the General tab, check the status of the fax under 'Status'.
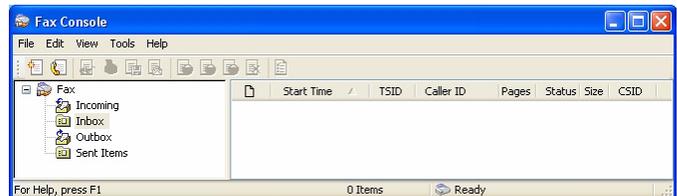
☑ **Note:** If an item is in the Outbox folder, then the fax attempt has failed. Until all retries have been exhausted, Status will read **Pending**. If all retries have been exhausted, Status will read **Failed**.

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Receiving and Viewing a Fax

1. Select **Start > All Programs > Accessories > Communications > Fax > Fax Console**. The Fax Console detects incoming faxes and stores them in your inbox.
2. To view a fax click **Inbox**, then double click on the fax you want to view.

Cancelling a Fax Job

You can cancel any fax you have set up to be sent at a future time.

1. If Fax is not open, select **Start > All Programs > Accessories > Communications > Fax > Fax Console**. The Fax Console appears.
2. To cancel a fax click **Outbox**, then right click on the fax you want to cancel.
3. Click **Delete** to cancel the fax.
4. Click **Yes**.

Automatically Send Retry

You can set up Fax so that it continues trying to send your fax if the receiving fax machine is busy.

☑ **Note:** Fax is automatically set up to retry three (3) times at 10-minute intervals.

1. Select **Start > Control Panel**. The Control Panel appears.
2. If your Control Panel is in Category View, click **Printers** and **Other Hardware**. Click **View installed printers or fax printers**. The **Printers and Faxes** screen appears.
   OR
   If your Control Panel is in Classic View, doubleclick the **Printers and Faxes** icon. The **Printers and Faxes** screen appears.
3. Right click **Fax** and select **Properties**. The Fax Properties dialogue box opens.
4. Click the **Devices** tab, then **Properties**. The Modem dialogue box opens.
5. Specify the number of retries and the amount of time between retries.
6. Click **OK**.

Automatically Cancelling a Fax

If your PC tried to send a fax and failed to connect to a fax machine, you can automatically cancel a failed fax.

1. Select **Start > Control Panel**. The Control Panel appears.
2. If your Control Panel is in Category View, click **Printers** and **Other Hardware**. Click **View installed printers or fax printers**. The **Printers and Faxes** screen appears. **OR**,
   If your Control Panel is in Classic View, double click the **Printers and Faxes** icon. The **Printers and Faxes** screen appears.
3. Right click **Fax** and select **Properties**. The Fax Properties dialogue box opens.
4. Click the **Devices** tab, then click **Properties**. The Modem dialogue box opens.
5. Click the **Cleanup** tab.
6. Click to check Automatically delete failed faxes after and specify the number of days.
7. Click **OK**.

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Fax via E-mail Client

Outbound Fax E-mail may be utilized from virtually any e-mail client. This feature requires no user-end configuration. The only requirement is that the fax e-mail is sent to the correct domain using the correct format.

Sending a Fax

☑ **Note**: This guide will use Microsoft Outlook as the e-mail client to send the fax e-mail. However, please keep in mind that this process can be repeated in virtually any e-mail client including web based e-mail clients.

Create a new e-mail message. In the **To...** field, type **fax=** followed by the number of the destination fax machine at(@) your company's server. For example, **fax=8005551234@vpim.company.com**.

Attach the fax file (fax files must be in **TIFF** format unless the server is configured to handle other formats as well). Send the e-mail when you're ready.

The message will be accepted by your server and will be processed into an outgoing fax job to the destination number you have entered.
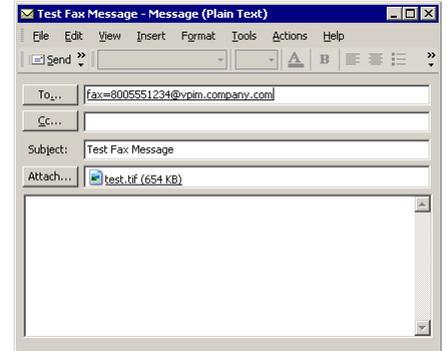
Sending a Fax through Fax Gadget

The default window for Fax Gadget will look like this. This window can be accessed by logging into Web Client directly or through a link from other web applications such as UC Web Gadget. To send a fax, simply click on **Send Fax** button at the top.
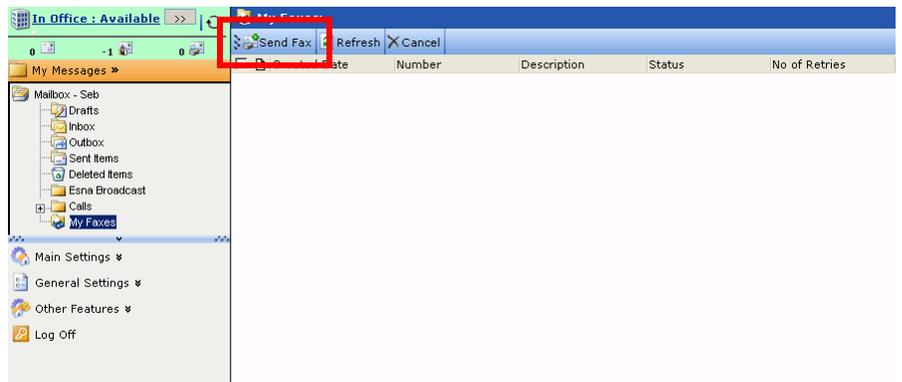
On the **To** field, enter the fax destination number. It is best to include all numbers including both country and area code (e.g. 1-123-765-4321). When you enter the full fax number on this field, Fax Gadget will automatically add the **Fax:** qualifier to indicate that this is a fax message. Click on the **Attachments** tab to add content to this fax message.

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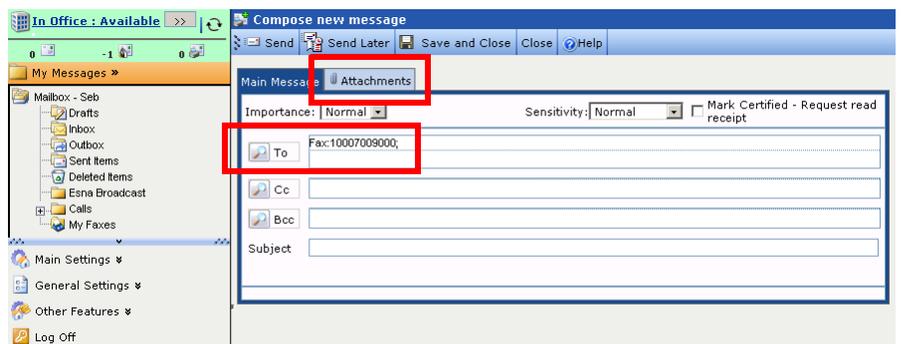
Clicking on **Add** button will open the menu shown here. Select **Fax File** from the menu. Click on the **Browse...** button to search for a file to be sent as the fax content then click **Upload**.
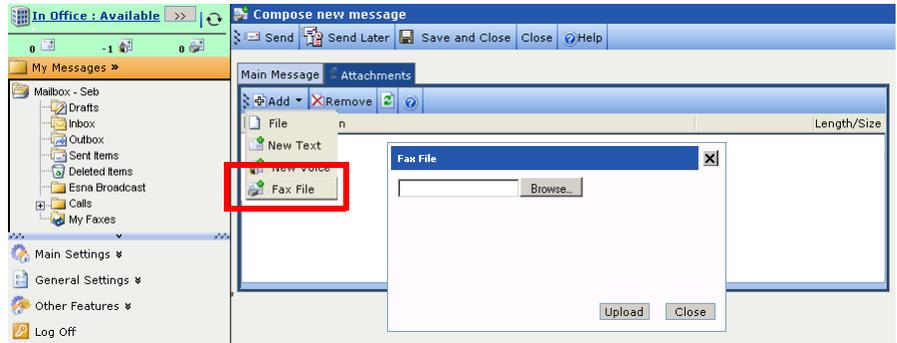
Selected file will now be added as fax content. Click **Send** to send the fax right away.
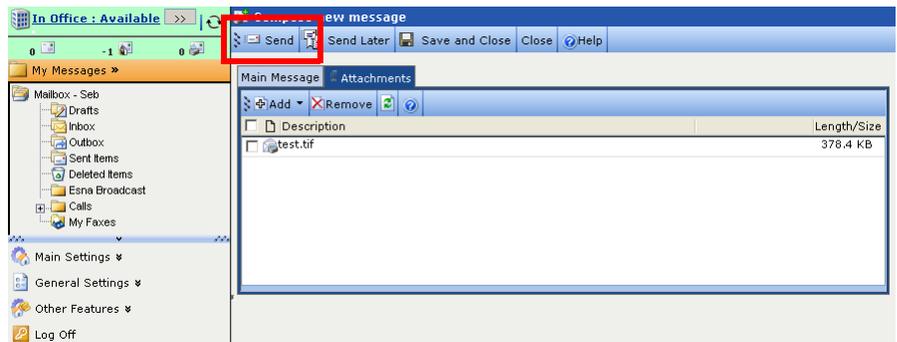
The fax message you've sent will now be listed under **My Faxes** section. You will be able to easily check on the status of the fax to ensure that it has been sent out. If the status doesn't change to **Sent** within a reasonable amount of time, or if the fax message fails repeatedly, please contact your system administrator for help regarding the matter.

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7 # UC Mobile - Android

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Chapter Summary

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UC Mobile - Android

Introduction

The new generation of mobile operating system created by Google is gaining popularity through its open architecture and customizeable nature. Numerous cellphone hardware manufacturers are currently creating or planning to create modern smartphones based on Google's mobile OS. To cater to such development in the industry, Office-LinX now includes UC Mobile for Android in its lineup of mobile clients.

Through the easy to use touch interface, users will be able to enhance their communication experience by being able to control most aspects of UC Client Manager right from their Android OS mobile phone.
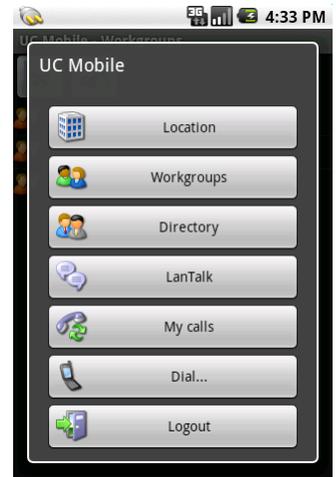
Requirements

Requirements	Details
License	---
Software	Office-LinX version 8.0 or higher Android OS 1.5

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Using UC Mobile

Logging In

When you launch the application, you will first see the log in screen. Fill out the necessary information explained below:

- ◆ **Company number**: This field determines the company that you'll be connecting to (1 by default). You should leave this value as a default unless you know that you specifically belong to another company in your organization.
- ◆ **Mailbox**: Enter your mailbox number.
- ◆ **Password**: Enter your mailbox password.

When all the necessary information are filled out, touch the **Login** button on the top left corner of the screen to connect to the UC Client Manager server.

If you need access to advanced settings, touch the icon on the top right corner of the screen to open the advanced menu shown here. You will now have access to the following settings as well:

- ◆ **Server**: Enter the domain name or the IP address of your UC Client Manager server. If you do not know this information, please consult your administrator.
- ◆ **Port**: Enter the port that will be used to connect to UC Client Manager server. While the default value is 13777, this number may differ depending in your organization's settings.

When all the necessary information are filled out, touch the **Login** button on the top left corner of the screen to connect to the UC Client Manager server.

For your convenience, UC Mobile also allows you to enable Auto-login and Auto-reconnect. **Auto-login** will automatically log you into the UC server when you launch the UC Mobile software using the credentials that you have used last time. **Auto-reconnect** will connect you back to the server automatically if you get disconnected due to network issues. To access these settings touch the double check box icon on top of the login screen. After your settings are complete, touch the return button on the top left corner of the screen to go back to the login screen.
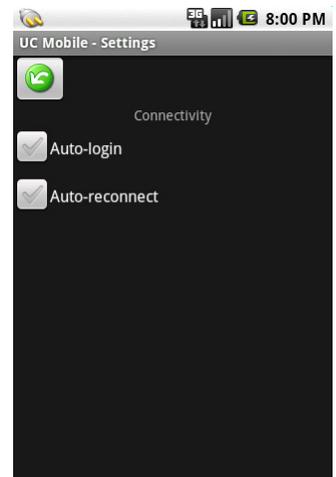
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Main Menu

From the main menu, you will be able to easily access each component of the UC Mobile application. To navigate, simply touch on the sections or the buttons to move onto the according pages. Please refer to the below list to learn about the specifics of each section in UC Mobile application.

Locations Management on page 146

Workgroups on page 149

Directory on page 150

LanTalk on page 151

My Calls on page 152

Dialing on page 153
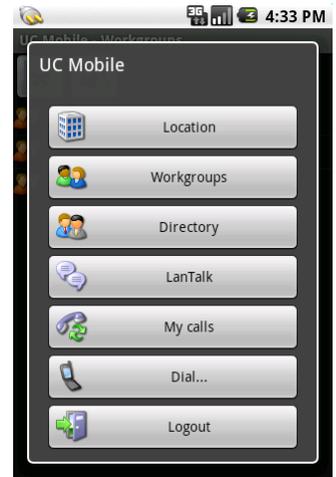
Locations Management

To change your location, availability, or extension, simply touch the location button from the main menu. Once you're inside the locations page, you can change your location, availability, extension and also define how long your newly chosen setting will be in effect for. Please refer to the individual sections listed below for detailed information.

Locations on page 146

Availability on page 147

Extensions on page 147

Schedule on page 147

Positioning on page 148 (Globe icon on top of screen)

☑ **Note**: When you choose a new location, both your **availability** and **extension** will change to the location's default value. You may change these settings afterwards for customization.

☑ **Note**: Positioning is only be available on GPS enabled devices.
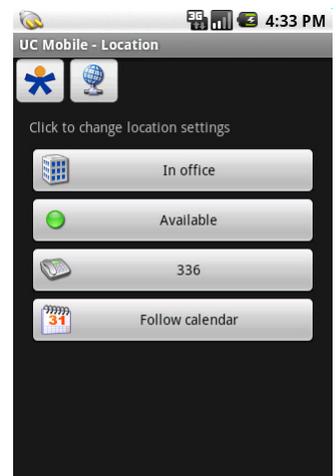
Locations

You will be able to see your entire list of locations here, including any custom locations that you may have created. To change your current location simply touch the desired location. If you wish to keep your current location as is, touch the **cancel** button at the bottom of the list to return to the previous menu.
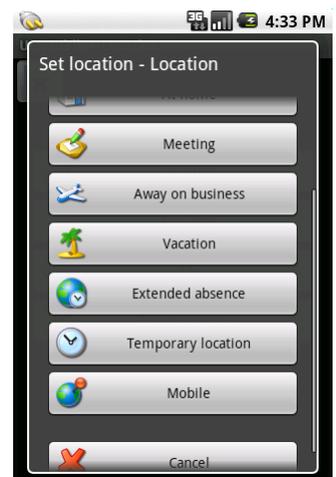
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Availability

From the menu, select either **Available** or **Unavailable** to change your availability. Once you have changed your availability, you will be returned to the main menu automatically. If you wish to keep your current availability as is, simply touch the cancel button on the bottom of the list to return to previous menu.
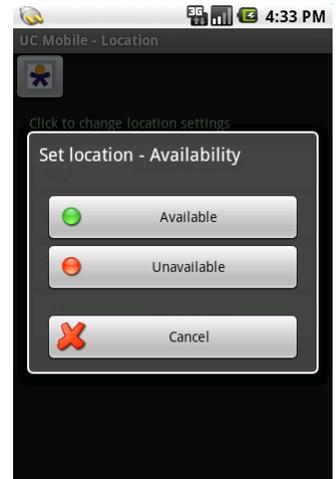
Extensions

You will be able to select your default extension from this section. The numbers available here will be the numbers that are directly associated with the location that is currently in use.

When someone is trying to find you through the auto-attendant, this is the number that you will be reached at first by default. This will also be the number that can be used for dialing out.

Schedule

Schedule allows you to determine how long your newly chosen location is going to last for. Please select one of the following options to append your changes.

Follow calendar: Your newly chosen location will revert back to the entry defined in the locations calendar right away.

Until next scheduled: Your location will change whenever the next event in the locations calendar occurs.

Until I change: Your newly chosen location will remain as your location until you manually change it again.

For next X minutes/hours: Your newly chosen location will revert back to the entry defined in the locations calendar after the selected time has elapsed.

Till tomorrow: Your newly chosen location will revert back to the entry defined in the locations calendar on the next day.

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Positioning

Positioning allows you to automatically change your UC location based on your physical location which is tracked by the GPS functionality within your device. For example, you can flag your office building with the location "In Office" and your home with "At Home". Whenever you enter the vicinity of either location, your UC location will automatically change to the defined settings, eliminating the hassle of manually changing your location whenever you move into a commonly visited area.

☑ **Note**: UC Mobile application must be running (active or in background mode) in order for the positioning feature to keep track of your location. The application cannot track your location when it is closed.

Positioning On/Off

The compass icon allows you to turn the positioning feature on or off. Simply touch the icon then make your choice to turn the feature on or off.

☑ **Note**: You can only add/remove/edit your GPS location entries when the feature is turned on.

☑ **Note**: Positioning feature will increase your battery usage when it is on.
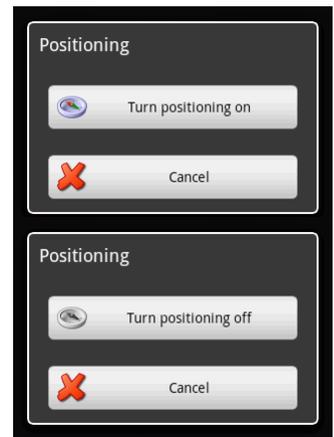
Location Definition

Location Definition is where you associate a GPS location with a UC location. You can access the Location Definition either by touching on the globe icon to create a new entry or by touching an existing entry from the list available at the main Positioning screen.

