OpenTouch™ Conversation for iPhone

User Manual

OmniPCX Office Rich Communication Edition user
OpenTouch Business Edition and Multimedia Services Conversation user
OpenTouch Business Edition and Multimedia Services Connection user

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I.1 OpenTouch Conversation Application Provisioning

This document describes the services offered by the OpenTouch Conversation application for iPhone.

The following guidelines are intended to help you get the most out of your device:

- Local contacts enriched with useful details: photo, job title, company, phone numbers, email, IM, address, etc. (For example, a photo & caller identification will be used in the Wall).
- Keep your local contacts synchronized across all your devices. For example, you can use Exchange Active Sync or Google Contacts. The idea is to add a new contact on one device only and it is automatically synchronized on the other devices via sync over the air (all OpenTouch clients - Android smartphone, iPhone & iPad will benefit from this sync).
- When you can, use a Bluetooth handset so that you can take full advantage of your display whatever the situation.
- Use Corporate WLAN or Wi-Fi when available for less network latency.
- Remember: always drive safely, avoid distractions and follow local laws!

OpenTouch Conversation for iPhone is an application that is common to OmniPCX Office Rich Communication Edition (OXO RCE), OpenTouch Business Edition (OTBE) and OpenTouch Multimedia Services (OTMS) infrastructures. Your system administrator will customize the application depending on the host infrastructure. Please consult the corresponding user manual by selecting the corresponding chapter for your system. If you need to check which system you are connected to, please open the ‘About’ section in the application:
I.2 Recommendations

For the latest requirements, please refer to the application description in the App Store.

I.2.1 Restricted access
The OpenTouch Conversation for iPhone application requires access to some of your phone’s features such as, your contacts, the microphone or the camera for QR Code processing. When you use the application for the first time, you are prompted to allow the application to have access to these features. This setting can be changed in the privacy menu of the iPhone settings.

I.2.2 Certificates
At the first connection, you will be prompted to accept certificates, to ensure security of the data transfer when the application communicates with the Call Server of your company. If the certificate has changed due to, for example, expiration or domain modification, you will be informed immediately and you will have to accept the new certificate.

I.2.3 Application update for OXO RCE User

If you update your application from an old version to the new OpenTouch Conversation, you must first uninstall the old version before installing the new one. The two versions should not be used at the same time.
II - OPENTOUCH CONVERSATION USER MANUAL FOR OXO RCE USER

II.1 START OpenTouch™ CONVERSATION
II.1.1 START THE APPLICATION
II.1.2 SIGN IN
II.1.3 VOICE-OVER-IP MODE
II.1.4 USING A BLUETOOTH AUDIO DEVICE CONNECTED TO YOUR PHONE

II.2 SETTINGS
II.2.1 MY PROFILE
II.2.2 ACTIVATE / DEACTIVATE VOIP FEATURE
II.2.3 DISPLAY YOUR USER INFORMATION
II.2.4 CHANGE YOUR PHOTO / AVATAR
II.2.5 NOTIFICATIONS

II.3 HOMEPAGE
II.3.1 HOMEPAGE DESCRIPTION
II.3.2 STATUS ICONS

II.4 CALL ROUTING
II.4.1 SELECT YOUR ROUTING PROFILE
II.4.2 DEFINE NUMBERS
II.4.3 CONVERSATION WALL (HISTORY)
II.4.4 TO ACKNOWLEDGE A MISSED CALL
II.4.5 TO DELETE ONE CONVERSATION LOG:
II.4.6 TO ACKNOWLEDGE ALL MISSED CALLS
II.4.7 CONTACT CARD
II.4.8 SEARCH A CONTACT
II.4.9 ADD A CONTACT TO YOUR LOCAL DIRECTORY
II.4.10 VISUAL VOICE MAIL

II.5 CONVERSATION
II.5.1 SET UP A CONVERSATION WITH A CONTACT
II.5.2 MAKE A CONVERSATION BY ENTERING A NUMBER
II.5.3 RECEIVING A CONVERSATION (VOIP OR CELLULAR)
II.5.4 VOIP MODE
II.5.5 CELLULAR MODE

II.6 DURING CONVERSATION
II.6.1 SCREEN DESCRIPTION
II.6.2 MAKE A SECOND CALL / SWITCHING BETWEEN TWO CALLS / TRANSFER CALL TO YOUR CONTACT ON HOLD / SETTING UP A CONFERENCE / SEND DTMF

II.7 INSTANT MESSAGING
II.7.1 START AN INSTANT MESSAGE
II.7.2 RECEIVE AN INSTANT MESSAGE
II.7.3 CONSULT INSTANT MESSAGE
II.7.4 DELETE A PART OF THE CONVERSATION
II.7.5 DELETE A CONVERSATION
II.7.6 DURING CONVERSATION
II.1 Start OpenTouch™ Conversation

II.1.1 Start the application

Select the OpenTouch Conversation Icon.

II.1.2 Sign in

When you connect for the first time, if you have not configured the connection parameters, a connection screen is displayed requiring the OmniPCX Office RCE subscriber credentials.

1. Set your connection parameters.
2. Enter your user name (login) - phone’s internal number. Enter your password. The password is the same as the voicemail.
3. Sign in.

4. In the initial login screen you can see the “Scan QR Code” button (when necessary, hide the input keyboard). When you press this button, the application scans the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy).

II.1.3 Voice-over-IP mode

OpenTouch Conversation integrates voice over IP (VoIP) capability allowing the user to place and receive business calls on the mobile through the wireless LAN (WLAN). Unless you do not wish to use VoIP (deactivated via a dedicated setting), VoIP capability will be provided automatically as soon as the mobile has corporate WLAN coverage and has successfully registered to the SIP server.

A VoIP icon on your mobile shows the VoIP status:

- ✅: VoIP capability is activated (application is registered to the SIP server).
- ✗: VoIP capability is deactivated via a dedicated setting.
- No icon displayed: cellular mode only or loss of SIP connection (VoIP capability is temporarily unavailable).
II.1.4 Using a Bluetooth audio device connected to your phone

For cellular calls, use your Bluetooth® headset as you usually do. For VoIP calls, you need to use the OpenTouch Conversation for iPhone application screen to:
- answer or end the call.
- switch from the Bluetooth® headset to hands-free mode and vice versa.

During a VoIP call, if you do not want to use your Bluetooth® headset and want to continue the conversation from your phone, you need to turn off the Bluetooth® headset.

When you consult your visual voice mailbox, you can listen to messages on the connected Bluetooth® headset.

II.2 Settings

II.2.1 My profile
1. Open your OpenTouch profile:
   - Call Routing.
   - Display your user information.
   - Access to settings.
   - Software version.
   - Sign out.

II.2.2 Activate / deactivate VoIP feature
1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Activate / deactivate VoIP feature.
4. Apply.
5. A specific icon is displayed on your home page if the feature is activated.

