OpenTouch® Conversation for PC

OpenTouch® Conversation for PC One
OpenTouch user

User Manual

R2.6.1

Alcatel·Lucent
Enterprise

1 Introduction

1.1 OpenTouch Conversation for PC

OpenTouch Conversation for PC (OTC PC) enhances collaboration and communication within the enterprise. OpenTouch Users benefit from multimedia conversations with high-quality voice and video, instant messaging, presence, seamless session shifts, and embedded collaborative sessions. OpenTouch Conversation for PC allows employees to find the right people, see if they are available and on what device, and collaborate using their preferred method as sharing documents, applications or desktop.

OpenTouch Conversation for PC One (OTC PC One) is a free client (User license) based on OpenTouch Conversation for PC (OTC PC) with a reduced service level, that enables users to call and collaborate: audio call, click to call, instant messaging, directory look-up, presence and favorites list.

Features, components or integrations depend on the OpenTouch Conversation for PC license:

	OTC PC One		OTC PC (Full featured)	
	User license (Free)	User license + Conferencing	User license + Universal license	User license + Universal license + Conferencing
Conversation History, search, contacts, favorites, presence, call routing	●	●	●	●
Audio conversation	●	●	●	●
Video conversation			●	●
Visual Voicemail			●	●
Voicemail	●	●		
Current conversations Management (audio/video controls, media controls, participants, conversation functions)			●	●
N-party conference			●	●
Meeting management		●		●
Content sharing		●		●
Supervision (optional)			●	●
Manager Assistant (optional)			●	●
US Emergency call compliance			●	●
Outlook Conference add-in		●		●
Office integration (IM & presence & C2C)			●	●
OTC for Microsoft Outlook (Outlook Telephony & Voice messaging & Contact synchronization add-in)			●	●
OTC for Skype for Business			●	●
OTC for Microsoft Teams			●	●

The Outlook conference add-in can be installed as a standalone add-in with the conferencing license. Depending on your needs, take advantage of better features by changing your license.
OpenTouch Conversation is available on Microsoft Windows and Apple Mac OS X platforms.

This document describes all features of the OpenTouch Conversation for PC on Windows and Mac OS X platforms and its add-ins for Microsoft applications on Windows. The labels and icons presented in this document are not contractually binding and may be modified without prior warning. The pictures are not contractually binding and are not localized. The pictures depend on the selected theme (skin).

1.2 Evolve your application

To take advantage of features not available with your current license, you just have to change your license. If an available integration has not been installed during the last installation, run the OpenTouch Conversation for PC setup to add new features. Contact your administrator or provider for more information.

1.3 Note about Windows installation of the OpenTouch Conversation for PC

During installation, you can select an installation mode:

- "*Standard installation*": OpenTouch Conversation and Microsoft Office integration packages will be installed.
- "*Advanced installation*": only selected applications will be installed.

Use the advanced installation mode to control exactly what you want to install:

- "*As a standalone application*": all features (conversations, instant messages, contacts, meetings, presence, if installed) are managed by the OpenTouch Conversation. During the installation, select the OpenTouch components you want to install. This installation integrates add-ins for Microsoft Outlook, Microsoft Office 365.
- "*Integrated with Microsoft Skype for business*": you want to use Microsoft Lync or Skype for Business with OpenTouch Conversation features.
- "*Integrated with Microsoft Teams*": you want to use Microsoft Teams with OpenTouch Conversation features.

Depending on your selection, some options can be enabled or disabled.

1.4 Real-time optimized audio and video in VDI environments (Virtual Desktop Infrastructure)

This feature is supported on Windows 7 and Windows 10.

In the VDI environment, all media (audio, video, signaling, data, etc.) are routed to your contact's device through the virtual server and can introduce some latency.
In order to improve audio and video quality in a VDI environment, you have to install the ALE-VRTX package on your computer. The ALE-VRTX will ensure the direct exchange of audio and video data between your computer and your contact's device. Please contact your installer for more information.

1.5 Note about Mac OS X

On Mac OS X, all features (conversations, instant messages, contacts, meetings, presence) are managed by the OpenTouch Conversation.
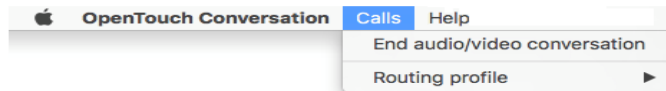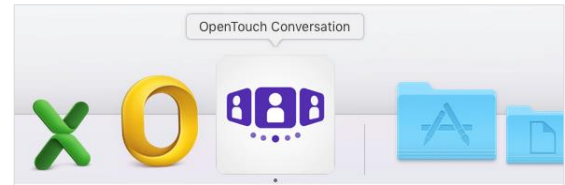
You can access some features from the standard Mac menu: end the active audio conversation, select a predefined routing profile, display the version of the application and copyright information ("*About*"), exit the application.
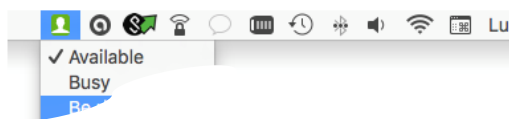
Menu bar also displays your presence status. You can see or change your status even if your application is not the foreground application.

1.6 Mac OS X restrictions

OpenTouch Conversation is only available as a standalone application. Microsoft and Google integrations are not available. Desktop sharing is not supported on Mac OS X. Hotkeys (keyboard shortcuts) are not supported on Mac OS X.

1.7 Softphone mode

The OpenTouch Conversation is considered as a VoIP softphone when all calls are dialed from/to your personal computer and not from/to a desk phone or mobile phone.
You are in softphone mode when the Personal computer is defined as the default device to make calls (see 2.9 Call Routing, "*Dial from*" option).

1.8 Note about US Emergency call compliance (RAY BAUM'S Act)

The OpenTouch Conversation complies with Section 506 of RAY BAUM'S Act. RAY BAUM'S Act emphasizes the importance of making available dispatchable location information from all emergency calls, regardless of the technological platform used. This feature requires connection to a Visual Notification Assistant (VNA) in charge of communicating the user location. For more details, see chapter: 7 US Emergency call compliance (RAY BAUM'S Act).

2 OpenTouch Conversation for PC

This section describes all features of OpenTouch Conversation for PC and OpenTouch Conversation for PC One, installed as a standalone application. All pictures come from OpenTouch Conversation running on Windows. All features are available on Windows and Mac OS X platforms, except desktop sharing, which is not supported on Mac OS X.

Some features are not available on the OpenTouch Conversation for PC One and appear grayed or are not displayed.

2.1 Start OpenTouch Conversation

You can log on automatically when starting a Windows session. OpenTouch Conversation remains active throughout a Windows session.

Run the OpenTouch Conversation from your Desktop or from the applications menu.

|	
▤	Enter the address of the OpenTouch server.
👤	Enter your username.
🔑	Enter your password.
"Remember password"	Validate the checkbox to store the password for the next connections.
"Show remote access"	If you are outside the company, enter your remote access credentials and the public address of your OpenTouch system.

The OpenTouch Conversation icon is displayed in the Windows notification area.

You can automatically sign in every time you start the application by selecting this option in settings of the application.

If the VNA server is set and the option *"Show location prompt"* is checked in advanced settings, a pop-up is displayed requesting your location. For more details, see chapter: 7 US Emergency call compliance (RAY BAUM'S Act).
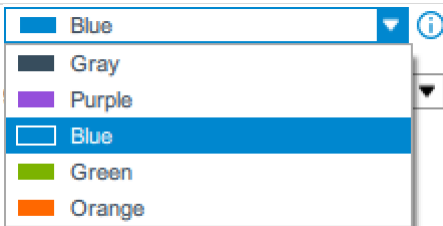
2.2 Exit the application

Closing the main window will no longer exit the application.
Right-click the OpenTouch Conversation icon from the Windows notification area or click on the Mac OS X menu of the application and then quit the application by selecting the corresponding menu item.
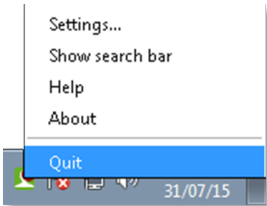
2.3 Change the theme (skin)

Personalize the phone by selecting a theme (skin). Select the theme in the *"General"* tab of the settings of the application.

|		
⚙ *"General"*	*"Theme"*: select the theme.	Blue / Gray / Purple / Blue / Green / Orange
ⓘ	Open the preview of the theme.	
"OK"/ "Apply"	Validate.	
Restart the application.		

2.4 Home page

Note that some functions can be disabled, depending on the context or options that are not available (e.g. voicemail, conferencing).

OpenTouch Conversation for PC allows choosing the display type by clicking on the corresponding button (left bottom of the window). Only the display that uses the tab vertically is available on the OpenTouch Conversation for PC One.

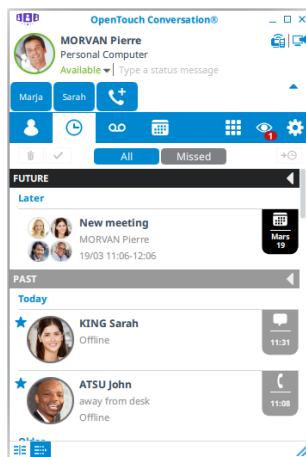Display the favorite contacts and the conversation history vertically.
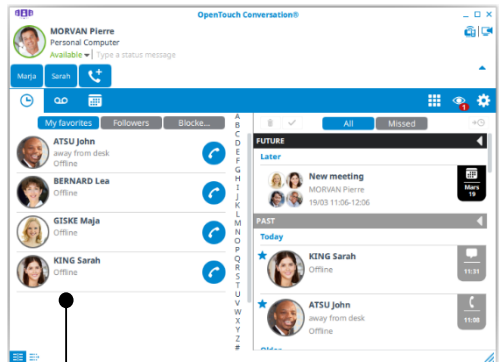
Favorite contacts

Top banner:
- User area.
- Programmable softkeys, Services area.
- Search area.
- Tabs, services area.

Conversation Wall:
- Past events.
- Conversation in progress.
- Future events.

Display information vertically using tabs.

Top banner:
- User area.
- Programmable softkeys, Services area.
- Search area.
- Tabs, services area.
- Open Favorite contacts (👤).

Conversation Wall:
- Past events.
- Conversation in progress.
- Future events.

Top banner
- Setting the routing profile and presence information.
- Changing the photo/avatar.
- Searching for contacts 🔍.
- Creating a contact 👤⁺.
- Seeing the audio device (mic, speakers) used with your computer.

Minimize/maximize the timeline

You can minimize or maximize the timeline for the past and future events' sections in the Conversation Wall:

- ▲ Minimize the timeline.
- ▼ Maximize the timeline.
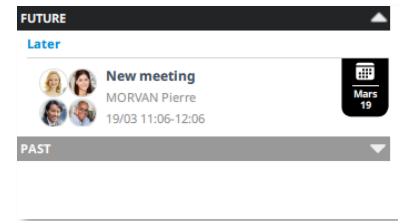
Tabs

👤	Favorites: quick access to your preferred contacts. Depending on the system configuration, you can manage who can see your presence.
🕐	Conversation Wall: past conversations, active conversation and future meetings. Click on the icon or on the corresponding button to display only missed calls or all conversations.
▣	Visual Voicemail or Voicemail.
📅	Meetings: manage your meetings (consult, create, modify, share documents, recorded meetings).
⊞	Keypad.
⚙	Settings.
👁	Supervision (optional).
👥	Manager/Assistant (optional).

Softkeys and Services

📞	Create programmable softkeys.
🎧	ACD (optional).
👁	Supervision (optional).
👥	Hunting groups (optional).
📍	US Emergency call compliance (optional).

The softkeys area can be displayed or hidden by clicking on the corresponding arrow:

▼	Display the softkey area.
▲	Hide the softkey area.

If the softkeys exceed the width of the window, you can scroll softkeys by long clicking on the softkeys area and slide left or right.
If there is not enough space for all services in the service area, the service icons are displayed with the softkeys.

Status icons

	Microphone and speakers of the computer are used for audio call.		Call from your desk phone.
	Headset of the computer is used for audio call.		Call from your professional mobile.
	Your personal computer will not ring when you receive an incoming call.		Call from your tablet.
	Microphone and speakers from two different devices are used for audio call.		Dual ringing is enabled.
	Microphone or speakers cannot be detected.		Call forwarded to your voicemail.
	Manager/assistant activated (optional).		Call forwarded to a number.

2.5 Change your photo or avatar
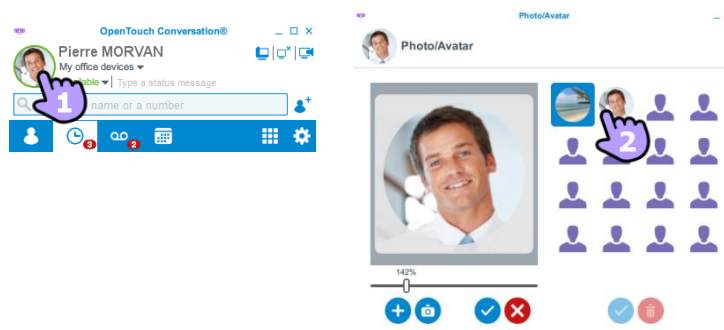
	Click on your Photo/Avatar.
	To change your photo or avatar, select a photo in the list (max. 16 pictures) and apply.
	To delete a photo in the list, select the photo and delete it.
X	Close the window when you have finished.

To add a new photo/avatar in the list:	
	Browse your computer to add a new photo in the list (max. 16 pictures).
	Use the camera of your computer to add a new photo in the list (max. 16 pictures).
	Take the photo with the camera of your computer.
29%	Resize the new photo (selected on your computer or taken with the camera). The new photo is displayed behind two layers (circle and square) to see how the application will display your photo in the top banner or history (circle) or in a contact card (square).
	Cancel the new photo.
	Apply the new photo and add it in the list.

2.6 Conversation Wall (history)

The Conversation Wall is more than a conversation history: it also displays your active conversations and your future meetings.

All conversations for a given contact are grouped into a single card. A card is displayed for each conversation with multiple participants (ad hoc or scheduled conversations). Move the Wall to the left/up to see future conversations and to the right/down for past meetings.
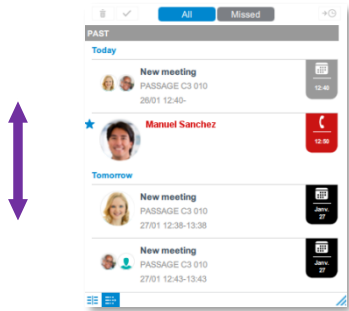
The Wall is divided into three parts:

- Past conversations and meetings
- Current conversations and meetings (optional)
- Future meetings

The badge associated to a card refers to the latest media used or latest event received (this depends on your system and can be audio call event, callback request, video call, instant message, meeting or Voicemail).

	Red badge: missed or new events.
	Purple badge: ongoing conversation (optional).
	Grey badge: past event.
	Black badge: future meeting (depending on your system).

• Select an item from the Wall to open the corresponding card or conversation.	
• Directly start an audio call with the contact.	
• Open a contextual menu by right-clicking on an item from the conversation Wall. The contextual menu displays all actions available with the selected conversation or meeting. ◦ Start an audio call with the contact. ◦ Start a video call with the contact (optional). ◦ Start an instant message with the contact. ◦ Share documents, an application window or desktop with the contact (optional). ◦ Send an email to the contact. ◦ Create or modify a meeting (optional).	

★	Add/remove a contact to/from your favorite list.	
🗑	Delete the selected conversation or meeting of the Conversation Wall.	
⟳	Join the meeting (optional).	
↩	Join the meeting in audio with another device than the current defined in call routing (optional).	

• Come back to the most recent conversation.	→🕐
• Acknowledge all missed events.	✓
• Delete the conversation history.	🗑
• Delete a callback request by right-clicking on the callback request card (this depends on your system) and selecting delete option.	

Note that if a contact name is modified on the system side, the change will appear on OpenTouch Conversation for PC after restarting the application.

Note about OpenTouch Conversation for PC One:
- The video call is not available.
- The current conversation and meeting are not displayed on the wall.
- The conferencing option (license) is required for meeting management and content sharing.

2.7 Programmable softkeys

OpenTouch Conversation for PC allows the creation of programmable softkeys (up to 30) to quickly access services or preferred contacts.

Sarah	Left click on the softkey to call the programmed service or contact.
Sarah	Hold down the left mouse button as you slide to the left or right to scroll softkeys if they exceed the width of the window.
Sarah	Hold down the left mouse button on a softkey until it is highlighted, then while holding the button down slide to the left or right to move it into the area.

2.7.1 Enter number during programmed service call

⊞	In softphone mode, in the case of programmed services, all requested numbers, as destination numbers or passwords, are dialed by opening the keypad.

If you are not in softphone mode, you can dial a number from your desk phone if the "dial from" device is defined as "desk phone" in the call routing.

2.7.2 Create a programmable softkey

▼		Display the programmable softkeys area if it is hidden.
🖱 📞⁺		Left click on the create programmable softkeys icon.

		Create the softkey (only numbers, * and # are accepted characters):
		
		• Choose one of the following:
		   o To define a service associated with the softkey, enter the name and the service's prefix followed by the number.
		    If a service is defined for a softkey without a number, the number will be requested when you click on the softkey.
		    For more information about the prefix, please contact your administrator.
		   o To define a number associated with the softkey, enter the name and the number of your contact.
		• Validate ("*ADD…*").