Description: Enter the name of this Location Definition. This is for your reference only and has no effect on functionality.

Area Size: Select either **Building**(approx. 50m radius), **Campus**(approx. 250m radius) or **Town**(approx. 3km radius) to define the radius of the GPS location. For example, you should choose Building for your office or home and choose Town for your frequent business destinations to define the general proximity of the area.

Location to Set: Select the UC location that this GPS location will be associated with. Whenever you enter this GPS location, your UC location will change automatically to the defined value. Your availability and extension will also change according to the selected UC location settings.

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Workgroups

Workgroup is a convenient tool for managing internal contacts. In a large organization, trying to find someone from the entire directory may be difficult and time consuming. Creating your own groups allows you to organize and manage your desired contacts so that you can easily check their status and initiate conversation on demand.

Since these groups are stored on the UC Client server, you will be able to access it through the PC version of UC Client Manager along side your mobile device. You can manage the groups at either application and the changes will be reflected on both clients since they share a single database.

Please refer to the sections below to learn more about interaction within the Workgroups section.

View Contacts on page 149

Modify Workgroup on page 149

Delete Group on page 150
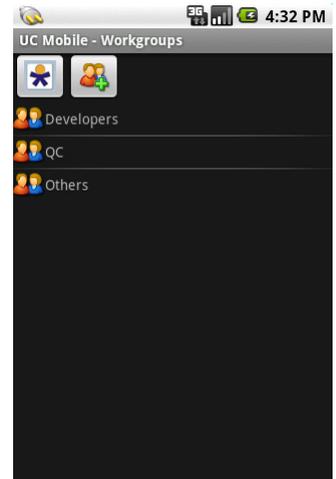
View Contacts

When you select a workgroup, you will be able to see the entire list of contacts that belong to the chosen group. At a glance, you will be able to view the contact's mailbox number, their full name and their status.

From this screen, you will also be able to add a new contact to the group. To do this, touch the **Add member** button at the top of the screen on the middle (+ button). You will be able to search and add any results that you find.

To interact with a contact, simple touch the desired entry.
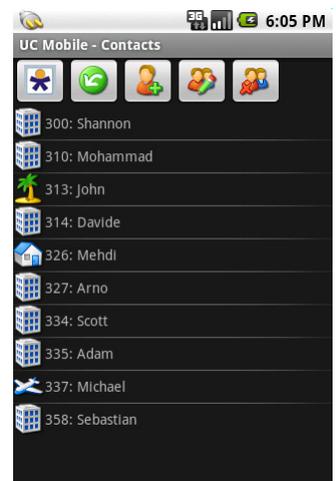
Modify Workgroup

When you choose to modify a group (the fourth button from the top), you will be able to rename the current workgroup. From here, simply enter the new group name that you desire then touch the **Accept** button.

If you wish to return to the previous screen without making any changes, touch the **Cancel** button.

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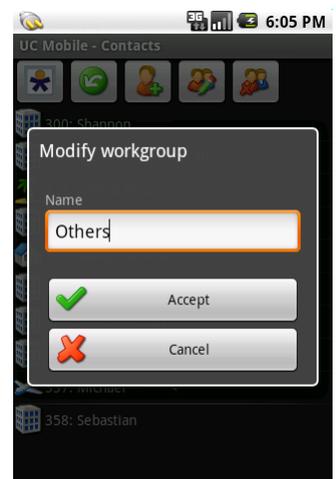
Delete Group

Deleting a group is simple. After selecting delete (last button at the top), simply confirm the choice by touching **Delete**.

Please keep in mind that deleting the group from UC Mobile will also delete it from the database, and therefore will be deleted from the PC version of UC Client Manager as well. This process cannot be undone.
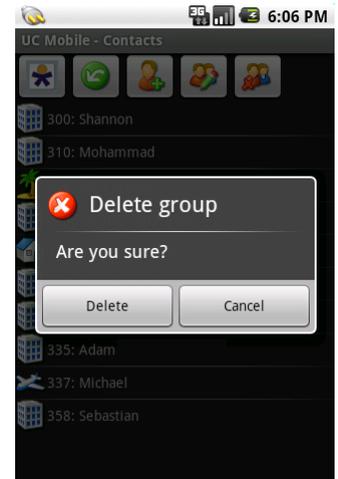
Directory

The Directory allows you to access the entire company directory, including the departments (aka Organizational Units) underneath it. Rather than having all internal contacts on one page, being able to navigate through the different departments will make searching for a contact much easier.

Touching the contact button at the top of the screen (second button) will allow you to view all the contacts that belongs in the folder that you are currently in. For example, the root folder of the directory is likely to have a contact along with folders (departments). In this case, the folders will be shown by default and the contacts must be accessed manually by touching the contact button. The same goes for folders which contain additional folders underneath.
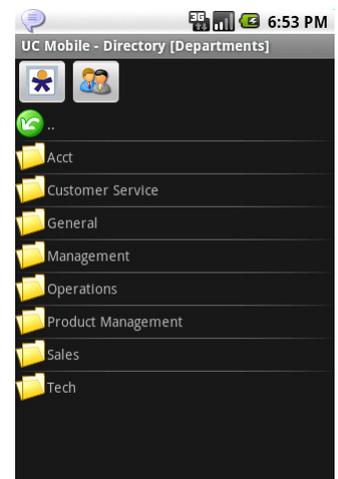
7

LanTalk

LanTalk allows you to initiate a conversation with a contact of your choice. By default, the conversation page should be empty. When you receive or send out a LanTalk message, the contact that you're conversing with will be added to the list as shown here.

In order to retrieve or send a message, simply touch the contact that you wish to converse with.

🚫   **Warning**: When you clear the chat log or exit from the UC Mobile application, your chat log will be lost.

To initiate a LanTalk session with someone who isn't on the list, simply touch the **Create new...** button then select the contact to converse with.
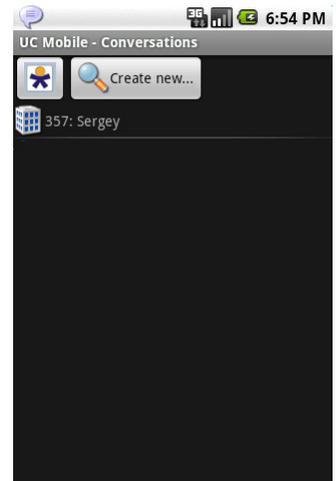
When you are in the LanTalk conversation page, you will be able to type in the message on the text field provided.

Typing a LanTalk message is very simple. Using the keyboard, type the message you wish to send then click on the **Send**(green triangle) button at the right side the screen. If you wish to cancel the process and return to the previous screen, click on the **back** button at the top of the screen.

If the contact has a valid SMS address defined, you may also send the copy of the LanTalk message to that contact's default SMS address by touching the **SMS** check box at the bottom of the text entry box before sending the message. This will increase the chance of your message being noticed by the contact right away. You may also choose the **LAP** option in the same manner if the contact has SMS capable paging device defined on their address.

The maximum number of characters that you can have on a single LanTalk message is 30,000 characters. But since the purpose of LanTalk is usually for short instant messaging, it would be best to keep it to a reasonable length. LanTalk does not support certain unicode (foreign) messages.
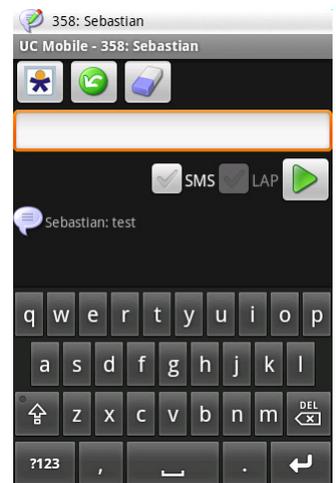
When you receive a LanTalk message you will receive a notification on top, regardless of which screen you are at, and assuming that the UC Mobile application is running on the background. When you drag down the notification, you will be able to see the message along with the sender. This option allows you to freely work with your mobile device without missing any important LanTalk messages.

Office-LinX
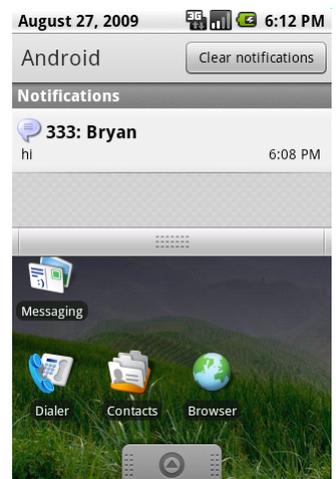
My Calls

My Calls keeps track of your calls that are monitored by the UC server. This means that the call history that you will see here isn't the call history of your mobile device. This history is stored on the server and keeps track of all incoming calls to your mailbox and outcalls that are made through the UC server with the same mailbox.

Since this can be a lengthy list, you can filter the call log to view only what you need through the filter menu accessible by touching the filter button (third button) at the top. The **Show answered calls** filter will filter out all incoming calls that were answered from the list. The **Show missed calls** filter will filter out all missed calls from the list. **Show outgoing calls** filter will filter out all outgoing calls from the list. If you wish to remove a filter, simply touch the button again to bring back the logs.
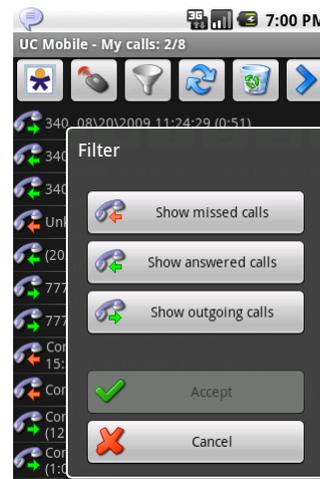
In the My Calls log, there will be two different types of call details available to you. Incoming call details and outgoing call details. Both may also be further segregated by the type of number as well, whether they are internal or external numbers. Regardless, UC Mobile will provide you with all possible information so that you can easily reference them.

While viewing the call detail, you will have the option of calling the number that you're currently viewing by touching the call button at the top (third button). It is important to note that the call isn't going to be directly made by your mobile device. When you touch the button, a call will be placed by the UC server. The server will first call you at your current extension. When you answer, the server will dial the number that you were looking at. The server will in essence bridge the call between you and the other party.

If you wish to clear your call history, there are two ways that you can approach this task. First is deleting them individually from the call details. Simply touch the Delete button (last button) at the top of the screen then confirm to delete the entry.
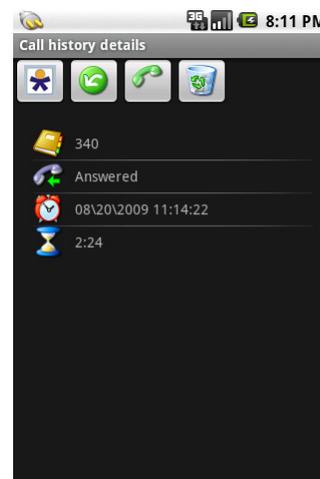
The other method is to use the delete button (fifth button) located on the top of the main call history screen. When you touch this button, you will be given four choices that you see from the screenshot to the right. You may delete all history, delete only the incoming call history (which includes calls missed by you), delete only the outgoing call history, or cancel the action.

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Dialing

UC Mobile allows you to initiate a phone call through your UC server even if you are not at your workstation. When you make a call through the UC server, the server will first call you on the defined number then start dialing out to the destination number as soon as you answer the call on the defined number, bridging the two calls together as if you are calling the person directly from the office. This means that the call's receiver will see the caller ID information of your office. Depending on where you are or who you are calling, you may also be able to avoid long distance charges on your mobile device.

You may dial an existing mailbox, entry from an address book or manually type in the number to dial. Once you select the number to dial, UC Mobile will ask you to define the Call-back number.

The **Call-back number** will determine the device you will be using to call the number that you have just defined. Please refer to below for explanation of each choice.

Use registered extension: This option will call you on the extension that is currently associated with your current location.

Call back to this device: This option will call you on the mobile device that you're currently using.

Direct Call: This option will initiate a call directly through the mobile device that you're using. Please keep in mind that this option is the only option that dials the chosen number directly. You will not go through the UC server, which means that the caller ID information displayed on the recipient's phone will be your mobile device's number and not of the UC server.

Specify: This option will call you on the number selected from your current location's address list or on a custom number that you enter.

When you have completed your selection, touch the **Dial** button to initiate the call.

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UC Mobile Installation

Overview

You will be able to install the UC Client software directly from the Android marketplace over the air. The application is available at free of charge, so you can freely download it on your current and future devices and install, upgrade and uninstall without any worries.

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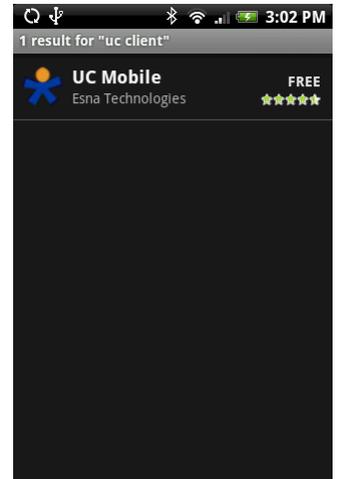
Step-by-Step Instruction

1. From the market, search for the text string "**UC Client**".

2. You will see the result to your right. Touch the search result to move onto the installation page.

3. To begin the installation, touch the **Install** button at the bottom of the screen.
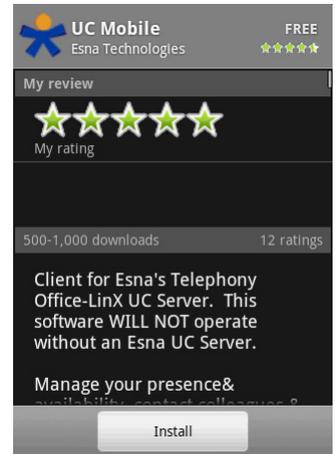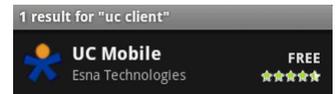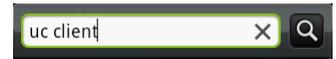
4. Confirm the access rights of the application by touching **OK**.
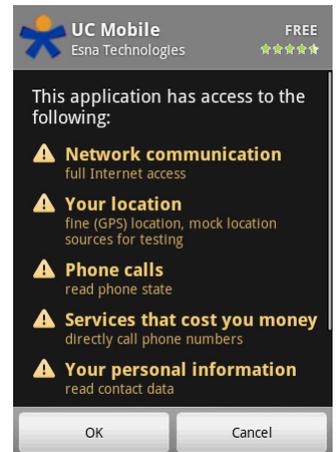
5. The application will be downloaded to you device.
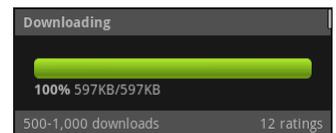
6. And install automatically. Once the installation is complete, you may run the application at any time.

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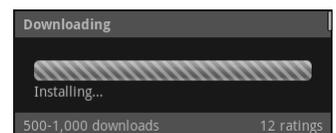
UC Mobile Uninstall

Overview

UC Client application uninstall procedure is identical to removing any other application on an Android device.

Step-by-Step Instruction

1. To uninstall the application, select the UC Client application from the **Manage applications** section on your device, then touch the **Uninstall** button to proceed.

2. Touch **OK** to confirm.

3. The uninstall procedure will start.

4. Touch **OK** once the procedure is complete. The application is now removed from your device.

Office-LinX
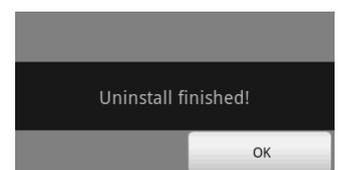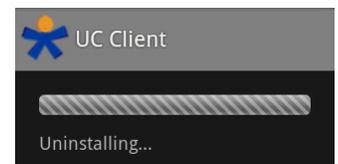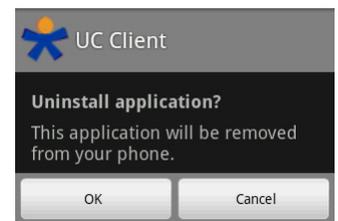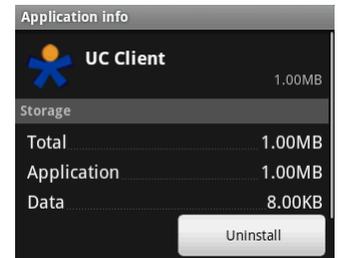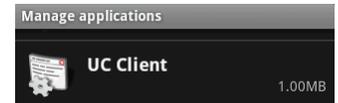
8   UC Mobile - iPhone

Chapter Summary

8

UC Mobile - iPhone

Introduction

iPhone is currently experiencing a fast growth in the Smartphone sector and is becoming a device of choice among professional business users. To cater to such development in the industry, Office-LinX now includes UC Mobile for iPhone in its lineup of mobile clients.