By default, the VoIP setting is activated.
II.2.3 Display your user information

1. Open your OpenTouch profile.
2. Display your user information.

II.2.4 Change your photo / avatar

1. Select the edition mode.
2. Tap on your current photo/avatar to change it.
3. Select your new picture.
4. Apply.

II.2.5 Notifications

We recommend configuring notifications as follows.

1. Open iPhone notification settings for OpenTouch Connection.
2. We recommend using 'alert' style for notifications.
3. Open the OpenTouch™ Conversation settings.
4. Ensure that enable notification is checked.
II.3 Homepage

II.3.1 Homepage description

1. My profile: settings and information about the user.
2. Display of all conversation logs.
   Display of missed conversations (filter).
3. Conversation wall.
   The number of new events are displayed (number of missed calls + number of unread messages).
   - Contacts.
   - Dialer.
   - Voicemail access.
   You have unread voice messages (the number of unread messages is displayed).
   - Display of instant messages (filter). The number of unread messages is displayed.

II.3.2 Status icons

VoIP capability is activated (application is registered to the SIP server).
VoIP capability is activated but no SIP connection (VoIP capability is temporarily unavailable).
VoIP capability is deactivated via a dedicated setting.
Application is connected and fully available.
Application is disconnected. The application does not display any new event. You cannot access any of the services.
Application is connected but some services are not accessible.

Selected routing profile with the mobile has no ringing on incoming calls.
Call in progress.
Missed calls.
New voice message(s).
II.4 Call Routing

II.4.1 Select your routing profile
1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Select a profile… Details of the selected profile are displayed just below.

4. You can customize a selected profile.
   Select which devices will ring when you receive an incoming call.
5. Apply.
6. The active routing profile is displayed in the user banner.

The displayed routing profiles depend on your configuration and installation. For example, Office profile is displayed if you have a multi set configuration.
At first launch of the application, a Popup will ask you for nomadic destination number.
The call routing details depend on the selected profile.

If you selected a routing profile with mobile not ringing, a specific status icon is displayed ( ).

II.4.2 Define numbers
- Select or define a phone number to use for mobility mode.
- Select or define a number to forward your calls on to.
1. Select the option to define or modify the number.
2. Select the number in the list of pre-defined numbers, edit the list to modify an existing number or create a new number (maximum of 4 numbers).
3. Enter the number and its label.
4. Apply.

II.4.3 Conversation wall (History)

Conversation Wall contains the history of all your conversations.
The conversation wall is divided into 2 parts:
1. Past conversations.
2. Conversation in progress.

How to understand the conversation wall:
Each item represents a conversation log by user, by time slot and by the corresponding number of unread events.
The badge contains the icon associated with the media used during the conversation (phone, voicemail and meeting).

- Red badge: missed or new events.
- Purple badge: ongoing conversation.
- Grey badge: past event.
- 🌐 Conversation.
- 📩 Instant messages.
- 📦 Voice messages.

- This icon indicates a contact from the local directory of the mobile.
- ★: This icon indicates a favorite contact.

The action on a contact depends on how you select it
1. Select the badge to direct call the displayed number.
2. If you select an unread event, you open the history card directly.
3. If you select a read event, you put your contact on the stage.
4. To display new missed calls only, select the appropriate filter or tap on the conversation wall icon.
II.4.4 To acknowledge a missed call
If an item is marked as a missed event, you can acknowledge the event.
A conversation log is acknowledged if all events for that item are acknowledged.
   1. Swipe right on the item.
   2. Acknowledge the event.

II.4.5 To delete one conversation log:
You can delete a conversation log if it is acknowledged.
   1. Swipe right or left on the item.
   2. Delete the conversation log.

II.4.6 To acknowledge all missed calls
1. Press the home page icon.
2. Acknowledge all missed calls.
   Confirm the acknowledgement of all missed calls.

To delete all conversations in the wall
You can delete all conversations if all events are acknowledged.
1. Press the home page icon.
2. Delete all conversations.
3. Confirm the deletion.
II.4.7 Contact card
A contact card represents a person. Open a contact card by selecting a contact in the conversation Wall or in your favorites.

A card contains 3 pages.

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.

From the conversation history page:

1. you can play a voicemail or call the originator of the voicemail.
2. you can acknowledge or delete an event or call the contact.
II.4.8 Search a contact
Search for a contact in your local contacts or in a corporate look-up by using the search interface.

1. Open your contact tab.
2. Enter the name of your contact.
   The search runs immediately on local contacts (predictive search). To perform a corporate look-up, select the specific search button.
   This icon indicates a contact from the local directory of the mobile.
3. Call the contact.
4. Open the contact card.

II.4.9 Add a contact to your local directory

1. Open a contact's card.
2. If the contact is not in your local directory, you can save them as a new local contact.
   If the contact is in your local directory, you can update it by opening your local directory directly from the application.

II.4.10 Visual Voice Mail

1. You have unread voice messages (the number of unread messages is displayed).
   Open your visual voicemail. All read and unread messages are displayed.
   If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application.
II. Select the message to listen to.
III. From the selected message you can:
   - Move the cursor along the play bar to go forward or backward in the message.
   - Pause or resume the message.
   - Activate/deactivate loudspeaker.

4. Customize your voice mail.

To delete a message
1. Swipe right or left on the item.
2. Delete the message.
   You cannot delete an unread message.

The Voicemail tab is not visible when a voicemail box has not been created for the end-user.

II.5 Conversation

Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed.

II.5.1 Set up a conversation with a contact
   - You can make a call from the conversation wall, visual voicemail tab or instant messaging tab.
   - You can make a call from a search on your local contacts or from a corporate look-up.
   - You can make a call from the contact card (details or history).

How to set up a conversation with a contact
1. Call directly using the displayed phone number.
2. Set up different types of conversation (if available).
3. Call using a specific phone number from the contact card.
II.5.2 Make a conversation by entering a number

- Open the keypad.
- Enter your caller’s number.
- Make the call.

II.5.3 Receiving a conversation (VoIP or Cellular)
Depending on your connection mode (VoIP or Cellular), you can answer a call in the following ways:

II.5.4 VoIP mode
1. Call is presented directly in the OpenTouch Conversation application (i.e. not the native dialer).
2. Answer the call.
3. You are in conversation.

Answer the call.
Forward an incoming call to business voice mail.
Answer with an instant message.
Transfer the call to another device or number.
Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide and enter your PIN code to take the call and follow the instructions as described in this section.
II.5.5 Cellular mode

- Call is presented in the native dialer (Apple constraint).
  1. Answer the call.
  2. A pop-up notification allows you to decide whether you want to manage the call in the OpenTouch application or not.

You are in conversation.

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide to take the call and follow the instructions described in this section.