2.7.3 Modify or Delete a programmable softkey

▼	Display the programmable softkeys area if it is hidden.
🖱	Right click on the programmable softkey to modify or delete. The contextual menu is displayed.
✏	Modify the programmable softkey.
🗑	Delete the programmable softkey.

2.8 Favorites

	The visibility of this feature depends on the system configuration managed by your administrator. The contact tab gives you faster access to your preferred contacts (see chapter Add/remove a contact to/from your favorite list). A favorite contact is a typically a corporate colleague whose real-time presence you can see.. If the "Privacy" option is enabled in your system, you can manage favorite contacts who can see your presence and can start a collaboration session as an instant message, sharing a document or your desktop.

2.8.1 Favorites without "Privacy" option

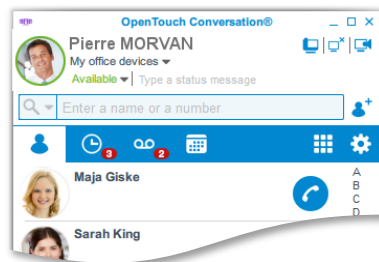|	
Close or open the favorite list. The presence of your contact is displayed by the picture.	👤
Use the alphabetical list to find your preferred contact quickly.	ABC
Click the contact you want to reach by opening the corresponding contact card.	🖱
Directly start an audio call with the contact.	📞
Open a contextual menu by right-clicking on an item from the Conversation Wall. The contextual menu displays all actions available with the selected conversation or meeting. 📞 Start an audio call with the contact. 📹 Start a video call with the contact (optional). 💬 Start an instant message with the contact. 🖥 Share documents, an application window or desktop with the contact (optional). ✉ Send an email to the contact (optional). 📝 Create or modify a meeting (optional). ★ Add/remove a contact to/from your favorite list. 🗑 Delete the contact.	🖱

Note about OpenTouch Conversation for PC One:
- The video call is not available.
- The conferencing option (license) is required for meeting management and content sharing.

2.8.2   Favorites with "Privacy" option

2.8.2.1 My favorites, followers or blocked contacts

	Manage your favorite contacts.

- All favorite contacts are listed in the tab: "*My favorites*". If your favorite is a corporate colleague, you can see his or her real-time presence. You can start a collaboration session as an instant message, sharing a document or your desktop.
- A follower is a corporate colleague who has added you as favorite and can see your real-time presence. He or she can start a collaboration session as an instant message, sharing a document or his desktop. All followers are listed in the tab: "*Followers*". You can delete a follower at any time.
- A blocked contact is a corporate colleague who has added you as a favorite but he or she cannot see your real-time presence. A blocked contact sees your presence as offline and cannot start any collaboration session with you. An instant message will be sent as an offline message and sharing a document or desktop is disable unless you are having a conversation with him or her or if you are participating in the same meeting. All blocked contacts are listed in the tab: "*Blocked contacts*".

Contact your administrator for more information.

2.8.2.2 Add a contact as favorite

When you tag a contact as a favorite (see: Add/remove a contact to/from your favorite list), a notification is sent to the contact. The contact is added to the list of your favorites. You can see his or her real-time presence unless the contact decides to add you to the blocked contact list.

2.8.2.3 Accept or reject a new follower request
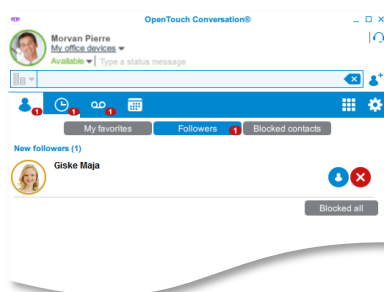
Select the "*Followers*" tab.
A contact may add you to his or her list of favorites. You receive a notification as a "follower" request. Each new "follower" request is displayed at the top of this tab.

	The number of "Follower" requests is displayed (logo and tab).
	Open the contact card. You can block the contact from the contact card.
	Block the contact. The contact is placed in the "Blocked contacts" list, sees your presence as offline and cannot start any collaboration session with you.
"Block all"	All contacts waiting for acceptance are blocked.
Accept new followers	All new followers, in the section "*New followers*" are accepted when you exit the "*Followers*" tab. A warning is displayed before acceptance. Contacts are added to your list of followers.

2.8.2.4 Unblock a contact
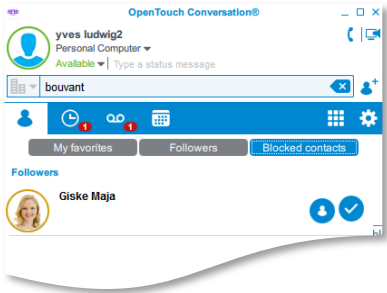
Select the "*Blocked contacts*" tab.

All blocked contacts are listed in this tab.

	Open the contact card of the contact you want to unblock. You can unblock the contact from the contact card. The contact is placed in the "*Followers*" list.
	The corresponding contact is unblocked. The contact is placed in the "*Followers*" list.

2.9 Call Routing

Call routing lets you to choose which devices will ring when you receive an incoming call and which device is used for making calls (predefined devices).

2.9.1 Select a call routing

1. Click your current call routing profile in the user area. The current routing profile is displayed.
2. Customize the current routing profile if necessary:
   - *"Dial from"*
     This section lists all available devices which you can use to make a call. The list of devices depends on the system configuration. If you are using multi-device, the main device and all secondary devices (up to 4 devices) are displayed. Select the current device to make outgoing calls. You are in softphone mode when the Personal computer is selected in the *"Dial from"* option.
   - *"Receive my calls on"*
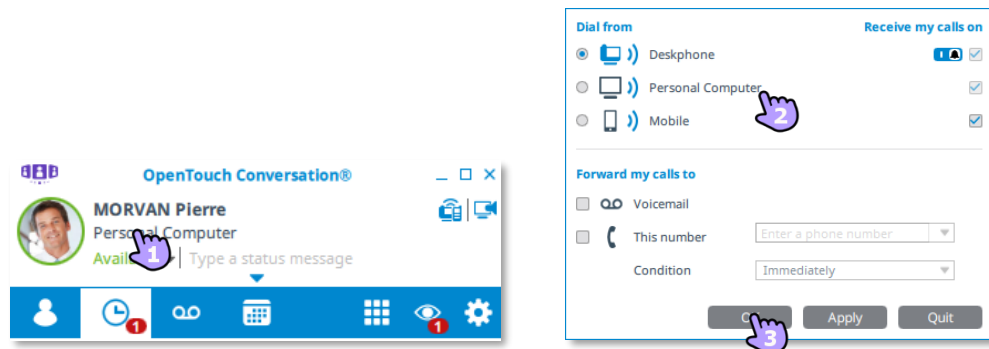   This section allows you to select which devices can be used to receive an incoming call (which devices will ring when you receive an incoming call). Depending on the selected device in the "*Dial from*" section, you can choose which related devices may receive an incoming call and which may not. Some devices are mandatory and cannot be unchecked.
     You can mute (📵) or unmute (🔔) the ringing of your desk phone by clicking on the icon. This can be useful to not disturb the people around you. You can also mute the ringtone of your desk phone when you are away from your office.
   - *"Forward calls to"*
     This section allows you to forward all incoming calls to your voicemail or any other phone number according to the following conditions: immediately (no condition), if busy, if no reply, if busy or no reply.
3. Validate:
   - "*Apply*": apply the routing profile.
   - "*OK*": apply the routing profile and close the window.
   - "*Quit*": close the window. The last applied routing profile is kept.

The selected routing profile and information about this profile are displayed in the user area:

|			
🖥	Your personal computer will not ring.	📱	Dual ringing is enabled.
🖥	Your desk phone is used to initiate the call.	📥	Calls are forwarded to your voicemail.
📹	Your personal computer is used to initiate the call.	➡	Calls are forwarded to a number.
📱	Your mobile is used to initiate the call.		

You can also select directly the current phone to make call, by right-clicking the OpenTouch Conversation icon from the Windows notification area.
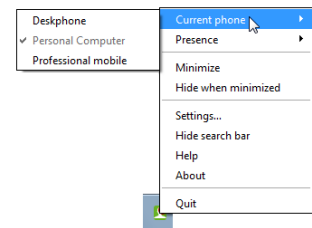
2.9.2 Define and save routing profiles

This feature depends on the system configuration (user account) and is controlled by the IT manager. The routing profile is enhanced by the capability to define and save personal profiles.

### 2.9.2.1 Create a new profile
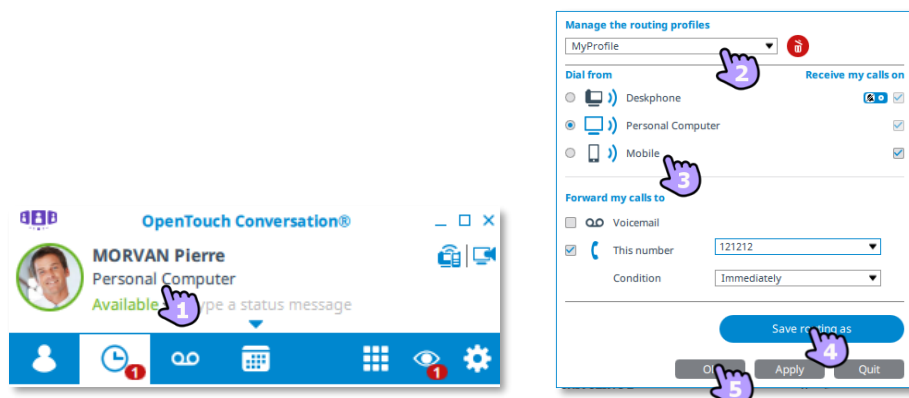
1. Click your current call routing profile in the user area. The current routing profile is displayed.
2. *Manage the routing profiles*
    Keep the current routing profile or select a routing profile from the list.
    The routing profile is displayed and you can either apply it or change it by selecting options (checkboxes).
3. Define your routing profile by selecting available options.
4. Save the new routing profile to use it another time.
    *   Enter the name of the new routing profile or keep the same name to replace it.
    *   Save the profile. If you replace a current profile, a warning is displayed.
5. Validate:
    *   "*Apply*": Apply the routing profile.
    *   "*OK*": Apply the routing profile and close the window.
    *   "*Quit*": Close the window. The last applied routing profile is kept.

Information about the selected profile is displayed in the user area: the name of the predefined profile and/or status icons. The name of a saved profile is not displayed.

2.9.2.2 Delete a profile

1. Click your current call routing profile in the user area. The current routing profile is displayed.
2. *Manage the routing profiles*
    In the list, select the routing profile to be deleted.
3.   Delete the selected routing profile.
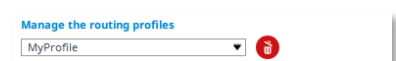
2.10 Presence

The OpenTouch Conversation presence shows the real-time availability of corporate colleagues (OpenTouch). It reduces the time you will spend "blind-calling" colleagues, only to get no answer, or to get forwarded to a voicemail service.

The presence status depends on the user profile of your contact.

The colored ring around the picture shows the contact's presence status.
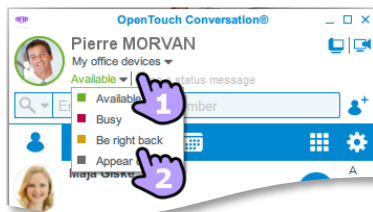

Available   *Busy*   *Be right back*   *Appear offline*

If you are using the OpenTouch Conversation for PC (full featured), the presence status of your contact can be augmented with the Outlook calendar presence (Exchange – depending on the system). The calendar presence, information about meetings and appointments scheduled of your contact for the current day, is displayed in favorites list, Conversation Wall or in the contact card when she or he is in an Exchange meeting with status Free (only in the contact card), Working Elsewhere or Tentative so that you know whether you can call her or him.

Change your OpenTouch Conversation presence:

- To change your presence, click on your current presence.
- Select your new presence status: *"Available", "Busy", "Be right back", "Appear offline"*.

A custom message (beside the presence label) other users will see can be defined.

 You can also set your presence status by right-clicking the OpenTouch Conversation icon from the Windows notification area.

2.11 Contact card

The Contact card is a great way to initiate a conversation with a contact. In addition to the presence and custom message, it also displays organization information (company, job title, phone numbers, etc.) and the conversations you had with that contact.

Open a contact card by selecting a contact in the Conversation Wall, from your favorite list or search result. Such card contains three views:
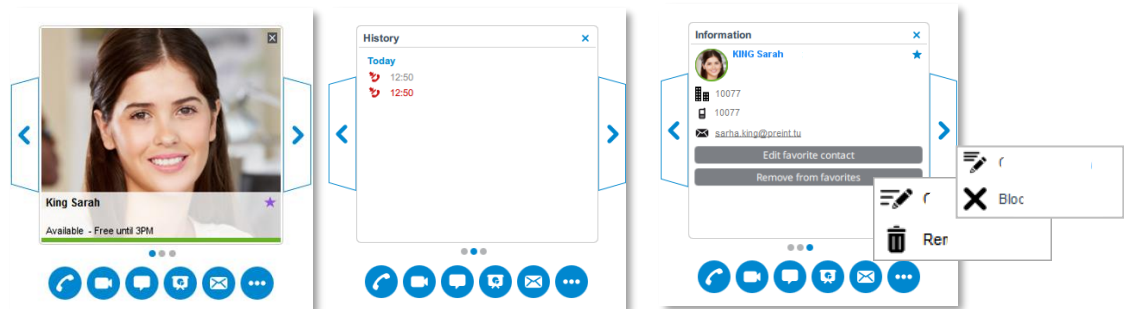
2.11.1   Main information

The first view displays the main information about your contact: picture, name, presence (if available) and the favorite icon (if the contact is a favorite). If you are using the OpenTouch Conversation for PC (full featured), the presence status of your contact can be augmented with the Outlook calendar presence (Exchange – depending on the system). The calendar presence, information about meetings and appointments scheduled of your contact for the current day, is displayed in the favorites list, Conversation Wall or in the contact card when she or he is in an Exchange meeting with status Free (only in the contact card), Working Elsewhere or Tentative so that you know if you can call her or him.
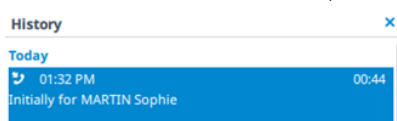
- ❯ Select the right arrow to access the next view.

2.11.2   History

The second view is your conversation history with this contact. If the history is empty, this view is not displayed. Unread events are in red. Clicking a contact card will automatically display the History view if there are unread events (voicemail, missed call, or missed instant message). From this view, you can call back the contact or start reading an instant message.

- oo   Voice message. Click the item to listen to the voice message.
- 🗩🗩   Read/Unread chat. Click the item to review exchanged messages.
- ☏ ↝   Outgoing call (answered or cancelled). Click the item to call back.
- ↰   Callback request. Click the item to call back.

In case of call redirection, information on the origin of the call is displayed in the history.

In this example, the call log, displayed in Sarah's history, indicates that you received a call from Sarah, who tried to call Sophie but Sophie has forwarded calls to you.

- ❯ Select the right arrow to access the next view.

2.11.3 Complete information

This third view contains more information about your contact: company name, job title, phone numbers, email, postal address, etc.

- ⌘ The picture of a federated contact (such as a Lync contact) is marked with a specific icon. In this case, the presence is displayed only if the contact has accepted to publish presence information.
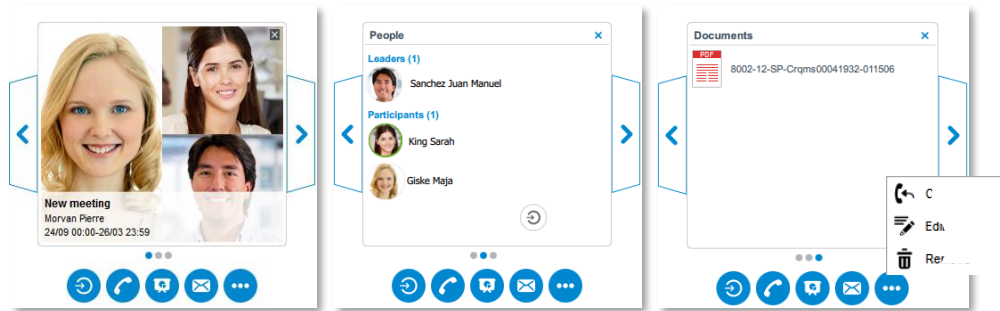- ☒ Close the card.

2.11.4 Available actions

All available actions are displayed on the card and depend on your license.
From a contact card, you can:

• Start an audio or video (optional) call with the contact. If there are several numbers for the same contact, select the desired number by clicking on the down arrow.	
• Start an instant message with the contact.	
• Share documents, an application window or desktop with the contact (optional).	
• Send an email to the contact.	
• Create a meeting with the contact (optional).	
• Remove the card from the Wall. Confirmation is requested if there are unread events with this contact.	
• Reject the "*Followers*" request (depends on the privacy option in the system configuration).	
• Depending on the contact, you can add the contact to favorites or edit the favorite contact to change name or phone number, or remove the contact from favorites, by clicking on the corresponding menu in the information page.	

2.12 Meeting card (conferencing option)

A meeting card represents a group of persons. Open a meeting card by selecting a meeting from the conversation wall. Such a card contains at least three views:
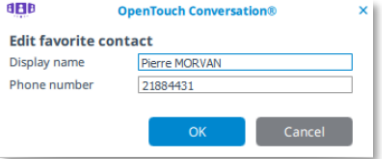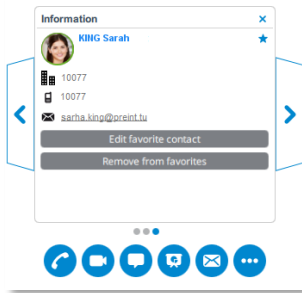

- The first view can display up to four participants of the meeting.

