OpenTouch® Conversation for PC
OpenTouch® Conversation for PC One
Conversation user
Connection user

User Manual
R2.3

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1 Introduction

1.1 OpenTouch Conversation for PC

OpenTouch Conversation for PC (OTC PC) enhances collaboration and communication within the enterprise. Both Connection and Conversation 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 Connection 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:

<table>
<thead>
<tr>
<th>Feature/Feature Set</th>
<th>OTC PC One</th>
<th>OTC PC (Full featured)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>User license (Free)</td>
<td>User license + Conferencing</td>
</tr>
<tr>
<td>Conversation History, search, contacts, favorites, presence, call routing</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Audio conversation</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Video conversion</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Visual Voicemail</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Voicemail</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Current conversations Management (audio/video controls, media controls, participants, conversation functions)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>N-party conference</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Meeting management</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Content sharing</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Supervision</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Manager Assistant</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Outlook Conference add-in</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Office integration (IM &amp; presence &amp; C2C)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>OTC for Microsoft Outlook (Outlook Telephony &amp; Voice messaging &amp; Contact synchronization add-in)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>OTC for Skype for Business</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>OTC for IBM Notes</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>OTC for IBM Sametime</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Click2Call extension for Gmail and Google Contacts</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

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 and IBM 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.

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, IBM Notes
- “Integrated with Microsoft Lync/Skype for business”: you want to use Microsoft Lync or Skype for Business with OpenTouch Conversation features.
- “Integrated with IBM Sametime”: you want to use IBM Sametime with OpenTouch Conversation features

1.4 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.

1.5 Mac OS X restrictions

OpenTouch Conversation is only available as a standalone application. Microsoft, IBM and Google integrations are not available. Desktop sharing is not supported on Mac OS X.
1.6 User profile

Features depend on the system, the user profile and the license: Conversation User, Connection User or Connection/OTC PC One. An unavailable function appears grayed or is not displayed. In the manual, the user profile is indicated for a specific feature.

If you need to check which user profile you are connected, please open the "About" section in the application (see About):

OTC for PC One, Connection user

OTC for PC, Conversation user

OTC for PC, Connection user

Contact your administrator for more information.
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.

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.
- 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.

**Top banner:**
- User area
- Search area
- Tabs

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

**Favorite contacts**

Display information vertically using tabs.

**Top banner:**
- User area
- Search area
- Tabs
- 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.

**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).
Keypad.

Settings

Supervision (optional)

### Status icons

- 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.
- Microphone and speakers from two different devices are used for audio call.
- Microphone or speakers cannot be detected.
- Manager/assistant activated (optional)

#### Call from your deskphone.

#### Call from your professional mobile.

#### Call from your tablet.

#### Dual ringing is enable.

### 2.5 Change your photo or avatar

<table>
<thead>
<tr>
<th>Photo/Avatar</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Photo/Avatar" /></td>
<td>Click on your Photo/Avatar.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Photo/Avatar" /></td>
<td>To change your photo or avatar, select a photo in the list (max. 16 pictures) and apply.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Photo/Avatar" /></td>
<td>To delete a photo in the list, select the photo and delete it.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Photo/Avatar" /></td>
<td>Close the window when you have finished.</td>
</tr>
</tbody>
</table>

To add a new photo/avatar in the list:

- ![Photo/Avatar](image5.png) Browse your computer to add a new photo in the list (max. 16 pictures).
- ![Photo/Avatar](image6.png) Use the camera of your computer to add a new photo in the list (max. 16 pictures).
- ![Photo/Avatar](image7.png) Take the photo with the camera of your computer.
- ![Photo/Avatar](image8.png) 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).
- ![Photo/Avatar](image9.png) Cancel the new photo.
- ![Photo/Avatar](image10.png) Apply the new photo and add it in the list.
2.6 Conversation Wall

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 conversations.

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).

