Desktop Application 5.2

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Table of Contents

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1 About this guide

This guide describes the functionality in the macOS and Windows desktop application for end users.

The following documents are relevant to the information contained in this guide:

- Compatibility information
- Feature list
- Release notes

2 Data protection information

The following pages cover data protection information:

- Diagnostics(see page 30)
- Data protection(see page 11)

3 Introduction

The Desktop application makes it possible to place and receive calls using a computer connected to the Internet and the backend system. Besides offering basic functions such as placing and receiving calls, the application enables presence status management, corporate directory search, and instant messaging.

The main features are the following:

- Basic call handling - place, answer, record, hold, and retrieve calls
- Call transfer
- Conference calls
- Directory search
- Presence handling
- Messaging and collaboration

> ⓘ To get started, a welcome e-mail is sent to you by your system administrator containing the link to download the application.
> Note, however, that in some system installations, the Windows version of the application may be installed by an Active Directory administrator, without user intervention. After installation, the user still needs to activate the application as described in Install Desktop Application.

3.1 Data protection

3.1.1 Cached data

The desktop application stores cached data, including vCard files, avatar images and other personal and potentially sensitive information. This is necessary to improve the overall user experience of the application and reduce the amount of network traffic. The application stores cached data in the following folders:

- On OS X/macOS: `~/Library/Application Support/<application-name>/cache/<username>`
- On Windows: `%USERPROFILE%\AppData\Local\<application-name>\cache\<username>`

For improved data protection, cached data that has not been used for two weeks is automatically deleted.

3.1.2 Remove application data when uninstalling the application

The OS X/macOS and Windows versions behave differently with respect to the application data. To completely remove the application data, follow the respective instructions.

3.1.2.1 OS X/macOS version of the application

Uninstalling the OS X/macOS version of the desktop application may leave user data, potentially containing personal and/or sensitive information, on the computer. This includes cached data, log files and user configuration data.

To completely uninstall the OS X/macOS application and delete the application data

1. Exit the application.
2. Remove the `<appname>.app` file from the `/Applications` folder.
3. Remove the folder `~/Library/Logs/<appname>` and all its contents.

4. Remove the folder `~/Library/Application Support/<appname>` and all its contents.

3.1.2.2 Windows version of the application

Uninstalling the Windows version of the desktop application automatically deletes the cached data, log files, contacts, and user configuration data.

3.2 Minimum system requirements

To install the desktop application, your system must meet the following requirements, at the minimum:

- Space required: 300 MB for installation and additional 250 MB (maximum) for log files.
- RAM: 1 GB
- Screen resolution: 1024 x 768

4 Installation and activation

4.1 Installation

This section describes Desktop application installation on Microsoft Windows and macOS platforms.

4.1.1 Microsoft Windows Installation

The Windows desktop application may be either installed and updated by the end user, or by a systems administrator through Active Directory. If the Active Directory installation is used, no action by the end user is needed for the installation. However, even in the case of installation by an Active Directory administrator, the end user still needs to activate the application as described later in this section.

Depending on the user policies implemented on your system, your system administrator may make different versions of the installation file for the Windows application available, for example MSI (Microsoft Installer) installation files for 32-bit and 64-bit Windows versions, as well as versions that require administrator rights for a successful installation, or can be installed by a user without these rights. For `64_noadmin.msi` or `86_noadmin.msi`, noadmin means possibility to install without administrator rights. The packages that require different user rights for the installation differ also in respect to the folders in which the application is installed.

`.msi` is an installer package file format, used by Windows.

Outlook plugin is installed with MSI installer with and without admin rights.

> ⓘ
> - The `noadmin.msi` is installed in `C:\Users[user]\AppData\Local` and `C:\Users[user]\AppData\Roaming`
> - The `.msi` and `.exe` is installed in `C:\Program Files (x86)`
>
> ⚠ The 64-bit package exists only for the 64-bit Outlook plugin, while the desktop application itself is 32-bit.

4.1.2 macOS Installation

The macOS desktop application is installed by running a software installation package. When updating, the installation package is opened automatically.

> ⚠ Before installing, make sure to:
> 1. Exit any previous versions of the application by selecting **Exit** from the **File** menu.
> 2. Close any Microsoft Office related windows.

> ⚠ **Microphone Access on macOS Mojave**
> With macOS Mojave, the user is prompted to configure microphone access once. If the user does not grant access, the user will have to modify the microphone access from the **Security & Privacy** preferences.

4.1.3 Security settings

> ⚠ If you have set the security setting in Internet Explorer or Control Panel to **High**, you need to add the server address to your trusted sites.

To add the server address to your trusted sites

1. Start Internet Explorer.
2. Select **Tools** > **Internet Options**.
3. Select the **Security** tab.
4. Select the **Trusted sites** icon.
5. Select **Sites**.
6. Enter the server address given to you by your administrator in the following formats:

```
http://example.servername.com
```

```
https://example.servername.com
```

7. Select **Add**.

4.2 Activation

There are two options to activate the application:

1. Activate using a temporary activation code
2. Activate using your password

To activate using a temporary activation code

1. In the activation view, fill in your username, your mobile number (including the country code, for example +46736123456) or your custom user identifier.

   > ⚠ You might also need to fill in the server address if it was not embedded in the application.

2. Press the **Get activation code** button. An activation code will be sent to you by SMS (in case you provided mobile number) or by email.
3. Fill in the activation code and press the **Activate** button.