- Select the right arrow to access the next view.
- The second view lists all participants of the meeting (click a participant to open the contact card).

- Select the right arrow to access the next view.
- The last view shows all shared documents for the meeting.
- From the meeting card, you can: edit (for a future or active meeting), create (from a past meeting), or delete the meeting.
- Close the card.
- If instant messages were exchanged during a meeting, an additional view allows displaying these exchanges.

All available actions are displayed on the card and depend on your license.
From a meeting card, you can:

• Join the meeting with all media (optional).	
• Join the meeting with audio only.	
• Joint the meeting without audio.	
• Send an email to all participants.	
• Modify the meeting (owner).	
• Remove the card from the Wall.	
• Join the meeting in audio with a device other than the currently defined in call routing. Enter a new number you would like to use for the meeting or select one of the nine numbers that were entered last (if necessary, you can select your current number in the list).	

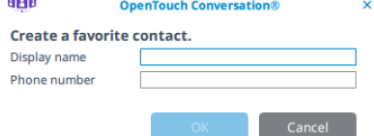## 2.13 Add/remove/modify a contact to/from your favorite list

🖱	From a list of contacts, open the contextual menu by right-clicking on the contact: • ✏ Edit the favorite contact to modify the name or the phone number. • ★ Add/remove the contact to/from your favorites.
☆ ★	From a contact card: • select/unselect the star or click the corresponding button in the Information view to add/remove the contact from your favorite list (“*Add to favorites*”, “*Remove from favorites*”). • Edit the card to modify the name and/or the phone number (“*Remove from favorites*”).

If the privacy option is enabled in the system configuration, a notification is sent to the contact you want to add. The contact is added to the list of your favorites. You can see his or her real-time presence unless he or she decides to add you to the blocked contact list.

2.14 Create a contact in your favorite list

• 👤⁺ Click to open the form to create your favorite contact.
• Enter the name and the phone number of your contact.
• Validate.
 The contact is displayed in your favorite list.

You can import a list of personal contacts by using a text file, see :2.25.4 Import/export a list of personal contacts in/from favorites: “*Phone numbers*”.

2.15 Group supervision (optional)

Your business phone number can be supervised and your incoming calls can be picked up by a supervisor when you are part of a supervision group.

If you are a supervisor, you receive a beep on a supervised incoming call. The calling party is displayed on the top banner. You can pick up a supervised call from your desk phone.
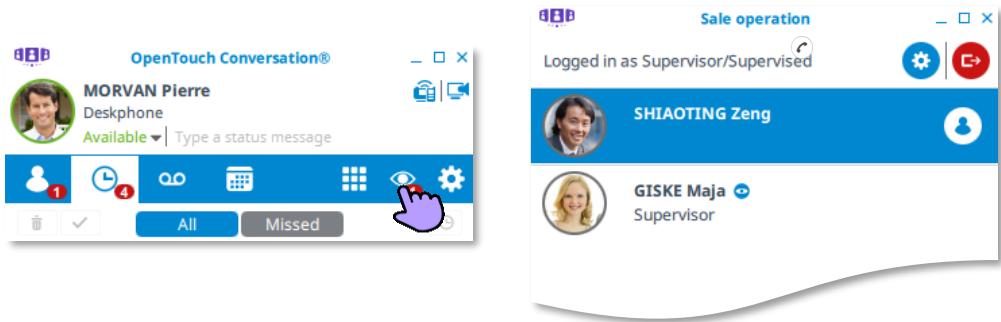
A specific icon is displayed on your home page if the function is activated. The number of connected supervisors is indicated with a red badge.

|	
Your business phone number is supervised (you are connected with a supervision group).	
Your business phone number is not supervised (you are not connected with a supervision group).	

• Click the Group Supervision icon to see details about all members of this group who are logged in: presence status, supervisor members. A supervisor member is marked with this icon: ⊙ .	
• Log in the group.	
• Exit from the group.	
• Open the contact card of a group member for initiating, for example, a conversation with that member.	
• Start directly an audio call with the contact.	

• Define options:
    o Display only members logged in (filter).
    o Display desktop alerts.
    o Play a sound when a member is called.	

Your call log will display the name of the supervisor who has picked up your call (in the conversation history page of the contact card).
You can define the ringtone used when receiving a notification, see : 2.25.7 Manage ringtones.

2.16 Hunting groups (optional)

The hunting group feature lets you distribute calls from a single number to a group of several phone numbers. If your phone number is part of a hunting group, it can be reached via the hunting group number.
You can take calls from all your compatible devices (mobile, desk phone or personal computer if available). You can activate or deactivate this feature from the OpenTouch Conversation for PC. Belonging to a group does not affect the management of direct calls. A specific telephone within a group can always be called by using its own number.
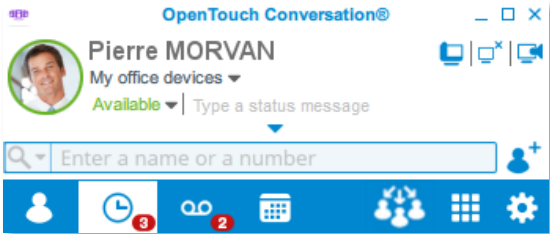
|	
Enter into your hunting group. You can answer when the hunting group number is called.	🔵
Leave your hunting group.	🔵

2.17 Visual Voicemail (OpenTouch Conversation for PC)
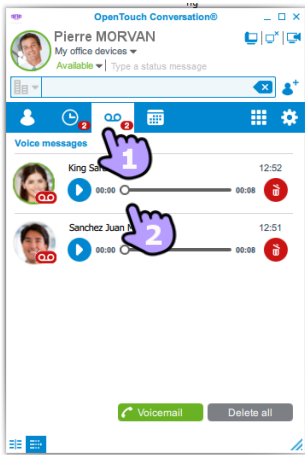
1. 🔵 You have new voice messages (the number of new messages is displayed with a red badge).
   Click on the icon to open your visual voicemail.
   All read and unread messages are displayed.
2. Select the message you want to listen to.

• Listen to the message / Resume playing the message.	▶
• Pause the message.	⏸
• Delete the message.	🗑
• Call your Voicemailbox to configure or activate for example your greetings.	📞 "Voicemail"
• Delete all voice messages.	"Delete all"

2.18 Voicemail (OpenTouch Conversation for PC One)
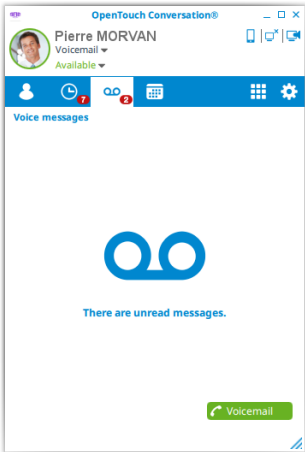
 You have new voice messages (the number of new messages is displayed with a red badge).

• Call your voicemail and follow instructions from the voicemail server.	*"Voicemail"*

To go back to the default greeting message, you have to delete all recorded messages (*Number*).

2.19 Start a conversation

You can start a conversation from:

- The Conversation Wall (history).
- The Favorite list.
- The visual Voicemail (optional).
- The list of participants of a meeting.
- A directory lookup.
- The list of members of a supervision group (optional).
- The keypad.
- A programmable softkey.

From a programmable softkey

• Display the programmable softkeys area if it is hidden.	
• Left click on the programmable softkey.	

From a list of contact

When a list of contacts is displayed, and according to the selected contact capabilities, you can:

• Start directly an audio call from a list of contacts.	📞
• Open a contextual menu by right-clicking on an item in a list of contacts. The contextual menu displays all actions available with the selected conversation or meeting. 📞 Start an audio call with the contact. 🎥 Start a video call with the contact (optional). 💬 Start an instant message with the contact.	🖱

From a contact card

When the contact card is opened, and according to the contact capabilities, you can:

• Start an audio call. If there are several numbers for the same contact, select the desired number by clicking on the down arrow.	📞
• Start a video call (optional).	🎥
• Send an instant message.	💬

By dialing a phone number
You can also dial a phone number:

- By entering a number in the search/dial area.
- By using the keypad:

  - ▦ Click to open the keypad.
  - Enter the caller's number.
  - 📞 Start an audio call / 🎥 video call (optional).
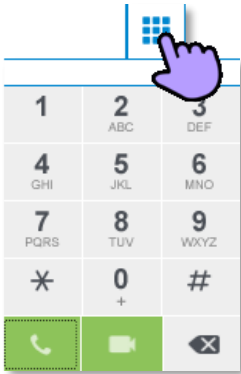
You can also enter a name or a number in the search/dial area from the Windows notification area (show or hide the search/dial area by right-clicking the OpenTouch Conversation icon from the Windows notification area).

Phone number format

- Short number for an internal contact.
- Canonical number: +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.
- Contact number without country code for a contact in the same country.

By using a hotkey (keyboard shortcut)

If you have defined a hotkey to start a call, you can select the defined keys to start a conversation with any highlighted number on OpenTouch Conversation for PC, text editor, browser, messenger, etc.

- Hold down the left mouse button on a number until it is highlighted.
- Click on the hotkey to start the audio call.

To define a hotkey, consult: General settings (display name, language, theme, hotkeys, call presentation screen): "General"

2.19.1   Callback request

Depending on your system, you can send a callback request when your contact doesn't answer or is busy.
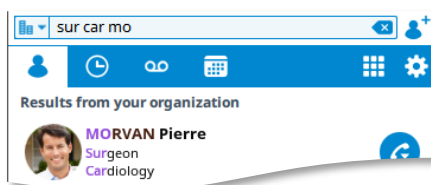
2.20 Search for a contact

Searching for contacts in an OpenTouch Conversation is simple. The search is performed through your local and corporate directories. OpenTouch Conversation offers a multi-criteria directory search, depending on the system configuration. It allows to search a corporate directory using first name, last name and up to 5 other customizable attributes. You can enter up to 5 strings in the search bar. The result lists any contacts whose attributes match the entered strings. To make your search easier, all the attributes are displayed in the search result.

		Select the directories in which you want to start your search.
🔍	🔍	The search is performed first through the local directories. If necessary, the result can be completed by a search through the corporate directories. The predictive search assists you in quickly finding your contact in your local directories.
	📇	The search is performed through the corporate directories.
✖		Cancel the search.

- From the search/dial area, enter the searched string. You can base your search on up to 5 strings for better results.
- 🔍 If local directories are selected: a check is immediately performed on "local" contacts (Microsoft Outlook contacts, favorites, contacts logged in the Wall).
  - o Up to four names are suggested among the local contacts matching the search criteria: the last called and the three most called numbers.
  - o 🔍 Select this option in the suggested list to display all local contacts.
  - o 📇 Select this option in the suggested list to perform the search in the corporate directories.
- 📇 If corporate directories are selected: press the enter key on your computer to perform the search in the corporate directories. The result lists any contacts with one or more defined attributes (first name, last name and up to 5 other customizable attributes) that match the entered strings. All entered strings are searched in all searchable attributes ("is contained in").

- Advanced search:
  - o Search an attribute starting with a string: enter "%" before the string.
  - o Exclude attribute containing a string: enter "-" before the string.

You can also enter the name of your contact in the search/dial area from the Windows notification area (show or hide the search/dial area by right-clicking the OpenTouch Conversation icon from the Windows notification area). The predictive search in local directories is performed as soon as you enter the first letter. Press the enter key on your computer to perform the search in corporate directories.

In the search result, the presence status of your contact is only displayed for favorite contacts. Open the contact card to see the presence status of the other users.

2.21 Answer a conversation

2.21.1 Audio or video call

If you are using OpenTouch Conversation for PC, a desktop alert (toast) is displayed when someone wants to start a conversation with you (example below with a Call):

|	
	- Accept the audio conversation.
	- Accept the video conversation.
	- Divert the incoming audio/video call to the voicemail.
	- Reply with an instant message or move the incoming call to a predefined number.
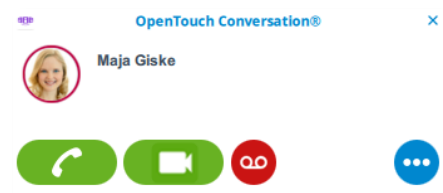
In case of call redirection, information on the origin of the call is displayed on the incoming call toast.

In this example, Sarah tried to call Sophie. Sophie has forwarded calls to you. You receive the call from Sarah.
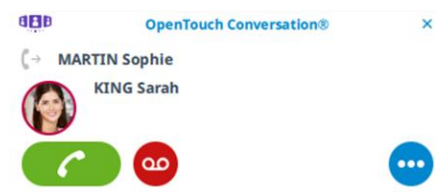
If you are using OpenTouch Conversation for PC One, video call is not available and you have to use your desk phone to answer the audio call.
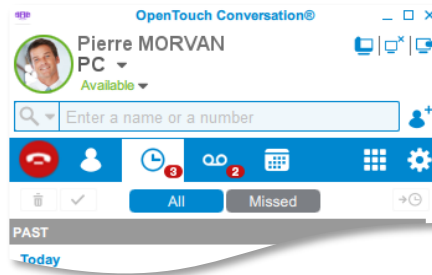
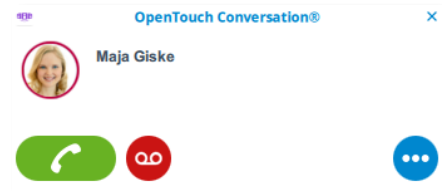|	When you receive an incoming audio call, the release button is displayed in the top banner. Select this icon to forward the call to your Voicemail.

	Use your desk phone to answer the call.
	At the end of the conversation, to release the call, use the release button or on-hook with the desk phone.

2.21.2   Answer incoming call on desk phone

This feature lets you establish the conversation on your desk phone when you answer an incoming audio call with the OpenTouch Conversation for PC.
The "*Answer incoming calls on deskphone*" option must be enabled in "*General*" settings and you are using a desk phone associated with the OpenTouch Conversation for PC in a multi-device environment.
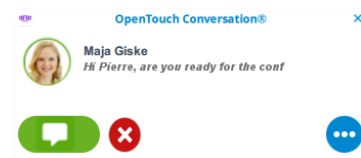
- You receive an incoming audio call. The desktop alert is displayed.
- Accept the audio conversation. The call is automatically established on your desk phone.

2.21.3   Answer an instant message

A Desktop alert is displayed when someone wants to start a conversation with you.

	• Accept the instant message conversation.
	• Decline the chat.
	• Start an audio or video (optional) call.

	• During an instant message conversation, you can share documents

The actions available depend on the type of conversation and system. If an action is not available, the icon is grayed or is not displayed.

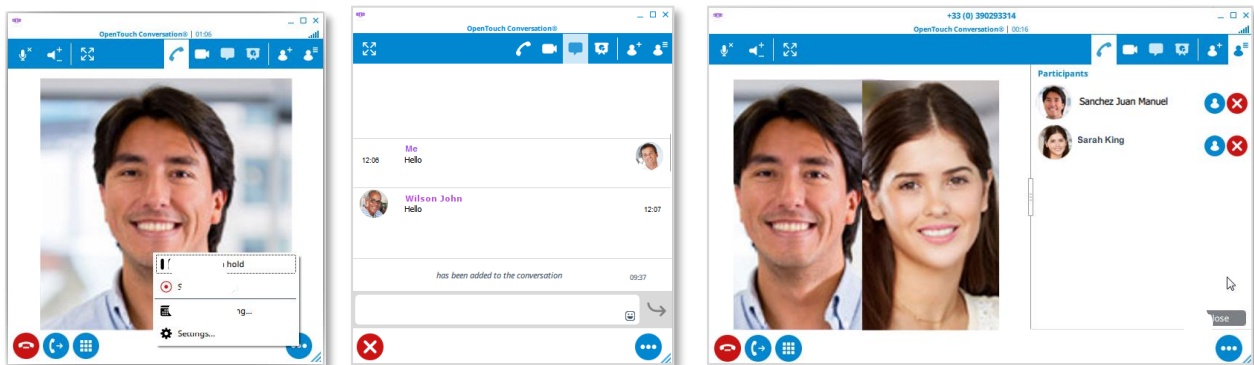## 2.22 During a conversation (OpenTouch Conversation for PC)

The actions available depend on the type of conversation and system. If an action is not available, the icon is grayed or is not displayed.

2.22.1 Screen description

Actions are available according to the type of conversation:

- Audio or video call.
- Conference.
- Meeting.
- Instant messaging.

Main audio/video controls (top bar, left side)

• Mute/unmute the conversation. 🔳 When the line is muted, the microphone is red and the OpenTouch Conversation icon appears in the task bar with a red-crossed microphone.	🎤	🔴
• Set the volume of your speakers.	🔊	
• Mute/unmute the video call.	📹	
• Hide/Show the "picture in picture" during a video call.	📷	📷

Media controls/Participants (top bar, right side)

• Add video to the conversation.	📹
• Add instant messaging to the conversation.	💬
• Share documents, an application or your desktop during the conversation (see section: Content sharing).	🖥
• Make a second call during conversation.	👤
• Display the list of participants.	👥

Conversation functions (bottom bar, left side)

• Hang up the audio/video conversation. • End the conversation.	
• Put the call on hold.	
• Retrieve the call on hold. If you are in conversation with another contact, the current conversation is put on hold.	
• Transfer the conversation to a predefined device (e.g. mobile, desk phone), another number, contact or a call on hold. • Blind transfer: select this icon when you make a second call to transfer the call directly.	
• Divert the conversation to your current device. The current device is defined in your call routing as the device making outgoing calls. This feature depends on the multi-device system configuration. If the conversation is not established via the OpenTouch Conversation for PC, you have to open the conversation in progress window by selecting it in the wall (history) of the application: .	
• Switch the conversation from main device to secondary devices (DECT, mobile, etc.). This feature depends on the multi-device system configuration.	
• Switch the conversation from secondary device to main device (defined for making calls in settings). This feature depends on the multi-device system configuration.	
• Send DTMF.	

