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Introduction

This guide is intended to provide you with the skills necessary to use Unify OpenScape Web Client. The OpenScape Web Client application allows you to communicate easily with contacts, create conference calls, redirect incoming calls to a preferred device, view the call journal, all from a convenient web page view. Whether working in the office, from home or traveling, the application allows callers to easily reach you using the “One Number Service” (ONS).

E164 Numbers

OpenScape uses the full E164 (International public telecommunication numbering plan) for all devices, contacts and all phone numbers. An example of the numbering plan is:

+441173941002
+44 (The dialing code for the UK)
117 (the locale dialing code for Bristol, users must always remove the first digit)
39 (Part of the University numbering scheme)
41002 (The actual persons internal extension). The last 5 digits (counting from the last digit) is your University extension number.

Dialling out

For internal UoB calls, just use the last 5 digits (e.g. 41102)
For outside calls, dial 21 for an outside line, followed by the number.
Logging in to the Unify OpenScape Web Client

1. Open your web browser.
2. Type the URL https://onenumer.brisk.ac.uk in the address bar.
3. Enter your User Name (this is the same as your University login)
4. Enter your password.
Using the Unify OpenScape Web Client Main Toolbar

The Unify OpenScape Web Client Main Toolbar provides quick and easy access to Unified Communication (UC) functionality. UC enables you to access telephone, contacts and directory search features in one central location. As you continue through the user guide, you will learn the basic UC features of the Unify OpenScape Web Client.

Accessing the Pearl Menu

The Pearl Menu enables you to view a variety of functions in a quick access view. The Pearl Menu icon rotates to indicate you have new Status Information such as missed calls.

1. Click the Pearl icon.

The Pearl Menu displays.
2. Select the desired function.

- **Status Information:** Notifies you of any new missed calls.
- **View:** Enable you to view some Unified Communications functionality that is defined in this guide.
- **Personal Settings:** Enables you to access and establish personal settings, such as device behaviour.
- **Help:** Displays the Siemens OpenScape Web Client Help Guide.
- **About:** Displays information regarding the active version of Siemens OpenScape Web Client.
Making, receiving and managing calls

Dial Field

The Dial Field allows you to place calls directly from your computer. When a call is placed, the telephone on your desk activates and places the call (via speaker phone on certain handsets). This is the default action. Other devices may be used, which is covered in the Devices sections of this guide.

Placing a Call

To place a call using the Dial Field:

1. Click in the Dial Field, and then type the telephone number you wish to call.

2. Click the Make Call icon to place the call or press Enter.
The *Call Control* window displays the outgoing call.

![Call Control Window](image)

The *Call Control* window displays the active call when answered by the other party or their voicemail.

**Note:** The *Call Control* displays a blue background for an active call or a white background for outgoing, waiting, or held calls.

**Answering a Call**

- Click the **Answer** icon located in the *Call Control* window to activate the speakerphone on your OpenStage phone.
Disconnecting a Call

- Click the Disconnect icon located in the Call Control window.

Placing a Call on Hold/Retrieving a Held Call

1. Click the Hold icon in the Call Control window.

2. Click the Retrieve Held Call icon in the Call Control window.
<table>
<thead>
<tr>
<th>Name</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kevin Thomas</td>
<td>213941001</td>
</tr>
</tbody>
</table>
Using Transfer (Unannounced Transfer)

1. Click the Transfer To icon during an active call, which transfers the call to another extension.

The Transfer To window displays:

2. Type the name or telephone number of the desired contact in the dial field.

3. Click the Transfer to icon. You are automatically disconnected and the call is transferred to the desired destination.
Note: The **Handover call to device** icon will transfer the existing connection to another device. This is useful for quickly switching from a desk phone to mobile phone while still on a call.
Using Transfer (Announced transfer)

1. Type a name or telephone number into the *dial field* during an active call.

   Note: This is the destination where the call will be transferred.

