OpenTouch Conversation for PC............................................................................. 4
Start OpenTouch Conversation ............................................................................. 4
Homepage ........................................................................................................... 5
3.1 Change your photo or avatar ........................................................................... 6
4 Conversation Wall ............................................................................................... 7
5 Favorites .............................................................................................................. 7
6 Call Routing ......................................................................................................... 8
7 Presence ............................................................................................................... 9
8 Contact card ......................................................................................................... 9
9 Meeting card ......................................................................................................... 10
10 Add/remove a contact to/from your favorite list .............................................. 11
11 Manager/Assistant (optional) ............................................................................ 11
12 Group Supervision (optional) ........................................................................... 12
13 Visual Voice Mail ............................................................................................... 13
14 Start a conversation .......................................................................................... 13
15 Search for a contact ........................................................................................... 15
16 Answer a conversation ....................................................................................... 15
17 During a conversation ....................................................................................... 16
17.1 Screen description ........................................................................................... 16
17.2 Make another conversation, N-party conference ........................................ 17
17.3 Add participants to a conversation ................................................................ 18
17.4 Share documents during a conversation ....................................................... 18
17.5 Share your desktop during a conversation ................................................... 20
18 Meeting ............................................................................................................. 21
18.1 Create a meeting ............................................................................................. 21
18.2 Consult the meeting list .................................................................................. 22
18.3 Modify an upcoming meeting ........................................................................ 23
18.4 Add or remove a participant from an upcoming meeting and define leaders 24
18.5 Upload a document to a meeting .................................................................. 24
18.6 Secure the access to the meeting .................................................................. 25
18.7 Join a meeting ................................................................................................. 26
19 Settings ............................................................................................................. 27
19.1 Start .................................................................................................................. 27
19.2 General ............................................................................................................ 27
19.3 Phone numbers ............................................................................................... 28
19.4 Call routing profiles ....................................................................................... 28
19.5 Call overflow ................................................................................................... 28
19.6 Ringing .............................................................................................................. 29
19.7 Audio and Video device preferences ............................................................. 29
19.8 Support ............................................................................................................ 29
20 OpenTouch Conversation for Microsoft® Outlook™ .......................................................... 30
  20.1 Supported versions of Outlook are: ........................................................................ 30
  20.2 OpenTouch Conversation services ......................................................................... 30
    20.2.1 Start OpenTouch Conversation integration ....................................................... 30
    20.2.2 OpenTouch communication services ................................................................. 30
    20.2.3 Make a conversation .......................................................................................... 31
    20.2.4 Listen to a voice message .................................................................................. 32
    20.2.5 Recording a message ......................................................................................... 32
    20.2.6 Presence information ......................................................................................... 32
    20.2.7 User options ...................................................................................................... 32
  20.3 OpenTouch conference ............................................................................................ 33
    20.3.1 Settings .............................................................................................................. 33
    20.3.2 Create a meeting ............................................................................................... 34
    20.3.3 Cancel the meeting ............................................................................................ 34
    20.3.4 View details of the meeting .............................................................................. 34
    20.3.5 Join a meeting .................................................................................................... 34
  21 Communicate with organizations using Microsoft® Lync™ user ................................... 35
    21.1 Supported version ................................................................................................. 35
    21.2 Features available with a Lync contact ............................................................... 35
1 OpenTouch Conversation for PC

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

2 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 your username and password. Select the “Remember password” checkbox to store the password for future sessions. If you are outside the company, enter your remote access credentials and the public address of your OpenTouch system.

When connected, the application homepage is displayed.

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 the settings of the application.

Exit the application

Closing the main window no longer exits the application. Right-click the OpenTouch Conversation icon from the Windows notification area and quit the application by selecting the corresponding menu item.
3 Homepage

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 you to choose the display type by clicking on the corresponding button (bottom left of the window).

Display the favorite contacts and the conversation history horizontally.

Display the favorite contacts and the conversation history vertically.

Display the information vertically using tabs.
Favorites: quick access to your preferred contacts.

Conversation Wall: past conversations, active conversation and future meetings. Click on the icon or the corresponding button to display only missed calls or all conversations.

Visual Voice Mail.

Meetings: manage your meetings (consult, create, modify, share documents).

Keypad.

Settings

Search for a contact.

### 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>
<tr>
<td>📌</td>
<td>Call from your deskphone.</td>
</tr>
<tr>
<td>📞</td>
<td>Call from your professional mobile.</td>
</tr>
<tr>
<td>📌</td>
<td>Call from your tablet.</td>
</tr>
</tbody>
</table>

### 3.1 Change your photo or avatar

1. Click on your Photo/Avatar.
2. Select a photo in the list and apply.
3. To add a new photo to the list (max 16 pictures), browse your computer to find a new photo. The photo is automatically resized if too large.
4. To delete a photo from the list, select the photo and delete it.