Other functions (bottom bar, right side)

• Open more actions.	
• Put the call on hold.	
• Record/Stop recording the audio conversation. • ◉ This icon is displayed when recording.	
• Create a meeting with your contact.	
• Export the entire conversation (instant message) to the clipboard. You can also paste the conversation in another application.	
• Access to the settings.	

In a scheduled meeting, the name of the active talker is displayed in the bottom bar (an avatar of the active talker is also highlighted in the participants view). The conversation window can be retrieved from the Wall when closed.

Note about recording conversations

- Recordings of audio calls with a contact are stored in your voicemail box and are available via the visual voicemail interface only (they are not displayed in your conversation history).
- Recordings of audio meetings are stored in the meeting tab. See section: Meeting.

2.22.2 Make a second call
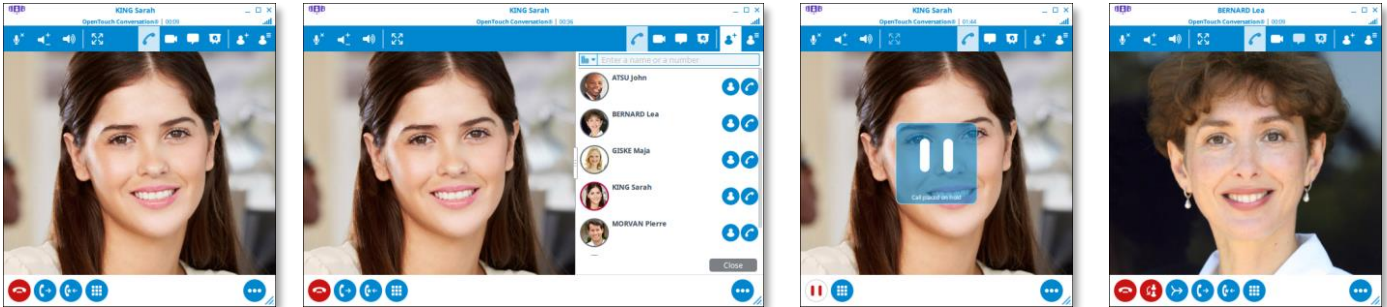
- You are in conversation with one contact.
- : select the second call icon.
- : call the second contact (number, search, history).
- The first call is on hold and you are in conversation with the second contact.

2.22.3 Blind transfer

Transfer your call directly to a contact without waiting for the contact to answer:

You are in conversation with one contact.

1- : select the transfer icon. Enter the number or search a contact.

2- : select the direct transfer icon to transfer the call to the selected contact.
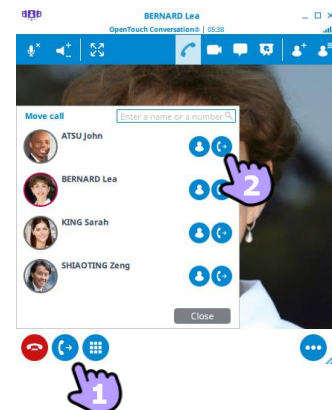
2.22.4 Make another conversation, 3-party conference

A new conversation window is opened when you receive a second call or when you start a new conversation (from the contact card, the search result, the dial box etc.).

• Hang up on the audio/video conversation. • End the conversation.	
• Put the call on hold.	
• Switching between calls (broker call): when you retrieve a call, the current conversation is put on hold.	
• You are in conversation with one contact and the second is on hold. Transfer the call to your contact on hold. You are no longer in conversation.	
• Transfer the conversation to a predefined device (e.g. mobile, desk phone), another number or contact.	
• Merge all conversations to conference.	
• Remove a participant.	
• Display information about the participant.	
• End the conference.	

2.23 Content sharing (conferencing option)

It is possible to share a document or the desktop during a conversation (see chapter Content sharing).

2.24 Join a meeting
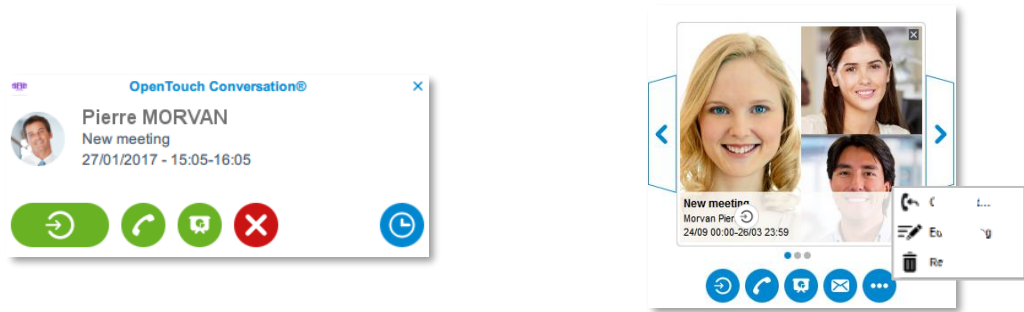
A Desktop alert is displayed 15 minutes before a meeting starts.

• Join the meeting with audio and video (optional).	
• Join the meeting with audio only.	
• Join the meeting without audio.	
• Repeat the notification in 5 minutes.	
• Dismiss the notification.	

You can also join the meeting from the Conversation Wall by opening the meeting card, if you have subscribed to the conferencing option (license).

• Join the meeting with all media (optional).	
• Join the meeting with audio only.	
• Joint the meeting without audio.	
• Send an email to all participants.	
• Join the meeting in audio with device other than the currently defined in call routing. Enter a new number you would like to use for the meeting or select one of the nine numbers entered last (if necessary, you can select your current number in the list).	

2.25 Settings

Only available settings are displayed.
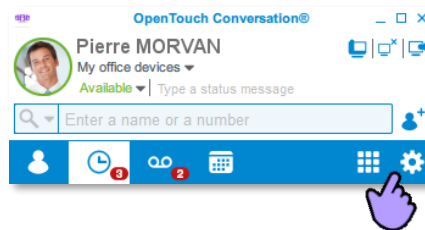
 Open the settings window.

2.25.1 Startup behavior settings: "*Start*"

Define how you want to start your OpenTouch Conversation application:

- Automatically start the application when logging on to Windows.
- Automatically sign in to the application when it starts. The "*Remember password*" checkbox has to be validated in the login window (see Start OpenTouch Conversation).
- Define the presence status when signing in (optional).
- "*OK*" / "*Apply*": validate.
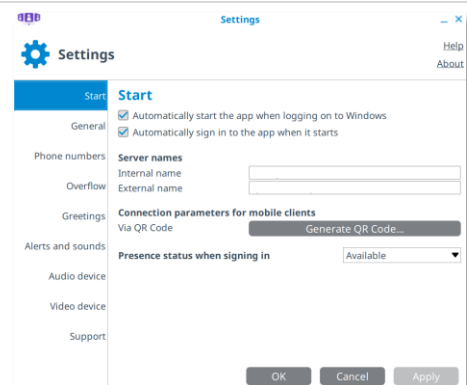
OpenTouch Conversation for PC can generate a QR code ("*Generate QR Code*"). The QR code lets you to easily configure connection settings for another client like OpenTouch Conversation for Android or iPhone.

2.25.2 General settings (display name, language, theme, hotkeys, call presentation screen): *"General"*

- *"Display order"*: define how to display contacts (last name first or first name first).
- *"Languages"*: define the display language.
- *"Theme"*: personalize the phone by selecting a theme.
- *"Hotkeys"*: define a keyboard shortcut (hotkey) for starting a call (on highlighted number) or for stopping the remote Desktop Control. Define combination keys using function keys, Ctrl key or Alt key.
- *"Toast options"*: display/hide the incoming audio call toast. By default, an incoming call toast is displayed. However, if you are using several applications which display a toast when you receive an incoming call (for example IP Desktop Softphone application), you can hide the OpenTouch Conversation toast for an incoming call for a better experience.
- *"Answer incoming calls on deskphone"*: automatically establish the incoming audio call on your desk phone when you answer it from OpenTouch Conversation for PC.
- *"OK"* / *"Apply"*: validate.
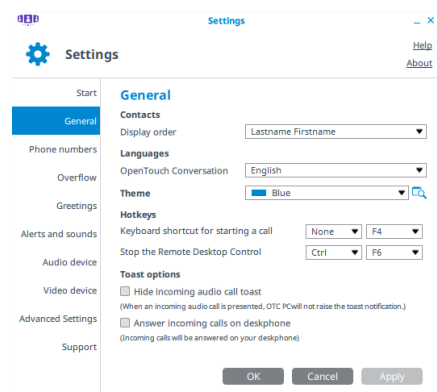
2.25.3 Professional and personal phone numbers: *"Phone numbers"*

- *"Professional numbers"*, *"Personal numbers"*: define professional and personal phone numbers (use these numbers for diverting/transferring calls or in call routing profiles). The phone number you entered is automatically formatted as a canonical number when you apply: +Country/RegionCode (AreaCode) Number. *"Professional numbers"* are not editable with OpenTouch Conversation for PC One. If you are using your mobile as a secondary device (multi-device feature), your mobile number is defined as your professional mobile and cannot be changed.
- *"OK"* / *"Apply"*: validate.
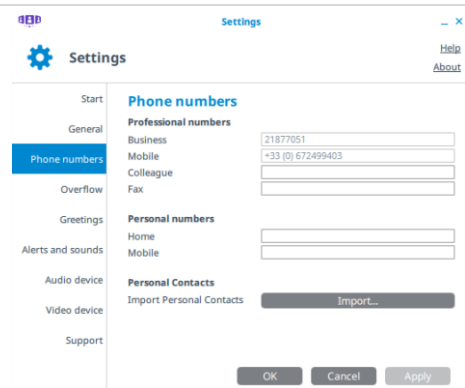
2.25.4 Import/export a list of personal contacts in/from favorites: "*Phone numbers*"

- *"Personal Contacts"*: OpenTouch Conversation allows to import to favorites a list of contacts from a text file (ASCII) with the following format: "Name Firstname, number".
- *"Import"*: select the text file containing the list of contacts. The file format must be: "Name, number", one contact per line.
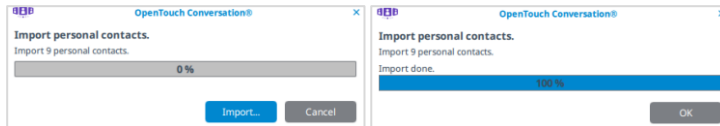
- *"Import"*: import contacts. All contacts are added to your favorites.
- *"Export"*: export personal contacts to a text file (.csv). Exported format is: "Name, number", one contact per line.
- *"OK"*: close the window.
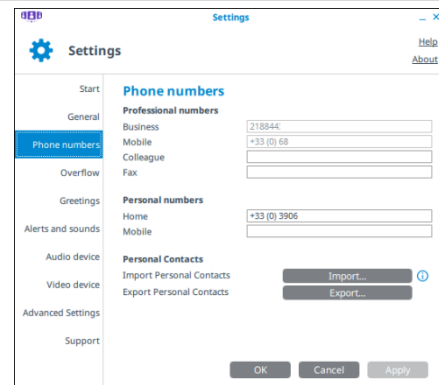
2.25.5 Manage overflow: "*Call overflow*" (OpenTouch Conversation for PC)

"Call overflow": define how to manage a call when you do not reply or when you are busy. All incoming calls can be diverted to voicemail or predefined phone number when you are absent and/or busy.

- Select the destination of the diversion: No diversion ("*None*") or predefined phone number ("*Phone number*").
- *"Condition"*: select the condition of the diversion (busy, no reply, busy or no reply).
- *"OK"* / *"Apply"*: validate.
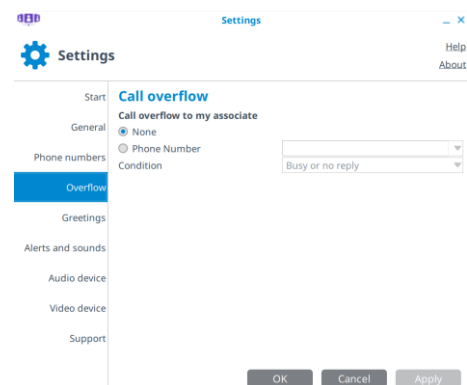
2.25.6 Manage your welcome greeting messages: "*Greetings*" (OpenTouch Conversation for PC)

- Manage your welcome greeting messages. See section : 2.26 Welcome greetings management.
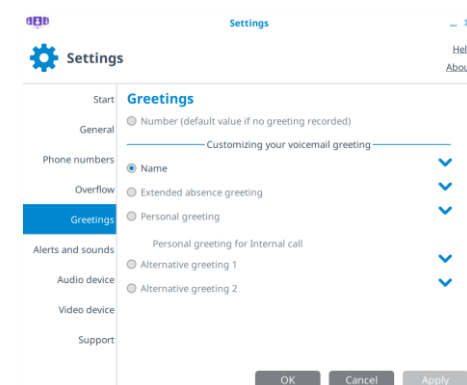
2.25.7 Manage ringtones

2.25.7.1 Define the ringtone: "Alerts and sounds" (OpenTouch Conversation for PC in Softphone mode)

Select a predefined or new ringtone to be used when receiving an incoming call on your computer or a supervision notification (optional). The supervision ringtone is only displayed if you are part of a supervision group and it is only played if this option is enabled in supervision settings (see: 2.15 Group supervision (optional)).

- Use one of the following:
    - "Ringtones": select the ringtone for use when receiving an incoming call on your computer.
    - Add a new ringtone: "Select a new WAV file".
    Upload a WAV file as a ringtone by selecting the VAW file.

    ▶ Check the ringtone.
- "OK" / "Apply": validate.
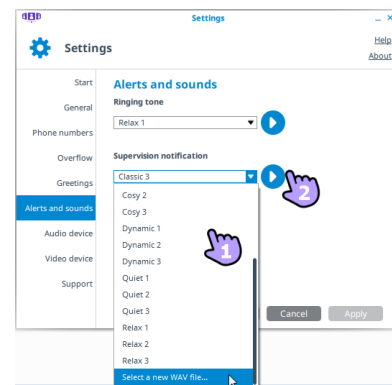
2.25.7.2 Mute/unmute Ringtone of your desk phone

From the call routing window, you can mute or unmute your desk phone.
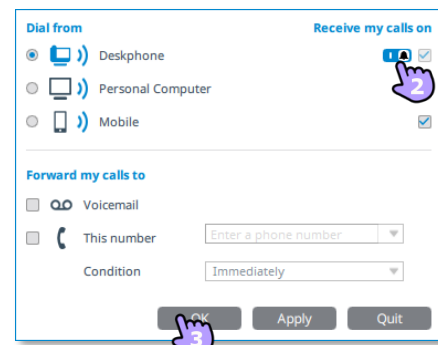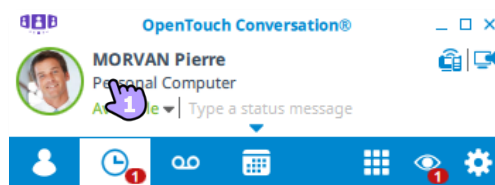
1. Click your current call routing profile in the user area.
2. Mute ( ) or unmute ( ) the ringing of your desk phone. This can be useful when you do not want to disturb the people around you. You can also mute the ringtone of your desk phone when you are away from your office.
3. Apply.

2.25.8 Manage audio and video device: *"Audio device", "Video device"* (OpenTouch Conversation for PC)

Select the webcam, microphone and speakers you want to use for video and audio calls.
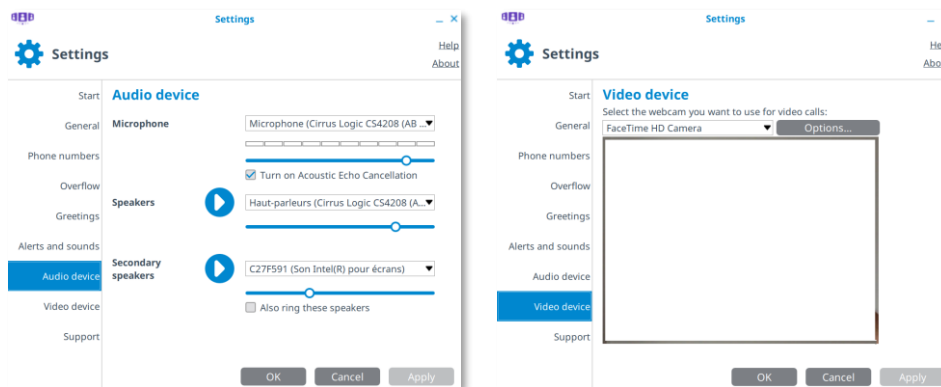
2.25.8.1 Define audio devices

Select the microphone and speakers you want to use for audio and video calls.
Depending on the audio device selected, a specific icon is displayed in the user area:

- 🖥 : Microphone and speakers of the computer.
- 🎧 : Headset.

2.25.8.2 Define video device

Select the webcam you want to use for video calls.