<table>
<thead>
<tr>
<th>Badge</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>Missed or new events.</td>
</tr>
<tr>
<td>Purple</td>
<td>Ongoing conversation (optional).</td>
</tr>
<tr>
<td>Grey</td>
<td>Past event.</td>
</tr>
<tr>
<td>Black</td>
<td>Future meeting (depending on your system).</td>
</tr>
</tbody>
</table>

- 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 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 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.

2.7.1 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.
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.

2.7.2 Favorites with “Privacy” option

2.7.2.1 My favorites, followers or blocked contacts

<table>
<thead>
<tr>
<th>Manage your favorite contacts.</th>
</tr>
</thead>
</table>

- 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 disabled 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.

2.7.2.2 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.

2.7.2.3 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.

<table>
<thead>
<tr>
<th>The number of “Follower” requests is displayed (logo and tab).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the contact card. You can block the contact from the contact card.</td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td>“Blocked all” All contacts waiting for acceptance are blocked.</td>
</tr>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>
2.7.2.4 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.

2.8 Call routing for Conversation user

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 or other numbers).

1. Click your current call routing profile in the user area.
2. Select a predefined profile, customize an existing profile or create a new profile.
3. “Customize active profile…”
   Customize your current profile (a temporally customized profile is created until you select another profile).
   a. “Dial from”: Define the device used for making calls.
   b. “Route calls to”: Select which devices will ring when receiving an incoming call.
4. “Create a profile…”
   Create a new profile, modify or delete an existing profile.

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

- This icon is displayed in the user area if your personal computer will not ring.
- Your deskphone is used to initiate the call.
- Your personal computer is used to initiate the call.
- Your professional mobile is used to initiate the call.
- Your tablet is used to initiate the call.
- Voicemail User: All your incoming calls are redirected to your voicemail and/or another user if you select voicemail and/or user option. In this case, no devices will ring except the one specified for the user.

You can also set a predefined profile by right-clicking the OpenTouch Conversation icon from the Windows notification area.
2.9 Call Routing for Connection user

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).

1. Click your current call routing profile in the user area.
2. “Profile”
   Select the current phone to make incoming calls and which devices will ring.
3. “Forward calls to”
   Decide to forward all incoming calls to:
   - Voicemail.
   - Predefined phone number.
   - Any other phone number following conditions: no condition, if busy, if no reply, if busy or no reply (optional).

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

- This icon is displayed in the user area if your personal computer will not ring.
- Your deskphone is used to initiate the call.
- Your personal computer is used to initiate the call.

You can also set a predefined profile by right-clicking the OpenTouch Conversation icon from the Windows notification area.

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:

The first view displays the main information about your contact: picture, name (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.
- 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.
  - 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.

- Select the right arrow to access the next view.
- This page 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.
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).

### 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 a contact to/from your favorite list

- From a list of contacts, open the contextual menu by right-clicking on the contact.
- Select the corresponding menu to add/remove a contact to/from your favorite list.
- 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”).

If the privacy option is enable 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 first name, last name and the number of your contact.
- Validate.
  - The contact is displayed in your favorite list.

2.15 Manager/Assistant (optional)

This function is available to users having a manager role or an assistant role. It allows a manager to delegate all calls toward the Assistant, except calls filtered through a white list (this white list is created by the manager from the deskphone and corresponding calls are processed according to the managers active call routing profile).

A manager can activate or deactivate the call delegation toward assistants.

- A specific icon is displayed on the home page if the function is activated.
An assistant can see managers that have activated the call delegation by clicking the Manager/Assistant icon ( ). Assistants cannot deactivate the call delegation from the application.

2.16 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 deskphone.

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.
- 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:
  - Display only members logged in (filter).
  - Display desktop alerts.
  - 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).
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.
- Delete all voice messages.

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.
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

From a list of contact

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>•</td>
<td>Start directly an audio call from a list of contacts</td>
</tr>
<tr>
<td>•</td>
<td>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.</td>
</tr>
<tr>
<td>•</td>
<td>Start an audio call with the contact.</td>
</tr>
<tr>
<td>•</td>
<td>Start a video call with the contact (optional).</td>
</tr>
<tr>
<td>•</td>
<td>Start an instant message with the contact.</td>
</tr>
</tbody>
</table>

From a contact card

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>•</td>
<td>Start an audio call. If there are several numbers for the same contact, select the desired number by clicking on the down arrow.</td>
</tr>
<tr>
<td>•</td>
<td>Start a video call (optional).</td>
</tr>
<tr>
<td>•</td>
<td>Send an instant message.</td>
</tr>
</tbody>
</table>

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 callers number.
  - Start an audio call / video call.
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.