If provided credentials are correct, your app is activated and should present you the main view.

To activate using your password

1. In the activation view, select **Login with username and password**.
2. Fill in your username or your custom user identifier and your password.

   > ⚠ You might also need to fill in the server address if it was not embedded in the application.

3. Press **Login**.

If provided credentials are correct, your app is activated and should present you the main view. [1]

---

1 http://example.servername.com

5 User interface overview
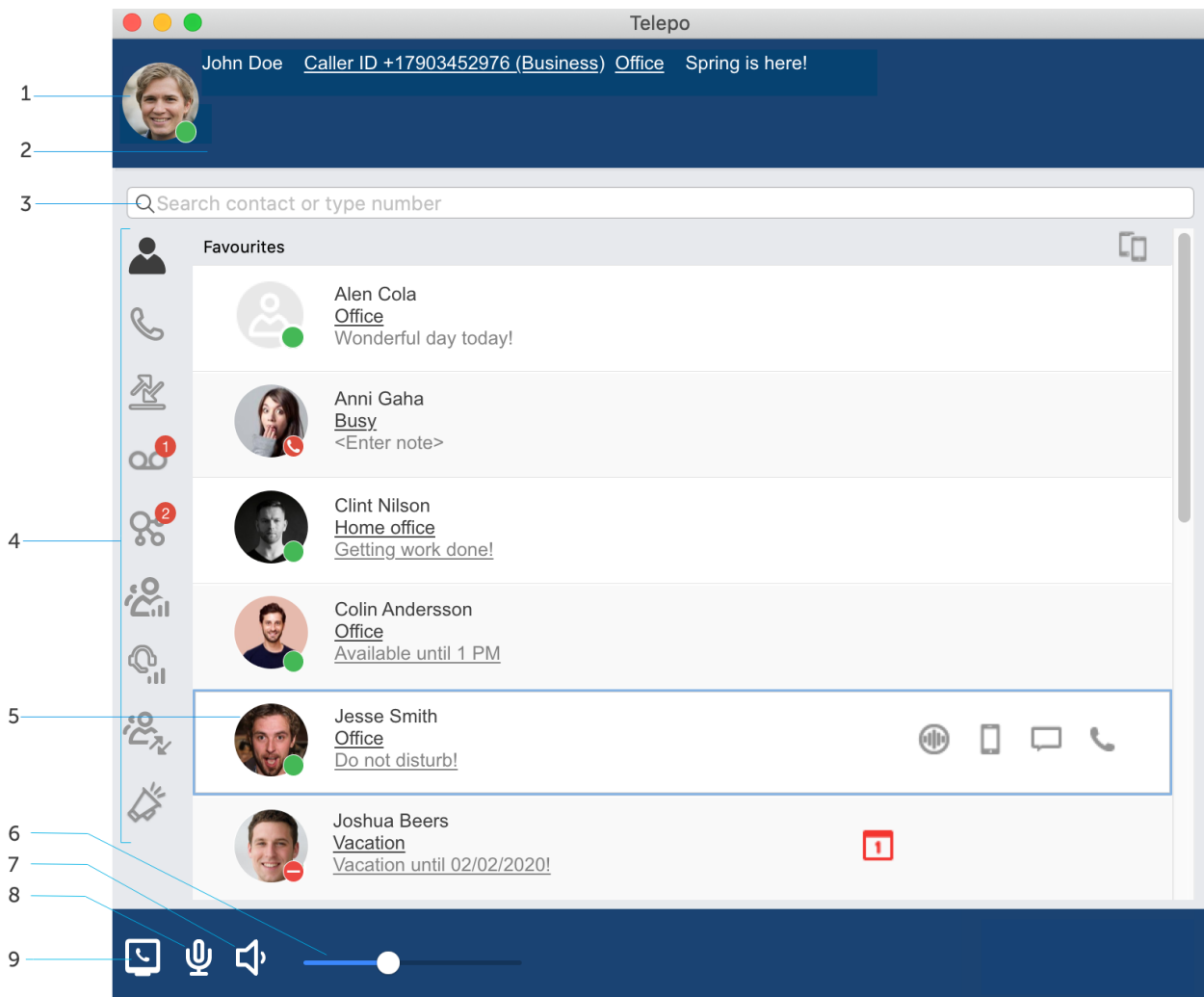
5.1 UI Area

1.	User area. Contains your picture, presence, name, Caller ID, diversion info, and note. Clicking on your picture opens your vCard(see page 41).
2.	Live aid area. You can see notifications, for example, transfers, etc here.
3.	Search field.
4.	Tab bar. Contains tabs to switch between the different views. See Tab bar(see page 17).

5.	Contacts/Calls/Log view. Each tab view contains different information regarding contacts, ongoing calls, log, etc.
6.	Volume bar.
7.	Click to toggle between speaker/headset mode.
8.	Click to mute/unmute microphone. ⓘ Access to microphone needs to be granted on macOS Mojave. See Installation and activation(see page 13) for more information.
9.	Click to switch which device to call from (Call using).

5.2 Icons

There are several function icons and buttons in the application. This section lists the most important ones.