2. Click the green telephone icon to place the call. The active call is placed on hold.

3. Inform the second party that you are transferring a call and then click the Transfer icon, which transfers the waiting call to the second party.
You are disconnected as the waiting and new calls are connected.
Toggling Between Two Concurrent Calls

When you have two calls in progress at the same time, Toggle allows you to switch back and forth between the active and held calls.

1. Click the **Toggle** icon, which switches the active and held calls.

   ![Call Control screenshot]

   **Note:** Hold is automatically activated when you click the **Toggle** icon.
Using Directory Search

The Directory Search feature allows you to search for colleagues within the University using the directory. This provides accurate contact information to place a call as well as pre-fills the new contact data fields.

Searching the Directory

1. Click Directory Search to search for someone within the University network directory.

2. Type the name of the contact, then click the Search icon.

The Directory Search window populates.

Note: You may call a contact directly for the Directory Search window using the icon show.
Adding a Contact via Directory Search

You may add a contact from the Directory Search feature. This is useful as the contact’s information populates from the directory, providing accuracy.

1. Click the box next to the contacts name. This selects the contact you wish to add.

2. Click the **Add Contact** icon.

![Image of the Contacts - Add Entry to Contact List window]

The Contacts - *Add Entry to Contact List* window displays the directory information.
3. Click OK.

4. Click Contacts. The list displays all your contacts.
Working With Your Contacts

Creating a Contact Manually

You may choose to manually create a contact. This method is often used for external (Non University) contacts, as you are unable to add them via the directory search.

1. Click Contacts.

2. Click the Create Contact icon.

The Add New Contact window displays.

3. Add the desired contact information, and click OK.
Editing a Contact Record

You may wish to edit a contact. Editing a contact enables you to update telephone number and details of contacts.

1. Select the contact you wish to edit, and then click the **Edit Contact** icon.

The *Contacts - Change entry in contact list* window displays.

2. Edit the information as needed, and then click OK.
Deleting a Contact

You can delete contacts from your Contact list.

1. Select the contact you wish to delete, and then click the **Delete Contact** icon.

![Delete Contact Icon]

The *Confirm deletion of selected entry* window displays.

![Confirm Deletion Window]

2. Click **OK**.
Creating a Contact Group

You may group contacts together.

1. Click the **Menu** icon, and then click **General....**

   The General Settings window displays.
2. Click the Addresses then Address Groups tabs.
3. Enter the name of the group.
4. Click OK.
Adding a Contact to a Contact Group

1. Select a contact from your contact list, and then click the **Edit Contact** icon.

   ![Contact List Window](image)

   The Change Entry in Contact List window displays.

2. Click the Edit icon to the right of the Address Group field and then select the desired group.

   ![Change Entry in the Contact List](image)

3. Select the group from the drop-down list.
Audio Conferencing

Audio Conferencing allows you to quickly, easily, and efficiently create and manage audio conferences with up to 200 participants.

There are two ways you can run an audio conference.

Using this method, you set a time for the conference and give people a number and PIN to dial in with.

The other method is useful for small, ad hoc conferences, and involves you calling the participants after starting the conference. Using this method, you don’t need to give your guests a phone number to call or a PIN to use. This is detailed under *Creating an Ad-Hoc Conference*.

Creating an Open Audio Conference

In an Open Audio Conference, all participants have moderator rights, such as locking the conference bridge, muting microphones, and disconnecting the conference.

1. Click the **Conferences tab** within Siemens OpenScape Web Client.

   ![Conferences Tab](image)

   The Conference List Displays.
**Note:** The Conference List shows any conference you have created. Additionally, any conferences other UC users have included you in as a participant display.

2. Click the Create New Conference icon.

![Create conference window](image.png)

The Create conference window displays.
3. Name the Conference.

4. Select the Start time check box, if applicable. Selecting a Start Time automatically starts the conference at the given date and time. There will be an expected End time required which creates a specific meeting duration that cannot be exceeded.
5. Click the **Add participant** field and enter the participant’s name.