2.19.1 Activate/deactivate the secret identity (CLIR) (Conversation user only)

Your external caller will not see your phone number. Select this option in the general settings (see: General).

When the secret identity is activated, the secret avatar is displayed instead of your photo or avatar in the top banner of the wall as a reminder. This feature depends on your system.

2.19.2 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 OpenTouch Conversation is simple. The search is performed through your local and corporate directories. The predictive search assists you to find quickly your contact.

- From the search/dial area, enter the name of your caller. You can specify initials or some characters from the first name/last name for searching contacts.
- Local directory is selected: a lookup is immediately performed on “local” contacts (Microsoft Outlook contacts, IBM Notes, favorites, contacts logged in the Wall).
  - Up to four names are suggested among the local contacts matching with the search: the last called and the three most called.
  - Select this option in the suggested list to display all local contacts.
  - Select this option in the suggested list to perform the search in the corporate directories.

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).
2.21 Answer a conversation

2.21.1 Audio or video call

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

| ![Icon] | Accept the audio conversation. |
| ![Icon] | Accept the video conversation. |
| ![Icon] | Divert the incoming audio/video call to the voicemail. |
| ![Icon] | Reply with an instant message or move the incoming call to a predefined number. |

If you are using OpenTouch Conversation for PC One, video call is not available and you have to use your deskphone 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 deskphone to answer the call.

At the end of the conversation, to release the call, use the release button or on-hook with the deskphone.

2.21.2 Answer an instant message

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

| ![Icon] | Accept the instant message conversation. |
| ![Icon] | Decline the chat. |
| ![Icon] | 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 (line is muted when the microphone is red).
- 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).
- Add a new participant to the 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.
- Divert the conversation to a predefined device (e.g. mobile, deskphone), another number or contact.
- Switch the conversation from main device to twinset (DECT, mobile).
- Switch the conversation from twinset to main device (defined for making calls in routing profile).
- Send DTMF.

## Other functions (bottom bar, right side)

- Open more actions.
- Put the call on hold.
- Record/Stop recording the conversation.
  - This icon is displayed when recording.
- Create a meeting with your correspondent or correspondents.
- 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.
**2.22.2 Make another conversation, N-party conference**

You can manage several audio (and video) communications at a time (maximum 10, depending on your system configuration).

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.
- Transfer the conversation to a predefined device (e.g. mobile, deskphone), another number or contact.
- Merge all conversations to conference.
- End the conference.

**2.22.3 Add participants to a conversation**

You are in an audio or video conversation and you want to add a participant to the conversation.

- Click to add a new participant in your conversation (your favorites are displayed by default).
- You can also enter a name or a number in the text field for adding a new participant. The search is performed in the local directories. Press Enter to perform the search in the corporate directories.
- Open the contact card.
- Add the participant to the conversation.
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.

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Join the meeting with audio and video (optional)</td>
</tr>
<tr>
<td>Join the meeting with audio only.</td>
</tr>
<tr>
<td>Join the meeting without audio.</td>
</tr>
<tr>
<td>Repeat the notification in 5 minutes.</td>
</tr>
<tr>
<td>Dismiss the notification.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Join the meeting with all media (optional).</td>
</tr>
<tr>
<td>Join the meeting with audio only.</td>
</tr>
<tr>
<td>Joint the meeting without audio.</td>
</tr>
<tr>
<td>Send an email to all participants.</td>
</tr>
<tr>
<td>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).</td>
</tr>
</tbody>
</table>
2.25 Settings

Settings depend on user profile (Conversation User, Connection User, Connection OTC PC One). Only available settings are displayed.

Open the settings window.