5.2.1 Tab bar

Icon	Description
👤	Contacts
📞	Calls
↗	Log
⚏	Voicemail
⚙	MiTeam
📊	Queue Statistics
🎧	Agent Statistics

Icon	Description	
	Group Log	
	Premium Attendant (Windows only)	
	Partner content	

5.2.2 Presence icons

Item	Description
🟢	The contact's presence state is available
🔴	The contact is in a call
⛔	The contact's presence state is unavailable
📅	The contact has a meeting that starts within 60 minutes according to Outlook
📅	The contact is in a meeting according to Outlook
🕐	Current activity end time available
⦸	Current activity end time expired
⤳	You have an activity diversion configured
⚠	You have an important message by the system

5.2.3 Active call buttons and icons
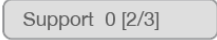
Item	Description
	Opens a keypad for sending tones
	Record the call (manual recording)
	Stop recording of the call (manual recording)
	Save call recording (automatic recording)
	Pause ongoing call recording (automatic recording)
	Resume a paused call recording (automatic recording)
	Discard a call recording (automatic recording)
	Activate transfer
	Dropdown menu
	Add the call to a conference
	Click to park the call
	Pick up a parked call
	Re-queue call

Item	Description
❚❚	Click to hold the call
▷	Continue with the call held
⌒	Hang up the ongoing call
☎	Answer call
🔒	Encrypted call
🔓	Unencrypted call
⚵	The calling identity is asserted by the server
⇥	Move call to another phone
🔕	Mute incoming call ringer
🔔	Unmute incoming call ringer
▶	Launch application (external applications)

5.2.4 Other buttons and icons

Item	Description
›	Click to expand the contacts info
☎	Click to call (using desktop application)

Item	Description
	Click to call (using a mobile phone)
	Start chat/Collaboration
	Start chat/Collaboration (contact is away)
	Send an SMS message
	(Attendant) Send an SMS to the user about the call
	(Attendant) Send an email to the user about the call
	Send an SMS to all contact list
	Intercom call
(Only text is shown)	Incoming call entry
(Only text is shown)	Missed call entry
(Only text is shown)	Outgoing call entry
	Edit the contact entry
	Add the contact to your **Favourites** list
	Remove the contact from your **Favourites** list

Item	Description
🗑	Delete local contact or an item
(Only text is shown)	New message in the Inbox
Support 0 [2/3]	Logged in to an ACD or Attendant group
Reception 1 [1/1]	Logged out from an ACD or Attendant group
📲	Call using desktop application (default)
📱	Remote call control for deskphone call
📱	Remote call control for mobile call
PBX	Remote call control for external PBX
🔊	Speaker mode activated
🎧	Headset mode activated

5.3 Tray icon

When not in the foreground or minimized, the desktop application is kept running in the tray bar (i.e. Windows taskbar or OS X/macOS dock).

It is possible to change activity, answer call, mute/unmute, hang up calls, and exit the application in the minimized mode.

6 Menubar

The menubar contains options related to tools, view, calls, services, and help.

This section describes the important menu options:

- Override nightmode
- Options/Preferences
- Diagnostics

6.1 Override nightmode

The **Override nightmode** option gives the possibility to extend the office hour function of call routing by two hours.

> ⚠ If the system has been configured for night mode, calls may not be routed in the same way as during normal working hours.

This option is only available for authorized user defined by your system administrator.

To override nightmode

1. Go to **Services** > **Override nightmode** in the menubar.
2. In the **Override nightmode** window, click **Extend working hours**.

6.2 Options/Preferences

The **Options** (on Windows) **or Preferences** (on OS X/macOS) menu is divided into four areas:

- Account
- Audio
- General
- Advanced

To go to your desktop application options (Windows)

- Select **Tools** > **Options** in the menubar.

To go to your desktop application preferences (OS X/macOS)

- Select your desktop application's name in menubar and choose **Preferences**.

6.2.1 Account

The **Account** option shows the account configured on the desktop application.

From here you can log out of the desktop application.

To log out of the desktop application

1. Go to the **Account** option in **Options** or **Preferences**.
2. Click **Logout.**

The action will log you out of the application and will take you to the activation screen.

6.2.2 Audio

The **Audio** option lets you configure your audio settings when using the application as a speaker phone or with a headset. You can also configure a custom ringtone.

6.2.2.1 Speaker profile

The **Speaker** tab is used to configure the sound devices that the application will use in the speaker profile. Use the speaker profile when using your computer as a speaker phone.

You can select the audio devices that should be used in the speaker profile. We recommend to select the audio device that is connected to the computer speakers.

6.2.2.2 Headset profile

The **Headset** tab is used to configure the sound devices that the application will use in the headset profile. Use the headset profile when using your computer with a headset.

You can select the audio devices that should be used in the headset profile. For **Input** and **Output**, select the audio device that is connected to the computer's headset. This audio device typically belongs to a connected USB headset. For the **Ringer** device, select an audio device that is connected to the computer speakers.

Supported headsets

The application works with most headsets, USB connected or wireless. However, if you also want to use features (apart from volume control) from a headset to control the calls, headsets from Plantronics and from Jabra are supported. In addition, other headsets may support call control through integration by the vendor. Please check with your headset vendor whether this is the case of your headset.

Plantronics headset support is included for PC and Mac, and Jabra headset support is included for PC. Note that Plantronics does not support Bluetooth connection with PC or Mac, and that Jabra headsets are not supported on Mac. Depending on headset model, you will get different supported features. All headsets support answering call, hanging up a call, and receiving a second incoming call. Depending on model, you can also have functions such as reject call, hold, swap between ongoing calls, mute, ringtone in headset, and caller ID, in addition to the headset volume control.