II.6 During conversation

The actions you can perform during a conversation depends on the connection mode (VoIP or Cellular) and the type of conversation. If there are more than six icons displayed, swipe down to access other available actions.

II.6.1 Screen description

You are in conversation with one contact.

You are in a call with two contacts (hold or conference).
### II.6.2 Make a second call / Switching between two calls / Transfer call to your contact on hold / Setting up a conference / Send DTMF

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>...</td>
<td>Navigates between action pages when there are more than six available actions.</td>
</tr>
<tr>
<td>📞</td>
<td>End the active call.</td>
</tr>
<tr>
<td>📞</td>
<td>End the conference and retrieve the first caller. The second is on hold.</td>
</tr>
<tr>
<td>📞</td>
<td>Make a second call.</td>
</tr>
<tr>
<td>⏸️</td>
<td>Put the distant on hold.</td>
</tr>
<tr>
<td>📞</td>
<td>Recover the call on hold.</td>
</tr>
<tr>
<td>📞</td>
<td>Transfer the call to another device or number.</td>
</tr>
<tr>
<td>⏪ 🎤</td>
<td>Mute/un-mute the conversation.</td>
</tr>
<tr>
<td>🔊</td>
<td>Loudspeaker.</td>
</tr>
<tr>
<td>⬤ ●</td>
<td>Display active or on-hold calls by swiping right or left.</td>
</tr>
<tr>
<td>⚪📞</td>
<td>Switching between two calls.</td>
</tr>
<tr>
<td>‍♂️</td>
<td>Setting up a conference.</td>
</tr>
<tr>
<td>➡️ ‍♂️</td>
<td>End the conference and retrieve your previous caller. The other callers are put on hold.</td>
</tr>
<tr>
<td>📬</td>
<td>Start an instant message with the contact.</td>
</tr>
<tr>
<td>💬</td>
<td>During the conversation, you can check information by consulting the Conversation Wall. Select the current conversation in the Conversation Wall to go back to the conversation screen.</td>
</tr>
<tr>
<td>☐️</td>
<td>Send DTMF.</td>
</tr>
</tbody>
</table>
II.7 Instant Messaging

II.7.1 Start an instant message
An instant message is a type of conversation which offers real-time text transmission with your contact.

You start an instant message like other conversation from a contact card.

II.7.2 Receive an instant message
If you are online, you receive instant messages on the Wall.

If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.

II.7.3 Consult instant message

1. From the homepage, select the messages tab.
2. Select the message to consult:
   - On the left: received messages.
   - On the right: sent messages.
   - Status of the message (delivered or read) is displayed under the message.
3. Enter and send a new message.
4. Long press on a message lets you copy the message or edit it.
II.7.4 Delete a part of the conversation
1. Enter Edit mode: long press on a message.
2. Select messages to delete in the conversation.
3. Delete selected messages.

II.7.5 Delete a conversation
1. Swipe right to left on the conversation to delete.
2. Delete the entire conversation.
3. Delete all conversations by selecting the messages tab and the corresponding action in the menu.

II.7.6 During conversation
1. Send message.
2. Open the contextual menu
   - Display the list of participants. From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
   - Add a participant to the conversation.
   - Leave the conversation.
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III.1 START OpenTouch™ CONVERSATION .................................................................................................. III-4
III.1.1 START THE APPLICATION .............................................................................................................. III-4
III.1.2 Sign in .............................................................................................................................................. III-4
III.1.3 VOICE-OVER-IP MODE ..................................................................................................................... III-4
III.1.4 USING A BLUETOOTH AUDIO DEVICE CONNECTED TO YOUR PHONE .................................. III-5
III.2 SETTINGS.............................................................................................................................................. III-5
III.2.1 MY PROFILE ..................................................................................................................................... III-5
III.2.2 ACTIVATE / DEACTIVATE VOIP FEATURE ...................................................................................... III-5
III.2.3 CHANGE USER INFORMATION ....................................................................................................... III-6
III.2.4 CHANGE YOUR PRIVATE PHONE NUMBERS ................................................................................... III-6
III.2.5 CHANGE YOUR PHOTO / AVATAR ................................................................................................. III-6
III.2.6 ACTIVATE/DEACTIVATE THE SECRET IDENTITY (CLIR) ............................................................ III-6
III.2.7 MANAGER/ASSISTANT (OPTIONAL) ............................................................................................... III-7
III.2.8 SUPERVISION (OPTIONAL) ............................................................................................................. III-7
III.2.9 NOTIFICATIONS ............................................................................................................................... III-8
III.3 HOMEPAGE......................................................................................................................................... III-9
III.3.1 HOMEPAGE DESCRIPTION ............................................................................................................. III-9
III.3.2 STATUS ICONS ............................................................................................................................... III-9
III.4 CALL ROUTING.................................................................................................................................. III-10
III.4.1 Select your routing profile ............................................................................................................... III-10
III.4.2 PRESENCE ..................................................................................................................................... III-11
III.4.3 CONVERSATION WALL .................................................................................................................. III-11
III.4.4 TO ACKNOWLEDGE A MISSED CALL .......................................................................................... III-12
III.4.5 TO DELETE ONE CONVERSATION LOG: ..................................................................................... III-13
III.4.5.1 To acknowledge all missed calls ................................................................................................ III-13
III.4.5.2 To delete all conversations in the wall ....................................................................................... III-14
III.4.6 CONTACT CARD ........................................................................................................................... III-14
III.4.7 CONTACTS AND FAVORITES ....................................................................................................... III-15
III.4.8 ADD A FAVORITE CONTACT .......................................................................................................... III-15
III.4.9 ADD A CONTACT TO YOUR LOCAL DIRECTORY .................................................................... III-15
III.4.10 VISUAL VOICE MAIL .................................................................................................................. III-16
III.5 CONVERSATION ............................................................................................................................ III-17
III.5.1 SET UP A CONVERSATION WITH A CONTACT ............................................................................. III-17
III.5.2 MAKE A CONVERSATION BY ENTERING A NUMBER ................................................................... III-17
III.5.3 SEARCH A CONTACT .................................................................................................................... III-18
III.5.4 RECEIVING A CONVERSATION (VOIP OR CELLULAR) ............................................................ III-18
III.5.5 GET YOUR ACTIVE CALL STARTED ON ANOTHER DEVICE ......................................................... III-19
III.6 DURING CONVERSATION................................................................................................................ III-20
III.6.1 SCREEN DESCRIPTION .................................................................................................................. III-20
III.6.2 LEAVE THE CONFERENCE (THE CALL IS STILL ACTIVE WITH THE OTHER PARTICIPANTS) / SWITCHING BETWEEN TWO CALLS / TRANSFER CALL TO YOUR CONTACT ON HOLD / SETTING UP A CONFERENCE / SEND DTMF ................................................................ ................ III-20
III.7 INSTANT MESSAGING ....................................................................................................................... III-22
III.7.1 START AN INSTANT MESSAGE .................................................................................................... III-22
III.7.2 RECEIVE AN INSTANT MESSAGE ................................................................................................ III-22
III.7.3 DURING CONVERSATION ............................................................................................................. III-22
<table>
<thead>
<tr>
<th>III.8 MEETING</th>
<th>III-23</th>
</tr>
</thead>
<tbody>
<tr>
<td>III.8.1 CREATE A MEETING</td>
<td>III-23</td>
</tr>
<tr>
<td>III.8.2 CONSULT MEETING LIST</td>
<td>III-24</td>
</tr>
<tr>
<td>III.8.3 MODIFY A FUTURE MEETING</td>
<td>III-24</td>
</tr>
<tr>
<td>III.8.4 START MEETING</td>
<td>III-24</td>
</tr>
<tr>
<td>III.8.5 DELETE A FUTURE MEETING</td>
<td>III-25</td>
</tr>
</tbody>
</table>
III.1 Start OpenTouch™ Conversation