2.25.8.3 Multiple audio sources (ducking)

If the defined audio device in the application is the same as the system default audio device, the OpenTouch Conversation for PC application manages external audio levels. For example, when listening to music, the music volume is reduced when you receive an incoming call.

2.25.8.4 Real-time optimized audio and video in VDI environments (Virtual Desktop Infrastructure)

This feature is supported on Windows 7 and Windows 10.

In order to improve audio and video quality in a VDI environment, you have to install the ALE-VRTX package on your computer. Please contact your installer for more information.

In this optimized environment, audio and video settings are displayed in a separated window.

2.25.9 Multi-tenant architecture: "Advanced settings"

If your company is part of a multi-tenant architecture, you must indicate the prefix allocated to your company.

- *"Multi tenant"*: check the option and enter your company prefix.
- *"OK"* / *"Apply"*: validate.
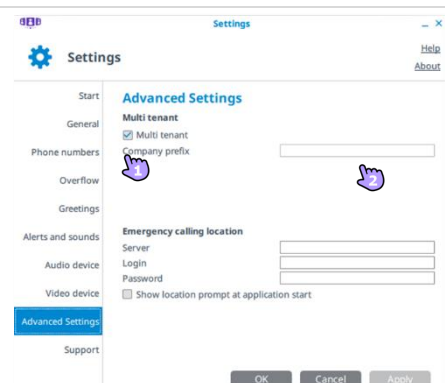
2.25.10 Emergency calling location: "Advanced settings"

Activate the emergency calling location feature (RAY BAUM Act) by entering the Visual Notification Assistant (VNA) credential information: address, login and password. For more details, see chapter 7 US Emergency call compliance (RAY BAUM'S Act).

- *"Emergency calling location"*: enter credential information of the VNA server: address, user login (ID from VNA) and password (PIN from VNA).
- *"Show location prompt"*: check this option for your location to be requested at application start-up.
  Caution: uncheck this option only if you don't want to be prompted for your location every time you start the application, for example if you never change your location.
- *"OK"* / *"Apply"*: validate.
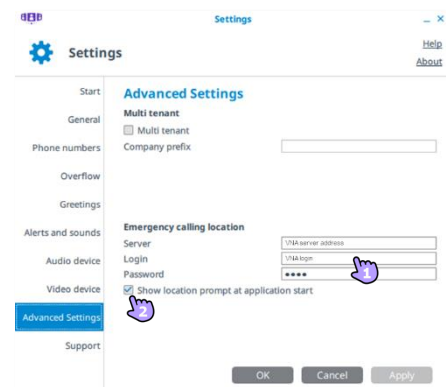
2.25.11 *"Support"*

- *"Activate logging"*: select this option to activate logging for the current session.
- Click *"Save logs..."* button to put the collected data into a zip archive that can be sent to the support team.
- Uncheck the option or stop the application to deactivate logging.
- *"Send usage statistics"*: select this option to help us improve our products by sending your daily usage data automatically and anonymously.
- *"OK"* / *"Apply"*: validate.
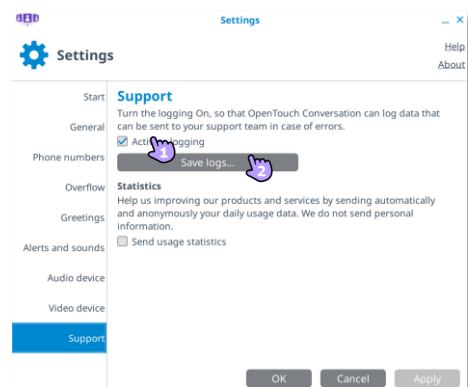
2.25.12 *"About"*

Open *"About"* information to know the software version and the user configuration.
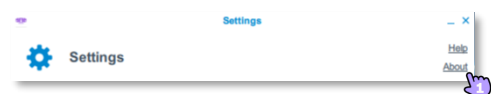
2.26 Welcome greetings management
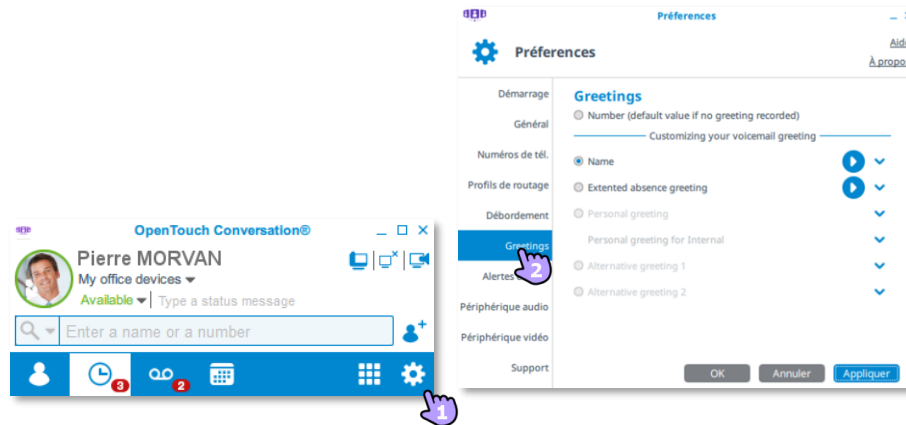
- Open the settings window.
- Select the greeting tab.

This feature lets you manage your welcome greeting messages. Welcome greetings are played to callers forwarded to your mail box. Different types of welcome greetings are available. A welcome greeting appears in grey if you have not recorded yet.

- The default greeting / *Number*
  The default greeting is the default message followed by your voice mail number. This message is selected as the default message if no message has been recorded.
- The standard greeting / *Name*
  The standard greeting is a standard text followed optionally by your recorded name.
- *Alternative 1/ Alternative 2*
  The system can provide up to two alternative greetings. These are only available when your system administrator has granted you the right to use them. They are alternative personal greetings, recorded for specific business situations (for instance a greeting when you are in a meeting), activated by you, according to your needs. Once you have returned to normal business operation, you may switch back to your personal greeting or to the standard greeting message. Alternative greetings are played to internal and external callers.
- *Extended Absence*
  The extended absence greeting is dedicated to situations where you are out of the office for a planned period of time, with no or limited access to your voice messages. The aim of this message is to inform internal and external callers of your absence (e.g. when you are on holidays). When an extended absence greeting is activated, callers are explicitly made aware that you may not be able to listen to your voice messages soon. They have to press a key to be able to leave you a message. When an extended absence greeting is activated, the system informs you each time you log into your mail box. At this stage, you can either retain or delete your extended absence greeting. If you decide to delete it, the system activates the greeting that was played before your extended absence message was activated. Unlike all other greetings, the extended absence greeting is automatically activated after it is recorded.
- *Personal/Internal Greeting*
  The personal greeting is an announcement recorded by you and activated via the Greetings Management Menu or the Web Interface. It replaces the standard greeting and is played to internal and external callers. You may record an additional personal internal greeting. This personal greeting shall be played to internal callers, while the first personal greeting is played to external callers only.

Activate a greeting message

When a welcome greeting is recorded, it appears in black. You cannot activate a greeting that has not yet been recorded.
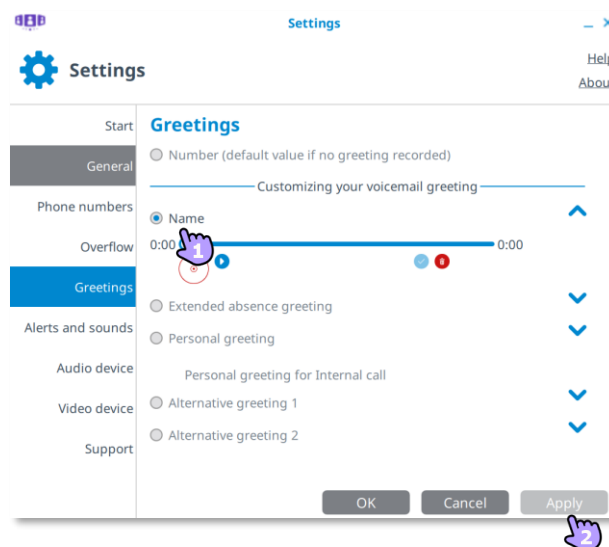
- ⦿ Select the message to play when a call is forwarded to your voicemail.
- Validate your choice.

Selecting the default "*Number*" greeting removes all other recorded greetings. In this case, a warning message is displayed asking the user to confirm the deletion.

Manage a welcome greeting

A welcome greeting appears in grey if you have not yet recorded anything. The message length is limited to 30 seconds.

Open / close the control panel to manage the welcome greeting.	˅ / ˄
Record the selected greeting message. Depending on the call routing, the default device is called. As soon as the call is established, the recording starts.	◎
Stop recording (or hang-up the call).	◼
Validate the selected greeting message.	✓
Play the selected greeting message. Depending on the call routing, the default device is called. As soon as the call is established, the message is played.	▶
Stop playing message (or hang-up the call).	⏸
Delete the selected greeting message (confirmation is requested). The greeting message that is currently activated cannot be deleted.	🗑

3 Manager/Assistant (optional)

This function is available to users having a manager role or an assistant role. It allows a manager to delegate calls to the assistant depending on the selected filter. This feature depends on the system configuration.

3.1 Manager view

3.1.1 Presentation

• Photos/avatars of registered assistants are displayed in the services area. If the assistant is currently absent, the avatar is grayed (manager/assistant presence). The manager/assistant presence indicates if the assistant is available to assist you and is different than rich OpenTouch presence. A tick on a photo/avatar indicates an active filtering rule with this assistant.	
• This icon indicates that the list of assistants is uncomplete. Select the manager/assistant icon to open the complete view.	•••
• Manager/assistant icon: select the manager/assistant icon to open the complete view of assistants (list of assistants and filters). o : Assistant present and at least one filtering rule activated. o : Assistant present, no filtering rule activated. o : Assistant absent, at least one filtering rule activated. o : Assistant absent, no filtering rule activated.	

3.1.2 Complete view and filters

A single click opens the matrix in order to view or change the filtering rules as necessary.	
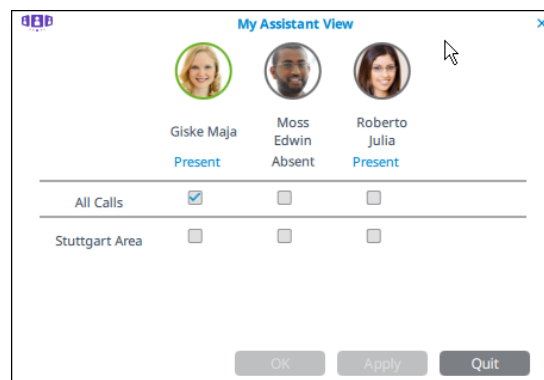
- All assistants are listed including their rich presence (OTC presence, color ring around avatar) and absence (manager/assistant presence) information.
- All available filters are listed (one line per existing filter). Filters depend on the system configuration and are defined by the administrator.
- A filter can be assigned to only one assistant.
- If no filter is selected for an assistant, the tick on the photo/avatar in the service area is not displayed.

In the example, Maja and Julia are present. All incoming calls are filtered by Maja. It is possible to filter calls from the Stuttgart area either via Edwin (when back) or Julia. You can unselect all filters if needed.

3.2 Assistant view

3.2.1   Presentation

• Photos/avatars of managers are displayed in the services area. A tick on a photo/avatar indicates an active filtering rule with the corresponding manager.	
• This icon indicates that the list of managers is uncomplete. Select the manager/assistant icon to open the complete view.	...
• Manager/assistant icon: select the manager/assistant icon to open the complete view of assistant (list of assistant and filters). ○ : Assistant present and at least one filtering rule activated. ○ : Assistant present, no filtering rule activated. ○ : Assistant absent, at least one filtering rule activated. ○ : Assistant absent, no filtering rule activated.	

3.2.2   Complete view and filters

A single click opens the matrix in order to view or change the filtering rules as necessary.	

- All managers are listed including their rich presence (OTC presence).
- All available filters are listed (one column per existing filter). Filters depend on the system configuration and are defined by the administrator.
- A filter can be assigned to one manager only.
- You can see and change your manager/assistant presence at any time to indicate if you are available to assist your managers (*Absent assistant*).
- If no filter is selected for a manager, the tick on the photo/avatar in the service area is not displayed.

In the example, you are present ("*Absent assistant*" option is not checked). All of Patrick's incoming calls are forwarded to you. You're not filtering any calls from Lea. It is possible to change the filter and receive all calls from Stuttgart area or Strasbourg area by selecting the corresponding filter (column). You can unselect all filters if needed.

3.3 Available actions on the manager or assistant

From the services area or the complete view of an assistant, the following actions are available.

• The name of your manager/assistant is displayed when you move the mouse over the photo/avatar.	

• Select (left click) a photo/avatar to open the corresponding contact card.
From the contact card, you can:
   Start an audio or video (optional).
   Start an instant message.
   Share documents, an application window or desktop (optional).
   Send an email to your assistant.
   Create or modify a meeting with your assistant (optional).	

• Open a contextual menu by right-clicking on a photo/avatar. The contextual menu displays all available actions:
   Start an audio call.
   Start a video (optional).
   Start an instant message.
   Share documents, an application window or desktop (optional).
   Send an email to the assistant.
   Create or modify a meeting (optional).
   Edit the favorite contact to modify the name or the phone number.
   Add/remove the assistant to/from your favorite list.
   Block the assistant.	

4 Content sharing

This feature depends on the user license. You have subscribed to the conferencing option.

4.1 Share documents during a conversation

• Open the sharing tool.	🖼️

Management panel:

PDF 3BA_29000_0401_XXZZA_0...	▶ ⬇ 🗑	
📄 Document...	➕	
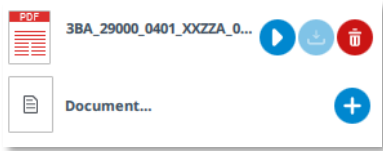
• Add a new document.	➕
• Share the document.	▶
• Download the document to your personal computer.	⬇
• Delete the document.	🗑

Controls (top bar of the conversation window):

⬛	1	/10	▦	⏮	‹	›	⏭	½	▶	▯	✎

• Stop the document sharing.	⬛	
• Go to the previous or next page of the document.	‹	›
• Go to the first or last page of the document.	⏮	⏭
• Select a page in the document.	1	
• Use thumbnails to display the pages of the document.	▦	
• Use the full screen mode.	⛶	
• Fit the document to the window or display the actual size.	⤢	½

Annotation tools

• Use a pen ✎ (to draw freehand), a highlighter ▣ (to highlight a specific area) or shapes ╱ ▱ (to draw lines and rectangles) to annotate the document. • Use the eraser ✐ to remove annotations or remove all annotations ✎ from current page. • Use the laser ✐ to point on the document.	▶
• Change the color of the annotations or laser pointer.	▣
• Change the size of the annotations or laser pointer.	✎

4.2 Share your desktop during a conversation

Desktop sharing is not supported on Mac OS X.

• Open the sharing tool.	▣

Management panel: all monitors are displayed.

• Share a monitor with the other participants (monitors you are connected to, are automatically displayed).	▶
• Stop the sharing.	■
• Remote desktop control: give control of your desktop to a participant during the conversation. Select the participant in the list. The name of the participant who has control is displayed. Stop the remote desktop control by clicking on the same icon and select the menu: Take back control. The remote desktop control is also stopped when you end the conversation or stop sharing.	●

Use the mouse wheel to zoom/unzoom the presentation.

Use defined hotkeys to take back control for screen sharing. To define hotkeys, consult: General settings (display name, language, theme, hotkeys, call presentation screen): "General"

5 Meeting

This feature depends on the user license. You have subscribed to the conferencing option. You can join a meeting without the conferencing option.

5.1 Create a meeting

Create a meeting:

• Via the corresponding icon on the home page. • Via the corresponding icon in the conversation window (this will automatically add the participants of the conversation to the meeting).	📅
• From a contact card or past meeting card - select the Create meeting menu item (this will automatically add the participants of the card to the meeting).	••• ✏️

Following window is displayed:
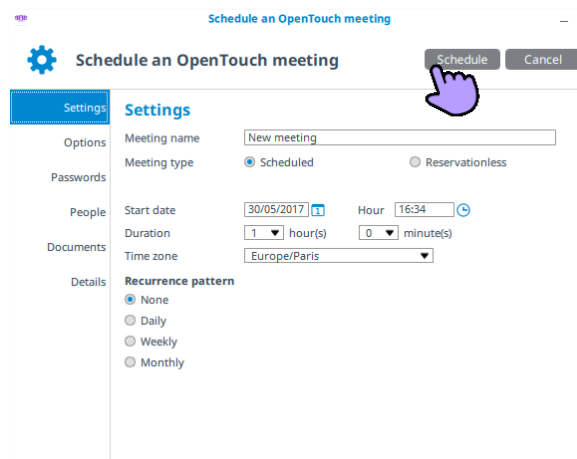
- Enter the name of the meeting (*"Meeting name"*)
- Choose the meeting type (*"Meeting type"*): scheduled or reservationless meeting. A reservationless meeting is useful to initiate an impromptu meeting without having to schedule the meeting in advance.
- Enter the different parameters and schedule the meeting (*"Start date", "Duration", "Time zone", "Recurrence pattern"*).
- Schedule the meeting (*"Schedule"*) or cancel the creation (*"Cancel"*).

You can complete the meeting by selecting the other tab when you create the meeting or later by editing the meeting:

- *"Options"*: define rules of the meeting.
- *"Password"*: secure the access to the meeting.
- *"People"*: add or remove a participant from an upcoming meeting and define leaders.
- *"Documents"*: upload a document to a meeting.