6.2.2.3 Audio settings

The following settings are configured for each profile:

- **Input audio device** – the audio device to which the microphone is connected.
- **Output audio device** – the audio device to which the speaker or headphone is connected.
- **Ringer audio device** – this audio device will be used to play ring signals.

> ⚠ The ringer audio device should not be connected to headphones since ringing signals will not be heard unless the headphones are worn.

6.2.2.4 Ringtone

You can set a custom ringtone to differentiate your phone from the other phones in the office.

To change the ringtone

1. Go to the **Audio** option in **Options** or **Preferences**.
2. In the **Ringtone** drop-down list, select **Choose** to browse for a new ringtone.
3. Click **OK**.

> ✅ You can press the **Play ringtone** button (▶) next to the drop-down list to listen to your current ringtone.

6.2.3 General

The **General** option is used to configure desktop application behavior, notifications, and keyboard bindings.

The following settings can be made.

6.2.3.1 Automatically start when the computer starts

This setting allows the application to be started when the computer is powered on. Autostart is selected by default.

6.2.3.2 Compact contact list

This setting shows a compact contact list instead of an expanded contact list that shows contact avatar.

6.2.3.3 Automatically answer incoming calls

This setting makes it possible to have the application answer incoming calls automatically without any active interaction from the user. When in call, the calling party is placed in a queue or will hear a line busy tone depending on server configuration.

6.2.3.4 Integrate with Address Book / Microsoft Outlook

Mark the checkbox if you want to integrate the desktop application with the address book on macOS or with Microsoft Outlook on Windows. This will let you get search results from MS Outlook on Windows or from Contacts app on macOS. Incoming calls will also be matched against contacts.

6.2.3.5 Use extended search with Microsoft Outlook (Windows only)

Mark this checkbox if you want Microsoft Outlook to return results from more than the user's address book basic fields, including also from other fields (such as middle name etc.) and vcards in sent and received emails. The search result is completely controlled by Microsoft Outlook and may differ depending on installed version.

> ⚠ This may impact the speed of the search function and should be unchecked if you experience that it slows down your computer.

6.2.3.6   Popup for incoming call

This setting makes the application to pop up in the foreground for incoming calls.

6.2.3.7   Answer with Enter

Mark this checkbox to enable call pickup using the main **Enter/Return** key on your keyboard**.** For agents answering multiple calls, this setting allows them to pickup incoming calls by simply pressing the **Enter** key on their keyboard.

The checkbox is disabled if **Automatically answer incoming calls** is enabled.

> ⚠️ The behaviour of secondary numeric **Enter** key is not configurable and pressing it will always result in answering the incoming call, regardless if the **Answer with Enter** setting is enabled or not.

> ⓘ The **Enter** key triggers call pick up only if the **Calls** tab is active on the desktop application. It may not work as expected if any other tab or window is active.

6.2.3.8   Notifications

This setting lets you configure notifications that you want to receive.

6.2.3.9   Configure keyboard bindings

Pressing the **Keyboard** button will open the keyboard bindings dialog. This dialog shows all current keyboard shortcuts. It is also possible to reassign keyboard shortcuts for all the commands.

Item	Description
Go to input field	Go to search field
Go to calls	Go to **Calls** tab
Go to contacts	Go to **Contacts** tab
Answer	Answer incoming call
Hangup	Hang up ongoing call
Start transfer	Initiate a transfer
Hold/Resume	Put call on hold or resume on-hold call
Park	Park a call
Re-queue	Return a previously camped-on call to a target user's personal queue. See Camp-on(see page 73) for more information

Item	Description
Copy	Copy selected text
Paste	Paste text from clipboard
Cut	Cut selected text (if allowed)
Select All	Select all
Start transfer, bypass diversion rules	Initiate transfer and bypass diversion rules

6.2.4 Advanced

The **Advanced** option is used to configure specialized settings.

6.2.4.1 Handle Callto and Tel URL calls

Callto links and Tel URLs on web pages are supported with desktop application.

On Microsoft Windows

Enable the option and click a number with a callto or tel link and the application will automatically call the number and connect you.

> ⚠ If you have Skype installed, it will try to override your callto setting and handle the call with Skype instead of desktop application. Make sure to start the application *after* Skype is started in order to solve this problem.

On OS X/macOS

The setting works differently on OS X/macOS where in order to use the Callto/Tel URLs functionality, you need to enable the **Place call** service by navigating to **System Preferences** > **Keyboard** > **Shortcuts** > **Services.** Once the service is enabled, you are able to right-click on numbers and use the **Place call** option to call the number.

6.2.4.2 Use F8 to dial the selected number

Mark the checkbox if you want to call a selected number using the desktop application by simply pressing F8. The desktop application filters out invalid characters automatically.

6.2.4.3 Show queue information in standard view

Mark the checkbox if you want to show your group buttons and your queue information in Standard view.

6.2.4.4 Automatic adjustment of microphone gain

Mark the checkbox if you want to have an automatic adjustment of microphone gain. This can prevent getting unwanted audio feedback.

6.2.4.5 Show extended search information

Marking this will highlight the match on your search results so you see why the contact appears in your search. This is only available when logged into an attendant group.

6.2.4.6 Show target information in the attendant view

This will enable extra information in the call item with information on whom the caller tried to reach. For example, a user calls a person and ends up in the voicemail where the possibility to press 1 to reach an attendant is played and used. Enabling extended target information will then for the attendant picking up the call also publish in the call item from whom the caller was diverted from.