Through the easy to use touch interface, users will be able to enhance their communication experience by being able to control most aspects of UC Client Manager right from their iPhone.
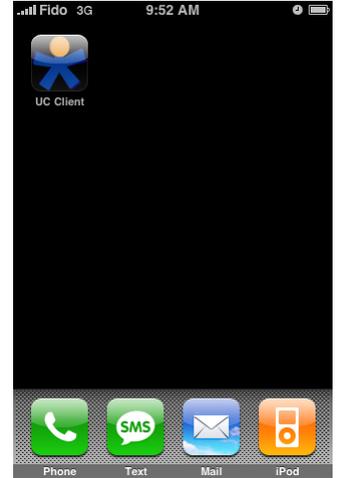
Requirements

Requirements	Details
License	---
Software	Office-LinX version 8.0 or higher iPhone OS 2.1 or higher

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Using UC Mobile

Logging In

When you launch the application, you will first see the log in screen. Fill out the necessary information explained below:

- **Server**: Enter the domain name or the IP address of your UC Client Manager server. If you do not know this information, please consult your administrator.
- **Port**: Enter the port that will be used to connect to UC Client Manager server. While the default value is 13777, this number may differ depending in your organization's settings.
- **Company**: This field determines the company that you'll be connecting to (1 by default). You should leave this value as a default unless you know that you specifically belong to another company in your organization.
- **Mailbox**: Enter your mailbox number.
- **Password**: Enter your mailbox password.
- **Auto-connect**: Set this option to **ON** if you want UC Mobile to connect to the server automatically when you turn it on.
- **Auto-reconnect**: Set this option to **ON** if you want UC Mobile to reconnect to the server whenever the connection is lost/dropped.

☑ **Note**: To turn off Auto-connect after you start its use, you must push the **Stop** button while the UC Mobile is connecting to return to the login screen then turn it off.

When all the necessary information are filled out, touch on **Login** button on the bottom left corner of the screen to connect to the UC Client Manager server.

When the server settings and the login credentials are correct, you will successfully land at the main menu of UC Mobile.
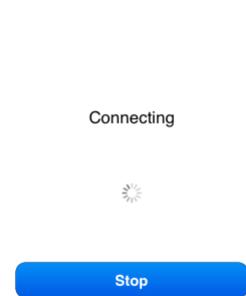
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Main Menu

From the main menu, you will be able to easily access each component of the UC Mobile application. To navigate, simply touch on the sections or the buttons to move onto the according pages. Please refer to the below list to learn about the specifics of each section in UC Mobile application.

Locations on page 160

Availability on page 161

Extensions on page 161

Schedule on page 162

Groups on page 162

Directory on page 164

Conversation on page 165

Call History on page 167

Dial on page 166

Settings on page 168
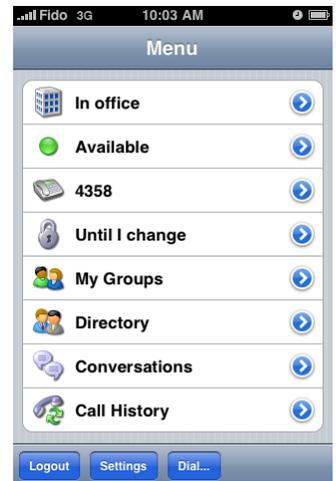
Locations

To change your locations, simply touch your current location (e.g. In Office) from the main menu. Once you're inside the locations page, you can change your locations by simply selecting a desired location from the list. This selection will last for the duration specified under the Schedule page.

Once you have selected a new location, you will be returned to the main menu automatically. If you wish to keep your current location as is, simply touch the back button on the top left corner of the screen to return to the main menu without any changes.

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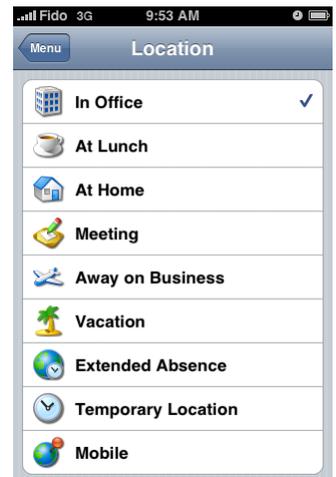
Availability

From the menu, select either **Available** or **Unavailable** to change your availability. Depending on your requirements, you may also enable **Unavailable if no caller Id** to appear unavailable to the callers that are calling from blocked numbers and are not providing their number manually either. **Override availability filters** may also be enabled to cancel any type of availability filters that may be associated with the locations that is currently in use.

Once you have changed your availability, you will be returned to the main menu automatically. The same goes for selecting any of the options. If you wish to keep your current availability as is, simply touch the back button on the top left corner of the screen to return to the main menu without any changes.
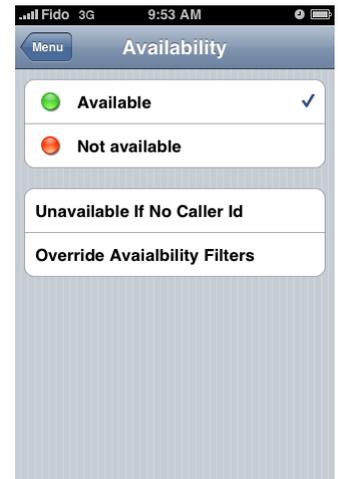
Extensions

You will be able to select your default extension from this section. The numbers available here will be the numbers that are directly associated with the location that is currently in use.

When someone is trying to find you through the auto-attendant, this is the number that you will be reached at first by default. This will also be the number used for dialing out. The system will use the extension by default if you do not have the option of manually selecting a number during a dial out event (explained on **Dial Settings on page 168**).

Once you have changed your extension, you will be returned to the main menu automatically. If you wish to keep your current extension as is, simply touch the back button on the top left corner of the screen to return to the main menu without any changes.

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Schedule

Schedule allows you to determine how long your newly chosen location is going to last for. Please select one of the following options to append your changes.

Follow calendar: Your newly chosen location will revert back to the entry defined in the locations calendar right away.

Until next scheduled: Your location will change whenever the next event in the locations calendar occurs.

Until I change: Your newly chosen location will remain as your location until you manually change it again.

For next X minutes/hours: Your newly chosen location will revert back to the entry defined in the locations calendar after the selected time has elapsed.

Till tomorrow: Your newly chosen location will revert back to the entry defined in the locations calendar on the next day.

Once you have selected your schedule, you will be returned to the main menu automatically. If you wish to keep your current schedule as is, simply touch the back button on the top left corner of the screen to return to the main menu without any changes.
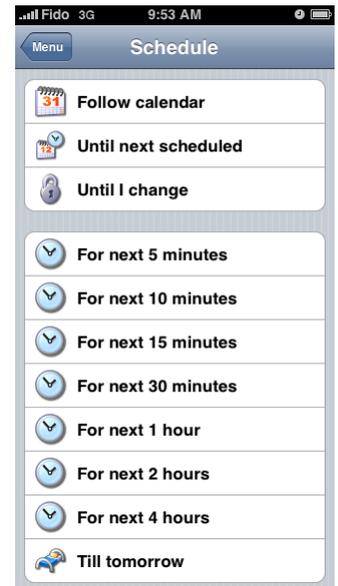
Groups

Groups (or My Groups) is a convenient tool for managing internal contacts. In a large organization, trying to find someone from the entire directory may be difficult. Creating your own groups allows you to organize and manage your desired contacts so that you can easily check their status and initiate conversation on demand.

Since these groups are stored on the UC Client server, you will be able to access it through the PC version of UC Client Manager along side your mobile device. You can manage the groups at either application and the changes will be reflected on both clients since they share a single database.

For creating a new group, please refer to **Add New Group on page 164**.

When you select a group that you wish to view, you will be able to view the contacts right away. The buttons at the bottom will also allow you to add a new contact to the group, rename the selected group or delete the selected group. Please refer to the below sections for detailed information.

View Contacts on page 163

Rename Group on page 163

Delete Group on page 163

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View Contacts

When you select view contacts, you will be able to see the entire list of contacts that belong to the chosen group. At a glance, you will be able to view the contact's mailbox number, their full name and their status.

From this screen, you will also be able to add a new contact to the group. To do this, touch the Add member button at the bottom of the screen (+ button). You will be able to search and add any results that you find. If you require help on the Mailbox search function, please go over **Search Mailbox on page 170**. Mailbox search is frequently used throughout UC Mobile, so it would be good idea to thoroughly understand the process.

Rename Group

When you choose to rename a group, you will be taken to the typical iPhone text entry screen. From here, simply enter the new group name that you desire then touch the **Done** button on the right top corner of the screen.

If you wish to return to the previous screen without making any changes, touch the back on top left corner of the screen.

Delete Group

Deleting a group is simple. After selecting Delete from the menu, simply confirm the choice by touching the red button or cancel by touching the black button.

Please keep in mind that deleting the group from UC Mobile will also deleted from the database, and therefore will be deleted from the PC version of UC Client Manager as well. This process cannot be undone.

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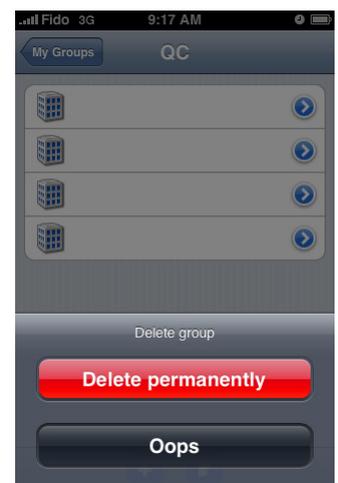
Add New Group

When you touch the New group button from the group selection screen, you will be taken to the typical iPhone text entry screen. To create a new group, simply enter the name for your new group then touch the Done button on the top right corner of the screen.

To cancel this process and return to the main group screen, simply touch the back button on the top left corner of the screen.
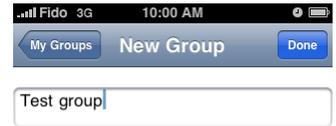
Directory

The Directory allows you to access the entire company directory, including the departments (aka Organizational Units) underneath it. Rather than having all internal contacts on one page, being able to navigate through the different departments will make searching for a contact much easier.

Touching the Mailboxes button at the left bottom corner of the screen will allow you to view all the contacts that belongs in the folder that you are currently in. For example, the root folder of the directory is likely to have a contact along with folders (departments). In this case, the folders will be shown by default and the contacts must be accessed manually by touching the Mailboxes button. The same goes for folders which contain additional folders underneath.

If you wish to find a specific contact from the directory, you may also utilize the search function by touching the Search button at the bottom of the screen. Please refer to **Search Mailbox on page 170** for the mailbox search feature.

When you move into the contact section, you will see the list as shown here. You will be able to interact with the individual contacts by simply touching them..

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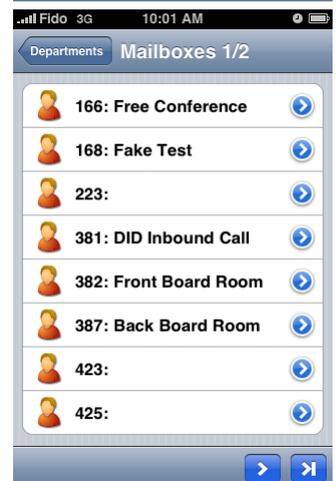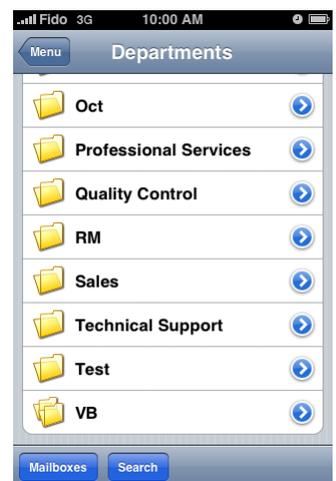
Conversation

Conversation allows you to initiate LanTalk sessions with a contact of your choice. By default, the conversation page should be empty. When you receive or send out a LanTalk message, the contact that you're conversing with will be added to the list as shown here.

In order to retrieve or send a message, simply touch the contact that you wish to converse with.

🚫 **Warning**: When you clear the chat log or exit from the UC Mobile application, your chat log will be lost.

To initiate a LanTalk session with someone who isn't on the list, simply touch the **Create new...** button then go through Search Mailbox on page 170.

When you are in the LanTalk page, you will see three buttons total. The **back** button at the top left corner of the screen, the **send** button at the top right corner of the screen, and the **SMS** button right below the text entry box.

Typing a LanTalk message is very simple. Using the iPhone's default text entry interface, type the message you wish to send then click on the **Send** button at the right top corner of the screen. If you wish to cancel the process and return to the previous screen, click on the **back** button at the top left corner of the screen.

If the contact has a valid SMS address defined, you may also send the copy of the LanTalk message to that contact's default SMS address by touching the **SMS** button at the bottom of the text entry box before sending the message. This will increase the chance of your message being noticed by the contact right away.

The maximum number of characters that you can have on a single LanTalk message is 30,000 characters. But since the purpose of LanTalk is usually for short instant messaging, it would be best to keep it to a reasonable length. LanTalk does not support certain unicode (foreign) messages.

When a message is successfully sent, you will see the time stamp and the message as shown here. Messages received work in the same fashion.

You should also keep in mind that you will automatically be taken to the conversation page when you receive a LanTalk message, assuming that you are currently inside the UC Client application and logged in. Since iPhone structure does not support background applications or push notification as of now, you will have to launch the application and be logged in to take advantage of this notification.

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Dial

UC Mobile allows you to initiate a phone call through your UC server even if you are not at your workstation. When you make a call through the UC server, the server will first call you on the defined number then start dialing out to the destination number as soon as you answer the call on the defined number, bridging the two calls together as if you are calling the person directly from the office. This means that the call's receiver will see the caller ID information of your office. Depending on where you are or who you are calling, you may also be able to avoid long distance charges on your mobile device.

You may dial an existing mailbox, entry from an address book or manually type in the number to dial. Once you select the number to dial, UC Mobile will take you to the Dialing screen.

→ **Dialing**

From the **Dialing** screen, you will be able to define exactly how the number will be dialed. Please refer to below for explanation of each choice. When you have selected all the required options, touch the **Dial** button on the top right corner of the screen to initiate the call.

☑ **Notes**: You may skip this step and directly dial after choosing a number by turning the **Always show** option **OFF**. You may re-enable this option by going into **Settings on page 168** from main screen.

Direct call: Touch the **Dial** button on this section to initiate a call directly from your device instead of going through the UC server. Please keep in mind that this option is the only option that dials the chosen number directly. You will not go through the UC server, which means that the caller ID information displayed on the recipient's phone will be your mobile device's number and not of the UC server.

Call-back number to dial from: Select the number to be used for dialing. The UC server will call you at this number when you choose to dial then bridge the call. You may select the **Other** option to manually define a number to be dialed at.

Once again, when you have completed your selection, touch the **Dial** button on top right corner of the screen to initiate the call. You will see a pop-up informing you that the call has been placed. You will be called at your selected device shortly.

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Call History

Call History keeps track of your calls that are monitored by the UC server. This means that the call history that you will see here isn't the call history of iPhone. This history is stored on the server and keeps track of all incoming calls to your mailbox and outcalls that are made through the UC server.

Since this can be a lengthy list, you can filter the call log to view only what you need. You will be able to create a filter by touching one or more of the icons at the bottom of the screen.

The incoming call button will filter out all incoming calls that were answered from the list. The missed call button will filter out all missed calls from the list. Outgoing call button will filter out all outgoing calls from the list. If you wish to remove a filter, simply touch the button again to bring back the logs.

There will be two different types of call details available to you, incoming call details and outgoing call details. Both may also be further segregated by the type of number as well, whether they are internal or external numbers. Regardless, UC Mobile will provide you with all possible information so that you can easily reference them.

Another difference will be the **Call again** and **Call back** buttons. While named differently, these two buttons will perform the same task of calling the number that you are looking at at the moment. It is important to note that the call isn't going to be directly made by your mobile device. When you touch either of buttons, a call will be placed by the UC server. The server will first call you at the number defined in your current location or other number depending on your Dial Settings (please refer to **Dial Settings on page 168** for detailed information). When you answer, the server will dial the number (contact) that you were looking at. The server will in essence bridge the call between you and the other party.

If you wish to clear your call history, there are two ways that you can approach this task. First is deleting them individually from the call details. Simply touch the Delete button at the bottom of screen then confirm to delete the entry.

The other method is to use the delete (X) button located on the top right corner of the main call history screen. When you touch this button, you will be given four choices that you see from the screenshot to the right. You may delete all history, delete only the incoming call history (which includes calls missed by you), delete only the outgoing call history, or cancel the action.

Since deleting an entry from call history is irreversible, please ensure that you no longer need the log when you decide to delete them.

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Settings

You can configure system wide settings from the Settings section. From the Settings screen, select the category that you wish to change.

Dial Settings

The Dial Settings allows you to change the device that you will be making call from. When you are dialing a contact or a specified phone number from UC Mobile, the server bridges the call between you and the destination by calling you first at the chosen number then dialing the contact afterwards.

☑ **Note**: **Using direct dialing** allows you to directly initiate a call from your device when calling external numbers.

If you wish to have the option of manually selecting the extension that the call will be connected to, ensure that the **Always show** option is set to **ON**. When this option is on, you will see the Dial Settings window every time you dial using UC Mobile. Otherwise, UC Mobile will bridge the call automatically between your current extension and the contact.

When you turn the **Use direct dialing** setting **ON**, you will be able to choose directly from your mobile device when making external calls through the Dial feature.

Selecting a call-back number from the settings window will not affect any settings. This list is simply a reference for you to see all the phone numbers registered on your personal address list. But if you are accessing this same window after choosing the option to dial, the number that you select will be used to bridge the call between you and the contact. If you wish to bridge a call to a number that isn't listed under your locations, use the **Other** option to manually enter a phone number. For accurate dialing purpose, it is always best to include as much information as you can, including the area codes.

Location services

Location services allows you to automatically change your UC location based on your physical location which is tracked by the GPS functionality within your device. For example, you can flag your office building with the location "In Office" and your home with "At Home". Whenever you enter the vicinity of either location, your UC location will automatically change to the defined settings, eliminating the hassle of manually changing your location whenever you move into a commonly visited area.

☑ **Note**: UC Mobile application must be running (active or in background mode) in order for the positioning feature to keep track of your location. The application cannot track your location when it is closed.

→ **Positioning On/Off**

You will have 3 choices when it comes to activating the Location services.

On: Select this option to keep the feature on at all times.

☑ **Note**: Positioning feature will increase your battery usage when it is on.