2.25.1 “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 validate in the login window (see Start OpenTouch Conversation).
- Define the presence status when signing in (optional).
- “OK”: 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”

- “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
- Define a keyboard shortcut for starting a call.
- “Caller identity”: activate/deactivate the secret identity (CLIR). Your external caller will not see your phone number. This feature depends on your system and is displayed if available (Conversation User only).
- “OK”: validate.
2.25.3 “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.
- “OK”: validate.

2.25.4 “Routing profiles” (Conversation User only)

2. “Profiles”: define the device for making calls. “Route calls to”: define the devices that will simultaneously ring when you receive a new call. If you route your calls to another number, the phone number you entered is automatically formatted as a canonical number when you apply: +Country/RegionCode (AreaCode) Number.

2.25.5 “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”).
- “Display order”: select the condition of the diversion (busy, no reply, busy or no reply).
- “OK”: validate.

2.25.6 “Alerts and sounds” (OpenTouch Conversation for PC in Softphone mode)

- “Ringtones”: define the ringtone when receiving an incoming call on your computer.
- Check the ringtone.
- “OK”: validate.
2.25.7 “Audio device”, “Video device” (OpenTouch Conversation for PC)
Select the webcam, microphone and speakers you want to use for video and audio 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 “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”: validate.

2.25.9 “About”
Open “About” information to know the software version and the user configuration.
## 3 Content sharing

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

### 3.1 Share documents during a conversation

- Open the sharing tool.

**Management panel:**

- Add a new document.
- Share the document.
- Download the document to your personal computer.
- Delete the document.

**Controls (top bar of the conversation window):**

- 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.
- 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.

**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.
3.2 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.

Use the mouse wheel to zoom/unzoom the presentation.
4 Meeting

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

4.1 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.

4.2 Options

You can configure the meeting by selecting some rules for the meeting as the leader starts or ends the meeting.

Select or unselect an option.

4.3 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.

4.4 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.
4.5 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.

4.6 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.
4.7 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 email”).
4.8 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.
- Join 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 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.

5.1 Supported versions

- Outlook 2010 – 32 or 64 bits
- Outlook 2013 – 32 or 64 bits
- Outlook 2016 – 32 or 64 bits
- Outlook 365

The screenshots are examples from Outlook 2013.

5.2 OpenTouch Conversation services

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

5.2.1 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.

5.2.2 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.
- 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.

5.2.3 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.
5.2.4 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)

5.2.5 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.

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

<table>
<thead>
<tr>
<th>Available</th>
<th>Be right back</th>
</tr>
</thead>
<tbody>
<tr>
<td>Busy/In conversation</td>
<td>Offline</td>
</tr>
</tbody>
</table>

5.2.7 User options
Click the bottom right corner of the OpenTouch application ( )

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

<table>
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</thead>
<tbody>
<tr>
<td>Busy/In conversation</td>
<td>Offline</td>
</tr>
</tbody>
</table>

5.2.7 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.

5.3 OpenTouch conference

OpenTouch conference integration is performed through an “add-in” client. Use Microsoft Outlook to schedule OpenTouch conferences.

5.3.1 Settings

Click the bottom right corner of the OpenTouch conference application ( ).

Enter the OpenTouch server name and the credentials ( ) or use OpenTouch Conversation settings for starting the conferencing add-in ( ). For remote worker users, the server is the conference server name and the option is not available.
5.3.2 Create a meeting

- Select the OpenTouch conference icon to create a new meeting.
  - From the Mail view, directly create a new meeting in the Calendar with current date and hour.
  - From a new created appointment.
- 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.

5.3.3 Cancel the meeting

From the appointment view, cancel the conference from the appointment.

5.3.4 View details of the meeting

From the appointment view, show all information and options about the OpenTouch Conversation meeting.

In meeting options, set Leader and Participant (default) roles when scheduling the conference (the leader access code must be sent separately to the invitees that have been promoted).

5.3.5 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.

6 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.
7 OpenTouch Click2Call extension for Gmail and Google Contacts

OpenTouch Click2Call is a free extension that allows making calls to any Gmail and Google contacts.