When created, the new meeting appears in the Conversation Wall (future events):

	Scheduled meeting.
	Reservationless meeting. Expiration date is displayed.
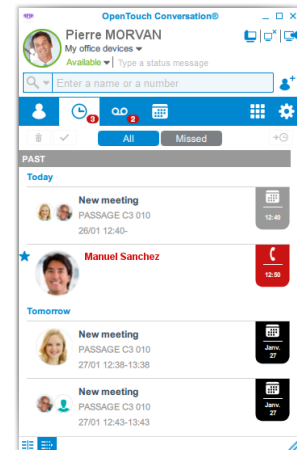
5.2 Options

You can configure the meeting by selecting some rules for the meeting, e.g. the leader starts or ends the meeting, passwords are required, or add documents.

Select or unselect an option.
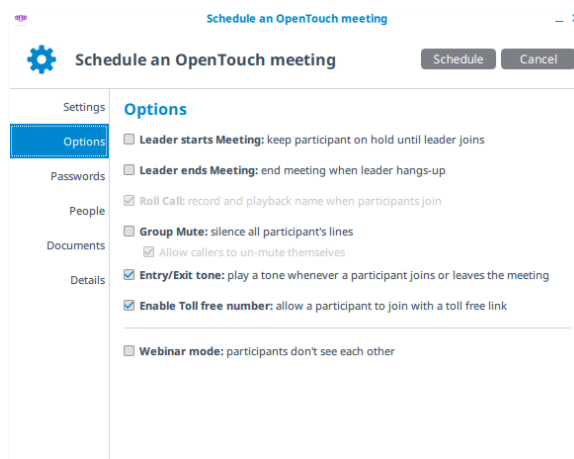
5.3 Secure the access to the meeting

You can protect the access to the meeting by using passwords.
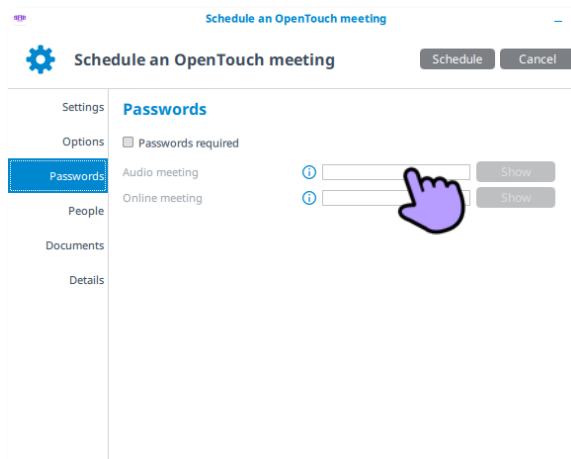
- Select the *"Passwords"* tab.
- *"Passwords required"*: validate the checkbox if you require a password to join the meeting.
- *"Audio meeting"*: you can define a password for audio meeting (digits only). In this case, an external user has to enter the password to join the audio meeting.
- *"Online meeting"*: you can define a password for online meeting. In this case, an external user has to enter the password to join the web meeting.
- *"Create"* or *"Schedule"*: create the new meeting or update an existing meeting.

Depending on your system configuration, you may need to follow a password policy.

- ⓘ Display the password policy.

5.4 Add or remove a participant from an upcoming meeting and define leaders

The leader role (according the licensed features):

- o Add or remove participants.
- o Mute or unmute a participant.
- o Share documents.
- o Annotate documents.
- o Share desktop.
- o Allow participants to use some roles.
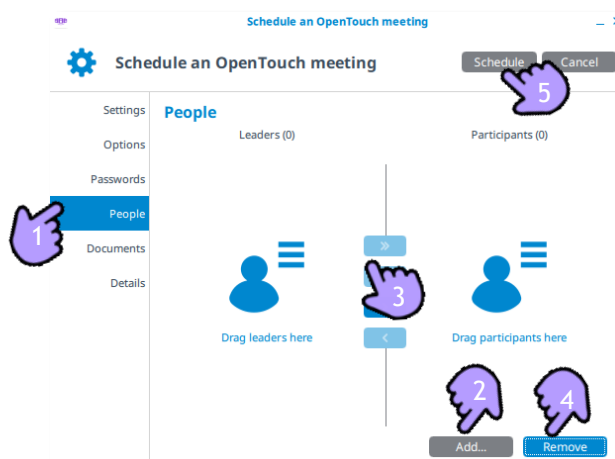
1. Select the "*People*" tab.
2. "*Add…*": add a participant (select a favorite or enter a name or an email address).
3. Move one or several participants to the Leader list if needed (select and drag and drop participants or use the move buttons).
4. "*Remove*": remove a selected participant.
5. "*Create*" or "*Schedule*": create the new meeting or update an existing meeting.

5.5 Upload a document to a meeting
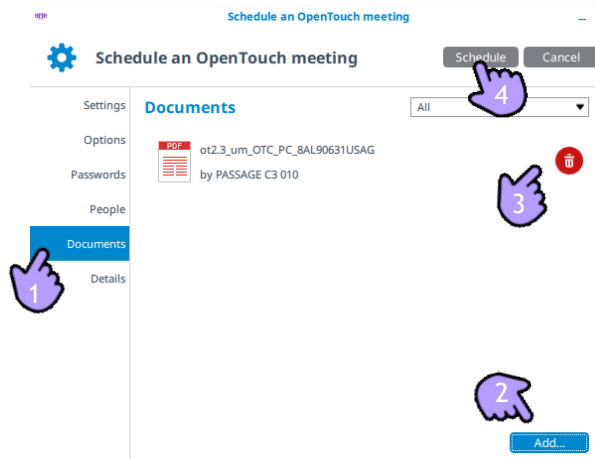
1. Select the "*Documents*" tab.
2. "*Add…*": Add a new document by selecting the file on your computer. You can add the document by dragging and dropping it in the application.

Select how to share the document:

- "*Upload as a presentation*": all participants can only view the document.
- "*Upload as an attachment*": all participants can only download the document.
- "*Upload as a presentation and attachment*": all participants can view and download the document.
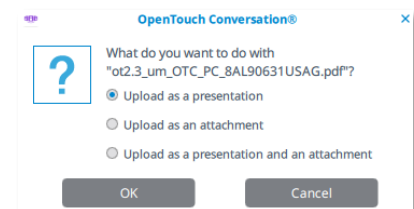
- Remove a document from the list.
- "*Create*" or "*Schedule*": create the new meeting or update an existing meeting.

5.6 Consult the meeting list
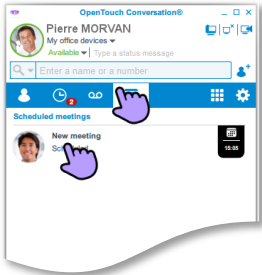
Use the Meeting icon or tab to display the meetings you have created (scheduled and reservationless) and invitations you have received. Scheduled meetings and reservationless meetings are sorted by date in two separate sections.

• Display the details of the meeting.	🗎
• Edit the meeting (double click the meeting or use the edit icon).	✎
• Delete the meeting.	🗑

5.7 Modify an upcoming meeting

• Edit a meeting from the meeting card or the meeting list.	✎
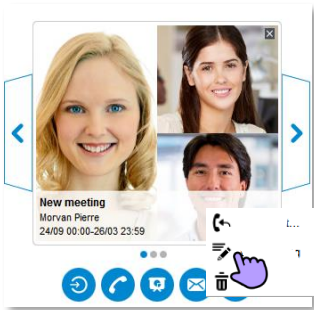
- Select the tab to complete:
  - *"Options"*: define rules of the meeting.
  - *"Password"*: secure the access to the meeting.
  - *"People"*: add or remove a participant from an upcoming meeting and define leaders.
  - *"Documents"*: upload a document to a meeting.
- Validate the change by clicking the *"Update"* button.

The "*Details*" tab contains the URL, the phone numbers and the access codes for joining the meeting. From this tab, you can send an email with this information to a participant ("*Send e-mail*").
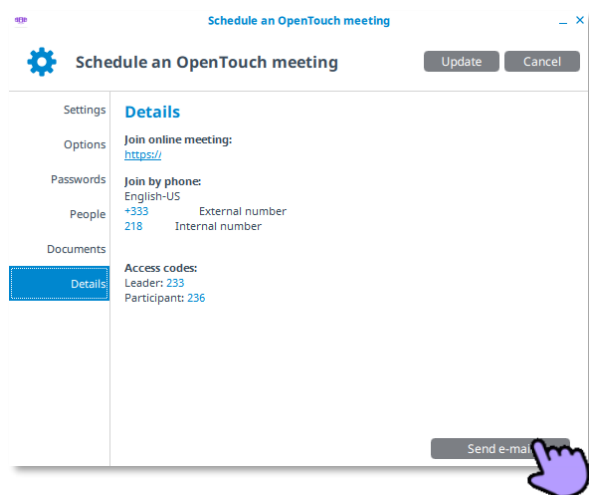
5.8 Join a meeting
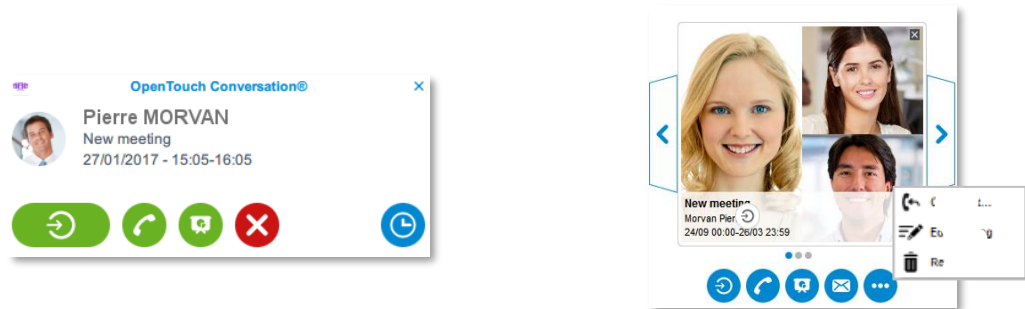
A Desktop alert is displayed 15 minutes before a meeting starts. Actions depend on the user license.

• Join the meeting with audio and video (optional).	
• Join the meeting with audio only.	
• Join the meeting without audio.	
• Repeat the notification in 5 minutes.	
• Dismiss the notification.	

You can also join the meeting from the Conversation Wall by opening the meeting card.
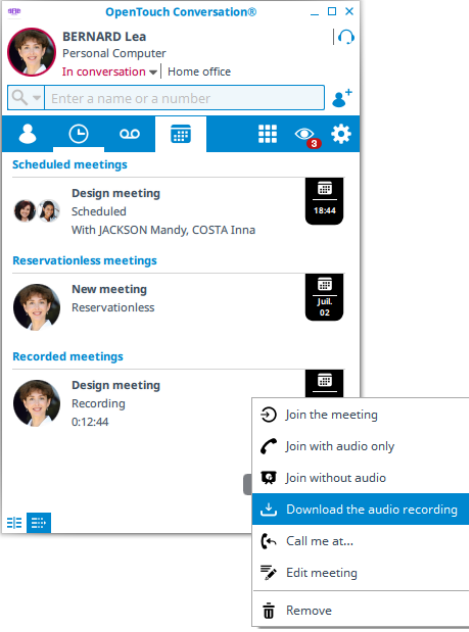
• Join the meeting with all media (optional).	
• Join the meeting with audio only.	
• Joint the meeting without audio.	
• Send an email to all participants.	
• Join the meeting in audio with a device other than the one currently defined in call routing. Enter a new number you would like to use for the meeting or select one of the nine numbers last used (if necessary, you can select your current number in the list).	

5.9 Record a meeting

The leader can record the meeting.

• Open more actions.		
• Record/stop recording the audio conversation. • ⊙ This icon is displayed when recording.		

After the meeting, retrieve the recorded meeting:

	• Use the Meeting icon or tab to display the recorded meetings (Recorded meetings).	
	• ⬇ Right click on the recorded meeting to download it to your PC and listen to it (.wav file).	

6   ACD: Agent set

A call center solution allows optimum distribution of calls to agents according to their availability and skills.

OpenTouch Conversation for PC integrates the basic features of ACD agent.

During the ACD session, OpenTouch Conversation for PC manages your ACD calls and allows you to access features like conversation history, presence, favorites, searching for contacts, instant messaging, desktop sharing and meetings.

Depending on the configuration of the system, during the ACD session, your incoming business calls are automatically forwarded to your voicemail or to the agent number, or you are defined as out of office.
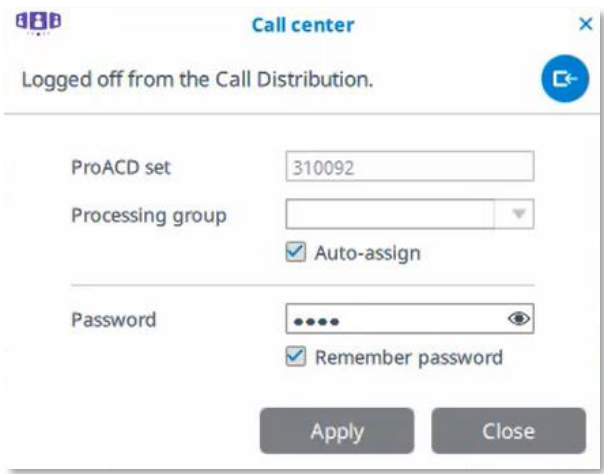
The ACD icon is displayed on the tab area and depends on the agent session status.

You are logged in as an agent to your call center group. The ACD Session is open.	
You are logged out of the ACD session.	

When you are logged in, you are able to answer incoming calls to a call center as an agent.

6.1   Opening or closing an ACD session (logging in or out as an agent)

You can open an agent session using your ACD number (ProACD).

• Click the ACD icon.	
A pop-up is displayed with information about the ACD session: • Number of the agent (ProACD). • The processing group: depending on the configuration of the system, you can select the last processing group you logged into or enter a new group. • Auto-assign check box: even if selected, the selection of the processing group has no effect. The auto-assign is enabled or disabled by the administrator. • Depending on the configuration of the system, a password can be requested when you open the session. • "*Apply*": save the configuration.	**Call center** Logged off from the Call Distribution. ProACD set 310092 Processing group ☑ Auto-assign Password •••• ☑ Remember password Apply Close
• Open the ACD session (log in).	
• Close the ACD session (log out).	

6.2 History

When you open the history of a contact from the conversation wall, all incoming calls made as an ACD agent are marked with the ACD icon.
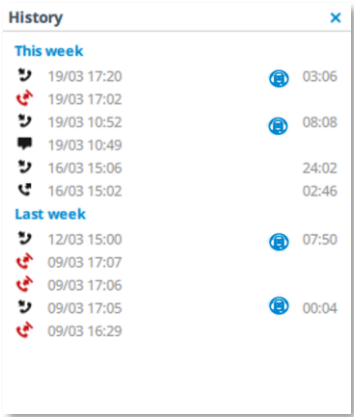
6.3 Agent status

A user who has added you as a favorite contact and then see your real-time presence is informed when you are logged in as an agent: the ACD icon is displayed near your avatar.
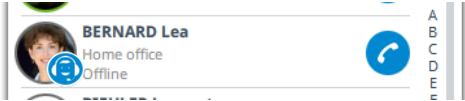
All users can see if you are logged in as an agent, by opening your contact card on the stage. The ACD icon is displayed.

6.4 Receiving an incoming call during ACD session

When you are logged in as an agent, you receive incoming call from the ACD group (call center), a desktop alert is displayed with information about ACD group (pilot name or number, caller name, …).

	• Accept the audio conversation.
	• Transfer the conversation to another device, number or person.
	• End the conversation.

You cannot open a video conversation or divert the incoming call to your business voicemail.

7   US Emergency call compliance (RAY BAUM'S Act)

RAY BAUM'S Act emphasizes the importance of making dispatchable location information from all emergency calls available , regardless of the technological platform used.
Depending on your country, as a user of the OpenTouch Conversation for PC (softphone), you must at any time give your location for your security.

7.1   Home page

This feature requires to be connected to a Visual Notification Assistant (VNA) which is in charged for communicating the user location to emergency. A VNA server can be defined as emergency calling location by your administrator or by entering information in the OpenTouch Conversation settings. If the VNA server is defined, the feature is visible on main page through a dedicated icon.

	The feature is enabled and you are connected to the VNA server. Select this icon to select or define a location.
	The feature is enabled but you are not connected to the VNA server. Please select this icon to open advanced settings and complete the server / login / password fields of the VNA (different from OTC PC). Contact your administrator if necessary.

7.2   Settings

 Open the settings window.

Select the following tab : "Advanced settings". • *"Server":* Enter the VNA server address if not already filled-in by your administrator. • *"Login", "Password"*: enter the login and the password of a VNA user. The VNA login/password are provided by your administrator (ID and PIN declared in the VNA directory)*. • *"Show location prompt"*: check this option to be requested of your location at application start-up. Caution: uncheck this option only if you don't want to be prompted for your location every time you start the application, for example if you never change your location. • *"OK"* / *"Apply"*: validate.	
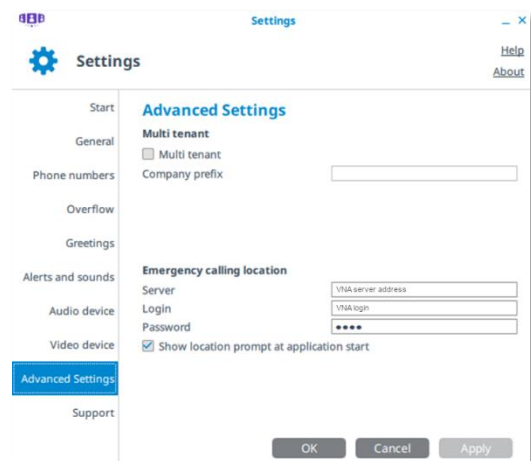
*Note: In case of Multidevice user, it is the ID/PIN of the OTC PC (SIP extension) which is required. So, it needs to be synchronized in the directory of the VNA.