Periodically: Select this option to check your GPS location every 5 minutes to conserve battery usage.

Off: Select this option to turn the feature off.

Office-LinX

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→ **Definition (Edit location/New location)**

Definition is where you associate a GPS location with a UC location. You can access the Edit Location panel either by creating a new entry or by touching an existing entry from the list available at the Location services screen.

Location: Enter the name of this location Definition. This is for your reference only and has no effect on functionality.

Coordinates: This is the GPS location that the UC location will be associated with. This entry is automatically populated by your device.

Distance around: Select the required length to define the radius of the GPS location. For example, you should choose **50m** for your office or home and choose **5km** for your frequent business destinations to define the general proximity of the area.

Availability to Set: Select the **Red** dot to become unavailable when entering this location, **White** dot to use the UC location's default settings and **Green** to become available.

Location to Set: Select the UC location that this GPS location will be associated with. Whenever you enter this GPS location, your UC location will change automatically to the defined value.

Extension to Set: Select the extension to be used when entering this GPS location. You may select any extension from your personal address list.

Delete location: Touch this button to delete the current location Definition entry.
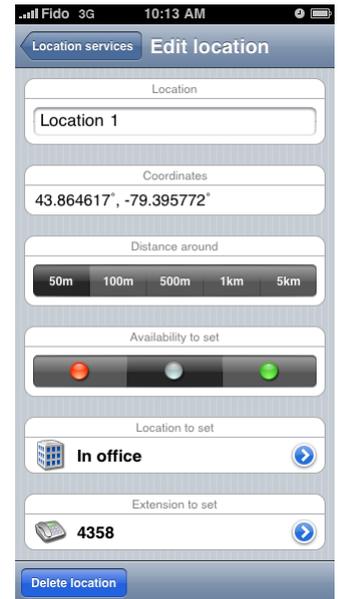
→ **Non-detected**

This setting is identical to other location Definitions but is meant to be used when there is no GPS signal present. However, you will still need an internet connection in order for the device to change your UC location settings should you go into a zone with no GPS signal.

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Search Mailbox

You will have to use the Search Mailbox function during two scenarios. One is when you are looking for a contact to converse with or to view information on, and second is when you wish to add a mailbox to one of your groups.

In either situation the search interface is exactly the same and the search method is identical as well. To begin a search, simply enter the mailbox number or the name of the contact that you wish to find from the company directory. There will always be an example of how you can search as shown here, so you won't have to worry about the variables required during the search.

After you made an entry, simply touch the Done button on the top right corner of the screen to begin the search.

When there is a matching entry to what you have entered, you will see the result as shown here. You will be able to see the details of the contact and also initiate a conversation with the contact in question through LanTalk by touching the button at the bottom of the screen.

☑ **Note**: If you searched for a contact to add to a group, the contact will be added automatically when it is found. If there are multiple results for the search (e.g. there are 2 Bobs in the company and you searched for first name Bob only), you will be given the full results and will be asked to select one of them.

If you reside on a system with high number of users the search mailbox function will be a vital part of your communication process. It is recommended that you get accustomed to the feature so that you can optimize the way in which you communicate with your contacts.

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UC Mobile Installation

Overview

You will be able to install the UC Client software via 2 ways. First is by downloading the application from iTunes and synchronizing it to your iPhone. The second is to directly download the application from the App Store on your iPhone.

This guide will cover the latter method which is more faster & convenient.

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Step-by-Step Instruction

1. From the App Store, touch the Search tab at the bottom of the screen. Search for the text string "**UC Client**" and you will see the result to your right. Touch the search result to move onto the installation page.

2. To begin the installation, touch the **FREE** button at the top portion of the page.

3. The button will change into a green **INSTALL** button. Touch the button again.

4. You will be asked to provide your iTunes account password. Enter your credentials then touch OK to proceed.

    ☑ **Note**: The UC Client application for iPhone is **free** of charge for all users. But even if the application is free, you will still need a valid iTunes account for App Store authentication purpose.
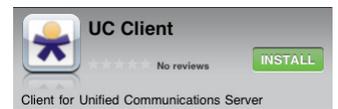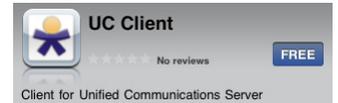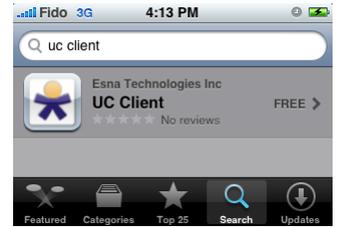
5. The application will start to download itself to your iPhone.

6. When the installation is complete, the icon will turn into a brighter color. You can touch the icon at any time to launch the UC Mobile application for iPhone.

8
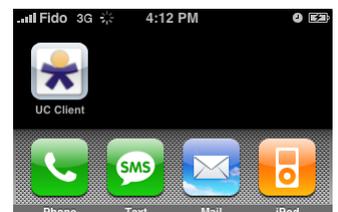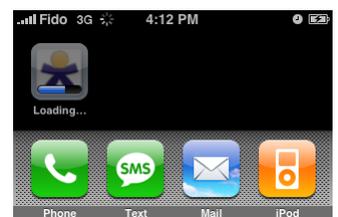
UC Mobile Upgrade

Overview

UC Client software upgrade may also be accomplished via 2 methods. First is by updating the application from iTunes and synchronizing it to your iPhone. The second is to directly upgrade the application from the App Store on your iPhone.

This guide will cover the latter method which is more faster & convenient.

Step-by-Step Instruction

1. When you launch the App Store application you will be automatically notified of any updates that are available for your applications. When you see that the UC Client is on the list, simply touch the entry to go into the details then touch the **FREE** button at the top portion of the page to begin.

2. The button will change into a green **INSTALL** button. Touch the button again.

3. You may be asked to provide your iTunes account password. If so, enter your credentials then touch OK to proceed.

☑ **Note**: The UC Client upgrade for iPhone is **free** of charge for all users. But even if the application is free, you will still need a valid iTunes account for App Store authentication purpose.

4. The application will start to download itself to your iPhone and start the automatic upgrade process.

5. When the upgrade is complete, the icon will turn bright again. You can touch the icon at any time to launch the UC Mobile application for iPhone.

8
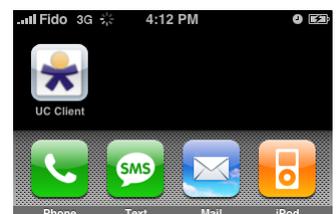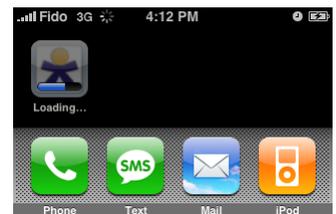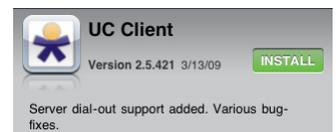
UC Mobile Uninstall

Overview

UC Client software uninstallation may also be accomplished via 2 methods. First is by removing the application from iTunes then synchronizing your iPhone. The second is to directly uninstall the application from your iPhone.

This guide will cover the latter method which is more faster & convenient.

Step-by-Step Instruction

1. To uninstall the application touch and hold onto the UC Mobile icon on the iPhone until the icons start to jiggle. When they do, you will see an **X** icon appear on top of the application icon. Touch the **X** icon to start the uninstall process.

2. A confirmation window will appear. Touch **Delete** to confirm.

3. UC Client is now removed from your iPhone.
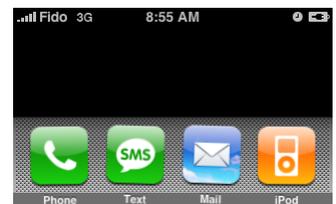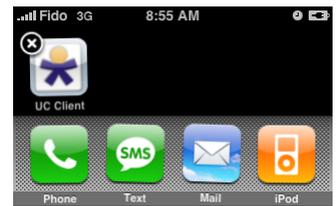
9 UC Mobile - Blackberry

Chapter Summary

9

UC Mobile - Blackberry

Introduction

UC Mobile is now available for most versions of BlackBerries that are used by both business and personal sectors throughout the world. This application allows the user to access UC Client Manager features, which are typically accessed from the user's desktop, right on palm of their hands via their BlackBerry device. Telephone calls, e-mail, location, availability can now all be effortlessly managed at virtually any location.

UC Mobile

Menu
- Location
- Workgroups
- Directory
- Call History
- Conversations
- Dial...
- Logout
- Background

Requirements

UC Mobile for BlackBerry is compatible with most BlackBerry models, including the Blackberry Strom which utilizes a touch screen interface. However, this document uses BlackBerry Bold (9000) as a showcase model and also uses BlackBerry Desktop Manager 4.7 to manage the software. The user experience may differ depending on the hardware & software used, but the main concept and behavior of the UC Mobile application should remain similar throughout the different versions of BlackBerry OS.

☑ **Note**: UC Mobile for Blackberry can also be installed through the App World.

Requirements	Details
License	---
Software	Office-LinX version 8.0 or higher Blackberry OS 4.5 or higher

Office-LinX

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Using UC Mobile

Logging In

When you launch the application, you will first see the log in screen. Fill out the necessary information explained below:

UC Mobile

Company number: 1
Mailbox: 8888
Password: ******
☑ Save password

Server: user.server.com
Port: 13777
☐ Use MDS

Mobile Data Service™ (MDS) is a way to perform network communication between your

- ◆ **Company number**: This field determines the company that you'll be connecting to (1 by default). You should leave this value as a default unless you know that you specifically belong to another company in your organization.
- ◆ **Mailbox**: Enter your mailbox number.
- ◆ **Password**: Enter your mailbox password.
- ◆ **Save password**: Enable this check box to save the password for future sessions.
- ◆ **Server**: Enter the domain name or the IP address of your UC Client Manager server. If you do not know this information, please consult your administrator.
- ◆ **Port**: Enter the port that will be used to connect to UC Client Manager server. While the default value is 13777, this number may differ depending in your organization's settings.
- ◆ **Use Mobile Data Service**: Enable this check box if your organization has a BES (BlackBerry Enterprise Server). The data traffic used my UC Mobile will first be directed through the BES on the way to its destination. This option may be the cause or solution to connection problems that you have depending on the phone & organization's settings.
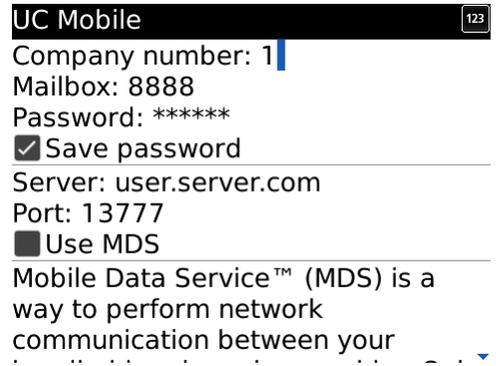
When all the necessary information are filled out, click on the menu button to bring up the menu, then select **Login** to connect to the UC Client Manager server.

UC Mobile

Company number: 1
Login
More options
Language
Show log
About...
Select
Clear Field
Show Symbols
Close

☑ **Note**: You may also utilize the **More options** section to customize your UC Mobile experience. Refer to the below section for more information.
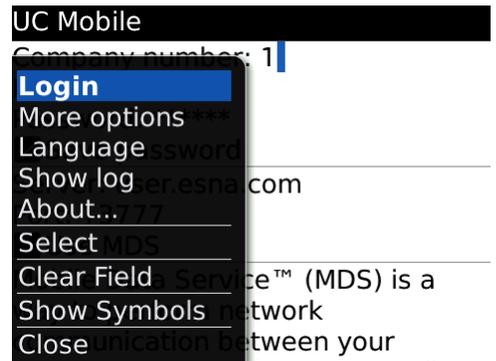
More Options

List size: Enter the maximum length that a single list may be.

LanTalk popup: Enable this check box to automatically open incoming LanTalk messages.

Auto-login: Enable this check box to automatically login whenever you launch the UC Mobile application.

Reconnect if dropped: Enable this check box to automatically reconnect to the server when a connection is lost.

Vibration alert (Background): Enable this check box to use vibration as an alert when UC Mobile is running on the background.

Vibration alert (In-holster): Enable this check box to use vibration as an alert when Blackberry device is in a holster.

Upload recent calls: Enable this check box to upload your Blackberry call history to your UC server mailbox.

Upload phone number: Enter the phone number in which the above history will be associated with when uploaded.
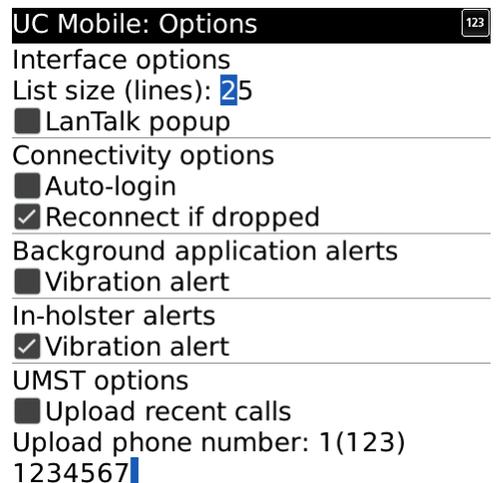
UC Mobile: Options

Interface options
List size (lines): 25
☐ LanTalk popup
Connectivity options
☐ Auto-login
☑ Reconnect if dropped
Background application alerts
☐ Vibration alert
In-holster alerts
☑ Vibration alert
UMST options
☐ Upload recent calls
Upload phone number: 1(123) 1234567

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Main Menu

From the main menu, you will be able to easily access each component of the UC Mobile application. To navigate, simply select an entry you wish to expand. Please refer to the below list to learn about the specifics of each section in UC Mobile application.

Locations Management on page 178

Workgroups on page 180

Directory on page 181

Call History on page 183

Conversations (LanTalk) on page 182

Dialing on page 184

Background on page 184

UC Mobile
Menu
🏢 Location
👥 Workgroups
👤 Directory
🔄 Call History
💬 Conversations
📞 Dial...
📇 Logout
🖥 Background

Locations Management

To change your location, availability, or extension, simply select the location option from the main menu. Once you're inside the locations page, you can change your location, availability, extension and also define how long your newly chosen setting will be in effect for. Please refer to the individual sections listed below for detailed information.

Locations on page 178

Availability on page 179

Extensions on page 179

Schedule on page 179

UC Mobile
Location
🏢 In office
🟢 Available
📖 8888
🔒 Until I change

☑ **Note**: When you choose a new location, both your **availability** and **extension** will change to the location's default value. You may change these settings afterward for customization.

Locations

You will be able to see your entire list of locations here, including any custom locations that you may have created. To change your current location simply select the desired location. If you wish to keep your current location as is, use the return button to return to the previous menu.

UC Mobile
Set location
🏢 In office
☕ At lunch
🏠 At home
💼 Meeting
✈ Away on business
🌴 Vacation
🌎 Extended absence
⏰ Temporary location

Office-LinX

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Availability

From the menu, select either **Available** or **Unavailable** to change your availability. If you wish to keep your current availability as is, simply use the return button to return to previous menu.

UC Mobile
Availability
● Available
● Unavailable

Extensions

You will be able to select your default extension from this section. The numbers available here will be the numbers that are directly associated with the location that is currently in use.

When someone is trying to find you through the auto-attendant, this is the number that you will be reached at first by default. This will also be the number that can be used for dialing out.

UC Mobile
Extension
8888
1(111)2222222

Schedule

Schedule allows you to determine how long your newly chosen location is going to last for. Please select one of the following options to append your changes.

Follow calendar: Your newly chosen location will revert back to the entry defined in the locations calendar right away.

Until next scheduled: Your location will change whenever the next event in the locations calendar occurs.

Until I change: Your newly chosen location will remain as your location until you manually change it again.

For next X minutes/hours: Your newly chosen location will revert back to the entry defined in the locations calendar after the selected time has elapsed.

Till tomorrow: Your newly chosen location will revert back to the entry defined in the locations calendar on the next day.

UC Mobile
Schedule
Follow calendar
Until the next scheduled
Until I change
For next 5 minutes
For next 10 minutes
For next 15 minutes
For next 30 minutes
For next hour
For next 2 hours

Office-LinX

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Workgroups

Workgroup is a convenient tool for managing internal contacts. In a large organization, trying to find someone from the entire directory may be difficult and time consuming. Creating your own groups allows you to organize and manage your desired contacts so that you can easily check their status and initiate conversation on demand.

Since these groups are stored on the UC Client server, you will be able to access it through the PC version of UC Client Manager along side your mobile device. You can manage the groups at either application and the changes will be reflected on both clients since they share a single database.

Please refer to the sections below to learn more about interaction within the Workgroups section.

View Contacts on page 180

Modify Workgroup on page 181

Delete Group on page 181
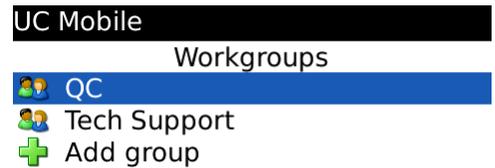
View Contacts

When you select a workgroup, you will be able to see the entire list of contacts that belong to the chosen group. At a glance, you will be able to view the contact's mailbox number, their full name and their status.

To manage your group (add contacts, renamge group, etc.), please refer to **Modify Workgroup on page 181**.

To interact with a contact, simply select the desired entry and you'll see a detailed status of the user.

From this section, you can:

Select **Delete contact** to remove this contact from this Workgroup.

Select **Switch notifications** to choose which actions from this contact will send you a notification.

Select **Do LanTalk** to initiate a LanTalk conversation with this contact (**Conversations (LanTalk) on page 182**).

Select **Dial** to call this contact (**Dialing on page 184**).