This is only available when logged into an attendant group and using the attendant view.

6.2.4.7 Enable monitored calls and call control

This option enables monitoring of your own ongoing calls, regardless of device/client that calls are initiated from (i.e. mobile, desktop, or phone). You can also start and control calls made from another device from the application.

> ⚠ Note that for external calls, contact names in monitored calls are shown only for desktop-initiated calls and when the external contact exists in the address book. For calls initiated by a client other than the desktop application, only contact number is shown regardless if the contact is saved in the address book or not. This is a known limitation.

The following call activities are available:

- Start
- Park
- Blind transfer
- Hang up
- Move to another device

6.2.4.8 Enable preview mode

The preview mode setting allows you as a desktop user to try upcoming releases. With this setting enabled and provided that your administrator has allowed previews, your desktop application will switch to the next upcoming version of the desktop application components.

The table below lists the different preview mode settings.

Setting	Description
Enable Premium Attendant preview mode	This setting controls the Premium Attendant previews.

> ⚠ Visibility of this setting is controlled by your administrator.

6.2.4.9 Keep blind transferred calls in attendant view until completed

With this option enabled, a call that is transferred blindly in Attendant View, will be monitored until called party has answered. The attendant will be marked as busy and will not receive new calls from the queue(s).

6.2.4.10 Play sound for second incoming call

With this option enabled, a short discrete sound indicates a new incoming call whilst already being in a call.

6.2.4.11 Contact search starts after typing is paused

By changing the pause value (minimum 50 milliseconds), it is possible to affect search speed and accuracy.

A user that types fast, may experiment with a lower value to collect more characters before the actual search is performed. When typing slow, a higher value is recommended, as otherwise a new search will be performed after each character is typed. This could slow down rendering the search results.

6.2.4.12 External applications

You can configure external applications that will be launched from within the application. You can configure so that the application automatically launches on every incoming call or so that you manually launch the application from the call.

To add external applications

1. Click the **External** button.
2. Use the +/- buttons to add or remove an external application.

Configuring your external application

To configure your external application, double click the application you want to edit.

Every application needs a name and a launch URI. The launch URI will be used when trying to launch the application. For instance, launching a web browser use the http URI. http://www.google.com. There are four special strings that you can use in your launch URI. These special strings will be exchanged to the real value when there is an ongoing call.

Select the **Auto-Launch** option to make the application launch when receiving a call. Select the **Show shortcut** option to make the application shortcut appear in every call.

- `$CALLINGNAME`. This will be exchanged to the name of the calling person.
- `$CALLINGNUMBER`. This will be exchanged to the number of the calling person.
- `$METATEXT`. This will be exchanged to any Meta information available in the call for an ACD or Attendant queued call.
- `$TRANSFERREDBY`. This will beexchanged to information if this call was transferred by anyone. It will be the name if the name is available otherwise the number.

> ⚠️ If the value isn't available in the current call the special string will be removed. However, any other information will still be there.
> For instance, `www.telepo.com?meta=$METATEXT` will be `http://www.telepo.com?meta=` if there is no `METATEXT` information.

Rewriting the values and testing

At the bottom of the configuration page, there is a section where you can re-write the values. For instance, if your external application expects all numbers in national format but you know that all incoming calls are in the international format you can use these fields to re-write the values. You can use normal Regexp expression in the **M atch expression** field. In the **Replace expression,** you put what value you want to replace it with. As an example, to exchange Swedish numbers from an international format to national format use the \+46 value in the Match expression field and a "0" in the **Replace expression** field.

The **Test Value** field can be used to test your expressions. Enter a value that you want to test. The resulting URI will be shown at the bottom.

6.2.4.13   Edit call message templates

Pressing the **Templates...** button will open the **Edit call message templates** dialog. With this dialog, you can change the default call message templates for email and SMS. You can personalize the templates or use the default ones, if needed.

The default template uses the following variables:

- $CALLINGNAME: Name of the caller.
- $CALLINGNUMBER: Number from which the call is placed.
- $CALLINGTIME: Time when the call was received.
- $CALLINGDATE: Date when the call was received.
- $RECIPIENTNAME: Name of the callee.
- $CONTACTINFO: Contact information of the caller.
- $YOURNAME: Attendant name.

These variables are replaced with actual values when the email or SMS is sent. See Attendant functionality(see page 70) for more information on how and when these email templates are used.

6.2.4.14   Email application

Choose whether to use **Microsoft Outlook** standard (semi-colon) or **Other** generic standard (comma) of separating email addresses when sending group emails.

> ⚠   The desktop application uses your default mail client. The selection whether to use **Microsoft Outlook** standard (i.e. semi-colon) or **Other** generic standard (i.e. comma) is only used to instruct the desktop application how to separate the email addresses when sending group emails.

6.3 Diagnostics

As a desktop application user, you can send diagnostics to an e-mail address such as support and services, using your e-mail client.

Diagnostics are created by the application when logging is manually enabled, and contain activity information to help facilitate the debugging of problems, such as abnormal call termination, etc.

⚠ Do not confuse diagnostic logs with the call activity log. The latter is accessed as described in Log(see page 65).

6.3.1 Diagnostics and data protection

By default, the collection of diagnostics is switched off. When updating to version 4.10.5 (or later) of this application, the collection of diagnostics is switched off even if already enabled in a preceding version, and any collected diagnostics are deleted.