III.1.1 Start the application

Select the OpenTouch Conversation Icon.

III.1.2 Sign in

When you connect for the first time, if you have not configured the connection parameters (OpenTouch settings), a login configuration window is displayed to enter the OpenTouch credentials and OpenTouch server address.

1. Set your connection parameters.
2. Enter your user name (login) / Password (OpenTouch user password).
3. Sign in.
4. In the initial login screen you can see the “Scan QR Code” button (when necessary, hide the input keyboard). When you press this button, the application scans the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy).

III.1.3 Voice-over-IP mode

OpenTouch Conversation integrates voice over IP (VoIP) capability allowing the user to place and receive business calls on the mobile through the wireless LAN (WLAN). Unless you do not wish to use VoIP (deactivated via a dedicated setting), VoIP capability will be provided automatically as soon as the mobile has corporate WLAN coverage and has successfully registered to the SIP server.

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- : VoIP capability is deactivated via a dedicated setting.
- No icon displayed: cellular mode only or loss of SIP connection (VoIP capability is temporarily unavailable).
III.1.4 Using a Bluetooth audio device connected to your phone

For cellular calls, use your Bluetooth® headset as you usually do.
For VoIP calls, you need to use the OpenTouch Conversation for iPhone application screen to:
• answer or end the call.
• switch from the Bluetooth® headset to hands-free mode and vice versa.

During a VoIP call, if you do not want to use your Bluetooth® headset and want to continue the conversation from your phone, you need to turn off the Bluetooth® headset.

When you consult your visual voice mailbox, you can listen to messages on the connected Bluetooth® headset.

III.2 Settings

III.2.1 My profile
1. Open your OpenTouch profile:
   • Call Routing.
   • Open Manager / Assistant settings (optional).
   • Activate / deactivate supervision feature (optional).
   • Display your user information.
   • Access to settings.
   • Software version.
   • Sign out.

III.2.2 Activate / deactivate VoIP feature
1. Open your OpenTouch profile.
3. Activate / deactivate VoIP feature.
4. Apply.
5. A specific icon is displayed on your home page if the feature is activated.

By default, the VoIP setting is activated.
III.2.3 Change user information
Define your private phone numbers, your photo or avatar.

1. Open your OpenTouch profile.
2. Display your user information.

III.2.4 Change your private phone numbers

1. Select the edition mode.
2. Define your phone numbers: business, colleague, home or personal mobile phone numbers. The business phone number is mandatory.
3. Save new phone numbers.

III.2.5 Change your photo / avatar

1. Select the edition mode.
2. Tap on your current photo/avatar to change it.
3. Select your new picture.
4. Apply.

III.2.6 Activate/deactivate the secret identity (CLIR)

1. Activate/deactivate the secret identity. Your external caller will not see your phone number. When the secret identity is activated, the secret avatar is displayed in the top banner of the wall as a reminder.
III.2.7 Manager/Assistant (optional)

System configuration provides a “Manager / Assistant” feature so that an assistant can receive all the manager’s calls except white list calls. The white list is created by the manager from the deskphone and the corresponding calls are processed according to the active call routing profile.

1. Open your OpenTouch profile.
2. Open Manager / Assistant settings.
3. Activate (on) / deactivate (off) the delegation.
4. -A specific icon is displayed on your home page if the feature is activated.

III.2.8 Supervision (optional)

Your business phone number can be supervised. This means that your incoming calls can be picked up by a supervisor when you are absent, busy or off-site.

1. Open your OpenTouch profile.
2. Activate / deactivate supervision feature.
3. A specific icon is displayed on your home page if the feature is activated.

If your phone is supervised, the call log displays the name of the supervisor who has picked up your call.
III.2.9 Notifications
We recommend configuring notifications as follows:
1. Open iPhone notification settings for OpenTouch Connection.
2. We recommend using ‘alert’ style for notifications.
3. Open the OpenTouch™ Conversation settings.
4. Ensure that enable notification is checked.
III.3 Homepage

III.3.1 Homepage description

1. My profile: settings and information about the user.
2. Display of all conversation logs.
   Display of missed conversations (filter).
3. Conversation wall.
   The number of new events is displayed.
   Contacts and favorites.
   Dialer.
   Voicemail access.
   You have unread voice messages (the number of unread messages is displayed).
   Meeting (filter).

III.3.2 Status icons

- Application is connected and fully available.
- Application is disconnected. The application does not display any new event. You cannot access any of the services.
- Application is connected but some services are not accessible.

Call in progress.
Missed calls.
new voice message(s).
Next meeting(s).

Manager / Assistant (call delegation activated).
Supervision activated (your business phone is supervised).
Voice over IP activated.
Voice over IP deactivated.
Consult the notification bar to identify the issue.
Selected routing profile with the mobile has no ringing on incoming calls.
III.4 Call Routing

III.4.1.1 Select your routing profile

1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Select a profile… Details of the selected profile are displayed just below.

4. You can customize a selected profile.
   Select which devices will ring when you receive an incoming call.
5. Apply.
6. The active routing profile is displayed in the user banner.

If you selected a routing profile with mobile not ringing, a specific status icon is displayed ().
### III.4.1.2 Create a new profile

1. Edit the new routing profile.
2. Define the new profile (name, numbers, routing).
3. Create the new profile. The new profile is displayed on the list of routing profiles.

### III.4.1.3 Delete a profile

1. Swipe right or left on the item.
2. Delete the profile.

### III.4.1.4 Define numbers

- Other number.
- Enter a phone number then apply.
- Apply.

### III.4.2 Presence

The colored bar under the avatar shows the contact's presence status.

- Available
- Busy
- Be right back
- Appear Offline
Change your presence status.