7.3 Locations

- *"Default"* is the default location, defined by your administrator in the VNA server.
- *"Home"*,*"Other"* are two locations you can define via the OpenTouch Conversation application.

7.4 Start OpenTouch Conversation

If the feature is enabled and the option *"Show location prompt"* is checked in the advanced settings, a pop-up is displayed when you start the application to request your current PC location: *Default, Home, Other*.
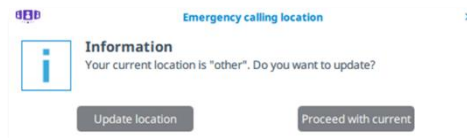
- *"Proceed with current"* : send the current location to the VNA server and close the pop-up. The current location is displayed in the pop-up (*"Other"* in the picture for example).
- *"Update location"* : open the location pop-up to define the new location.

7.5 Define new location

There are two ways to define a new location:

- *"Update_this_location"*: select this button at the start-up of the application (if the option *"Show location prompt"* is checked in the advanced settings).

- : select this icon on the home page of the application.

In these cases, a window is opened to define new location.

- You can select a defined location:
  - *"Default"* : default location set by the administrator.
  - *"Home"*: Home address you defined previously.
  - *"Other"*: Other address defined previously.
- Or define a new location:
  - Select the location to create or modify: *"Home", "Other"*.
  - Complete all fields of the location: street number, street name, additional address, city, zipcode, state, country, numbers.
- Select one of the following:
  - *"OK"*: save the new location and send it to the VNA server. The pop-up is closed.
  - *"Apply"*: save the new location (the windows remains opened). The location is not sent to the VNA server.
  - *"Cancel"*: cancel the changes and send the previous selected location to the VNA server. The pop-up is closed.

8 OpenTouch Conversation for Microsoft© Outlook™

This feature is only available with OpenTouch Conversation for PC (full featured).
The OpenTouch Conversation provides a high level of service when associated to Microsoft Outlook.

8.1 Supported versions

- Outlook 2010 – 32 or 64 bits.
- Outlook 2013 – 32 or 64 bits.
- Outlook 2016 – 32 or 64 bits.
- Outlook 2016 with Office 365.
- Outlook 2019 – 32 or 64 bits.
- Outlook 2019 with Office 365.
- Outlook 365.

The screenshots are examples from Outlook 2013.
Not supported on Outlook Online.

8.2 OpenTouch Conversation services

OpenTouch communication services integration is performed through the native Microsoft user interface: telephony and messaging services and personal contact search capabilities.
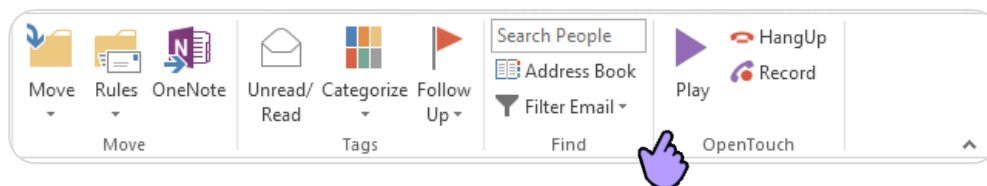
8.2.1 Start OpenTouch Conversation integration

1. Check that OpenTouch Conversation for PC is started.

2. Click the lock icon in Outlook ribbon (home page) to start the Telephony & Messaging add-in.

3. Once logged in, buttons are displayed according to user's permissions.
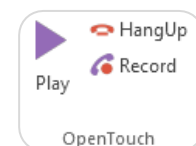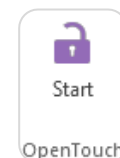
8.2.2   OpenTouch communication services

OpenTouch communication services depend on user's permission and context. The corresponding button is displayed only if the associated action is currently possible.

• Make an audio call.	📞
• Make a video call (optional).	📹
• Send an instant message.	💬
• Play/replay a voice message (received or recorded).	▶
• End the active conversation.	☎
• Record a voice message to send by email.	📞
• Reply with an instant message.	💬

OpenTouch Conversation is integrated to Outlook interface:

- In the Outlook ribbon of the home tab, the contact tab or the message window.
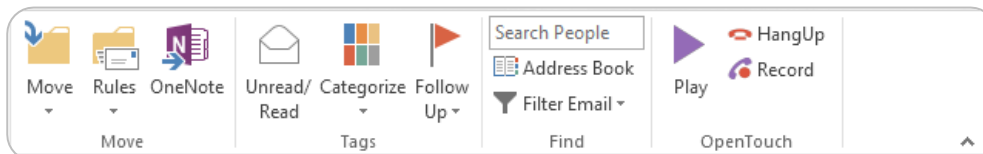
- In the contextual menu by right-clicking on email, contact, ….
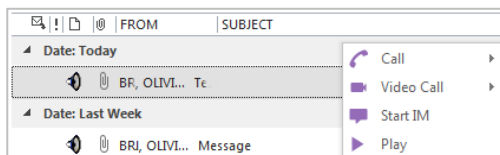
- In the respond menu of Outlook.
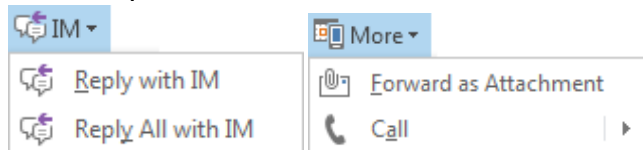
- In the contact card.
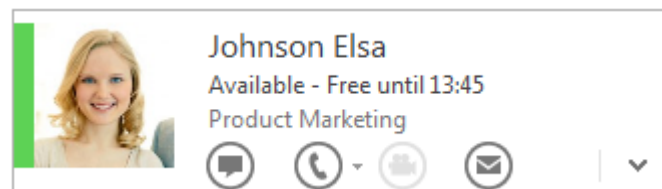
Note that OpenTouch Conversation uses the native UI of Microsoft Office applications. Communication services can be displayed in other Office application as SharePoint, Excel, and Word.

8.2.3   Make a conversation

According to user permissions and OpenTouch Conversation for PC configuration, you are able to start a video, audio or instant message conversation with Outlook contacts.
All conversations are managed by the OpenTouch Conversation for PC.

You can make a conversation from:

- An email with the sender or any recipients.
- A contact card.
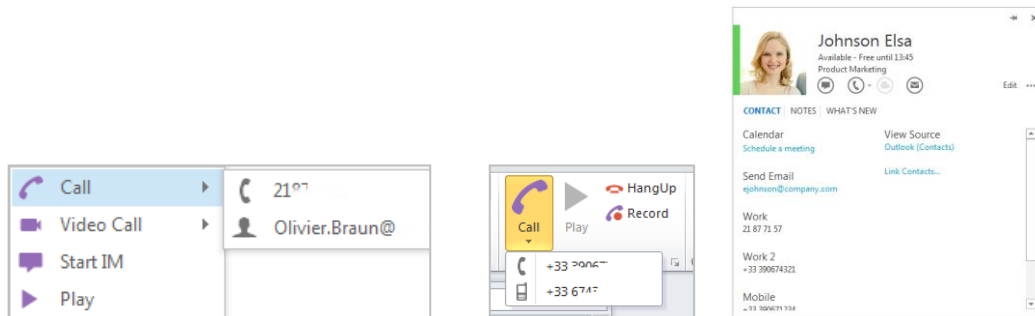
The phone number to dial can be selected if several numbers are available.

- Use the Hang Up button to end any audio or video active call.

8.2.4   Listen to a voice message

- : indicates a voice message received via email (when using the unified messaging store based on the email server).
- Select the email.
- Play/replay a voice message (contextual menu or ribbon).

8.2.5   Recording a message

- : add a voice message (.wav file) to an email (new mail, reply or forward).
- The current phone will ring and you will be able to record the message.
- The current recording ends (see also below) when the recording is attached to the email, replayed, cancelled, or if a new recording is started. Several recordings can be added to an email.

• To attach the latest recorded message.	
• To record a new message (the previous one will be lost if not attached).	
• To play the recorded message.	
• To cancel the record operation.	

8.2.6   Presence information

The presence of your OpenTouch Conversation favorite contacts is displayed with his or her avatar, name (status color and text):

	Available		Be right back
	Busy/In conversation		Offline

8.2.7   User options
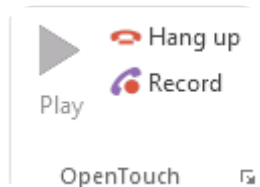
Click the bottom right corner of the OpenTouch application (⌐).

Once you have accessed the user options, you can select or populate the fields below:
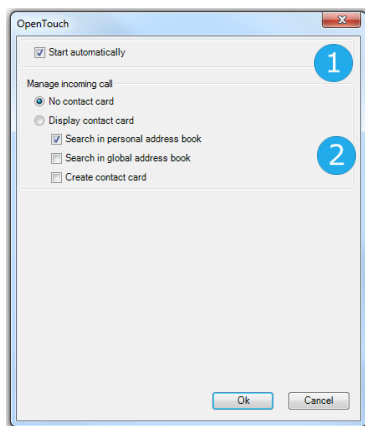
1 If this option is selected, the add-in is automatically started when you start Outlook.

2 When receiving an incoming call, an Outlook contact card can be displayed if the calling party can be identified from Outlook Personal Folders or the Exchange Global Address List. Contact cards can be created for calling parties that are not recognized.

8.3 OpenTouch conference

OpenTouch conference integration is performed through an "add-in" client. Use Microsoft Outlook to schedule OpenTouch conferences. The OpenTouch conference integration can be installed with the OpenTouch Conversation application or as a standalone application.
The server URL and user credentials are configured using the OpenTouch Conversation for PC authentication dialog box. If the OpenTouch conference integration is installed as a standalone application, the authentication dialog box is opened when Outlook is started.

(server icon)	Enter the address of the OpenTouch server.
(user icon)	Enter your username.
(key icon)	Enter your password.
"Remember password"	Validate the checkbox to store the password for the next connections.
"Show remote access"	If you are outside the company, enter your remote access credentials and the public address of your OpenTouch system.

The outlook conference integration is available in:

The calendar main page (ribbon):	The new items menu of the calendar:	The meeting creation page (ribbon):
New OpenTouch meeting	New Items ▾ New OpenTouch meeting	Include OpenTouch conference

8.3.1 Create a meeting

- Select the OpenTouch conference icon to create new meeting.
  - From the calendar view, create a new meeting directly in the Calendar with current date and hour.
  - From a new created meeting page, include information about OpenTouch meeting.
- If the OpenTouch system is configured with password required, a pop-up is displayed to define a password for meeting.
- The outlook meeting is automatically populated with all information needed to join the conference.
- Complete the appointment.
- Send the email invitation including the meeting URL, dial-in numbers and the access code.

Meetings created in Microsoft Outlook are displayed in OpenTouch Conversation application.

Notes: Meetings created via the Outlook plug-in may not be canceled in the OpenTouch Conversation for PC application. Similarly, meetings created in the OpenTouch Conversation application may not be canceled in Outlook.

8.3.2 Cancel the meeting

You can cancel an OpenTouch meeting at any time:

- from the new meeting page during the creation
- from the appointment view.

Notes: Recurrent meetings can be created through Outlook Add-In. One-time occurring meetings may not be modified in Outlook. Such occurrences will need to first be canceled and a dedicated meeting created for the new schedule. If a regular shift of time occurs, it is recommended to create a Reservation Less meeting that will remain accessible at any schedule.

8.3.3 View details of the meeting and configure the meeting

The appointment view shows all information and options about the OpenTouch Conversation meeting:

- Configure the OpenTouch meeting:
  - Set some rules for the meeting, see section 50 Options.
  - Set a password to access the meeting, see section 5.3 Secure the access to the meeting.
  - Attach documents to the conference, see section 5.5 Upload a document to a meeting.
- Display all information about the meeting such as conference URL, phone numbers, access codes, see section 5.6 Consult the meeting list.

8.3.4 Join a meeting

An Outlook reminder pops up to notify you of the meeting 15 minutes before it starts.

Join the meeting via the OpenTouch Conversation Web interface, by clicking the 'join online' button or the conference URL.

8.3.5 Settings
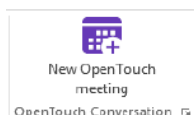
Click the bottom right corner to display the general options of the add-in (⌐).
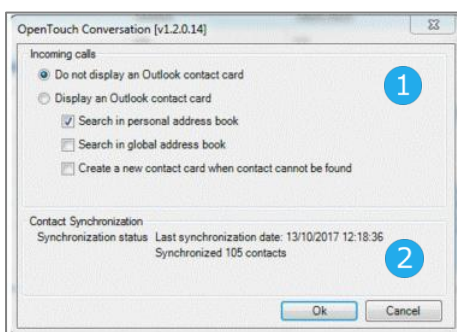
When receiving an incoming call, an Outlook contact card can be displayed if the calling party can be identified from Outlook Personal Folders or the Exchange Global Address List. Contact cards can be created for unrecognized calling parties.

Date of the last synchronization of the contacts.

9 OpenTouch Conversation for Skype for Business

This feature is only available with OpenTouch Conversation for PC (full featured).

The OpenTouch Conversation provides a high level of service when associated to Skype for Business. OpenTouch Conversation has to be installed with option: "*Integrated with Microsoft Lync/Skype for business*".
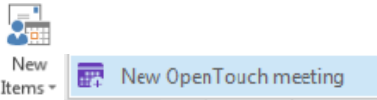
9.1 OpenTouch Conversation integration

OpenTouch communication services integration is performed through the native Skype for Business user interface: telephony and messaging services and personal contact search capabilities.
When you are connected, the OpenTouch Conversation ribbon is added to the Skype for Business window.

The ribbon displays the current routing profile, selected device for making a call and available actions. Open the OpenTouch Conversation services by clicking on the corresponding button in the ribbon. Refer to the OpenTouch Conversation for PC sections for more information about the following features.

	Conversation Wall: past conversations, active conversation and future meetings. Click on the icon to open the conversation Wall. The number of new events is displayed (missed call, callback request if available).
	Visual Voicemail.
	Meetings: manage your meetings (consult, create, modify, share documents). All meetings are managed as described for OpenTouch Conversation application.
	Settings: open the OpenTouch Conversation settings
	List current active conversations. If only one conversation is active, the corresponding communication card is opened.
	Supervision (optional)
	US Emergency call compliance (optional). For more details, see chapter: 7 US Emergency call compliance (RAY BAUM'S Act).
	Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.

	Microphone and speakers of the computer are used for audio call. Headset of the computer is used for audio call. Your personal computer will not ring when you receive an incoming call.		Call from your desk phone.
			Call from your professional mobile.
			Call from your tablet.

Manager Assistant (optional)

From the tools menu, you can choose to display or hide the OpenTouch Conversation add-in.

9.2   Telephony presence information

 Pierre Morvan - In a call

OpenTouch phone presence is communicated to the Microsoft Skype for Business client so that anyone else looking at the user status will see that this user is on the phone.

9.3   Routing profile

- Click on your current call routing profile in the OpenTouch Conversation ribbon.

  Select the routing profile. The selected routing profile and information about this profile are displayed in the user area.
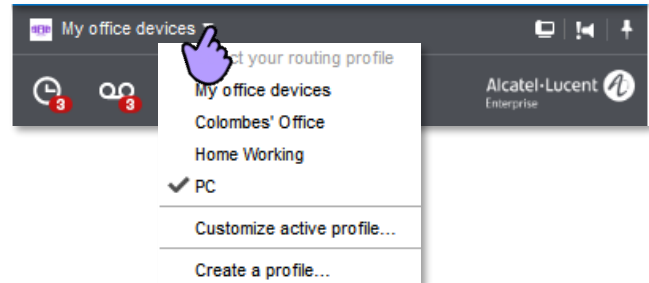
For more information, refer to the next OpenTouch Conversation for PC section: 2.9 Call Routing

9.4   Automatic routing to voicemail

According to the Skype presence (global Skype availability states), you can route automatically your calls to your voicemail:

-    Open the OpenTouch Conversation settings.
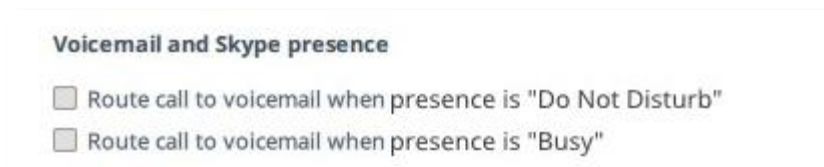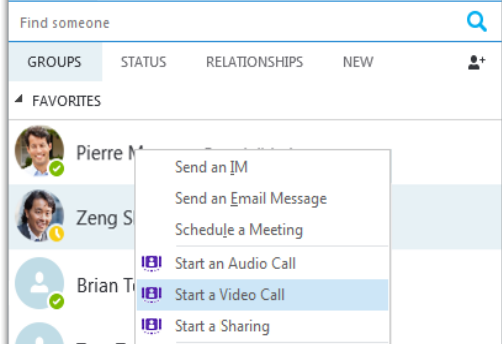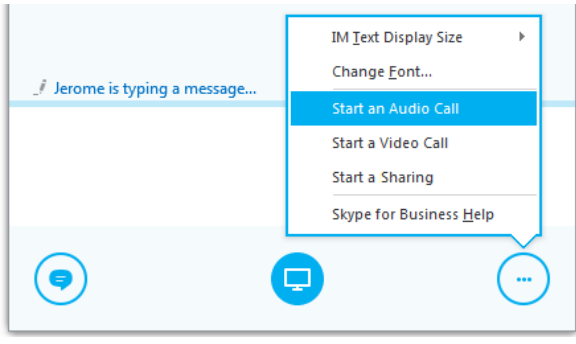
- Select the desired options:
  - *Route call to voicemail when presence is 'Do Not Disturb'.*
    Your calls are routed to your voicemail when, the "do not disturb" Skype state is activated or you are in a Skype presentation.
  - *Route call to voicemail when presence is 'Busy'.*
    Your calls are routed to your voicemail when, the "Busy" Skype state is activated: you are on a conference call, on a call, busy or in a meeting in a Skype environment.