   OR

   Click the **drop-down arrow** to select a participant from a previous conference.

6. Click **OK**
The newly-added participants are displayed in the Participants section.
7. Check the boxes for **Open Conference** and **Record Name** based on Join Option preference.

8. Click **Apply**.

   The Conference Bridge numbers and PINs populate.

9. Click **OK**. The Create Conference window closes.

   The conference is saved.

**Note:** The Regenerate button, located to the right of the PIN, can be used to generate a new PIN.

10. Skip the Other number field as it is not available.
Name Field: The creator of the conference names the conference. The system reads the name or title of the conference to anyone who joins the conference.

Creator: Auto-populates with the name of the person creating the conference.
**Start Time:** Allows the creator to set a specific start time and date. The conference activates at the specified date and time.

**Participants:** The conference creator can add participants by clicking Participants to add the participants shown

**PIN:** A unique identifier that allows participants to access the conference. The PIN is generated when you click Apply.

**Note:** You can click Regenerate to get a new PIN.

**Bridge Number & Toll-free:** These numbers are generated when you click Apply. These numbers cannot be changed.

**Other Number:** Not applicable.

**Web Conference:** The creator may select OpenScape Web Collaboration from this drop-down menu. This will allow the creator to promote the Audio Conference to a Siemens OpenScape Web Collaboration.

**Related Information:** The creator may type any conference-related information in this box.

**Open Conference:** Allows participants to use the bridge immediately without waiting for the conference creator to open the bridge. It is a good idea to remove this option for larger conferences.
**Note:** Open Conference also grants participants moderator rights, such as locking the conference bridge, muting microphones, and disconnecting other participants.

**Record Name:** When checked, this option requires participants to record their name prior to entering the conference. This is not recommended for larger conferences.
Starting the Audio Conference

- Click the Join to conference green triangle icon to access the desired conference.

Note: The icons indicated in red below apply to everyone on the conference bridge and are defined below.

Note: The four icons indicated in red above apply to everyone on the conference bridge and are defined below.
**Lock Conference:**

Locking the conference will not allow any other participants to join. If this is an Open conference bridge, that means a participant could lock the moderator out if they select this function.

**Mute Conference or Mute Connection:**

The microphone can be used to mute all participants. To mute an individual, click the **microphone** icon next to their name.

**Drop Conference:**

This will disconnect the entire conference bridge.

**Handover Existing Connection and Continue:**

This allows the participant to handover (transfer) the conference bridge connection to another device such as a cell phone.
Creating an Ad-Hoc Conference

Ad-Hoc Conferencing quickly and easily joins parties together. You may join up to 250 parties using this method.

The following method allows you to call each participant individually. This removes the need for your guests to remember phone or PIN numbers. It also allows you to invite other individuals to join in a conversation you’re already having with someone.

1. Type a name or telephone number in the Dial Field during an active call.

2. Click the telephone icon to place the call to the party you want to join to the conference.

The Call Control window displays the active and waiting calls.

3. Click the Set Conference icon to join all parties together.
The Call Control window displays the conference call.

4. To join additional parties, repeat steps 1-4 as noted above. Parties are added individually.
### Call Control

#### Waiting Calls
- Steve Tong-Wilkins: +441173941000
- Kevin Thomas: 213941001
- Steve Tong-Wilkins: 20187923

#### Active Call
- J. BLOGGS: 20187922

New Call: <Name or Number>
Using Presence Notifications

Establishing Your Presence

Presence is your way to communicate your availability to your co-workers. For example, select the Available presence status when you are at your desk or In meeting when you go into a meeting. This notification of Presence can streamline business and enhance communication. To set your personal status:

1. Click Presence.

2. Click the desired Presence Status.
Creating Presence Status Text

Each Presence status contains a default text. For example, Available presence contains a default text of, “I’m Available.” The default text is editable, so you may customize your Status Text to provide additional information to your co-workers.