Office-LinX

UC Mobile
Workgroups
- QC
- Tech Support
- Add group

UC Mobile
QC
- Modify group
- 3333: Matthew

UC Mobile
3333
- Matthew
- In Office
- Available, Logged in
- Off the Phone
- Allows Lantalk

Available actions:
- Delete contact
- Switch notifications
- Do LanTalk
- Dial

9
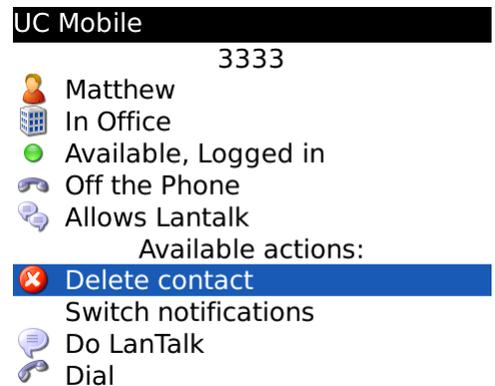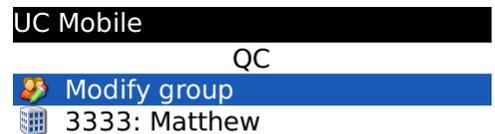
Modify Workgroup

When you choose to modify a group, you will be able to **Add contact** to the current group, **rename** the current workgroup or **delete** the current group. Simply select an action you wish to perform or click on the back button to return to previous screen.

UC Mobile
QC
👤 Add contact
👥 Rename group
👥 Delete group
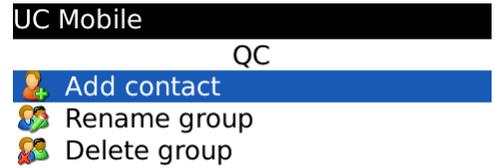
→ **Delete Group**

Deleting a group is simple. After selecting delete, simply confirm the choice by choosing **Yes**.

Please keep in mind that deleting the group from UC Mobile will also delete it from the database, and therefore will be deleted from the PC version of UC Client Manager as well. This process cannot be undone.

UC Mobile
QC
👥 Modify group
⚠ Are you sure?
Yes
No
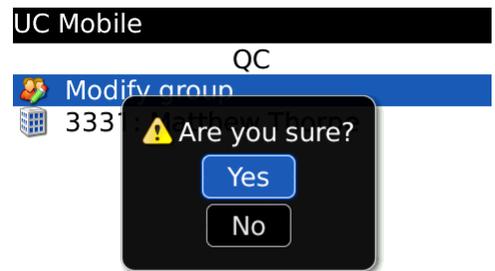
Directory

Directory allows you to access the entire company directory, including the departments (aka Organizational Units) underneath it. Rather than having all internal contacts on one page, being able to navigate through the different departments will make searching for a contact much easier.

When you select the **Mailboxes** option, it will allow you to view all the contacts that belongs in the folder that you are currently in. For example, the root folder of the directory is likely to have a contact along with folders (departments). In this case, the folders will be shown by default and the contacts must be accessed manually by selecting the **Mailboxes** option. The same goes for folders which contain additional folders underneath.

UC Mobile
8.0
🔍 Search
👥 Mailboxes
📁 Accounting
📁 CSR
📁 Engineering
📁 Guest
📁 Management
📁 Original Mailboxes
📁 Quality Control

The behaviour of contacts that are viewed through Directory is identical to viewing a contact through Workgroup which was explained previously().

UC Mobile
Quality Control
🔄 Refresh
📇 3333: Matthew
📇 8888: Sebastian

Office-LinX

9

Conversations (LanTalk)

LanTalk allows you to initiate a conversation with a contact of your choice. By default, the conversation page should be empty. When you receive or send out a LanTalk message, the contact that you're conversing with will be added to the list as shown here.

In order to retrieve or send a message, simply select the contact that you wish to converse with.

🚫 **Warning**: When you clear the chat log or exit from the UC Mobile application, your chat log may be lost.

To initiate a LanTalk session with someone who isn't on the list, simply select the **New conversation** option then select the contact/mailbox to converse with.

UC Mobile
Conversations
✚ New conversation
▦ 3333: Matthew

When you are in the LanTalk conversation page, you will be able to type in the message on the text field provided.

Typing a LanTalk message is very simple. Using the keyboard, type the message you wish to send then click on the **Send** button on the right side the screen. If you wish to cancel the process and return to the previous screen, click on the **back** button.

The maximum number of characters that you can have on a single LanTalk message is 30,000 characters. But since the purpose of LanTalk is usually for short instant messaging, it would be best to keep it to a reasonable length. LanTalk does not support certain unicode (foreign) messages.

UC Mobile
3333: Matthew
Text to send : ǀ   [Send]
Me>
Lantalk Message

When you receive a LanTalk message, you will receive a notification on your device, either through vibration or blinking message light. When you open the Conversations section, you will be able to see that a new message is available for the contact through the message icon. As long as UC Mobile is running (either as a main application or on background as shown in **Background on page 184**), you will be notified of any incoming LanTalk message.

✉UC Mobile
Conversations
✚ New conversation
▦ 3333: Matthew

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Call History

Call History keeps track of your calls that are monitored by the UC server. This means that the call history that you will see here isn't the call history of your mobile device. This history is stored on the server and keeps track of all incoming calls to your mailbox and outcalls that are made through the UC server with the same mailbox. However, if you chose to upload your device's call history from **More Options on page 177** during login, those uploaded entry will also be shown here.

Since this can be a lengthy list, you can filter the call log to view only what you need through the filters accessible from the **Options** menu. **Show outgoing calls** filter will filter out all outgoing calls from the list. **Show answered calls** filter will filter out all incoming calls that were answered from the list. The **Show missed calls** filter will filter out all missed calls from the list.

You may also clear your call history from here. **Clear incoming calls** will delete all incoming call history. **Clear outgoing calls** will delete all outgoing call history. **Clear history** will delete all call history.

In the **Call History** details, there will be two different types of call details available to you. Incoming call details and outgoing call details. Both may also be further segregated by the type of number as well, whether they are internal or external numbers. Regardless, UC Mobile will provide you with all possible information so that you can easily reference them.

While viewing the call detail, you will have the option of calling the number that you're currently viewing by selecting the **Dial** option. For detailed information regarding the **Dial** feature, refer to **Dialing on page 184**. You may also individually delete call history entries by selecting the **Delete** option from here.

UC Mobile

Call History
- ⚙ Options
- 📞 0216 14:02, 0s, (000)8888888
- 📞 0211 13:02, 18s, (000)8888888
- 📞 0211 09:02, 13s, (000)8888888
- 📞 0211 09:02, 34s, 7777
- 📞 0210 13:02, 22s, (000)8888888
- 📞 0210 13:02, 25s, (000)8888888
- 📞 0209 11:02, Missed
- 📞 0208 14:02, 31s,

✉UC Mobile

Call History
Filter
- ✅ Show outgoing calls
- ✅ Show answered calls
- ✅ Show missed calls

Available actions:
- ❌ Clear incoming calls
- ❌ Clear outgoing calls
- ❌ Clear history

UC Mobile

Call History
- 📒 8888888888
- 📞 Outgoing
- ⏰ 02\16\2010 14:32:40

Available actions:
- 📞 Dial
- ❌ Delete

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Dialing

UC Mobile allows you to initiate a phone call through your UC server even if you are not at your workstation. When you make a call through the UC server, the server will first call you on the defined number then start dialing out to the destination number as soon as you answer the call on the defined number, bridging the two calls together as if you are calling the person directly from the office. This means that the call's receiver will see the caller ID information of your office. Depending on where you are or who you are calling, you may also be able to avoid long distance charges on your mobile device.

You may dial an existing mailbox or manually type in the number to dial. Once you select the number to dial, select the **Dial** button. You will be asked to select one of the following options.

Use registered extension: This option will call you on the extension that is currently associated with your current location.

Call back to this device: This option will call you on the mobile device that you're currently using.

Direct Call: This option will initiate a call directly through the mobile device that you're using. Please keep in mind that this option is the only option that dials the chosen number directly. You will not go through the UC server, which means that the caller ID information displayed on the recipient's phone will be your mobile device's number and not of the UC server.

Specify: This option will call you on the number defined under **Call-back number**.

When you have completed your selection, select the **Dial** button to initiate the call.
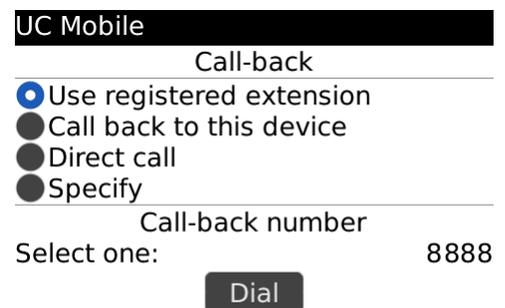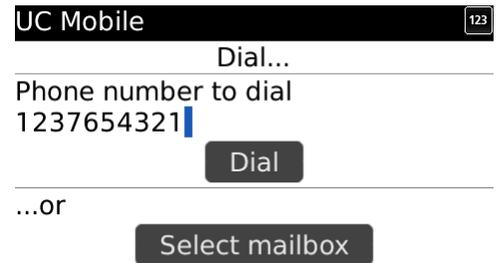
Background

The Background action will minimize the UC Mobile application and return you to the BlackBerry OS. Depending on the version of BlackBerry OS you're running, you will be able to return to the application by simply running it again or by selecting it from the list of active applications.

☒   **Hint**: Clicking on the hangup button will accomplish the same result as the background action.

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UC Mobile Installation

Overview

The UC Mobile application can downloaded right on the device through the Blackberry App World.

Step-by-Step Instruction

1. Open the **Blackberry App World** application from your device then search for **UC Client** as shown here then select the **UC Client by Esna Technologies** entry..

2. Choose to **install** the application.

3. The application will be downloaded and installed to your device.

4. Once the installation is complete, you will be asked to restart the device.

5. Once the reboot process has completed, UC Mobile application will be available from your list of applications.

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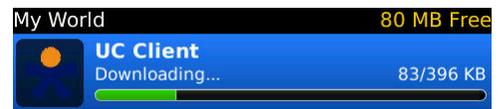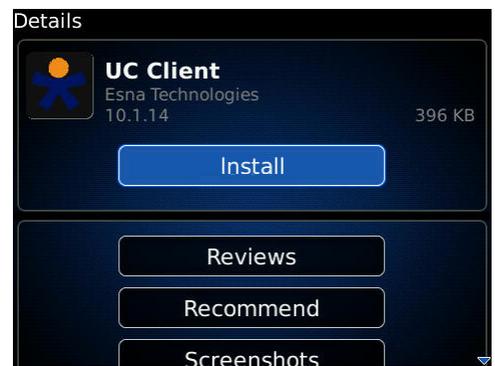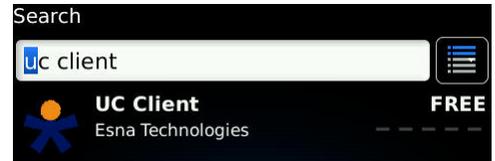
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10 UC Mobile - Java-enabled Phone

Chapter Summary

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UC Mobile - Java-enabled Phone

Introduction

☑ **Note**: Java version of UC Mobile can be downloaded from http://esnatech.com/software/ucmobile.htm

UC Mobile, now compatible with any Java-enabled phone, allows the user to readily integrate the UC Client Manager installed on the user's desktop with the UC Client Manager installed on the user's Java-enabled phone. Telephone calls, email, location, availability - all effortlessly synchronised.

1. The initial screen will appear as follows:
2. Click on the middle selection key (**Select**). The Settings screen appears.

Settings

Settings > Account Setup

The Account Setup option requires some very basic information at the user's account level.

1. Highlight **My settings** and click on either of the left hand or middle selection keys (**Select**). The following screen appears:

☑ **Note:** The preceding screen may also be seen in a separate situation with **Login** immediately above **Account setup**. Selecting **Login** will of course initiate log in to UC Mobile on your Java-enabled phone.

2. Highlight **Account setup** and click on the middle selection key (**Select**).

☑ **Note: Settings > Log** see page 191. **Settings > Select** is as per below.

3. The Account setup screen is as follows:
4. Complete the following:
   ◆ The **Company number** field is filled automatically.
   ◆ In the **Mailbox** field, enter your UC Client Manager mailbox number.
   ◆ In the **Password** field, enter your UC Client Manager mailbox password.
   ◆ Select the **Save password** check box to allow UC Mobile to remember your password, eliminating the need to enter your password every time UC Mobile is used.
   ◆ Select the **Auto-login** check box to automatically log in when UC Mobile is started on your Java-enabled phone.
   ◆ Select the **Auto-reconnect** check box to automatically seek to reestablish a connection to UC Mobile if inadvertently lost.
   ◆ In the **Phone number** text field, enter any telephone number by which you wish to be contacted. In practice, this is usually a cell phone number.
   ◆ Click on the left hand selection key (**Save**) to keep your changes., the middle selection key (**Edit**) to revise them, or the right hand selection key (**Cancel**) to return to your original values.

Settings > Network Setup

Network setup too requires some very basic information, this time at the network level.

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1. Highlight **My settings** and click on either of the left hand or middle selection keys (**Select**). The following screen appears:

☑ **Note:** The preceding screen may also be seen in a separate situation with **Login** immediately above **Account setup**. Selecting **Login** will of course initiate log in to UC Mobile on your Java-enabled phone.

2. Highlight **Network setup** and click on the middle selection key (**Select**).

3. The Network setup screen is as follows:

4. In the **Server** text field, enter your server's IP address.

5. In the **Port** text field, enter the port number. '**13777**' is the default value and should be kept.

6. Select the **Send heartbeats** check box to ensure that your connection is maintained.

7. Select the **Use additional connection** check box to ensure that a GPRS (General Packet Radio Service) connection is established.

☑ **Note:** The above field is for devices which cannot readily handle GPRS autodial, notably GSM & IS-136 mobile phones. Select this option only if the regular connection fails to work properly.
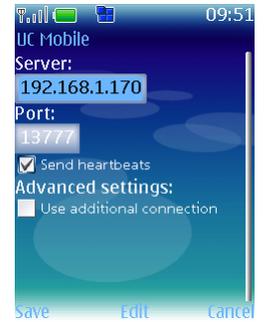
8. Click on the left hand selection key (**Save**) to keep your changes., the middle selection key (**Edit**) to revise them, or the right hand selection key (**Cancel**) to return to your original values.

Settings > UI Setup

The UI Setup option allows the user to manage settings on a more intimate level than Account or Network, giving control over Lan Talk popups, vibrating alert, sound alert, and screen display.

1. Highlight **UI setup** and click on either of the left hand or middle selection keys (**Select**). The following screen appears:

☑ **Note:** The preceding screen may also be seen in a separate situation with **Login** immediately above **Account setup**. Selecting **Login** will of course initiate log in to UC Mobile on your Java-enabled phone.

2. Highlight **UI setup** and click on the middle selection key (**Select**).

3. The UI setup screen is as follows:

4. In the **Items to fetch** field, enter an integer value for the number of entries to show. The default value of '**25**' is a suggested starting point.

5. Select the **LanTalk popup** check box to enable a screen popup on your Java-enabled phone when receiving a Lan Talk message.

6. Select the **Vibro alert** check box to enable your Java-enabled phone to vibrate when issuing an alert.

7. Manipulate the **Sound alert volume** scale to determine the loudness of any alerts issued by your Java-enabled phone.

8. Click on the left hand selection key (**Save**) to keep your changes., the middle selection key (**Edit**) to revise them, or the right hand selection key (**Cancel**) to return to your original values.

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Login

1. With setup complete, return to the Settings screen:

2. Highlight **Login** and click on the selection key. UC Mobile logs in. The following screen appears:

3. Click on the left hand selection key (**Options**).

4. The following screen appears:

5. Highlight **Select** by scrolling (manipulating the edges of the middle selection key). Click on the selection key:

☒ **Hints:** If the user has selected him/herself (see **page 190**), the Current Location screen appears, stating current location and availability.

6. Displayed is the user's - *not one of his or her contact's* - location and availability:

7. Select **Change loc...** by clicking on the selection key. The following screen appears:

8. Using the scroll keys, highlight **Use Calendar** to employ your UC Client Manager calendar. Highlight **Override my location** and click on the middle selection key. The following screen appears:

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9. Use the scroll keys to select the desired location. Clicking on the selection key calls up the Availability screen:

10. Select **Available** or **Unavailable** using the scroll keys, then click on the selection key. The Location phone screen appears:

11. Select the desired mailbox or phone number using the scroll keys and click on the selection key. The Location options screen appears:

12. Select the **Options > Override availability filter** check box to override availability filters set in your UC Client Manager.

13. Under **Validity**, select the **Until I change (my location)**, **Until the next scheduled (event)** or **Till (a time)** radio button to determine how long your UC Client Manager filters are to be overruled.

14. Select **Options** by clicking on the left hand selection key. Highlight **Back** to return to the previous screen, or highlight **Accept** to keep your changes. Click on the selection key:

15. These changes are reflected in the LanTalk screen:
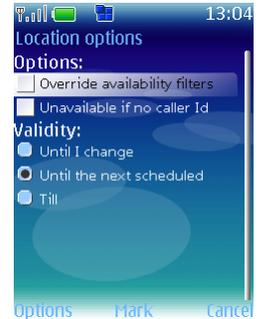
Add contact

Use this feature to add contacts from your UC Client Manager Company Directory directly to your Java-enabled phone. This will allow the user to more easily reach those individuals with whom he or she deals with on a frequent basis.

1. From the LanTalk screen, click on the left hand selection key (**Options**). The following screen appears:

2. Scroll to **Add Contact** and click on the selection key (**Select**). The following screen appears:

3. Complete the following fields:

    ◆ Scroll to **Mailbox** and click on the selection key (**Edit**). A **Mailbox** field appears. Enter the new contact's mailbox number. Click on the selection key (**OK**).