9.5 Make a conversation

According to user permissions and OpenTouch Conversation for PC configuration, you are able to start a video or audio conversation with Skype for Business contacts. All conversations are managed by the OpenTouch Conversation for PC.

You can make a conversation:

• From favorites, history or search result, by selecting the corresponding action in the contextual menu (right-click).	• From an instant message session, by selecting the menu button.

The phone number or URI to dial can be selected if several numbers are available.
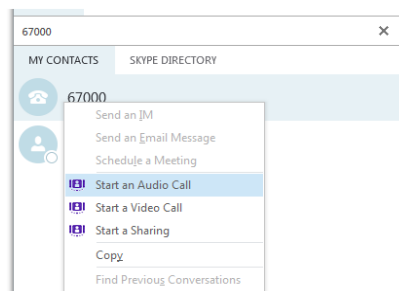
You can also enter the number of your contact in the search/dial area. The number is displayed as a Skype for Business contact. You have just to start a conversation by right-clicking on the number and selecting the corresponding menu.
Phone number format: canonical number: +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.

9.6 Search a contact

The OpenTouch Conversation integration fully relies on the Skype for Business capabilities for searching people.

9.7 Receiving an incoming call

Receive incoming call alerts from OpenTouch Conversation with the option to answer, divert (to the voicemail or a predefined number), or reply using chat.

9.8 Share a document

Like a conversation, you can share a document with a Skype for Business contact (history, favorites, search result, Instant message), by right-clicking on the contact or using the menu button, and selecting the start sharing document menu.

For more information, refer to the next OpenTouch Conversation for PC sections:
- 4 Share documents during a conversation
- 4.2 Share your desktop during a conversation
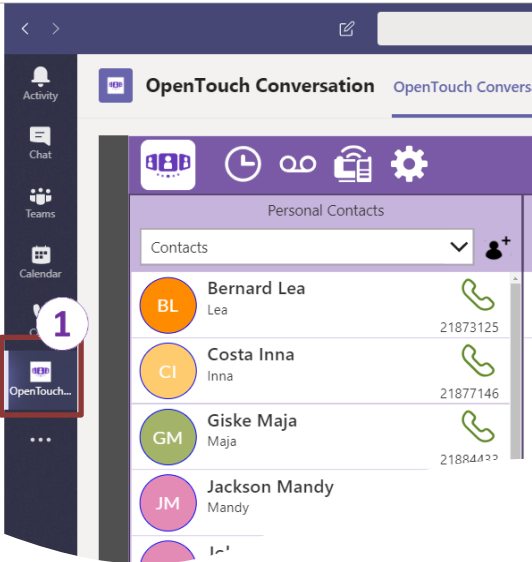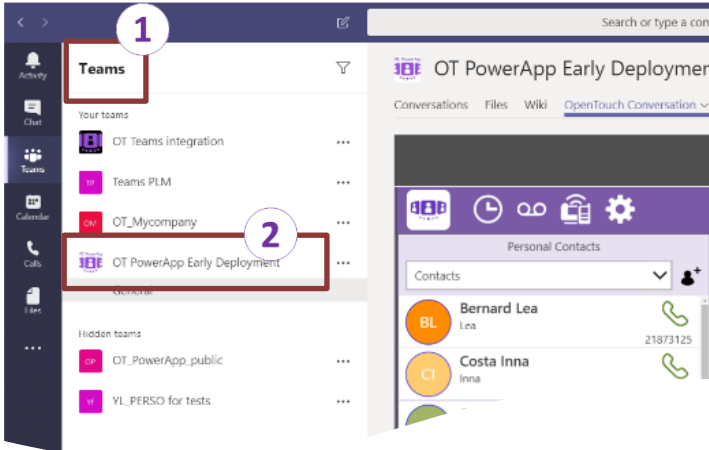
10 Microsoft© Teams

This feature is only available with OpenTouch Conversation for PC (full featured). Please refer to the OpenTouch Conversation for PC section to have a complete description of the available features.

The OpenTouch Conversation provides a high level of services when associated to Teams. OpenTouch Conversation has to be installed with the option: "*Integrated with Microsoft Teams*".
Some features have to be selected during the installation to be used via Teams.

This feature depends on the system configuration. OpenTouch Conversation is integrated as a Microsoft PowerApps. The administrator has to install the OTC PowerApps and manage the OpenTouch Conversation team.

Access to the OpenTouch Conversation depends on how you have installed it into the Teams environment. The OpenTouch Conversation can be installed as a Teams application or a Teams PowerApps.

Teams application	Teams PowerApps
When you are connected, the OpenTouch Conversation application is displayed in the Teams application area. 1. Select the OpenTouch Conversation application to open it.	When you are connected, open the team containing the OpenTouch Conversation PowerApps. 1. Open the Teams tab. 2. Select the team containing the OpenTouch Conversation PowerApps.

10.1 Installation

This section describes how to install the OpenTouch Conversation integration into Teams.
Firstly, it is recommended to ask your administrator to carry out this installation.
There are two methods to install OpenTouch Conversation.

10.1.1   Installation as a Teams application

OpenTouch Conversation integration will be added into the Teams application area.

Prerequisite: OpenTouch Conversation PowerApps must be provided by the administrator to all company employees.
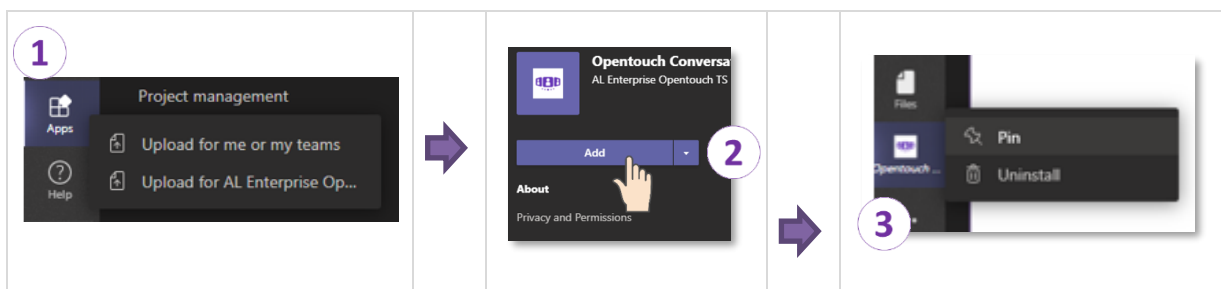
1. [Apps icon] In Microsoft Teams, open the application manager to upload a custom application.
    You can choose to upload the OpenTouch Conversation for you and your teams or for all the company.
2. Select the OpenTouch Conversation application to upload.
    Click to "Add" button.
3. The OpenTouch Conversation is installed as a Teams application. Don't forget to pin it.

10.1.2   Installation as a Teams PowerApps

A PowerApps is an application that allows Teams behavior to be customized. The installation requires certain rights. The OpenTouch Conversation integration can be added to all desired teams.

Prerequisite: the OpenTouch Conversation PowerApps has to be imported by your administrator into Teams environment using PowerApps development tool.

1. Open the team where you want to add the OpenTouch Conversation PowerApps.

2. Add a new tab by selecting this icon: [+] .

3. Open the PowerApps application: [icon] .

4. Add the OpenTouch Conversation PowerApps:
- Click on the "add" button.
- Search the OpenTouch Conversation PowerApps.
- Select and save the PowerApps.

The OpenTouch Conversation integration is added to your team (new tab and ribbon).

10.2 OpenTouch Conversation integration

OpenTouch communication services integration is performed through the native Teams user interface.
At each launch, the application begins at the start. No parameters/status can be memorized.

1	The OpenTouch Conversation integration is composed of three contact views: - Your personal contact (Outlook). - Your team. - Corporates contacts.
2	The search is performed among all your contacts and is displayed on all views at the same time.
3	Open the OpenTouch Conversation pane to access more features by selecting the OpenTouch Conversation icon or specific feature in the ribbon. Conversation Wall: past conversations, active conversation and future meetings. Click on the icon to open the Conversation Wall. The number of

		new events is displayed (missed call, callback request if available). For more details, refer to: 2.6 Conversation Wall (history).
		Visual Voicemail. For more details, refer to: 2.17 Visual Voicemail (OpenTouch Conversation for PC).
		Routing profile. For more details, refer to: 2.9 Call Routing.
		Settings: open the OpenTouch Conversation settings. For more details, refer to: 2.25 Settings.
Other features (depending on the configuration) are accessible from the pane:		
		Meetings: manage your meetings (consult, create, modify, share documents). For more details, refer to: 5 Meeting. This feature depends on selected options during installation.
		Keypad.
		Supervision (optional). For more details, refer to: 2.15 Group supervision (optional).
		Manager Assistant (optional). For more details, refer to: 3 Manager/Assistant.
		US Emergency call compliance (optional). For more details, see chapter: 7 US Emergency call compliance (RAY BAUM'S Act).
		List current active conversations. If only one conversation is active, the corresponding communication card is opened.

10.3 Routing profile
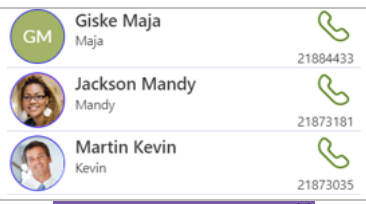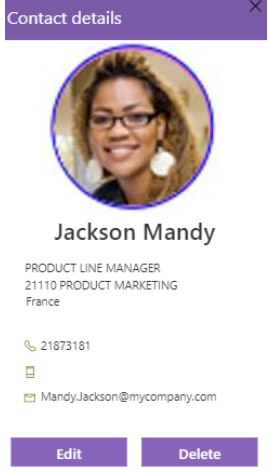
| | Select the routing profile icon in the OpenTouch Conversation ribbon or click on your current call routing profile in the OpenTouch Conversation pane. For more details, refer to: 2.9 Call Routing. |

10.4 Search a contact
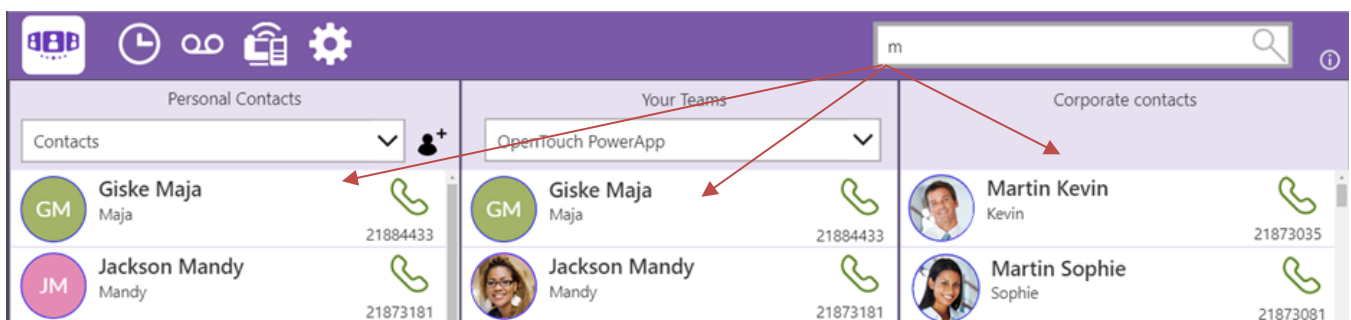
Enter the string in the search area. The search is performed among all your contacts and is displayed on all views at the same time. All contacts containing the string in last name and/or first name are displayed.

10.5 Make a conversation

|	
218 📞	Enter a number directly into the search area. Select the call icon.
📞	Select the call icon from the team views or seach result	Giske Maja / Maja 21884433 Jackson Mandy / Mandy 21873181 Martin Kevin / Kevin 21873035
📞	Select the call icons from the contact card, by selecting an available number (📞 📱).	Contact details Jackson Mandy PRODUCT LINE MANAGER 21110 PRODUCT MARKETING France 📞 21873181 📱 ✉ Mandy.Jackson@mycompany.com Edit Delete

When you start a conversation, the OpenTouch conversation windows are displayed to manage the call as described in the OpenTouch Conversation for PC section. Only available actions are displayed. Access all OpenTouch Conversation features by opening the pane (depending on system configuration): programmable softkeys, manager/assistant, group supervision, hunting group, etc. Please refer to: 2 OpenTouch Conversation for PC.

To make a video call, first make an audio call with your contact. In the OpenTouch Conversation windows, escalate to a video call (depending on system configuration).

10.6 Receiving an incoming call

When you receive an incoming call, a desktop alert (toast) is displayed from OpenTouch Conversation with the option to answer, divert (to the voicemail or a predefined number), or reply using chat.

OpenTouch Conversation®
BERNARD Lea
ALE - Product Line Manager
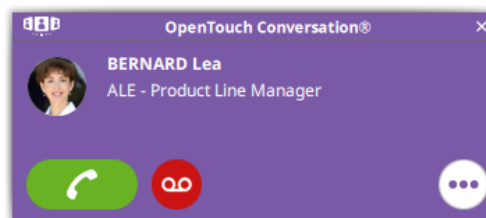
When you answer the incoming call, the OpenTouch Conversation windows are displayed to manage the call as described in the OpenTouch Conversation for PC section. Only available actions are displayed.

10.7 Meetings

📅	Manage OpenTouch Conversation meetings. This feature depends on selected options during installation. For more details about meetings, refer to: 5 Meeting.

11 Microsoft Office 365

Microsoft Office 365 is a cloud solution for Microsoft Office. In this case, your email and calendar can be managed in the Microsoft cloud.

Depending on the configuration of your system, OpenTouch Conversation supports Office 365:
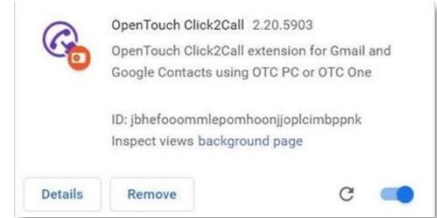
- Your voicemails are accessible from Outlook or Outlook Web Access (OWA)
- OpenTouch Conversation meetings are synchronized with Office 365 calendar.
- OpenTouch Conversation and conference add-in for Microsoft Outlook are available.
- Communication services can be displayed in other Office application as SharePoint, Excel, and Word.

12 Alcatel-Lucent click to call plugin extension

The Click to Call plugin is a free extension that allows calls to be made to a number displayed on Google Chrome (Gmail, Google contacts or any web pages).

12.1 Installation

The "Alcatel-Lucent Click to Call plugin extension" is a Chrome extension.
Install it via the Chrome Web Store.

OpenTouch Click2Call 2.20.5903
OpenTouch Click2Call extension for Gmail and Google Contacts using OTC PC or OTC One

ID: jbhefooommlepomhoonjjoplcimbppnk
Inspect views background page

Details   Remove

If necessary, check whether the Chrome extension is enabled after installation (chrome://extensions/).

When first starting, you have to allow Alcatel-Lucent Click to Call to use information on your contact.

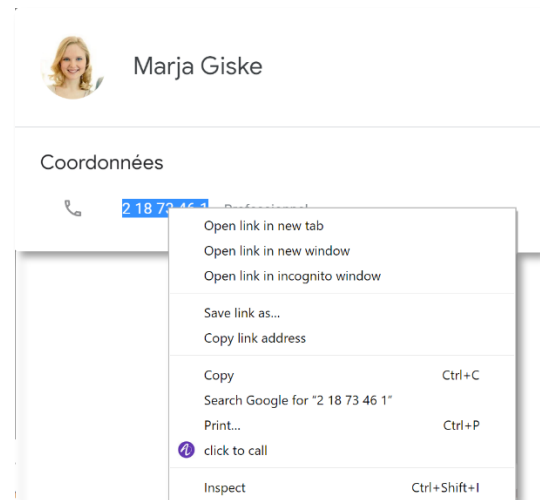## 12.2 Make a call from a Gmail or Google contact or a web page

- Select the number (click and hold the left button to highlight the complete number to call).

- Right click on the selected number. A contextual menu is displayed.

- Select the "click to call" menu. The call is started with OpenTouch Conversation for PC.

Marja Giske

Coordonnées

2 18 73 46 1

Open link in new tab
Open link in new window
Open link in incognito window

Save link as…
Copy link address

Copy   Ctrl+C
Search Google for "2 18 73 46 1"
Print…   Ctrl+P
click to call

Inspect   Ctrl+Shift+I