7.1 Installation

OpenTouch Click2Call is a Chrome extension. Install OpenTouch Click2Call via the Chrome Web Store.

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

When first starting, you have to allow OpenTouch Click2Call to use information about your contact.

7.2 Make a call from a Gmail or Google contact

Select the Click2Call icon of your contact. The call is managed by the OpenTouch application.

If you select the Click2Call icon in Google list of contacts, the first number of your contact defined in Google card is used. If you want to use another number of your contact, open the Google card and select the Click2Call icon of the corresponding number.
8 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".

8.1 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.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Feature Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>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).</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Visual Voicemail.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Meetings: manage your meetings (consult, create, modify, share documents). All meetings are managed as described for OpenTouch Conversation application.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Settings: open the OpenTouch Conversation settings</td>
</tr>
<tr>
<td>![Icon]</td>
<td>List current active conversations. If only one conversation is active, the corresponding communication card is opened.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Supervision (optional)</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.</td>
</tr>
</tbody>
</table>

- 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 deskphone.
- 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.
8.2 Presence information

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.

8.3 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.

The routing profile depends on your user profile (Conversation User, Connection User). For more information, refer to the next OpenTouch Conversation for PC sections:

- 2.8 Call Routing for Conversation user
- 2.9 Call Routing for Connection user

8.4 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.
8.5 Search a contact

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

8.6 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.

8.7 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:

- 3 Share documents during a conversation
- 3.2 Share your desktop during a conversation
9 OpenTouch Conversation for IBM Sametime

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

The OpenTouch Conversation provides a high level of service when associated to IBM Sametime. OpenTouch Conversation has to be installed with option: “Integrated with IBM Sametime”.

9.1 Sametime add-in

Before using your application, you have to authorize add-in installation in the Sametime server administration (Sametime default rules). Contact the administrator of the Sametime server if necessary. If the add-in is correctly installed, OpenTouch conversation is started automatically when you start Sametime. Enter the OpenTouch Conversation username and password. Validate the “Remember password” checkbox to store the password for the next connections. If you are outside the company, enter your remote access credentials and the public address of your OpenTouch server.

The OpenTouch Conversation icon is displayed in the top bar menu of Sametime.

| The add-in is starting and you are connected to the OpenTouch server. |
| Add-in can be started (OpenTouch Conversation is running). |
| Add-in is not running (OpenTouch Conversation is not started or add-in cannot be executed) |

9.2 OpenTouch Conversation integration

OpenTouch communication services integration is performed through the native Sametime user interface: telephony, messaging services and personal contact search capabilities.

You can also access all other features of the OpenTouch Conversation application. 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 or on the corresponding button to display only missed calls or all conversations. |
| Visual Voicemail. |
| OpenTouch Conversation Meetings: manage your meeting (consult, create, modify, share documents). |
| Keypad. |
| OpenTouch Conversation settings |

Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.
**Status icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎤</td>
<td>Microphone and speakers of the computer are used for audio call.</td>
</tr>
<tr>
<td>🎧</td>
<td>Headset of the computer is used for audio call</td>
</tr>
<tr>
<td>📱</td>
<td>Your personal computer will not ring when you receive an incoming call.</td>
</tr>
</tbody>
</table>

**Manager Assistant (optional)**

The ribbon displays the current routing profile, selected device for making a call and available actions.

**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.

The routing profile depends on your user profile (Conversation User, Connection User). For more information, refer to the next OpenTouch Conversation for PC sections:

- 2.8 Call Routing for Conversation user
- 2.9 Call Routing for Connection user

**9.4 OpenTouch communication services in Sametime**

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

- Open the Conversation Wall. The number of missed calls is displayed.
- Make an audio call.
- Make a video call.
- Share a document.
9.5 Make a conversation

According to user permissions and Opentouch Conversation for PC configuration, you are able to start a video, audio or share a document with Sametime contacts.

All conversations are managed by the OpenTouch Conversation for PC. Access all available services:

- From the Sametime menu bar by selecting a Sametime contact.
- From the contextual menu by right-clicking on a contact.
- From contextual menu by right-clicking on the Sametime contact card.