    ◆ Scroll to **First name** and click on the selection key (**Edit**). A **First name** field appears. Enter the new contact's given name. Click on the selection key (**OK**).

    ◆ Scroll to **Last name** and click on the selection key (**Edit**). A **Last name** field appears. Enter the new contact's family name. Click on the selection key (**OK**).

4. Click on the left hand selection key (**Search**). The LanTalk screen appears, with the new contact included.

Show log

Show log allows the UC Mobile user to view the details of his or her recent call history on their Java-enabled phone.

1. From the LanTalk screen, click on the left hand selection key (**Options**). The following screen appears:

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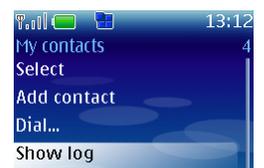
2. Scroll to **Show log** and click on the selection key (**Select**). The UC Mobile screen appears, detailing the logs:

- Click on the left hand selection key (**Clear**) to clear the logs.
- Click on the middle selection key (**Refresh**) to refresh the logs.
- Click on the right hand selection key (**Hide**) to hide the logs and return to the previous screen plus one (LanTalk > Contacts).

Login > Options > Contacts

☑ **Note:** If the user has selected a genuine contact as opposed to him- or herself (see **page 190**), the following screen appears, providing a list of available options. Note that these options apply to the highlighted contact only; applying these options to a different contact will require the user returning to the Contacts screen and highlighting another contact.

Details (see screenshot on page 192)

This option permits the user to view a number of details relating to one of his or her contacts, such as mailbox number, name, location, availability, and if they are configured for Lan Talk, LAP or SMS.

1. Highlight **Details**. Click on the left hand selection key (**Options**). The following screen appears:

- Highlighting **Select** and clicking on the selection key returns the user to the previous screen.
- Highlighting **Go** and clicking on the selection key calls up the following screen:

☑ **Note:** Highlighting **Details** and clicking on the selection key (**Select**) will immediately call up the screen above.

2. Clicking on the right hand selection key (**Hide**) will call up the screen on **page 192**.
3. Clicking on the left hand selection key (**Cancel**) will call up the screen on **page 192**.

Conversation (see screenshot on page 192)

The Conversation option allows the user to initiate a Lan Talk session.

1. Highlight **Conversation** and click on the selection key.

Place a Call (see screenshot on page 192)

This option allows the user to initiate a telephone call.

1. Highlight **Place a call** and click on the selection key.

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Notification Request (see screenshot on page 192)

This option permits the user to check simply if a particular contact is on a phone call or not.

1. Highlight **Notification Request** and click on the selection key (**Select**). The following screen appears:

2. If your contact is off the phone, a screen pop up will appear, as above.

3. Click on the left hand selection key (**Options**). The following screen appears:

    ◆ Highlighting **Select** and clicking on the selection key takes the user two screens back.

    ◆ Highlighting **Go** and clicking on the selection key returns the user to the previous screenshot, as in Step 1.

Delete Contact (see screenshot on page 192)

The Delete Contact option allows the user to remove a contact from the contact list on his or her Java-enabled phone. Note that the contact will remain in the UC Client Manager Company Directory.

1. Highlight a contact to be deleted on the Contacts screen.

2. Click on the selection key (**Select**). The following screen appears:

3. Click on the selection key (**Select**). You are returned to the Contacts screen. The highlighted contact has been deleted.

    Alternately,

1. Click on the left hand selection key (**Options**). The following screen appears:

    ◆ **Select** returns the user to the screen in Step 2 above.

    ◆ **Go** deletes the highlighted contact and returns the user to the Contacts screen.
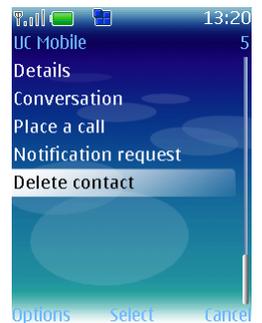
Navigating My contacts/My calls/Directory/Settings/Logout

UC Mobile for your Java-enabled phone allows the user to review and manage many apsects of the software; ideally, to render UC Mobile a more efficient and convenient tool. To access the options above:

◆ Turn on your Java-enabled phone.

◆ Log in to UC Mobile. The Contacts screen appears.

◆ Click on the left hand selection key (**Back**).

    The following screen appears:

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My contacts (see screenshot on page 193)

Use this feature to add contacts from your UC Client Manager Company Directory directly to your Java-enabled phone. This will allow the user to more easily reach those individuals with whom he or she deals with on a frequent basis.

1. Highlight **My Contacts** and click on either of the left hand selection or middle selection keys (both **Select**). The following screen appears:

2. Refer to **page 191** for detailed instruction on adding a contact.

My calls (see screenshot on page 193)

The My calls options allows the user to review and manage his or her call history.

1. Highlight **My Calls** and click on either of the left hand selection or middle selection keys (both **Select**). The following screen appears:

2. Highlight a number or name and:

   ♦ Click the left hand selection key (**Options**). The following screen appears:
   ♦ Highlight **Select** and click on the selection key (**Select**) to return to the previous screen.

   ♦ Highlight **Show details** and click on the selection key (**Select**) to call up the following screen:
   ♦ Highlight **Delete item** and click on the selection key (**Select**) to remove one entry from the call history.
   ♦ Highlight **Clear history** and click on the selection key (**Select**) to delete the entire call history.
   ♦ Highlight **Next page** and click on the selection key (**Select**) to view the next call history page.
   ♦ Highlight **Last page** and click on the selection key (**Select**) to view the last call history page.
   ♦ Highlight **Answered** and click on the selection key (**Select**) to view all answered calls.
   ♦ Highlight **Missed** and click on the selection key (**Select**) to view all missed calls.
   ♦ Highlight **Outgoing** and click on the selection key (**Select**) to view all outgoing calls.

   Alternately,

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- Click the middle selection key to call up the following screen (as above):
- Clicking on the middle selection key (**Place a call**) or the right hand selection key (**Back**) returns the user to the previous screen.

  Alternately,
- Click on the right hand selection key (**Back**) to return to the previous screen.

Directory (see screenshot on page 193)

This options allows the user to add groups of contacts (Organizational Units) from the Client Manager Company Directory to your Java-enabled phone en masse.

1. Highlight **Directory** and click on either of the left hand selection or middle selection keys (both **Select**). The following screen appears, containing a list of your UC Client Manager Directory values:
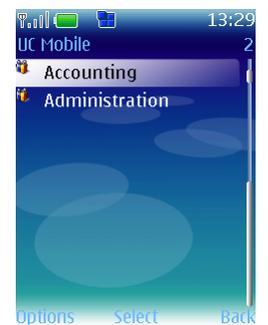
2. Clicking on the left hand selection key (**Options**) calls up the following screen:

   - Highlight **Select** and click on the selection key to call up the members belonging to a previously highlighted **UC Client Manager > Directory > Organizational Unit**.

   - Highlight **Select** and click on the selection key to call up a screen which will solicit the user for the **Group name** and **Group number** of the group to be added:
   - Highlight **Contact** and click on the selection key to call up your **UC Client Manager > Directory > Contacts** entries.
   - Click on the left hand selection key (**Options**). Refer to Details on **page 192**.
   - Click on the middle selection key (**Select**) to call up a screen which will solicit the user for the **Group name** and **Group number** of the group to be added.
   - Click on the right hand selection key (**Back**) to return to the screen on **page 193.**

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Settings

Please refer to this section on **page 188.**

Logout (see screenshot on page 193)

The Logout option allows the user to leave UC mobile, while maintaining operation of the Java-enabled phone.

1. From your Contacts screen, click on the right hand selection key (**Back**). The following screen appears:

2. Highlight **Logout** and click on either of the left hand or middle selection keys (**Select**). The following screen appears:

3. Click on the right hand selection key (**Close**). UC Mobile logs out.

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11 UC Mobile - Pocket PC

Chapter Summary

11

UC Mobile - Pocket PC

Introduction

UC Mobile, now compatible with any Pocket PC, allows the user to readily integrate the UC Client Manager installed on the user's desktop with the UC Client Manager installed on the user's Pocket PC. Telephone calls, email, location, availability - all effortlessly synchronised.

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Installing UC Mobile (Pocket PC)

☑   **Note**: UC Mobile for Windows Mobile is available as a free download at Microsoft Windows Mobile App Store.

Make sure to locate the proper installation file (for the device you are using) on your PC before proceeding with the UC Mobile installation. For example, if you are using a Dell Pocket PC, the processor is an ARM type. Therefore, the file you must use is UCMobile.ARM.CAB.

If you do not have the proper installation file on your PC, rightclick on your **Link** icon and select **WebClient Home...** . Underneath **Getting Started?** on the Web Client screen, click on **UC Mobile**. Click on the appropriate file and download as per normal.

You are now ready to install UC Mobile to your device.

1. If your device is not in its cradle, place it there now.

2. On your PC, navigate to **Start > All Programs > Microsoft ActiveSync** to establish a connection between your PC and your mobile device. The following screen indicates a successful connection:

3. Click on the Microsoft ActiveSync **Explore** icon. Double click on the mobile device icon to open it. Copy the appropriate CAB file and paste it into your mobile device.

4. Locate the UC Mobile CAB installation file on your mobile device. Using your device's stylus, tap **Start > Programs > File Explorer** and then tap on the CAB file. The following installation screen appears:
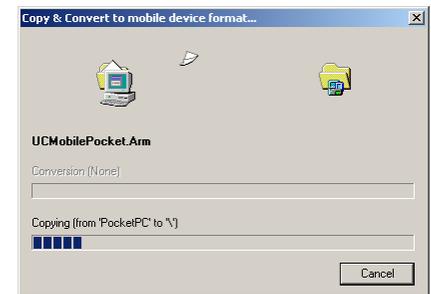
5. On your Pocket PC, tap on **Start**. The following menu appears:

6. Tap on **Programs**. The following screen appears:

7. Tap on the **File Explorer** icon. The following screen appears:

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8. Tap on **Up** (Soft Key 1). The following screen appears:

9. Tap on **UCMobilePock...** . The following screen appears:

10. The Start screen appears:

11. Tap **OK**. The File Explorer screen appears:

12. Close the window by tapping on the **X** in the top right hand corner. Refresh the display. The Programs screen now displays the newly upgraded UC Mobile icon:

Congratulations! You have successfully installed UC Mobile onto your Pocket PC!

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The Pocket PC Keypad

The keypad is integral to the use of UC Mobile on the Windows Pocket PC. Understanding its capabilities is required to make the utmost use of UC Mobile and its features. Note that the keys explained below are specific to a particular Windows Pocket PC. Keys found on the user's Pocket PC may well vary.

→ **Explaining the Windows Smartphone keypad:**

1. The following screen illustrates the various keys:
2. From top to bottom and left to right, the key functions are as follows:

   - Soft Key 1 [image] operates on screen options immediately above it.

   - Soft Key 2 [image] operates on screen options immediately above it.

   - App Launch 1 [image] calls up a list of functions available on the Pocket PC.

   - App Launch 2 [image] will turn the Pocket PC screen from its vertical axis to its horizontal; clicking on this button again will reverse the action.

   - Scroll keys [image] up, down, left, right.

   - Enter [image] functions as a left mouse button, equivalent to the device stylus.

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Using UC Mobile

UC Mobile, now compatible with any Windows Pocket PC, allows the user to readily integrate the UC Client Manager installed on the user's desktop with the UC Client Manager installed on the user's Pocket PC. Telephone calls, email, location, availability - all effortlessly synchronized.

1.   On powering up your Pocket PC, the following screen will appear:

2.   Tap on **Start**. The following screen appears:

☑   **Note:** Clicking on the **App Launch 2** key turns the screen onto its horizontal axis.

3.   Tap on **Programs**. The following screen appears:
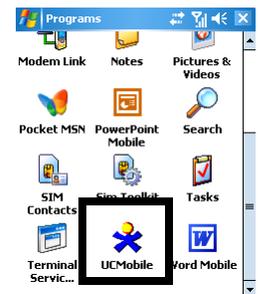
4.   Tap on the **UC Mobile** icon. The UC Mobile > Account screen appears:

   ◆   In the **Company** field, enter the number associated with your company in the Unified Communications system. Your System Administrator can supply you with this value.

   ◆   In the **Mailbox** field, enter your mailbox number.

   ◆   In the **Password** field, enter your mailbox password.

   ◆   Tap on the **Save password** check box to automatically complete the password field on starting UC Mobile in the future.

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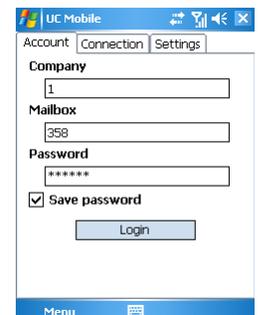
5. Tap on the **Connection** tab. The following screen appears:

   ♦ In the **Server** text field, enter your server's IP address.

   ♦ In the **Port** text field, enter the port number. '**13777**' is the default value and should be kept.

   ♦ Select the **Send heartbeats** check box to ensure that your connection is maintained.
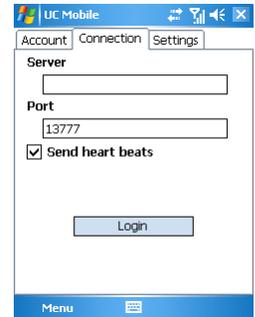
6. Tap on the **Settings** tab. The following screen appears:

   ♦ In the **Login screen** field, use the selection arrows to choose a desired login screen. This screen will appear on starting UC Mobile. The options are **My calls**, **My contacts** or **Directory**.

   ♦ In the **Report my phone number** field, enter a phone number - most likely new, or temporary - which UC Mobile can present as an option when the user makes a call. When making a call, the user will then select from among these numbers to determine from which device - Pocket PC, Smartphone, Home phone, Business phone, temporary phone, etc., - the call is to issue.

   ♦ Select the **LanTalk popup** check box to allow a popup to appear on your Smartphone screen on receiving a LanTalk message.

   ♦ Select the **Sound alert** check box to be notified by a sound on receiving messages or notifications on your UC Mobile-enabled Smartphone.

   ♦ Select the **Upload recent calls** check box to automatically synchronize your calls with your UC Client Manager

7. Tap on the **Login** button. You are logged in to UC Mobile.
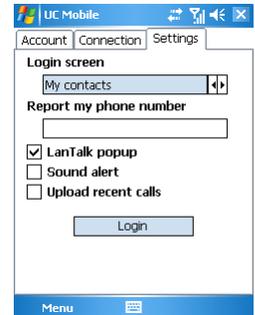
Navigating 'Menu' via the User's Mailbox

☑ **Note:** See **Navigating 'Menu' via a Contact's Mailbox on page 209** for comparison.

1. Tap on the UC Mobile icon. The following screen appears:

2. Tap on **Menu** (Soft Key 2). The following screen appears when the user's mailbox has been highlighted:

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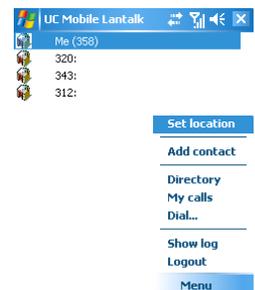
Set Location

This option allows the user to maintain or override location and availability settings as stipulated in the user's UC Client Manager. Included is a thorough array of availability filters for complete convenience.

1. Tap on **Set location**. The following screen appears:

2. Your current location and availability are given. To override your Locations Calendar in UC Client Manager - for example, in the case of an unanticipated move to a new location - select the **Override my scheduled location** check box.

3. The screen is now filled with an array of options:

4. To make use of these many options:

    ◆ Scroll to (or employ the stylus) the **Location** selection arrows (or use the left and right scroll keys) to change your current location.

    ◆ Scroll to (or employ the stylus) the **Availability** selection arrows (or use the left and right scroll keys) to change your current state of availability.

    ◆ Scroll to (or employ the stylus) the **Unavailable if no caller Id** check box. Select to make yourself appear unavailable to unknown callers; deselect to appear available to all callers.

    ◆ Scroll to (or employ the stylus) the **Number** field. Use the selection arrows to choose a mailbox or telephone number assigned to this location.

    ◆ Scroll to (or employ the stylus) the **Override availability filters** check box. Select to override availability filters previously set in your UC Client Manager; deselect to maintain these filters.

    ◆ Scroll to (or employ the stylus) the **I will be at this location** field. Use the selection arrows to determine how long you will override your UC Client Manager scheduled location. The available options are: **Until I change (my location)**, **Until the next scheduled (event)**, or **Till (a time)**.

5. Tap on **Cancel** to negate any changes just made. Or tap on **Menu**. The following menu appears:

6. Tap on **Accept** to keep your changes; tap on **Cancel** to discard your changes.

Add contact

Use this feature to add contacts from your UC Client Manager Company Directory to your Pocket PC. This will allow the user to reach more easily those individuals with whom he or she deals with on a frequent basis.

1. Tap **Add contact** on the menu:

2. The following screen appears:

3. Complete the following:

    ◆ In the **Mailbox** text field, enter the contact's UC Client Manager mailbox number.
    ◆ In the **First name** text field, enter the contact's given name.
    ◆ In the **Last name** text field, enter the contact's family name.

    ☑ **Note:** Entering a value in the mailbox fields blocks the name fields. Conversely, entering a value in the name fields blocks the mailbox field. UC Mobile will automatically complete these blocked fields itself.

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4. The **Add contact** button will now be active. Tap on it. The contact is added to your Contact list:

☑ **Note:** These contacts are drawn from your UC Client Manager Company Directory only.

Directory

The Company Directory contains all the individuals - including their location and availability, among other details - in your organization. The Directory feature permits the user to access this information in order to facilitate interaction between them.