- Open your OpenTouch profile.
- Access to the presence feature.
- Change your presence status.
- Apply.

### III.4.3 Conversation wall 📱

Conversation Wall contains both your history of all conversations and future meetings. The conversation wall is divided into 4 parts:
1. Past conversations.
2. Today's conversations.
3. Conversation in progress.
4. Future meetings.

How to understand the conversation wall:
5. Each item represents a conversation log by user, by time slot and by the corresponding number of unread events.
6. The badge contains the icon associated with the media used during the conversation (phone, voicemail and meeting).

- Red badge: missed or new events.
- Purple badge: ongoing conversation.
- Grey badge: past event.
- Black badge: future event (meeting).
- 📩 Conversation.
- 🗓 Meeting.
- 💬 Instant messages.

ภา: This icon indicates a contact from the local directory of the mobile.
⭐: This icon indicates a favorite contact.
The colored bar under the avatar shows the contact's presence status.
The action on a contact depends on how you select it:

1. Select the badge to direct call the displayed number.
2. If you select an unread event, you open the history card directly.
3. If you select a read event, you put your contact on the stage.
4. To display new missed calls only, select the appropriate filter or tap on the conversation wall icon.

III.4.4 To acknowledge a missed call
If an item is marked as a missed event, you can acknowledge the event.
A conversation log is acknowledged if all events for that item are acknowledged.
1. Swipe right on the item.
2. Acknowledge the event.

III.4.5 To delete one conversation log:
You can delete a conversation log if it is acknowledged.
1. Swipe right or left on the item.
2. Delete the conversation log.

III.4.5.1 To acknowledge all missed calls
1. Press the home page icon.
2. Acknowledge all missed calls.
   Confirm the acknowledgement of all missed calls.
III.4.5.2 To delete all conversations in the wall
You can delete all conversations if all events are acknowledged.

1. Press the home page icon.
2. Delete all conversations.
3. Confirm the deletion.

III.4.6 Contact card
A contact card represents a person.
Open a contact card by selecting a contact in the conversation Wall or in your favorites.

A card contains 3 pages.

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.

From the conversation history page:
1. you can play a voicemail or call the originator of the voicemail.
2. you can acknowledge or delete an event or call the contact.
III.4.7 Contacts and favorites

Favorites give you faster access to your preferred contacts.

1. Open your contact tab.
   Your favorite contacts are displayed.
   Favorites give you faster access to your preferred contacts.
   A favorite contact is indicated by an asterisk ⭐.
2. To display all your contacts or just your favorites, select the corresponding filter.
3. Contacts are sorted alphabetically. Select a letter to display contacts whose name starts with the selected letter.
   Search for a contact in your local contacts or in a corporate look-up by using the search interface (See Search a contact).

   The contact tab also includes some temporary entries (corporate look-ups, incoming or outgoing calls) thanks to a local cache mechanism. This cache mechanism is cleared when you exit the application.

III.4.8 Add a favorite contact

The contextual menu displays the feature available on your system.

- Open a contact's card.
- Open the contextual menu.
- Add the contact to your favorites list.

Use the same procedure to remove a contact from your favorites. The contact is not deleted.

III.4.9 Add a contact to your local directory

1. Open a contact's card.
2. If the contact is not in your local directory, you can add it.
III.4.10 Visual Voice Mail

1. You have unread voice messages (the number of unread messages is displayed). Open your visual voicemail. All read and unread messages are displayed.

   If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application.

2. Select the message to listen to.
3. From the selected message you can:
   - Move the cursor along the play bar to go forward or backward in the message.
   - Pause or resume the message.
   - Activate/deactivate loudspeaker.
4. Customize your voice mail.

To delete a message
1. Swipe right or left on the item.
2. Delete the message.
   You cannot delete an unread message.

The Voicemail tab is not visible when a voicemail box has not been created for the end-user.
Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed.

III.5.1 Set up a conversation with a contact

- You can make a call from the conversation wall, visual voicemail tab, instant messaging tab or a scheduled meeting, if available on your system.
- You can make a call from a search on your local contacts or from a corporate lookup (See Erreur ! Source du renvoi introuvable.).
- You can make a call from the contact card (details or history).

How to set up a conversation with a contact
1. Call directly using the displayed phone number.
2. Set up different types of conversation (if available).
3. Call using a specific phone number from the contact card.

III.5.2 Make a conversation by entering a number

1. Open the keypad.
2. Enter your caller’s number.
3. Make the call.
### III.5.3 Search a contact

1. Open your contact tab.
2. Enter the name of your contact.
   - Search is immediately done on local contacts (predictive search). You can base your search on 2 strings for better results.
3. To perform a corporate look-up, select the specific search button.
4. From the search result, select the contact you are searching for.
5. Call your caller.
6. If the contact is not in your local directory, you can save them as a new local contact.

### III.5.4 Receiving a conversation (VoIP or Cellular)

Depending on your connection mode (VoIP or Cellular), you can answer a call in the following ways:

- **VoIP mode**
  1. Call is presented directly in the OpenTouch Conversation application (i.e. not the native dialer).
  2. Answer the call.
  3. You are in conversation.

<table>
<thead>
<tr>
<th>Action</th>
<th>Action</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer the call.</td>
<td>Forward an incoming call to business voice mail.</td>
<td>Transfer the call to another device or number. Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.</td>
</tr>
</tbody>
</table>
If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide and enter your PIN code to take the call and follow the instructions as described in this section.

- **Cellular mode**
  Call is presented in the native dialer (Apple constraint).
  1. Answer the call.
  2. A pop-up notification allows you to decide whether you want to manage the call in the OpenTouch application or not.
  
  You are in conversation.

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide to take the call and follow the instructions described in this section.

### III.5.5 Get your active call started on another device

You set up a call from another device. You need to get this call on your mobile.

1.  
2.  

Select the « get call » icon.
III.6 During conversation

The actions you can perform during a conversation depends on the connection mode (VoIP or Cellular) and the type of conversation. If there are more than six icons displayed, swipe down to access other available actions.

III.6.1 Screen description

You are in conversation with one contact.

You are in a call with two contacts (hold or conference).