To protect the privacy of users of this application, diagnostics do not contain passwords and tickets. In addition, collected diagnostics are deleted once the user switches off the collection of diagnostics. For this reason, if you wish to send the collected diagnostics, you must do so before switching off this function.

For further data protection, enable the collection of diagnostics only when necessary.

6.3.2 Using the diagnostics

Prerequisites to be able to send diagnostics

- Make sure that your e-mail client to be used for sending diagnostics is either Microsoft Outlook or Apple Mail.

To start collecting diagnostics

- Go to **Help** > **Diagnostics**, and click the **Collect diagnostics** menu item. A notice is displayed in the live aid area(see page 16) of the application whenever this setting is changed.

Once you have enabled the option **Collect debug logs**, you are able to send diagnostic report.

To send the collected diagnostics

1. Go to **Help** > **Diagnostics,** and click the **Email collected diagnostics** menu item.

2. In the e-mail message window, add additional diagnostic information or problem description (optional).

   ⚠ The diagnostics are automatically attached to the e-mail message as a zipped file.

   ⚠ On Microsoft Windows, you may edit the e-mail, whereas on OSX/macOS you can only forward the e-mail.

3. Send the e-mail.

   ⚠ For better data protection, delete the e-mail and its attachment from the **Sent** box of your e-mail client.

To stop collecting diagnostics and delete any existing diagnostics

- Go to **Help** > **Diagnostics,** and untick the **Collect diagnostics** menu item.

6.4 Tools

The **Tools** menu contains shortcuts to the following functions:

- Home
- Profile
- UC Analytics
- Inbox
- Add contact
- Schedule meet
- Call routing
- Future presence

6.4.1 Home

Home opens a web browser and the option to log on to the Self Service Portal. The Self Service Portal contains different settings such as:

- Presence status - change settings for activities and roles
- Changing password - change your own password used to log in to the system
- Overriding Nightmode
- Service configuration - call recording, call routing, fax and voicemail settings
- Conferencing configuration
- Contacts settings
- Log

Several of the settings are available as shortcut options.

To go to your home

- Click **Tools** > **My home**.

> ⓘ For detailed Self Service Portal documentation, see the **Backend** documentation.

6.4.2 Profile

Your profile is where you set your personal information, such as:

- Update directory information.
- Change your photo.
- Change your password.
- Change your PIN code.

To go to your profile

- Click **Tools** > **My profile**.

6.4.3 UC Analytics

The **UC Analytics** option is used to access the UC Analytics web portal from where you can access your automatic call recordings and other business analytics features.

> ⚠ The availability of this option in the tools menu is controlled by your administrator.

To access the UC Analytics portal

1. Click the **UC Analytics** option in the application's **Tools** menu. The action redirects you to your web browser.
2. Log in using the credentials provided by your administrator.

6.4.4 Inbox

The inbox contains all your messages, i.e. native call recordings in the system. The inbox is a filter in your **Log**.

To go your inbox

- Click **Tools** > **Inbox**.

To play or read a message

- Click the message.

To delete a message

- Select a message and click **Delete selected**.

6.4.5 Add contact

The **Add contact** option is used to create a new contact as, favorite, contact, VIP, or blocked.

6.4.5.1 Favorites, VIPs, and blocked contacts

Your contacts are either default contacts or one of the following:

- **Favorite** – a contact that is displayed in your contacts list when you do not have an active search query.
- **VIP** – a contact, also added to Favorites, that you can add specific call routing rules for. Rules set both for VIP and Favorites will apply to VIP contacts.
- **Blocked** – a contact that you can add specific call routing rules for.

Contacts can be added using the application or the user web.

To add a new local contact

1. Click **Tools** > **Add contact**.
2. Select if the contact should be added as a **Contact**, **Favorite**, **VIP** or **Blocked Contact**.
3. Enter the contact details and add a phone number. It is possible to add more than one phone number for a contact.
4. Click **Ok** to save the contact information.

The contact is added to your contact list. You can then set call routing rules depending of the type of contact.

> ⚠ Favorite and VIP contact types show up in your **Contacts** tab.

You can also add contacts by directory search. See Add contact by directory search(see page 46) for more information.

6.4.6 Schedule meet

Using the **Schedule Meet** option, you can schedule a voice meeting by inviting multiple participants to the call.

If your organization has MiTeam collaboration enabled, you are redirected to the MiTeam tab where you can perform meet activities (see MiTeam documentation for more information). If your organisation does not have MiTeam collaboration enabled, a pop-up is shown where you can perform basic meet activities.

6.4.7 Call routing

The call routing rules are used to define how the system handle calls. Call routing rules are set on the organization and group level and can also be set on the user level. Rules set on the organization and group level are inherited by the user level and can been seen on the call routing page.

Depending on authorization settings on the organization and group level, you might not have permission to override inbound and outbound rules.

The following types of call routing rules can be defined:

- **Inbound rules** – These rules are used to control how an incoming call is handled. This is where the association between personal phone numbers and personal phones are defined, that is, controlling which of the available phones should ring when a call is received to the personal number.
- **Outbound rules** – These rules control how the system should behave when a call is placed. For example, to control which number should be presented as a calling party number. If no outbound rule exists, the system will set the calling party number to private.
- **Fallback rules** – These rules control how incoming calls which cannot be connected are handled. For example if the called party is busy the call may be diverted to voicemail.