A list of phone numbers is displayed if the contact owns several numbers (click the number to dial).

9.6 Dial a number

Enter the number of your contact in the search/dial area. Right-click to get the contextual menu with OpenTouch Conversation services.

Phone number format: canonical number: +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.

9.7 Search a contact

Search for anyone in your Sametime contacts and initiate a call with that person (if several contacts match the search criteria, a list of phone numbers is displayed for each contact. Right-click to get the contextual menu with OpenTouch Conversation services.
9.8 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.

9.9 Listen to a voice message

- Select the visual voicemail tab in the OpenTouch Conversation home page.

9.10 Presence information

The presence of contacts is displayed with name (status color and text):

<table>
<thead>
<tr>
<th>Available</th>
<th>Be right back</th>
</tr>
</thead>
<tbody>
<tr>
<td>Busy/In conversation</td>
<td>Offline</td>
</tr>
</tbody>
</table>

The telephony presence of your contact is displayed:

Your contact is in conversation.

9.11 Share a document

Like a conversation, you can share a document with a Notes contact, by right-clicking on the contact, and selecting the start sharing document menu.

For more information, refer to the next OpenTouch Conversation for PC sections:

- 3. Share documents during a conversation
- 3.2 Share your desktop during a conversation

9.12 Settings

OpenTouch Conversation is automatically launched when Sametime is started. Uncheck if you don’t want an auto-start.
**10 OpenTouch Conversation for IBM Notes**

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

The OpenTouch Conversation provides a high level of service when associated to IBM Notes. OpenTouch Conversation has to be installed with option: “Standalone”.

**10.1 Notes add-in**

Before using your application, the add-in has to be installed and configured on the Domino server and in your Notes application. The add-in is stored in the folder “Notes update site” of the OpenTouch Conversation installation. Add this folder location in Notes features updates. Refer to the Notes/Domino documentation or contact your installer. Mass provisioning deployment is possible.

To display the toolbar associated to the OpenTouch Conversation in the top bar menu of Notes, you have to unselect “show toolbars only when editing” option in “View” -> “Toolbar” menu.

If the add-in is correctly installed, OpenTouch conversation is started automatically when you start Notes. Enter the OpenTouch Conversation username and password. Validate the “Remember password” checkbox to store the password for the next connections. If you are outside the company, enter your remote access credentials and the public address of your OpenTouch server.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>The add-in is correctly running and you are connected to the OpenTouch server.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Add-in can be started (OpenTouch Conversation is running) – Automatic start option is unchecked.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Add-in is not running (OpenTouch Conversation is not started or add-in cannot be executed)</td>
</tr>
</tbody>
</table>

**10.2 OpenTouch Conversation integration**

OpenTouch communication services integration is performed through the native Notes user interface: telephony, messaging services and personal contact.

Click the lock icon in the top bar menu of Notes to start the OpenTouch Conversation add-in. Once started, buttons are displayed according to user’s permissions in the Notes menu bar and the OpenTouch Conversation home page is displayed in a separate window. The start icon is not displayed if the automatic start option is checked in OpenTouch Conversation add-in settings (Notes settings).

You can also access all other features of the OpenTouch Conversation application. Refer to the OpenTouch Conversation for PC sections for more information about the following features.

- **Favorites**: quick access to your preferred contacts.
- **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**.
- **OpenTouch Conversation Meetings**: manage your meetings (consult, create, modify, share documents).
Keypad.

OpenTouch Conversation settings

Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.

To search a contact, use the search feature in OpenTouch Conversation home page or from the Windows notification area (show or hide the search/dial area by right-clicking the OpenTouch Conversation icon from the Windows notification area).

### Status icons

| Microphone and speakers of the computer are used for audio call. | Call from your deskphone. |
| 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 enable. |
| Microphone or speakers cannot be detected. | |
| Manager/assistant activated (optional) | |

The ribbon displays the current routing profile, selected device for making a call and available actions.