III.6.2 Leave the conference (the call is still active with the other participants) / Switching between two calls / Transfer call to your contact on hold / Setting up a conference / Send DTMF

<table>
<thead>
<tr>
<th>Action</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigates between action pages when there are more than six available actions.</td>
<td>...</td>
</tr>
<tr>
<td>End the active call.</td>
<td>...</td>
</tr>
<tr>
<td>Leave the conference (the call is still active with the other participants).</td>
<td>...</td>
</tr>
<tr>
<td>Add a participant to the conversation.</td>
<td>+</td>
</tr>
<tr>
<td>Put the distant on hold.</td>
<td>...</td>
</tr>
<tr>
<td>Recover the call on hold:</td>
<td>...</td>
</tr>
<tr>
<td>Transfer the call to another pre-defined phone number(s) (colleague, home,...).</td>
<td>...</td>
</tr>
<tr>
<td>Mute/un-mute the conversation - VoIP mode only.</td>
<td>...</td>
</tr>
<tr>
<td>Activate/deactivate loudspeaker - VoIP mode only.</td>
<td>...</td>
</tr>
<tr>
<td>Display active or on-hold calls by swiping right or left.</td>
<td>...</td>
</tr>
<tr>
<td>Switching between two calls.</td>
<td>...</td>
</tr>
<tr>
<td>Transfer call to your contact on hold.</td>
<td>...</td>
</tr>
<tr>
<td>Setting up a conference.</td>
<td><img src="image" alt="Group" /></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>List of conference participants or meeting details.</td>
<td><img src="image" alt="Group" /></td>
</tr>
<tr>
<td>End all conversations.</td>
<td><img src="image" alt="Close" /></td>
</tr>
<tr>
<td>During the conversation, you can check information by consulting the Conversation Wall. Select the current conversation in the Conversation Wall to go back to the conversation screen.</td>
<td><img src="image" alt="Left Pointer" /></td>
</tr>
<tr>
<td>Send DTMF.</td>
<td><img src="image" alt="Keyboard" /></td>
</tr>
<tr>
<td>Record/Stop recording the conversation.</td>
<td><img src="image" alt="Record" /> <img src="image" alt="Stop" /></td>
</tr>
<tr>
<td><img src="image" alt="This icon is displayed when recording." /></td>
<td></td>
</tr>
</tbody>
</table>
## III.7 Instant Messaging

### III.7.1 Start an instant message
An instant message is a type of conversation which offers real-time text transmission with your contact.

You start an instant message like other conversation from a contact card.

### III.7.2 Receive an instant message
If you are online, you receive instant messages on the Wall.

If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.

### III.7.3 During conversation

1. Send message.
2. Open the contextual menu
   - Display the list of participants. From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
   - Add a participant to the conversation.
   - Leave the conversation.

From a group chat, if you want a private chat with one participant, you need to create a new IM session with only this participant.
III.8 Meeting

III.8.1 Create a meeting

1. Select the meeting tab.
2. Create a new meeting.
3. Select the type of meeting (scheduled or reservation less) and fill in the various appointment fields.
4. Swipe left to manage leaders and participants of the meeting.
   - Add a new leader/participant. A meeting leader can add or remove a participant, share a document, and cancel the meeting (depending on the OTC client).
   - Remove a participant by a long press on it.
5. Swipe left to manage the profile and password for the meeting.
   **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 hear and see the Web presentation of leaders.
   - Training: use for a teacher-student scenario. All licensed features are available. The session ends when the teacher hangs up (leader).
   - Conference call: use for a voice only conference.

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

   Depending on the system configuration, you may need to follow a password policy (consult the password policy).

6. Confirm the meeting.

Scheduled meetings and non-reservation meetings are sorted by date in two separate sections.
III.8.2 Consult meeting list
Future scheduled meetings are displayed on the conversation wall.

1. Open the meeting details from the conversation wall or the meeting tab. The meeting details show the subject, start and end dates, duration, recurrence if any, owner, participants (with leader and participant information) and calling number information.

2. From this page, you can send an email containing all the information needed to join the meeting. A pop-up about leader access code security is displayed.

III.8.3 Modify a future meeting

1. Open the meeting details from the conversation wall or the meeting tab.

2. Edit the meeting to modify it.

III.8.4 Start meeting
The badge becomes purple five minutes before the conference starts. There are 3 ways to join a live conference:

- From the conversation wall, select the corresponding badge to join the conference.
- From the conference details, select the corresponding action at the bottom of the screen.
- From your email client, select the link in the invitation you have received by email.

During the meeting, you can open the details of the meeting.
III.8.5 Delete a future meeting

- Select the meeting tab.
- Swipe left or right.
- Delete the meeting.

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IV - OpenTouch Conversation User Manual for OTBE/OTMS Connection User
IV.1 START OpenTouch™ Conversation ................................................................. IV-3
IV.1.1 Start the Application .................................................................................. IV-3
IV.1.2 Sign In .......................................................................................................... IV-3
IV.2 SETTINGS ....................................................................................................... IV-4
IV.2.1 My Profile ................................................................................................ IV-4
IV.2.2 Change Your Photo / Avatar ...................................................................... IV-4
IV.2.3 Notifications ............................................................................................... IV-4
IV.3 HOMEPAGE .................................................................................................... IV-5
IV.3.1 Homepage Description ............................................................................... IV-5
IV.3.2 Conversation Wall ...................................................................................... IV-5
IV.3.3 To Acknowledge a Missed Call ................................................................. IV-6
IV.3.4 To Delete One Conversation Log ............................................................. IV-7
IV.3.5 To Acknowledge All Missed Calls ............................................................ IV-7
IV.3.6 To Delete All Conversations in the Wall .................................................. IV-7
IV.3.7 Status Icons .............................................................................................. IV-7
IV.3.8 Presence ..................................................................................................... IV-7
IV.4 CALL ROUTING ............................................................................................. IV-8
IV.4.1 Select Your Routing Profile ...................................................................... IV-8
IV.4.2 Define Numbers ......................................................................................... IV-9
IV.4.3 Contact Card ............................................................................................. IV-9
IV.4.4 Contacts and Favorites ............................................................................. IV-10
IV.4.5 Add a Favorite Contact ........................................................................... IV-11
IV.4.6 Add a Contact to Your Local Directory ................................................... IV-11
IV.4.7 Visual Voice Mail ..................................................................................... IV-11
IV.5 CONVERSATION ........................................................................................... IV-12
IV.5.1 Set Up a Conversation with a Contact .................................................... IV-12
IV.5.2 Make a Conversation by Entering a Number .......................................... IV-13
IV.5.3 Search a Contact ...................................................................................... IV-13
IV.5.4 Receiving a Conversation ........................................................................ IV-13
IV.6 DURING CONVERSATION ........................................................................... IV-14
IV.6.1 Screen Description ..................................................................................... IV-14
IV.6.2 Leave the Conference (the Call is Still Active with the Other Participants) / Switching Between Two Calls / Transfer Call to your Contact on Hold / Three-party Conference / Send DTMF ........................................ IV-14
IV.7 INSTANT MESSAGING ............................................................................... IV-16
IV.7.1 Start an Instant Message ........................................................................... IV-16
IV.7.2 Receive an Instant Message ...................................................................... IV-16
IV.7.3 During Conversation ................................................................................ IV-16
IV.8 MEETING ....................................................................................................... IV-17
IV.8.1 Create a Meeting ........................................................................................ IV-17
IV.8.2 Consult Meeting List ................................................................................... IV-18
IV.8.3 Modify a Future Meeting ........................................................................... IV-18
IV.8.4 Start Meeting ............................................................................................. IV-18
IV.8.5 Delete a Future Meeting ........................................................................... IV-19
IV.1 Start OpenTouch™ Conversation

IV.1.1 Start the application

Select the OpenTouch Conversation Icon.