Close the window when you have finished.
4 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 3 parts:

- Past conversations and meetings.
- Current conversations and meetings.
- Future meetings.

The badge associated to a card refers to the latest media used or latest event received (can be audio call event, video call, instant message, meeting or voice mail). Select an item from the Wall to open the corresponding card or conversation.

| Come back to the most recent conversation. |
| Delete the conversation history. |

5 Favorites

Favorites give you faster access to your preferred contacts.

1. Close or open the favorites list.
   The presence of your contact is displayed under the picture.
2. Use the alphabetical list to find your preferred contact quickly.
3. Click the contact you want to reach by opening the corresponding contact card.
6 Call Routing

Call routing lets you 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.
3. You can customize your current profile (a temporally customized profile is created until you select another profile).
   a. Define the device used for making calls.
   b. Select which devices will ring when receiving an incoming call.
4. You can 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:

<table>
<thead>
<tr>
<th>Voicemail</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>You can also set a predefined profile by right-clicking the OpenTouch Conversation icon from the Windows notification area.</td>
</tr>
</tbody>
</table>
7 Presence

The colored bar under a picture shows the contact’s presence status.

Available  Busy  Be right back  Appear Offline

1. To change your presence, click on your current presence.
2. Select your new presence status.

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.

8 Contact card

A contact card represents a person.

Open a contact card by selecting a contact in the conversation Wall or from your favorite list. Such card contains 3 views:

- The first view displays main information about your contact: picture, name, presence (if available) and the favorite icon (if the contact is a favorite).

  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.

  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 agreed to publish presence information.

  Close the card.
From a contact card, you can:

- Start an audio or video 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 or desktop with the contact.
- Send an email to the contact.
- Create a meeting with the contact.
- Remove the card from the Wall. Confirmation is requested if there are unread events with this contact.

9 Meeting card

A meeting card represents a group of persons.
Open a meeting card by selecting a meeting from the conversation wall. The card contains at least 2 views:

- The first view can display up to 4 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).
- 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 you to display these exchanges.
From a meeting card, you can:

- Join the meeting with all media.
- Join the meeting with audio only.
- Joint the meeting without audio.
- Send an email to all participants.
- Modify the meeting.
- Remove the card from the Wall.
- Join the meeting in audio with a different device from the one defined in call routing. Enter a new number you would like to use for the meeting or select one from the last 9 numbers entered (if necessary you can select your current number in the list).

10 Add/remove a contact to/from your favorites list

Open the contact card of the contact you want to add to your favorites list.

- Select the star or click the corresponding button from the Information view.
- Your contact is added to your favorites list.
- Unselect the star or click the corresponding button in the Information view to remove the contact from your favorites list.

11 Manager/Assistant (optional)

This function is available to users with a Manager role or an Assistant role. It allows a Manager to delegate all calls towards 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 manager’s active call routing profile).

Manager can activate or deactivate the call delegation towards assistants.

A specific icon is displayed on the home page if the function is activated.

Assistant can see managers that have activated call delegation by clicking the Manager/Assistant icon ((QtGui10)). Assistant cannot deactivate the call delegation from the application.
12 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 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 supervisor(s) is indicated with a red badge.

| Your business phone number is supervised (you are connected in a supervision group) | 🎯2 |
| Your business phone number is not supervised (you are not connected in a supervision group) | 🎯1 |

1. 🎯2 Click the Group Supervision icon to see details about all members of this group who are logged in: presence status, supervisor members.

2. ⏮ Log into the group / 🚴 Exit the group

3. ⌛️ Open the contact card of a group member to initiate for example a conversation with that member.

4. 🌟 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).
13 Visual Voice Mail

1. You have new voice messages (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.
3. Call your voice mailbox to configure or activate for example your greetings.
4. Delete all voice messages.

14 Start a conversation

Open a contact card:
- Following a directory lookup.
- From the Wall or the favorite list.

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.
- Send an instant message.
- Start content sharing.
- Send an email.
- Create a meeting with your contact.
- Remove the card from the Wall.

You can also dial a phone number:
- By entering a number in the search/dial area.
- By using the keypad:
  1. Click to open the keypad.
  2. Enter the caller's number.

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.