#### 10.3 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.

The routing profile depends on your user profile (Conversation User, Connection User). For more information, refer to the next OpenTouch Conversation for PC sections:

- 2.8 Call Routing for Conversation user
- 2.9 Call Routing for Connection user
10.4 OpenTouch communication services in Notes

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

- Make an audio call.
- Make a video call.
- Send an instant message.
- Play/replay a voice message (received or recorded).
- End the active conversation.
- Record a voice message to send by email.

10.5 Make a conversation

According to user permissions and OpenTouch Conversation for PC configuration, you are able to start a video or audio conversation with Notes/Domino contacts. All conversations are managed by the OpenTouch Conversation for PC. Access all available services:

- From the Notes menu bar by selecting a Notes/Domino contact or message.
- From contextual menu by right-clicking on a message of a contact.
- From contextual menu by right-clicking on the Notes/Domino contact card.
- From contextual menu by right-clicking on a phone number
- From contextual menu by right-clicking on an email address or name

A list of phone numbers is displayed if the contact owns several numbers (click the number to dial).

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

10.6 Dial a number

Enter the number of your contact in the Notes search/dial area. Select the call option or right-click to get the contextual menu with OpenTouch Conversation services. Phone number format: canonical number : +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.
10.7 Search a contact

Search for anyone in your Notes/Domino contacts and initiate a call with that person (if several contacts match the search criteria, a list of phone numbers is displayed for each contact).

From OpenTouch Conversation application, search for anyone in your Notes contacts and initiate a call with that person.

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).

10.8 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. A Notes contact card can be displayed if the calling party can be recognized (see add-in settings).

10.9 Listen to a voice message

- To consult your voice messages, select the corresponding icon in the Notes top bar or select the visual voicemail tab in the OpenTouch Conversation home page.

10.10 Recording a message

- 🎧: add a voice message (.wav file) to a Notes message.
- 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.

10.11 Presence information

The presence of contacts is displayed with name (status color and text):

- Available
- Busy/In conversation
- Be right back
- Offline
- Offline

The telephony presence of your contact is displayed:

Your contact is in conversation.
10.12 Settings

Customize the OpenTouch Conversation add-in from the Notes preferences.

1 If this option is selected, the add-in is automatically started when you start Notes.

2 When receiving an incoming call, a Notes contact card can be displayed if the calling party can be identified from Notes/Domino Address List. Contact cards can be created for calling parties that are not recognized.
11 Communicate with organizations using Microsoft Lync™ user

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

Federation with Lync 2013 XMPP Federation Gateway allows Presence and IM federation between OpenTouch Conversation users and Lync 2013 users. This federation feature lets you communicate faster and more effectively with contacts outside your organization, such as partners, suppliers, customers, or vendors.

If federation is configured on your OpenTouch system, you will be able to:

- Add Lync users to your favorite contacts.
- Send instant messages to these Lync contacts.
- See the presence of these Lync contacts.
- Reach Lync contacts with audio or video.

11.1 Supported version

- Microsoft Lync™ Server 2013 and more
- Microsoft Lync™ 2013 and more

11.2 Features available with a Lync contact

Use your application for initiating a conversation with a Microsoft Lync user like any other contact.

<table>
<thead>
<tr>
<th>A federated contact is tagged with a specific icon.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenTouch Conversation users can request to be notified of Microsoft Lync users’ available or busy presence status. The same applies for Lync users.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As an OpenTouch user, you are able to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange instant messages: when presence is federated between Conversation and Lync users, instant messages can be sent (note that Instant Messaging is limited to peer-to-peer sessions).</td>
</tr>
<tr>
<td>Place voice calls: open a contact card of a federated user and click to call.</td>
</tr>
<tr>
<td>Invite Lync users to join a scheduled OpenTouch conference: send an invitation with OpenTouch meeting details that Lync users can join from a web client and a phone.</td>
</tr>
<tr>
<td>Add a federated contact with audio only in a multimedia/multi-party conversation (instant messages cannot be exchanged with this contact in this context).</td>
</tr>
</tbody>
</table>

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