IV.1.2 Sign in

When you connect for the first time, if you have not configured the connection parameters (OpenTouch settings), a login configuration window is displayed to enter the OpenTouch credentials and OpenTouch server address.

1. Set your connection parameters.
2. Enter your user name (login) / Password (OpenTouch user password).
3. Sign in.

4. In the initial login screen you can see the “Scan QR Code” button (when necessary, hide the input keyboard). When you press this button, the application scans the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy).
IV.2 Settings

IV.2.1 My profile

1. Open your OpenTouch profile:
   - Call Routing.
   - Display your user information.
   - Access to settings.
   - Software version.
   - Sign out.

IV.2.2 Change your photo / avatar

1. Open your OpenTouch profile.
2. Display your user information.
3. Select the edition mode.
4. Tap on your current photo/avatar to change it.
5. Select your new picture.
6. Apply.

IV.2.3 Notifications

We recommend configuring notifications as follows

1. Open iPhone notification settings for OpenTouch Connection.
2. We recommend using ‘alert’ style for notifications.
3. Open the OpenTouch™ Conversation settings.
4. Ensure that enable notification is checked.

IV.3 Homepage

IV.3.1 Homepage description
1. My profile: settings and information about the user.
2. Display of all conversation logs.
   Display of missed conversations (filter).
   Display of callback requests.
3. Conversation wall.
   The number of new events is displayed.
   Contacts and favorites.
   Dialer.
   Voicemail access.
   You have unread voice messages (the number of unread messages is displayed).
   Meeting (filter).

IV.3.2 Conversation wall 🏛
Conversation Wall contains the history of all your conversations. The Wall is divided into 4 parts:
4. Future meeting if managed by your system.
5. Conversation in progress.
6. Callback requests.
7. Past conversations.
   All conversations are sorted by date: today, yesterday, this week, last week and before.

How to understand the conversation wall:
Each item represents a conversation log by user, by time slot and by the corresponding number of unread events.

- Red badge: missed or new events.
- Purple badge: ongoing conversation.
- Grey badge: past event.
- Black badge: future event (meeting).
- 📞 Conversation.
- 📡 Visual Voice Mail.
- 📩 Instant messages.
- 🗓 Meeting.

☆: This icon indicates a contact from the local directory of the mobile.
⭐: This icon indicates a favorite contact.
The colored bar under the avatar shows the contact's presence status.

Selected routing profile with the mobile has no ringing on incoming calls.

The action on a contact depends on how you select it

1. **Select the badge to direct call the displayed number.**
2. If you select an unread event, you open the history card directly.
3. If you select a read event, you put your contact on the stage.
4. To display new missed calls only, select the appropriate filter or tap on the conversation wall icon.

### IV.3.3 To acknowledge a missed call

If an item is marked as a missed event, you can acknowledge the event.
A conversation log is acknowledged if all events for that item are acknowledged.

1. Swipe right on the item.
2. Acknowledge the event.
### IV.3.4 To delete one conversation log:
You can delete a conversation log if it is acknowledged.
1. Swipe right or left on the item.
2. Delete the conversation log.

![Conversation Log Deletion](image)

### IV.3.5 To acknowledge all missed calls

1. Press the home page icon.
2. Acknowledge all missed calls.
   Confirm the acknowledgement of all missed calls.

![Missed Calls Acknowledgment](image)

### IV.3.6 To delete all conversations in the wall
You can delete all conversations if all events are acknowledged.

1. Press the home page icon.
2. Delete all conversations.
3. Confirm the deletion.

![Conversations Deletion](image)

### IV.3.7 Status icons

<table>
<thead>
<tr>
<th>Status Description</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application is connected and fully available.</td>
<td>![status1]</td>
</tr>
<tr>
<td>Application is disconnected. The application does not display any new event.</td>
<td>![status2]</td>
</tr>
<tr>
<td>You cannot access any of the services.</td>
<td>![status3]</td>
</tr>
<tr>
<td>Application is connected but some services are not accessible.</td>
<td>![status4]</td>
</tr>
</tbody>
</table>

Call in progress.

- Missed calls.
- new voice message(s).
- Next meeting(s).
- Callback requests.
- Selected routing profile with the mobile has no ringing on incoming calls.

### IV.3.8 Presence
The colored bar under the avatar shows the contact's presence status.

- Available
- Busy
- Be right back
- Appear Offline

![Presence Status](image)
Change your presence status.

1. Open your OpenTouch profile.
2. Access to the presence feature.
3. Change your presence status.
4. Apply.

IV.4 Call Routing

IV.4.1 Select your routing profile

The call routing profiles displayed depend on your configuration and installation (main phone and other registered devices).

1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Select a profile... Details of the selected profile are displayed just below.
4. Select which devices will ring when you receive an incoming call.
   For example, select a profile between:
   - Deskphone and mobile.
   - Deskphone.
   - Home phone and mobile.
   - Home phone.
   - Other phone and mobile.
   - Other phone.
Immediate forward:

- Immediate forward to voicemail.
- Immediate forward to number.
- Immediate forward.

If you selected a routing profile with mobile not ringing, a specific status icon is displayed (_signal).

The active routing profile is displayed in the user banner.

IV.4.2 Define numbers

1. Other number.
2. Enter a phone number then apply.
3. Apply.

IV.4.3 Contact card

A contact card represents a person.
Open a contact card by selecting a contact in the conversation Wall or in your favorites.

A card contains 3 pages

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.
From the conversation history page:

1. you can play a voicemail or call the originator of the voicemail.
2. you can acknowledge or delete an event or call the contact.

IV.4.4 Contacts and favorites
Favorites give you faster access to your preferred contacts.

1. Open your contact tab.
   Your favorite contacts are displayed.
   Favorites give you faster access to your preferred contacts.
   A favorite contact is indicated by an asterisk 🌟.
2. To display all your contacts or just your favorites, select the corresponding filter.
3. Contacts are sorted alphabetically. Select a letter to display contacts whose name starts with the selected letter.
   Search for a contact in your local contacts or in a corporate look-up by using the search interface (See Search a contact).

The contact tab also includes some temporary entries (corporate look-ups, incoming or outgoing calls) thanks to a local cache mechanism. This cache mechanism is cleared when you exit the application.
IV.4.5 Add a favorite contact
The contextual menu displays the feature available on your system.
- Open a contact's card.
- Open the contextual menu.
- Add the contact to your favorites list.

Use the same procedure to remove a contact from your favorites. The contact is not deleted.