Activate/deactivate the secret identity (CLIR)
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.
15 Search for a contact

- From the search/dial area, enter the name of your contact (click on the search icon if search area is not opened).
- A lookup is immediately performed on “local” contacts (Microsoft Outlook contacts, favorites, contacts logged in the Wall).
- To perform a search in your organization, press the RETURN key in the search bar.
- Click an entry in the search result list for opening the contact card.

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).

16 Answer a conversation

A Desktop alert is displayed when someone wants to start a conversation with you (example below with a Call toast):

- 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.

- Accept the instant message conversation.
- Decline the chat.
- Start an audio or video call.
17 During a conversation

17.1 Screen description

Actions are available according to the type of conversation:

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

<table>
<thead>
<tr>
<th>Main audio/video controls (top bar, left side)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Mute/un-mute the conversation (line is muted when the microphone is red).</td>
</tr>
<tr>
<td>• Set the volume of your speakers.</td>
</tr>
<tr>
<td>• Mute/unmute the video call.</td>
</tr>
<tr>
<td>• Hide/Show the ‘picture in picture’ during a video call.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Media controls/Participants (top bar, right side)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Add video to the conversation.</td>
</tr>
<tr>
<td>• Add instant messaging to the conversation.</td>
</tr>
<tr>
<td>• Share documents or your desktop during the conversation.</td>
</tr>
<tr>
<td>• Add a new participant to the conversation.</td>
</tr>
<tr>
<td>• Display the list of participants.</td>
</tr>
</tbody>
</table>
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 a 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.
- 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.
- Set up a meeting with the other caller(s).
- Access the settings.

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

17.2 Set up another conversation, N-party conference

You can manage several audio (and video) conversations 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.).
### 17.3 Add participants to a conversation

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

1. Click to add a new participant to your conversation (your favorites are displayed by default).
2. You can also enter a name or a number in the text field to add a new participant.
3. Add the participant to the conversation.

### 17.4 Share documents during a conversation

Start sharing documents.
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 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.
- Change the color.
- Change the size.

Use the mouse wheel to zoom in and out.
17.5 Share your desktop during a conversation

Start sharing monitors.

Management panel:

- Share a monitor with the other participants (monitors you are connected to are automatically displayed).
- Pause the sharing.
- Resume the sharing.
- Stop the sharing.

Use the mouse wheel to zoom in and out.
18 Meeting

18.1 Create a meeting

Create a meeting:

- Via the corresponding icon in the homepage.
- 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 participant(s) of the card to the meeting).

Following window is displayed:

- Choose the meeting type: scheduled or reservationless meeting. A reservationless meeting is useful to initiate an impromptu meeting without having to schedule the meeting in advance.
- Choose a predefined profile for the meeting:
  - Meeting: use for interactive business meetings. All licensed features are available.
  - Webinar: use for a Web presentation (large events). Participants only listen and see the Web presentation of leaders.
  - Training: use for teacher-student scenario. All licensed features are available. Session ends when the teacher hangs up (leader).
  - Conference call: use for a voiceonly conference.
- Enter the different parameters and schedule the meeting.
The new meeting appears in the conversation wall (future events):

- Scheduled meeting.
- Reservationless meeting.
  Expiration date is displayed.

18.2 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 separated sections.

- Display the details of the meeting.
- Edit the meeting (double-click the meeting or use the edit icon).
- Delete the meeting.
18.3 Modify an upcoming meeting

Edit a meeting from the meeting card or the meeting list.

The first tab (Settings) enables the user to modify the main information: name, date, duration, recurrence, etc.

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

The leader role (according to the licensed features):

- Add or remove participants.
- Mute or unmute a participant.
- Share documents.
- Annotate documents.
- Share desktop.
- Allow participants to use some roles.

1. Select the People tab.
2. 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 a selected participant.
5. Update the meeting.

18.5 Upload a document to a meeting

1. Select the Documents tab.
2. Add a new document by selecting the file on your computer. You can add the document by dragging and dropping it to the application.
Select how to share the document:

- As a presentation: all participants can only view the document.
- As an attachment: all participants can only download the document.
- As a presentation and an attachment: all participants can view and download the document.

3. Remove a document from the list.
4. Update the meeting.

18.6 Secure access to the meeting

You can protect access to the meeting by using passwords.

- Select the Passwords tab.
- You can define a password for audio meetings (digits only). In this case, an external user has to enter the password to join the audio meeting.
- You can define a password for online meetings. In this case, an external user has to enter the password to join the web meeting.

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

- Display the password policy.
A Desktop alert is displayed 15 minutes before a meeting starts.