To configure call routing rules

- Click **Tools** > **Call routing**.

6.4.7.1 Inbound Rules

To add a new inbound rule

- Click **Add** to insert a new inbound rule. Follow the instructions on screen to build a new rule with matching criteria and actions.

Table - Inbound rules match criteria

Match Criteria	Description
Activity	To match the current presence activity when the call is received. For example, when an activity is set to meeting a rule to forward calls to voice mail can be created.
Availability	To match the current availability when the call is received. For example, when an unavailable activity is set, a rule to forward calls to voice mail can be created.

Match Criteria	Description
Call is tagged	To match against what the call is tagged with. This is mainly a technical rule.
Call's destination	To match against line type set on the primary and secondary line.
Calling party	To match the type of calling party. This can be: internal, external, favorite, blocked, VIP. This allow rules treating callers differently. VIP contacts match rules both for VIP and for favourites.
Call's destination is tagged	To match against what the call's destination is tagged with. This is mainly a technical rule.
Call's source is tagged	To match the call's source towards a list of tags. This is mainly a technical rule.
Date	To match a date. The possible values are: before, after or a specific date.
Day of week	To match a weekday. It is possible to specify "is" or "is not" and then provide the day of week.
Diverted	To match on calls that have been diverted by one user to another number while using the "Enter number:" setting. A call forked to a user's own devices is not considered a diversion.
Dialing number	To match the dialed number against a set of defined number types, for example international or mobile.
Incall	To match the call status. Possible values are: true and false. This rule allows specifying what should happen if you are busy on a phone when receiving a call.
Nightmode	To match the Nightmode state. Possible values are: true and false. This rules allows specifying what should happen when Nightmode is active or not. For example, should calls be forwarded to a mobile when a call is received during Nightmode.
Role	To match the current presence role when the call is received. This rule allows for example, forwarding calls to attendant if role is set to private. Possible values are the roles configured for the organization.
Time	To match a time value. Possible values are: before or after a specified time.

Inbound rules actions defines destinations where to forward the call. Some of the destinations allow multiple destinations to be specified. It is also possible to define the delay when the call will be redirected to other destinations. The following inbound rule actions are available.

Table - Inbound Rules Actions

Action/Destination	Description (If the rule is matched...)
Desktop phone	The call should be forwarded to the desktop phone.
Lync application	The call should be forwarded to the Lync application.
Analog phone	The call should be forwarded to an analog phone.
Mobile phone	The call should be forwarded to the mobile phone.
Queue	The call should be forwarded to the personal queue. This action is typically used in conjunction with the Incall match criteria. It is only possible to distribute a call that has been in a personal queue to internal extensions. If a rule with an external number distribution is available, the call will not be distributed to the external number.
Active diversion number	The call should be redirected to the redirect number set by the feature code. Rules containing this action will only match if an active call diversion set by a feature code exists.
Softphone	The call should be forwarded to the desktop application.
Switchboard	The call should be forwarded to the switchboard number.
Voicemail	The call should be forwarded to the voicemail inbox.
Voicemail play activity	The call should play current activity and then call forwarded to the voicemail.
Voicemail play busy in call	The call should play activity busy in call and then call forwarded to the voicemail.
Voicemail play out of reach	The call should play activity out of reach and then call forwarded to the voicemail.
Enter phone number...	The call should be forwarded to a custom phone number added to the rule.

Action/Destination	Description (If the rule is matched...)
External PBX phone	The call should be forwarded to the desk phone that is behind a PBX connected to the system.
Play activity	The call will play current activity.
Send ringing	A ringing tone will be played.
Send busy response	A busy tone will be sent to the calling party.
Send decline response	A decline tone will be sent to the calling party.

6.4.7.2 Outbound Rules

To add an outbound rule

- Click **Add** to insert a new outbound rule. Follow the instructions on screen to build a new rule with matching criteria and actions.

Table - Outbound Rules Match Criteria

Match Criteria	Description
Call is tagged	To match against what the call is tagged with. This is mainly a technical rule.
Called party	To match the type of calling party, internal or external. This allow rules treating internal and external calls differently.
Call's destination is tagged	To match the call's destination towards a list of tags. This is mainly a technical rule.
Call's source is tagged	To match the call's source towards a list of tags. This is mainly a technical rule.
Date	The possible values are before, after or a specific date.
Day of week	It is possible to specify "is" or "is not" and then provide the day of week.
Dialed number	To match the dialed number against a set of defined number types, for example international or mobile.

Match Criteria	Description
Diverted	To match on calls that have been diverted by one user to another number while using the "Enter number:" setting. A call forked to a user's own devices is not considered a diversion.
Nightmode	To match the Nightmode state. Possible values are True and False. This rules allows specifying what should happen when Nightmode is active or not. For example, should calls be forwarded to a mobile when a call is received during Nightmode.
Role	To match against the current presence role. Possible match values are the roles configured for the organization.
Time	To match a time value. Possible values are before or after a specified time.