IV.4.6 Add a contact to your local directory

1. Open a contact's card.
2. If the contact is not in your local directory, you can add it.

IV.4.7 Visual Voice Mail

1. You have unread voice messages (the number of unread messages is displayed). Open your visual voicemail. All read and unread messages are displayed.
   
   If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application.

2. Select the message to listen to.
3. From the selected message you can:
   - Move the cursor along the play bar to go forward or backward in the message.
   - Pause or resume the message.
   - Activate/deactivate loudspeaker.

4. Customize your voice mail.
To delete a message
1. Swipe right or left on the item.
2. Delete the message.
   You cannot delete an unread message.

The Voicemail tab is not visible when a voicemail box has not been created for the end-user.

IV.5 Conversation

Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed.

IV.5.1 Set up a conversation with a contact
- You can make a call from the conversation wall, visual voicemail tab, instant messaging tab or a scheduled meeting, if available on your system.
- You can make a call from a search on your local contacts or from a corporate look-up (See *Erreur ! Source du renvoi introuvable.*).
- You can make a call from the contact card (details or history).

How to set up a conversation with a contact
1. Call directly using the displayed phone number.
2. Set up different types of conversation (if available).
3. Call using a specific phone number from the contact card.
IV.5.2 Make a conversation by entering a number

1. Open the keypad.
2. Enter your caller’s number.
3. Make the call.

IV.5.3 Search a contact

1. Open your contact tab.
2. Enter the name of your contact.
   Search is immediately done on local contacts (predictive search). You can base your search on 2 strings for better results.
3. To perform a corporate look-up, select the specific search button.
4. From the search result, select the contact you are searching for.
5. Call your caller.
6. If the contact is not in your local directory, you can save them as a new local contact.

IV.5.4 Receiving a conversation

   Call is presented in the native dialer (Apple constraint).
1. Answer the call.
2. A pop-up notification allows you to decide whether you want to manage the call in the OpenTouch application or not.
   You are in conversation.
Answer the call.

Forward an incoming call to business voice mail.

Transfer the call to another device or number.
Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide and enter your PIN code to take the call and follow the instructions as described in this section.

IV.6 During conversation

The actions you can perform during a conversation depends on the connection mode (VoIP or Cellular) and the type of conversation. If there are more than six icons displayed, swipe down to access other available actions.

IV.6.1 Screen description

You are in conversation with one contact.

You are in a call with two contacts (hold or conference).

IV.6.2 Leave the conference (the call is still active with the other participants) / Switching between two calls / Transfer call to your contact on hold / Three-party conference / Send DTMF

Navigates between action pages when there are more than six available actions.

End the active call.
Leave the conference (the call is still active with the other participants).

Add a participant to the conversation.

Put the distant on hold.

Recover the call on hold:
<table>
<thead>
<tr>
<th>Action</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer the call to another pre-defined phone number(s) (colleague, home,...).</td>
<td>![Call Transfer Icon]</td>
</tr>
<tr>
<td>Display active or on-hold calls by swiping right or left.</td>
<td>![Swipe Right Left Icon]</td>
</tr>
<tr>
<td>Switching between two calls.</td>
<td>![Switch Calls Icon]</td>
</tr>
<tr>
<td>Transfer call to your contact on hold.</td>
<td>![Contact Icon]</td>
</tr>
<tr>
<td>Setting up a conference (Three-party conference).</td>
<td>![Conference Icon]</td>
</tr>
<tr>
<td>List of conference participants or meeting details.</td>
<td>![List Icon]</td>
</tr>
<tr>
<td>End all conversations.</td>
<td>![Stop Icon]</td>
</tr>
<tr>
<td>During the conversation, you can check information by consulting the Conversation Wall.</td>
<td>![Conversation Wall Icon]</td>
</tr>
<tr>
<td>Select the current conversation in the Conversation Wall to go back to the conversation screen.</td>
<td>![Select Icon]</td>
</tr>
<tr>
<td>Send DTMF.</td>
<td>![DTMF Icon]</td>
</tr>
<tr>
<td>Record/Stop recording the conversation.</td>
<td>![Record Icon]</td>
</tr>
</tbody>
</table>

This icon is displayed when recording.
IV.7 Instant Messaging

IV.7.1 Start an instant message
An instant message is a type of conversation which offers real-time text transmission with your contact.

You start an instant message like other conversation from a contact card.

IV.7.2 Receive an instant message
If you are online, you receive instant messages on the Wall.

If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.

IV.7.3 During conversation

1. Send message.
2. Open the contextual menu
   - Display the list of participants. From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
   - Add a participant to the conversation.
   - Leave the conversation.

From a group chat, if you want a private chat with one participant, you need to create a new IM session with only this participant.
IV.8Meeting

IV.8.1 Create a meeting

1. **Select the meeting tab.**
2. **Create a new meeting.**
3. **Select the type of meeting (scheduled or reservation less) and fill in the various appointment fields.**
4. **Swipe left to manage leaders and participants of the meeting.**
   - Add a new leader/participant.
     A meeting leader can add or remove a participant, share a document, and cancel the meeting (depending on the OTC client).
   - Remove a participant by a long press on it.
5. **Swipe left to manage the profile and password for the meeting.**
   **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 hear and see the Web presentation of leaders.
   - **Training:** use for a teacher-student scenario. All licensed features are available. The session ends when the teacher hangs up (leader).
   - Conference call: use for a voice only conference.
   **Secure access to the meeting**
   - You can define a password for an audio meeting (digits only). In this case, an external user has to enter the password to join the audio meeting.
   - You can define a password for an online meeting. In this case, an external user has to enter the password to join the web meeting.

Depending on the system configuration, you may need to follow a password policy ( consult the password policy).
6. **Confirm the meeting.**

Scheduled meetings and non-reservation meetings are sorted by date in two separate sections.
IV.8.2 Consult meeting list
Future scheduled meetings are displayed on the conversation wall.

1. Open the meeting details from the conversation wall or the meeting tab. The meeting details show the subject, start and end dates, duration, recurrence if any, owner, participants (with leader and participant information) and calling number information.

2. From this page, you can send an email containing all the information needed to join the meeting. A pop-up about leader access code security is displayed.

IV.8.3 Modify a future meeting

1. Open the meeting details from the conversation wall or the meeting tab.

2. Edit the meeting to modify it.

IV.8.4 Start meeting
The badge becomes purple five minutes before the conference starts. There are 3 ways to join a live conference:

1. From the conversation wall, select the corresponding badge to join the conference.
2. From the conference details, select the corresponding action at the bottom of the screen.
3. From your email client, select the link in the invitation you have received by email.

During the meeting, you can open the details of the meeting.
IV.8.5 Delete a future meeting

- Select the meeting tab.
- Swipe left or right.
- Delete the meeting.

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