- Join the meeting
- 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.
- Join the meeting with audio only.
- Joint the meeting without audio.
- Send an email to all participants.
- Join the meeting in audio with a different device from the one defined in call routing. Enter a new number you would like to use for the meeting or select one from the last 9 numbers entered (if necessary you can select your current number in the list).
19 Settings

Open the settings window.

19.1 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 selected in the login window (see Start OpenTouch Conversation).

From this page, you can generate a QR code. The QR code lets you easily configure connection settings for another client like OpenTouch Conversation for Android or iPhone.

19.2 General

- Define how to display contacts (last name first or first name first).
- Define the display language.
- Define a keyboard shortcut for starting a call.
- Activate/deactivate secret identity (CLIR). Your external caller will not see your phone number.
19.3 Phone 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.

19.4 Call routing profiles

1. Create, rename or delete a routing profile.
2. Define the device for making calls and 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.

19.5 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 a predefined phone number when you are away and/or busy.

- Select the destination of the diversion: No diversion, voicemail or predefined phone number.
- Select the condition of the diversion: busy, no reply, busy or no reply.
- Validate the call overflow.
19.6 Ringing

1. Define the ringtone when receiving an incoming call on your computer.
2. Check the ringtone.

19.7 Audio and Video device preferences

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.

19.8 Support

1. Select this option to activate logging for the current session.
2. Click “Save logs” button to put the collected data into a zip archive that can be sent to the support team.
3. Uncheck the option or stop the application to deactivate logging.
20 OpenTouch Conversation for Microsoft© Outlook™

OpenTouch Conversation provides a high level of service when associated with Microsoft Outlook.

20.1 Supported versions of Outlook are:

- Outlook 2010 - 32 or 64 bits
- Outlook 2013 - 32 or 64 bits

The screenshots are examples, provided from Outlook 2013.

20.2 OpenTouch Conversation services

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

20.2.1 Start OpenTouch Conversation integration

1. Check that OpenTouch Conversation for PC is started

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

3. Once logged in, buttons are displayed according to user’s permissions

20.2.2 OpenTouch communication services

OpenTouch communication services depend on the user’s permissions 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 the 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 contact card.

Note that OpenTouch Conversation uses the native UI of Microsoft Office applications. Communication services can be displayed in other Office applications such as SharePoint, Excel, Word.

20.2.3 Set up a conversation

Depending on user permissions and your 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 OpenTouch Conversation for PC.

You can start 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 HangUp button to end any active audio or video call.
20.2.4 Listen to a voice message
- ![Voice Message Icon]: indicates a voice message received via email (when using the unified messaging store based on the email server).
- Select the email
- ![Play/Replay Icon]: Play/replay a voice message (contextual menu or ribbon)

20.2.5 Recording a message

- ![Record Icon]: 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.

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>To attach the latest recorded message</td>
</tr>
<tr>
<td>To record a new message (the previous one will be lost if not attached)</td>
</tr>
<tr>
<td>To play the recorded message.</td>
</tr>
<tr>
<td>To cancel the record operation.</td>
</tr>
</tbody>
</table>

20.2.6 Presence information

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

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

20.2.7 User options

Click the bottom right corner of the OpenTouch application (⬛).
Once you have accessed the user options, you can select or populate the below fields:

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

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.

20.3 OpenTouch conference

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

20.3.1 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.
20.3.2 Create a meeting

- Select the OpenTouch conference icon to create a new meeting.
  - From the Mail view, create a new meeting directly in the Calendar with the current date and time.
  - 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 the OpenTouch Conversation application.

20.3.3 Cancel the meeting

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

20.3.4 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 shall be sent separately to the invitees that have been promoted).

20.3.5 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.
21 Communicate with organizations using Microsoft® Lync™ user

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.

21.1 Supported version

- Microsoft® Lync™ Server 2013
- Microsoft® Lync™ 2013

21.2 Features available with a Lync contact

Use your application for initiating a conversation with a Microsoft Lync 2013 user, like any other contact.

<table>
<thead>
<tr>
<th></th>
<th>A federated contact is tagged with a specific icon.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>OpenTouch Conversation users can request to be notified of Microsoft Lync users’ available or busy presence status. Same applies for Lync users.</td>
</tr>
<tr>
<td></td>
<td>As an OpenTouch user, you are able to:</td>
</tr>
<tr>
<td></td>
<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></td>
<td>- Place voice calls: open a contact card of a federated user and click to call.</td>
</tr>
<tr>
<td></td>
<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></td>
<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>

The information presented is subject to change without notice. ALE International assumes no responsibility for inaccuracies contained herein. Copyright 2015 ALE International. All rights reserved.