1. Click **Presence**, and then click Change Status Text.

![Image showing the Change Status Text window]

The Change Status Text window displays.

2. Type the desired Status Text, and then click OK to apply changes.
Note: You will see contacts’ Status Text when you hover your mouse pointer over their Presence Status within your Contacts list.
Managing Devices

Devices enable you to create a One Number Service (ONS), which forwards calls to a specified device. For example, the default device is the phone at your desk, which is the only contact number that you need to provide to co-workers or clients. You may create additional devices, such as a mobile phone, which are used as a forwarding destination from your default phone.

Adding a Device

1. Click Devices.

2. Click Change Setting.

   The General Settings window displays.

3. Select Devices tab.
4. Click the Add Device icon or the New button.
The Edit Device window displays.
5. Enter the name of the device, for example Mobile Phone, and then enter the telephone number of the Mobile Phone.

6. Click OK.

The new device displays within the List of Preferred Devices.
7. Click OK.

You have now created a new device to be able to use for incoming and outgoing calls.
Activating a Device

1. Click Devices, and then click the desired device from the list.

The selected device displays.

Note: Upon activation of another device, all calls to the primary telephone number will automatically route to the new device.

Creating Rules for Call Handling

Rules enable you to set guidelines for call handling. For example, a rule can be created to forward calls to a device on certain days of the week, as specified by you. Rule creation instructions are found in the Super User Guide.
Operating the Call Journal

The Journal enables you to view, search, sort, call, or creates contacts using the 250 most recent calls pertaining to your telephone number. This is a great way to find a missed call from a certain date and time.

1. Click Journal.

The Journal window displays 250 previous calls. Calls are stored on a First In, First Out basis.
Sorting the Journal

Sorting the Journal allows you to display entries based on the selected parameter.

1. Click the drop-down arrow, and select the desired list parameter.

![Screen capture showing a drop-down menu with options such as All Calls, Missed Calls, Incoming Calls, and Outgoing Calls.]

The results display within the Journal window.
Managing Journal Entries

You may want to call, add to contacts, delete, or get more information regarding a Journal entry.

1. Select the desired entry, and use the appropriate icons to manage the entry.

Note: For further assistance with managing Journal entries, reference the Managing Your Contacts or Placing Calls sections.
Managing Presence Automation Rules

Using Presence Automation rules, you can forward calls to your work phone, mobile phone, or another phone of your choosing.

1. Click the **Pearl** icon.

2. Select **Personal Settings**.


4. Select the **Preferences** tab.

5. In the **Behavior after Presence status changes** area, select the status you want to edit.
6. In the *Set preferred device to* area, enter the preferred device.

7. Click **Apply**.

8. Click **OK**.
Managing Rules

You can create a rule to establish call handling guidelines. For example, you can create a rule to forward calls to a specific device on certain days of the week.

Creating a Rule

1. Locate the Rules drop-down list.

2. Select Add/Edit Profile from the drop-down list. The rules display under Active Profile.

3. Click New to create a new profile.
4. To edit the name of the profile click **New profile** or click.
5. Rename the profile.

6. Click **New Rule** to create a rule within the new profile. The *Rules* window appears.

7. Rename the new rule.
8. To edit the rule, click the pencil icon 🆕️. The *Edit rule* screen appears.
9. Click the add icon + to select a number.

10. Click OK.

11. Click the add icon + to edit the date range.

12. Select the day you want to edit.

13. Click the add icon + to edit the time.

14. Enter the time in 24-hour format in the Time Range field.

15. Click OK.
16. Click the pencil icon to create a rule associated with your Presence status. The *Presence* window appears.
17. Click the pencil icon  
 to edit the action. The Action window appears.
18. Select an Action.
   a. Select **Put straight through** to put the call through.
   b. Select **Redirect to** and enter a phone number.
   c. Select **Use preferred device** and enter a device.