1. Tap on **Menu**, then tap on **Directory:**

2. The following screen appears:

3. Tap on **Filter**. The following screen appears:
   - Enter values in the **Mailboxes from** and **Mailboxes to** text fields to stipulate a range of mailboxes from which to search in the Company Directory.
   - In the **First name** field, stipulate a given name for which to search in the Directory.
   - In the **Last name** field, stipulate a family name for which to search in the Directory.
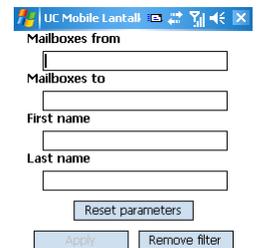
☒ **Hint:** Entering '**Smith**' will return all Smiths. Entering '**Bob**' will return all Bobs.

☑ **Note: Mailboxes from** / **Mailboxes to**, **First name** and **Last name** may be used independently of one another.

4. Tap on **Reset parameters** to clear all text fields.
5. Tap on **Remove filter** to cancel use of this filter.
6. Tap on **Apply** to implement this filter against the Company Directory.

☑ **Note:** The following steps assume that a contact from the Directory has been highlighted.

7. Tap on **Menu**. The following menu appears:
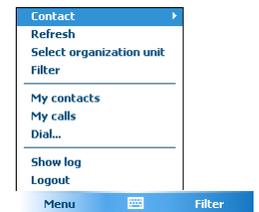
   - Tap on **Contact**. The following menu appears:
   a. Tap on **Show details**. A screen appears, listing the Directory contact's name, location, availability, etc.

☑ **Note:** The Directory contact will have set this information in their own PC's UC Client Manager.

   b. Tap on **Do LanTalk**. A LanTalk screen appears, containing a **Message** field with which to enter dialogue and a field containing a record of the conversation.

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c.   Tap on **Notify when off the phone**. The following screen appears:
     If the recipient of your call is on the phone, the previous screen will appear when
     that person hangs up. Tap on **Close** to close the screen; tap on **Dial** to initiate a
     call.

d.   Tap on **Dial** to initiate a call.

•   Tap on **Refresh** to update the Directory.
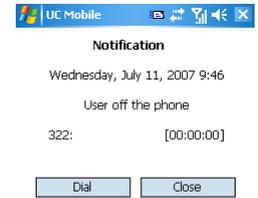
•   Tap on **Select Organizational Unit**. The following screen appears:
     A list of Organizational Units in your Company Directory appears. Tap the OU you
     wish to include in UC Mobile and tap **Accept**.
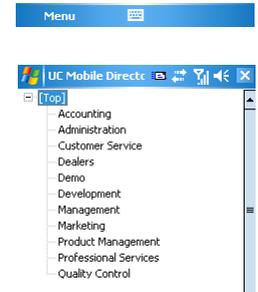
My Calls

The My Calls option allows the user to review his or her call history, make a telephone call and employ the
convenience and usefulness of a registered phone number.

1.   Tap on **My calls:**

2.   The following screen appears, detailing your recent call history:

3.   Tap on **Menu**. The following screen appears:

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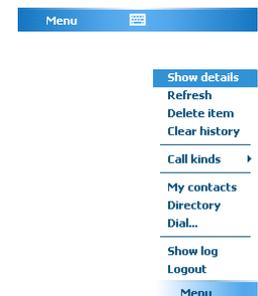
4. Highlight a call entry, then tap on **Show details**. The following screen appears, providing details (i.e.: type, ID, number, Date) of the highlighted call:

    ◆   Tap on **Close** or **Menu > Close** to return to the Call history screen.

5. Tap on **Refresh**. The Call history screen is updated.

6. Highlight a call entry, then tap **Delete Item**. That particular call is removed from the Call history.

7. Tap **Clear history**. Your entire call history is deleted.

8. Tap **Call kinds**. The following screen appears:

    ◆   Tap **Show answered calls** to display only *answered* calls on the Call history screen.

    ◆   Tap **Show missed calls** to display only *missed* calls on the Call history screen.

    ◆   Tap **Show outgoing calls** to display only *outgoing* calls on the Call history screen.

    ◆   Tap **Preset: incoming** to display *answered and missed* calls on the Call history screen.

    ◆   Tap **Preset: missed** to display only *missed* calls on the Call history screen.

    ◆   Tap **Preset: outgoing** to display only *outgoing* calls on the Call history screen.

    ◆   Tap **Preset: all calls** to display *all* calls on the Call history screen.

⊠   **Hint:** The first three options will affect *past* calls only. The Preset options (the last four) will affect both *past* and *future* calls.

9. Tap **My contacts** to display your list of contacts previously culled from your UC Client Manager Company Directory.

10. Tap **Directory** to display your Company Directory, as it will be found in your **UC Client Manager > Directory**. For more information, see **Directory on page 205**.

11. Tap **Dial...** . The following screen appears:
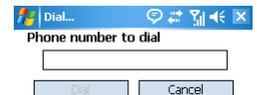
12. In the **Phone number to dial** field, enter the telephone number you wish to call and click on the **Dial** button. The following screen appears:

A phone number of the device to make the call must be specified:

    ◆   Select the **Use my registered phone** radio button and use the scroll arrows to locate a phone number of yours previously known to UC Client Manager.

    ◆   Select the **Specify phone number** radio button and enter a new telephone number in the text field.

    ◆   Tap on the **Dial** button to initiate the call, or the **Cancel** button to forego the call.

13. Tap **Show log**. Your UC Mobile Log screen appears, detailing UC Mobile activity. See screenshot on **page 208**.

14. Tap **Logout**. UC Mobile logs out.
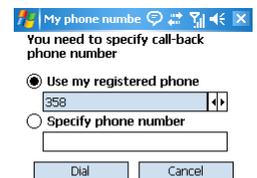
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Dial...

The UC Mobile Dial feature of course satisfies the most basic use of your Windows Smartphone, that of making a telephone call, though with particular versatility.

1. Please refer to dialling instructions on the previous page (**page 207**)**.**

1 Set location

2 Add contact

3 Directory
4 My calls
5 Dial...

6 Show log
7 Logout

Show log

The Show log feature gives a detailed account of activity on your UC Mobile-enabled Windows Smartphone, allowing you to monitor use.

1. **Show log** is found as follows on the menu below:

1 Set location

2 Add contact

3 Directory
4 My calls
5 Dial...

6 Show log
7 Logout

2. Tap on **Show log**. Your UC Mobile Log screen appears, detailing UC Mobile activity:

Logout

The Logout feature permits the user to logout from UC Mobile, while retaining use of his or her Pocket PC.
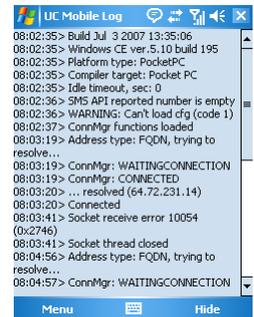
1. Tap on **Logout**. UC Mobile logs out.

1 Set location

2 Add contact

3 Directory
4 My calls
5 Dial...

6 Show log
7 Logout

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Navigating 'Menu' via a Contact's Mailbox

☑ **Note:** See **Navigating 'Menu' via the User's Mailbox on page 203** for comparison.

1. Tap on the UC Mobile icon. The following screen appears:

2. Tap on **Menu**. The following screen appears when a contact's (*not* the user's) mailbox has been highlighted:

Conversation

The Conversation feature allows the user to send instant (LanTalk) messages to his or her contacts from the Company Directory.

1. To begin a LanTalk conversation, tap on **Conversation**. The following screen appears:
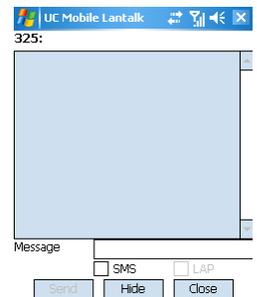
2. Enter your dialogue in the **Message** field and tap on **Send** button. Your text appears in the main field:

3. Select the **LAP** (Local Area Paging) check box to send your LanTalk message to a pager. Select the **SMS** (Short Messaging Service) check box to send your LanTalk message to a mobile device on which UC Mobile is *not* installed.

4. Tap on the **Hide** or **Close** buttons to return to the Contacts screen. The former places the LanTalk Conversation screen behind the Contacts screen, while the latter eliminates it entirely.

Show Details

This feature shows details related to a highlighted contact, location and availability in particular. This will provide the user with a quick idea of the contact's current status.

1. Tap on **Show Details** on the menu:

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2. The following screen appears:
3. Details pertaining to the highlighted contact (i.e., mailbox number, location, availability, etc.) are displayed.
4. Tap on the **Close** button with your stylus to return to the Contacts screen.
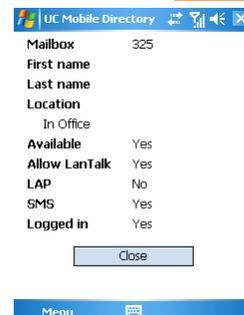
Notify When Off The Phone

This feature allows the user to swiftly ascertain if a particular contact is currently on or off the phone, and in the former case to be alerted when that status changes.

1. Tap **Notify when off the phone** on the menu:

2. The following screen appears:
3. If the recipient of your call is on the phone, the previous screen will appear when that person hangs up. Tap on **Close** to close the screen; tap on **Dial** to initiate a call.

Dial

This feature allows the user to make a telephone call directly from UC Mobile.

1. Tap **Dial** on the menu:
2. See **page 207** for complete dialling instructions**.**

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Delete Contact

This feature allows the UC Mobile user to remove a contact very simply from his or her contact list when that individual is no longer relevant, having, for example, been transferred to another department or moved to another team.

1. Tap **Delete Contact** on the menu. The selected contact is removed.

Conversation
Show details
Notify when off the phone
Dial
Delete contact
Add contact
Directory
My calls
Dial...
Show log
Logout

Add Contact

Use this feature to add contacts from your UC Client Manager Company Directory to your Pocket PC. This will allow the user to reach more easily those individuals with whom he or she deals with on a frequent basis.

1. Tap **Add Contact** on the menu:
2. See **Add contact on page 204** for full instructions.

Conversation
Show details
Notify when off the phone
Dial
Delete contact
Add contact
Directory
My calls
Dial...
Show log
Logout

Directory

The Company Directory contains all the individuals - including their location and availability, among other details - in your organization. The Directory feature permits the user to access this information in order to facilitate interaction between them.

1. Tap **Directory** on the menu:
2. See **Directory on page 205** for full instructions.

Conversation
Show details
Notify when off the phone
Dial
Delete contact
Add contact
Directory
My calls
Dial...
Show log
Logout

My Calls

The My Calls option allows the user to review his or her call history, make a telephone call and employ the convenience and usefulness of a registered phone number.

1. Tap **My calls** on the menu:
2. See **My Calls on page 206** for full instructions.

Conversation
Show details
Notify when off the phone
Dial
Delete contact
Add contact
Directory
My calls
Dial...
Show log
Logout

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Dial...

The UC Mobile Dial feature of course satisfies the most basic use of your Windows Smartphone, that of making a telephone call, though with particular versatility.

1. Tap **Dial..** on the menu:
2. See **page 207** for full instructions.

Conversation
Show details
Notify when off the phone
Dial
Delete contact

Add contact

Directory
My calls
Dial...

Show log
Logout

Show Log

The Show log feature gives a detailed account of activity on your UC Mobile-enabled Windows Smartphone, allowing you to monitor use.

1. Tap **Show log** on the menu:
2. See **Show log on page 208** for full instructions.

Conversation
Show details
Notify when off the phone
Dial
Delete contact

Add contact

Directory
My calls
Dial...

Show log
Logout

Logout

The Logout feature permits the user to logout from UC Mobile, while retaining use of his or her Windows Smartphone.

1. Tap **Logout** on the menu. UC Mobile logs out.

Conversation
Show details
Notify when off the phone
Dial
Delete contact

Add contact

Directory
My calls
Dial...

Show log
Logout

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12 UC Mobile - Windows Smartphone

Chapter Summary

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UC Mobile - Windows Smartphone

Introduction

UC Mobile, now compatible with any Windows Smartphone, allows the user to readily integrate the UC Client Manager installed on the user's desktop with the UC Client Manager installed on the user's Windows Smartphone. Telephone calls, email, location, availability - all effortlessly synchronised.

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UC Mobile Installation - Smartphone

☑   **Note**: UC Mobile for Windows Mobile is available as a free download at Microsoft Windows Mobile App Store.

Make sure to locate the proper installation file (for your Windows Smartphone) on your PC before proceeding with the UC Mobile installation.

If you do not have the proper installation file on your PC, rightclick on your **Link** icon and select **WebClient Home...** . Underneath **Getting Started?** on the Web Client screen, click on **UC Mobile**. Click on the appropriate file and download as per normal.

You are now ready to install UC Mobile to your device.

1.   If your device is not in its cradle, place it there now.

2.   On your PC, navigate to **Start > All Programs > Microsoft ActiveSync** to establish a connection between your PC and your mobile device. The following screen indicates a successful connection:

3.   Click on the Microsoft ActiveSync **Explore** icon. Click on the mobile device icon to open it. Copy the appropriate CAB file and paste it into your mobile device.

4.   The following installation screen appears:
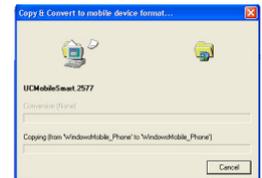
5.   Power up your Windows Smartphone. Locate the **File Explorer** icon:

6.   Highlight **File Explorer** and click on the **Enter** key. The My Documents screen appears:
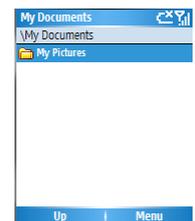
7.   Click on **Up** (Soft Key 1). The following screen appears:

8.   Highlight or scroll to **WindowsMobile_Phone** and click on the **Enter** key. The following screen appears:

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9. Highlight **UCMobileSmart.2577** and click on the **Enter** key. The following screen appears:

10. Click **OK** (Soft Key 1) to continue the upgrade process. The Installing screen appears, then replaced by the following:

11. Click on **Done** (Soft Key 1). The following screen reappears:

12. Click on the **Home** [ ] key. The Start screen appears.

13. Click on **Start > More** (Soft Key 1 > Soft Key 1). The following Start screen appears:

14. Highlight **UCMobile** and click on the **Enter** key. The Login Screen appears.

Congratulations! You have successfully installed UC Mobile on to your Windows Smartphone!

To enjoy and make the most of UC Mobile, please refer to **The Smartphone Keypad on page 217** and **Using UC Mobile on page 218**.

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The Smartphone Keypad

The keypad is integral to the use of UC Mobile on the Windows Smartphone. Understanding its capabilities is required to make the utmost use of UC Mobile and its features. Note that the keys explained below are specific to a particular Windows Smartphone. Keys found on the user's Smartphone may well vary.

→ **Explaining the Windows Smartphone keypad:**

1. The following screen illustrates the various keys:
2. Clockwise from top-left, their functions are as follows:

   • Soft Key 1 [   ] operates on screen options immediately above it

   • Soft Key 2 [   ] operates on screen options immediately above it

   • Home [⌂] returns user to the Smartphone start screen

   • Talk [📞] initiates a phone call

   • Back [↰] returns user to the previous screen

   • End [📞] terminates the phone connection

   • Scroll keys [⬚] up, down, left, right

   • Enter [⬚] functions as a left mouse button

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Using UC Mobile

UC Mobile, now compatible with the Windows Smartphone, allows the user to readily integrate the UC Client Manager installed on the user's desktop with the UC Client Manager installed on the user's Smartphone. Telephone calls, email, location, availability - all effortlessly synchronized.

1. The initial Smartphone screen will appear as follows:

☑ **Note:** The icons visible along the top of the Smartphone screen indicate recently accessed programs. If the **UC Mobile** icon is not there, you may navigate to **Start > More** (both Soft Key 1), then highlight and click on the **UC Mobile** icon.

2. On startup, the login screen appears:
    - In the **Company** field, enter the number associated with your company in the Unified Communications system. Your System Administrator can supply you with this value.
    - In the **Mailbox** field, enter your mailbox number.
    - In the **Password** field, enter your mailbox password.

    - Click the **Save password** check box to automatically complete the password field on starting UC Mobile in the future.
    - In the **Login screen** field, use the selection arrows to choose a desired login screen. This screen will appear on starting UC Mobile. The options are **My calls**, **My contacts** or **Directory**.
    - Select the **LanTalk popup** check box to allow a popup to appear on your Smartphone screen on receiving a LanTalk message.
    - Select the **Sound alert** check box to be notified by a sound on receiving messages or notifications on your UC Mobile-enabled Smartphone.
    - Select the **Send heart beats** check box to maintain a connection to the server.
    - Select the **Upload recent calls** check box to automatically synchronize your calls with your UC Client Manager.
    - In the **Report my phone number** field, enter a phone number - most likely new, or temporary - which UC Mobile can present as an option when the user makes a call. When making a call, the user will then select from among these numbers to determine from which device - Smartphone, Home phone, Business phone, temporary phone, etc., - the call is to issue.
    - In the **Server** field, enter your UC Client Manager Server IP address.
    - In the **Port** field, enter your UC Client Manager Port number. The default value is **13777**, and need not be changed.

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Login

The following steps will log the user in to UC Mobile on the Windows Smartphone, making UC Mobile's features fully available.

1. Click on **Login** (Soft Key 1) to log in to UC Mobile on your Windows Smartphone.
2. Click on **Menu** (Soft Key 2). The following menu appears:
3. Highlight **Login** and click on the **Enter** selection key. You are logged in to UC Mobile.

4. Highlight **Language** and click on the **Enter** selection key. The following menu appears:
5. This menu determines which language UC Mobile will employ on your Windows Smartphone. Select the language appropriate to your use and click on the **Enter** selection key.

6. Highlight **Show log** and click on the **Enter** selection key. The following screen detailing the UC Mobile system log appears:
7. Click on **Menu** (Soft Key 2) to call up another menu. Select **Refresh** to update the call logs, **Clear** to delete them, or **Hide** to return to the Login screen.