19. Click **OK**.

20. To assign the Rule to a profile click the pencil icon next to the **Assigned profile**. The **Edit rule** window appears.

21. Add rules to each profile, if applicable.

22. Click **OK** when you are done.
Activating a Rule

1. Locate the **Rules** drop-down list.

2. Select the rule you want to activate from the *Rules* drop-down list.
Managing Pop-Up Screen Settings

You can edit the pop-up screen settings. For example, you can have the Web Client window open in front of all other windows while you are on an active call.

1. Click **Menu -> General**. The *General settings* window appears.

![Menu Settings]

2. Click the **Common** tab.

3. Click the **Appearance** tab.

4. Select **Try to start in a separate window**, if applicable.

5. Select **Pop up on incoming call**, if applicable.
6. Click **Apply**. A message indicates that the data was successfully saved.

7. Click **OK**.
Managing Contact Permissions

When someone adds you as a contact, or when you add someone as a contact, a notification is sent asking if you want to allow that contact to see your Presence status. You can edit your Contact Permissions at any time.

Editing a Permission

1. Click the Pearl menu icon.
2. Click Personal Settings.
3. Click Presence Access Control.

The General settings window appears.
4. Select the **Presence** tab.

5. Select the **Access Control List** tab.
6. Make a selection from the *If other users would like to see your presence status* drop-down list.

   a. Select *ask me* (default) to send a notification each time someone adds you as a contact that you must allow or block.

   b. Select *provide access* to enable anyone who adds you as a contact to see your Presence.

   c. Select *block access* to block anyone who adds you as a contact from seeing your Presence.

7. To add contacts when you allow them to view your Presence, select *When accepted, add inquiring users to the contact list.*

8. Click *Yes* to confirm.
Blocking a Contact

You can block a contact from viewing your Presence.

1. From the *General settings* window, select the **Presence** tab.

2. Select the **Access Control List** tab.
3. In the *These users are allowed to see your presence status* area, select the contact you want to block.

![Image of user selection]

4. Click **Block**. A confirmation pop-up appears.

5. Click **Yes**. The contact now appears in the *These users are not allowed to see your presence status* area.

![Image of user blocking]
Allowing a Contact

You can allow a contact to view your Presence even after you blocked them.

1. From the General settings window, select the Presence tab.
2. Select the Access Control List tab.

3. In the These users are not allowed to see your presence status area, select the contacts you want to allow to view your Presence.

4. Click Accept. A pop-up confirmation appears.
5. Click **Yes** to confirm the change. The contact now appears in the *These users are allowed to see your presence status* area.
Managing Tell-Me-When Notifications

You can create a *Tell-Me-When* notification to alert you when someone becomes available on the phone or in their office, or edits their Presence settings.

Creating a Tell-Me-When Notification

1. Click the **Contacts** tab. A list of contacts will appear.

2. Select the contact for which you want to set a notification.

3. Click the double arrow icon to display the drop-down menu.

4. Select **Set Tell-Me-When**. The *Tell-Me-When* pop-up appears.
5. Make a *When* selection.


7. Make an *Expires in* selection.

8. Click **OK**.
Managing Device or Rollover Lists

You can set up a device list or rollover list to handle incoming calls. For example, if your desk office phone rings and you do not answer it, the call can roll over to another device.

**Note:** You need to add devices before you can create a device list or rollover list.

1. From the home page, select **Menu | General**. The *General settings* window appears.

2. Select the **Devices** tab.

3. Add the devices you want to make available for rollover purposes.

4. Enter the *Name and Number* of the device.
5. Click **OK**.

6. Select the **Named Device Lists** tab.

7. Click **New** and name the device list.
8. Click **Add** to display the devices previously created.

9. Select the devices to be included in the device or rollover list.

10. Click **Add** when finished. The *Settings* window closes.
11. Click **OK**.

12. Click the **Device** drop-down list and select the device list you just created.