8. Highlight **About...** and click on the **Enter** selection key. The following screen appears:
9. Click on **Hide** or **Menu > Hide** to return to the Login screen.
10. Highlight **Exit** and click on the **Enter** selection key to exit UC Mobile. You are returned to the Start screen.
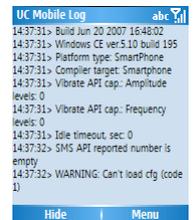
Navigating 'Menu' via the User's Mailbox

☑   **Note:** See **Navigating 'Menu' via a Contact's Mailbox on page 224** for comparison.

1. Using the scroll keys surrounding the selection key [icon], highlight the UC Mobile icon and click on the selection key (**Enter**). The following screen appears:

2. Click on **Menu** (Soft Key 2). The following screen appears when the user's mailbox has been highlighted:

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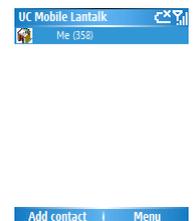
Set Location

This option allows the user to maintain or override location and availability settings as stipulated in the user's UC Client Manager. Included is a thorough array of availability filters for complete convenience.

1. Highlight **Set location** and click on the **Enter** key. The following screen appears:
2. Your current location and availability are given. To override your Locations Calendar in UC Client Manager - for example, in the case of an unanticipated move to a new location - select the **Override my scheduled location** check box.

3. Click on the **Enter** key. The screen is now filled with an array of options:
4. To make use of these many options:
   - Scroll to (or employ the stylus) the **Location** selection arrows (or use the left and right scroll keys) to change your current location.
   - Scroll to (or employ the stylus) the **Availability** selection arrows (or use the left and right scroll keys) to change your current state of availability.
   - Scroll to (or employ the stylus) the **Unavailable if no caller Id** check box. Select to make yourself appear unavailable to unknown callers; deselect to appear available to all callers.
   - Scroll to (or employ the stylus) the **Number** field. Use the selection arrows to choose a mailbox or telephone number assigned to this location.
   - Scroll to (or employ the stylus) the **Override availability filters** check box. Select to override availability filters previously set in your UC Client Manager; deselect to maintain these filters.
   - Scroll to (or employ the stylus) the **I will be at this location** field. Use the selection arrows to determine how long you will override your UC Client Manager scheduled location. The available options are: **Until I change (my location)**, **Until the next scheduled (event)**, or **Till (a time)**.
5. Click on **Cancel** (Soft Key 1) to negate any changes just made. Or click on **Menu** (Soft Key 2). The following menu appears:
6. Highlight **Accept** and click on Soft Key 2 to keep your changes; highlight **Cancel** and click on Soft Key 2 to discard your changes.

Add contact

Use this feature to add contacts from your UC Client Manager Company Directory to your Windows Smartphone. This will allow the user to reach more easily those individuals with whom he or she deals with on a frequent basis.

1. Highlight **Add contact** on the menu:

2. Click on the **Enter** key. The following screen appears:
3. Complete the following:
   - In the **Mailbox** text field, enter the contact's UC Client Manager mailbox number.
   - In the **First name** text field, enter the contact's given name.
   - In the **Last name** text field, enter the contact's family name.

   ☑ **Note:** Entering a value in the mailbox fields blocks the name fields. Conversely, entering a value in the name fields blocks the mailbox field. UC Mobile will automatically complete these blocked fields itself.

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4. Click on the **Enter** key. The contact is added to your Contact list.

☑ **Note:** These contacts are drawn from your UC Client Manager Company Directory only.

Directory

The Company Directory contains all the individuals - including their location and availability, among other details - in your organization. The Directory feature permits the user to access this information in order to facilitate interaction between them.

1. Click on **Menu** (Soft Key 2). Highlight **Directory:**

2. Click on the **Enter** key. The UC Mobile Directory screen appears:

3. Click on **Filter** (Soft Key 1). The following screen appears:
   - Enter values in the **Mailboxes from** and **Mailboxes to** text fields to stipulate a range of mailboxes from which to search in the Company Directory.
   - In the **First name** field, stipulate a given name for which to search in the Directory.
   - In the **Last name** field, stipulate a family name for which to search in the Directory.

☒ **Hint:** Entering '**Smith**' will return all Smiths. Entering '**Bob**' will return all Bobs.

☑ **Note: Mailboxes from / Mailboxes to**, **First name** and **Last name** may be used independently of one another.

4. Click on **Reset parameters** (Soft Key 1) to clear all text fields.

5. Click on **Menu** (Soft Key 2). The following screen appears:
   - Highlight and click on **Apply** (Enter) to apply this newly configured filter against the Directory.
   - Highlight and click on **Remove filter** (Enter) to return to the main Directory screen.
   - Highlight and click on **Reset parameters** (Enter) to clear all fields.

☑ **Note:** The following steps assume that a contact from the Directory has been highlighted.

6. Click on **Menu** (Soft Key 2). The following screen appears:

   - Highlight and click on **Contact** (Enter). The following menu appears:
   a. Highlight and click on **Show details** (Enter). A screen appears, listing the   Directory
      contact's name, location, availability, etc.

☑ **Note:** The Directory contact will have set this information in their own PC's UC Client Manager.

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b. Highlight and click on **Do LanTalk** (Enter). A LanTalk screen appears, containing a **Message** field with which to enter dialogue, a field containing a record of the conversation.

c. Highlight and click on **Notify when off the phone** (Enter). The Notification screen appears. If the recipient of your call is on the phone, the screen will appear when that person hangs up. Click on **Close** (Soft Key 1) to close the screen; click on **Menu** > **Dial** (Soft Key 2) to initiate a call.

d. Highlight and click on **Dial** to initiate a call.

◆ Click on **Refresh** to update the Directory.

◆ Click on **Select Organizational Unit**. A screen appears, containing a list of Organizational Units in your UC Client Manager Company Directory. Highlight the OU you wish to include in UC Mobile and click **Accept** (Soft Key 2).

My Calls

The My Calls option allows the user to review his or her call history, make a telephone call and employ the convenience and usefulness of a registered phone number.

1. Highlight **My calls:**
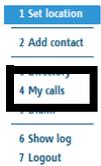
2. Click on the **Enter** key. The following screen appears, detailing your call history:
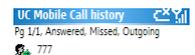
3. Click on **Menu** (Soft Key 2). The following screen appears:

4. Highlight a call entry, then highlight **Show details** and click on the **Enter** key. The following screen appears, providing details (i.e.: type, ID, number, Date) of the highlighted call:
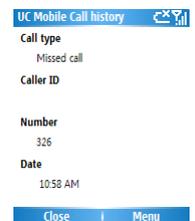
   ◆ Click on **Close** (Soft Key 1) or **Menu > Close** (Soft Key 2 > Enter) to return to the Call history screen.

5. Highlight **Refresh** and click on the **Enter** key. the Call history screen is updated.

6. Highlight a call entry, then highlight **Delete Item**. Click on the **Enter** key. That particular call is removed from the Call history.

7. Highlight **Clear history** and click on the **Enter** key. Your entire call history is deleted.

8. Highlight **Call kinds** and click on the **Enter** key. The following screen appears:

   ◆ Highlight **Show answered calls** and click on the **Enter** key to display only *answered* calls on the Call history screen.

   ◆ Highlight **Show missed calls** and click on the **Enter** key to display only *missed* calls on the Call history screen.

   ◆ Highlight **Show outgoing calls** and click on the **Enter** key to display only *outgoing* calls on the Call history screen.

   ◆ Highlight **Preset: incoming** and click on the **Enter** key to display *answered and missed* calls on the Call history screen.

   ◆ Highlight **Preset: missed** and click on the **Enter** key to display only *missed* calls on the Call history screen.

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- ◆ Highlight **Preset: outgoing** and click on the **Enter** key to display only *outgoing* calls on the Call history screen.
- ◆ Highlight **Preset: all calls** and click on the **Enter** key to display *all* calls on the Call history screen.

☒ **Hint:** Options 1~3 will affect past calls only. Preset options 4~7 will affect both past and future calls.

9. Highlight **My contacts** and click on the **Enter** key to display your list of contacts previously culled from your UC Client Manager Company Directory.

10. Highlight **Directory** and click on the **Enter** key to display your Company Directory, as it will be found in your **UC Client Manager > Directory**. For more information, see **Directory on page 221**.

11. Highlight **Dial...** and click on the **Enter** key. The following screen appears:
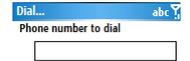
12. In the **Phone number to dial** field, enter the telephone number you wish to call and click on the **Enter** key. The following screen appears:

A phone number of the device to make the call must be specified:

- ◆ Select the **Use my registered phone** radio button and use the scroll arrows to locate a phone number of yours previously known to UC Client Manager.
- ◆ Select the **Specify phone number** radio button and enter a new telephone number in the text field.
- ◆ Click on **Menu > Dial** (Soft Key 2 > Enter) to initiate the call, or **Menu > Cancel** (Soft Key 2 > Enter) or **Cancel** (Soft Key 1) to forego the call.

13. Highlight **Show log** and click on the **Enter** key. Your UC Mobile Log screen appears, detailing UC Mobile activity. See screenshot on **page 219**.

14. Highlight **Logout** and click on the **Enter** key. UC Mobile logs out.
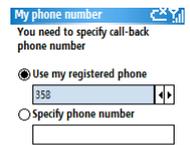
Dial...

The UC Mobile Dial feature of course satisfies the most basic use of your Windows Smartphone, that of making a telephone call, though with particular versatility.

1. Please refer to dialling instructions on the previous page (**page 223**)**.**

Show log

The Show log feature gives a detailed account of activity on your UC Mobile-enabled Windows Smartphone, allowing you to monitor use.

1. Please refer to instructions on this page (**page 219**).
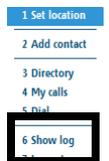
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Logout

The Logout feature permits the user to logout from UC Mobile, while retaining use of his or her Windows Smartphone.

1. Please refer to logout instructions on **page 223**.

Navigating 'Menu' via a Contact's Mailbox

☑ **Note:** See **Navigating 'Menu' via the User's Mailbox on page 219** for comparison.

1. Using the scroll keys surrounding the selection key [image], highlight the UC Mobile icon and click on the selection key (**Enter**). The following screen appears:
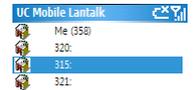
2. Click on **Menu** (Soft Key 2). The following screen appears when a contact's (*not* the user's) mailbox has been highlighted:

Conversation

The Conversation option allows the user to initiate a LanTalk conversation.

1. Highlight **Conversation** and click on the **Enter** key. The following screen appears:
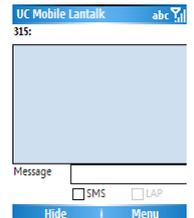
2. Enter your dialogue in the **Message** field and click the **Enter** key. Your text appears in the main field:

3. Click **Menu** (Soft Key 2) and select **Hide** to remove the conversation from view, or **Close** to end the conversation.
   - Click **Menu > Hide** (Soft Key 2) to remove the conversation from view; or **Menu > Close** (Soft Key 2) to end the conversation.
   - Click **Hide** (Soft Key 1) to place the Conversation screen *behind* the Contacts screen. Click on the **Enter** key to return to the LanTalk conversation.

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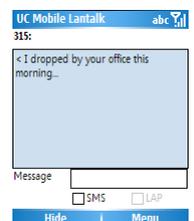
Show Details

This feature permits the user to see at a glance the particulars of a contact.

1. Highlight **Show Details** and click on the **Enter** key. The following screen appears:
2. Details of the highlighted contact (i.e., mailbox number, name, location, availability) are all displayed.
3. Click on **Close** (Soft Key 1) or **Menu > Close** (Soft Key 2) to close the screen.

Notify when off the phone

This feature will alert the user to a contact's availability by delivering a screen popup to the user when the contact is free or no longer on the phone.

1. Highlight and click on **Notify when off the phone** (Enter). The Notification screen appears. If the recipient of your call is on the phone, the screen will appear when that person hangs up:
2. Click on **Close** (Soft Key 1) to close the screen; click on **Menu > Dial** (Soft Key 2) to initiate a call.
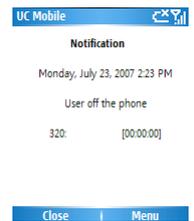
Dial

The Dial feature enables the user to make a call quickly and conveniently from his or her Windows Smartphone.

1. Highlight **Dial...** and click on the **Enter** key. The following screen appears:

2. In the **Phone number to dial** field, enter the telephone number you wish to call and click on the **Enter** key. The following screen appears:
3. A phone number of the device to make the call must be specified:
    *   Select the **Use my registered phone** radio button and use the scroll arrows to locate a phone number of yours previously known to UC Client Manager.
    *   Select the **Specify phone number** radio button and enter a new telephone number in the text field.
4. Click on **Menu > Dial** (Soft Key 2 > Enter) to initiate the call, or **Menu > Cancel** (Soft Key 2 > Enter) or **Cancel** (Soft Key 1) to forego the call.
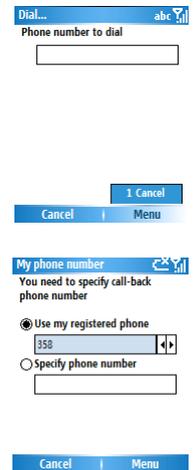
Delete Contact

This feature allows the user to delete a contact from his or her contact list when that contact is no longer valid.

1. Highlight **Delete contact** and click on the Enter key. The contact is removed.

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Add Contact

Please refer to **Add contact on page 220.**

Directory

Please refer to **Directory on page 221.**

My calls

Please refer to **My Calls on page 222.**

Dial...

Please refer to **Dial on page 225.**

Show log

Please refer to **Show log on page 223.**

Logout

Please refer to **Logout on page 224.**

A UC GTalkSync for Android

Chapter Summary

A

UC GTalkSync for Android

Introduction

UC GTalkSync for Android allows users to synchronize their phone's status with Google Talk status. For example, if you are talking on the phone on your Android device, UC GTalkSync is able to reflect that status on your Google Talk account, allowing everyone who has you on the contact list to be aware of your status.

Another key feature offered by UC GTalkSync is calendar synchronization between your device and your Google account. For example, whe you have a meeting event setup on your device's calendar, UC GTalkSync will automatically display that status on Google Talk side so that your colleagues will be aware of your status.

Since these activities take place on the background, all you have to do is go about your daily routine of using your device without having worry about status or presence management.
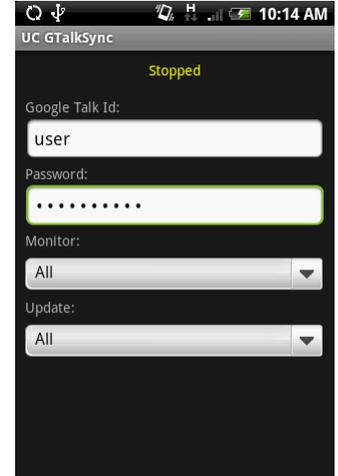
Requirements

Requirements	Details
License	---
Software	Android OS 1.5 or higher Must be logged into Google Talk from dedicated application.

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Using UC GTalkSync

Logging In

In order to utilize UC GTalkSync, you must first fill out your credentials. Under the **Google Talk Id** field, enter your Google Talk (Google Apps or Gmail) account name, including the prefix (e.g. google_user@gmail.com). In the **Password** field, enter the password for your account.

Once all the information has been entered, open the **Start service** menu by pushing the menu button on your device. Touch the **Start Service** button to activate the application.

☑   **Note**: You must also be **logged into GTalk from another application** (e.g. Logged into Gmail from a web browser or being logged into GTalk on your Android device) in order for UC GTalkSync to successfully sync your status.

Your application status will change from **Stopped** to **Running** if the credentials you have provided are correct. Your UC GTalkSync will now be active until you touch the **Stop service** button or close the application.

Please refer to **Monitor on page 230** or **Update on page 230** for details on configuring synchronization.

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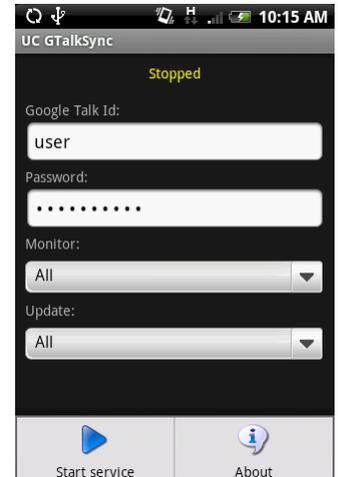
Monitor

UC GTalkSync is able to monitor your status from two locations. First is the Phone status, which refers to you being on a call from your Android device. Second is Calendar, which refers to your device's calendar where you would enter various types of appointments. Whenever an event occurs at any of these two locations, UC GTalkSync will reflect the status on your Google Talk account so that your colleagues will be aware of your status.

You can select **Phone status** only to sync the on call status or select **Calendar** only to sync your schedule with Google Talk status. By default, the choice is set **All** to sync both events.
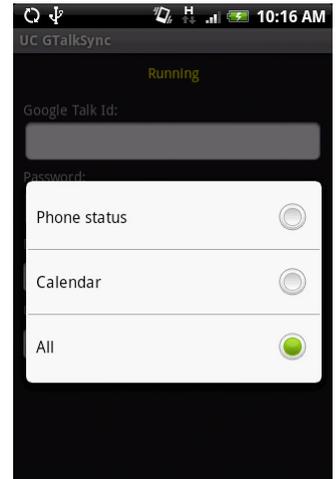
Update

From the Update section, you can determine exactly what type of information will be reflected on your Google Talk account.

Availability will change your availability accordingly. For example, if a meeting event comes up on your device's calendar, your Google Talk status will be changed from Available to Busy.

Status text will add a blurb to your status on the Google Talk side. For example, if you are on the call using your Android device, UC GTalkSync will automatically populate the text "On the Phone" to your Google Talk status field.

You may activate these features separately, or use the **All** option to enable both.

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