The outbound rules actions are either used to specify the calling party number to be displayed for the placed call or to block a placed call for different reasons. The following outbound rule actions are available:

Table - Outbound Rules Actions

Action	Description (If the rule is matched...)
Blocked because of forbidden destination	The call will be blocked and instead the caller will hear a prompt informing the reason for blocking the call.
Blocked because of restricted time	The call will be blocked and instead the caller will hear a prompt informing the reason for blocking the call.
Blocked because of unauthorized user	The call will be blocked and instead the caller will hear a prompt informing the reason for blocking the call.
Placed from anonymous line	The calling party number will be hidden for the placed call.
Placed from billing Id line	The calling party number will be the billing id line.
Placed from personal office line	The calling party number will be set to the number configured as the primary personal number for the user.
Placed from external system	The calling party number will be set to the number configured on the external system.
Placed from	The calling party number will be set to the function number chosen in the next dropdown list.

Action	Description (If the rule is matched...)
Placed from secondary office line	The calling party number will be set to the number configured as the secondary personal number for the user.
Placed from switchboard line	The calling party number will be set to the switchboard number of the organization.
Redirected to switchboard	The caller will be redirected to the switchboard number instead of connected to the dialed number.

6.4.7.3 Fallback Rules

Click **Add** to insert a new fallback rule. Follow the instructions on screen to build a new rule with matching criteria and actions.

Table - Fallback Rules Match Criteria

Match Criteria	Description
Calling party	To match the type of calling party. This can be: internal, external, favorite, blocked, VIP. This allow rules treating callers differently. VIP contacts match rules both for VIP and for favorites.
Date	To match a date. The possible values are be- fore, after or a specific date.
Day of week	To match a weekday. It is possible to specify "is" or "is not" and then provide the day of week.
Time	To match a time value. Possible values are before or after a specified time.

The following actions are available for fallback rules.

Table - Fallback Rules Actions

Action	Description
Fallback to switchboard on no answer after 30 seconds	If the called party has not answered within 30 seconds, the call will get diverted to the switchboard number.
Fallback to switchboard on busy	If the called party is busy in a call the call, will get diverted to the switchboard number.
Fallback to switchboard on call rejected	If the called party declines an incoming call the call will get diverted to the switchboard number.

Action	Description
Enter phone number... on call rejected	If the called party declines an incoming call the call will get diverted to the entered phone number.
Send busy response on busy	If the called party is busy, the calling party will hear busy tone.
Send failure response on failure	If the call fails the error cause will be forward- ed to the calling party.

6.4.7.4 Rule Order

Each rule defined is added to an ordered list. When a rule is processed the system start evaluating the match criteria of the first rule in the list. If the rule has no match, the system continues down the list until a match is found.

It is possible to change the rule order using the up and down arrows.

6.4.8 Future presence

With future presence you can view and schedule presence events.

To add a new future event

1. Click **Tools** > **Future presence**.
2. Click **+**.
3. Add your info, period and if the event should be repeated.

You can map diversions to the activity from the Activity diversion setting.

7 User area

In the user area(see page 16), you can view or set the following:

- vCard
- Caller ID
- Presence and activity
- Personal note

7.1 vCard

Your vCard displays your contact and organizational information such as:

- your name
- your business and mobile phone numbers
- your email
- your company information
- your title/occupation

To view your vCard

- Click on your picture in the desktop application.

To close your vCard

- Click outside the vcard/picture area.

You can perform additional actions using the information displayed in your vCard fields. See View contact details(see page 46) for more information.

7.2 Caller ID

The Caller ID displays the number that will be presented when placing a call. Your current Caller ID is displayed next to your presence.
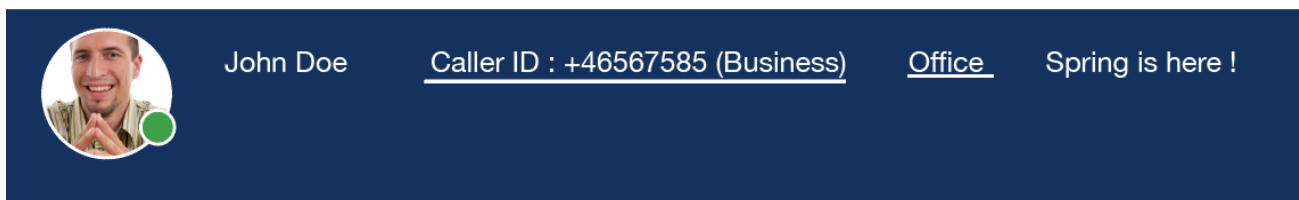
> ⚠ Not all numbers may be enabled for you.

The following outbound numbers can be set:

- Primary line
- Secondary line
- Switchboard number
- Anonymous
- ACD and Attendant numbers

To set a new Caller ID

1. Click on the current **Caller ID**.

2. In the list that pops up, choose a new Caller ID.

7.3 Presence and activity

As a user in the system, you can select between different activities and roles available in the system. For example, if you want to have your calls routed to a specific phone when you are out of office, it is possible to set a specific role and activity matching the case. Activities and roles are defined and configured by the system administrator.

To change another user's presence, see Change another user's presence.

7.3.1 Activities

The presence state for an activity can either be **Available** (green icon) or **Unavailable** (red icon).

> ⚠ Depending on system settings, certain users or user groups may not be able to see the presence state for all other users or user groups.

To set an activity

- Click on the activity area and select a new activity from the drop-down list or select **Activity** and **End time** from **Custom activity**.

The following default activity types are available:

- Available
- Busy
- Lunch
- Meeting
- Out of office
- Vacation

How incoming calls are routed depending on your activity can either be defined by your system administrator or if you are an authorized user you can manage your own settings. See Call Routing for more information.

7.3.1.1 Custom activity

A custom activity will let you set a new active activity, availability, end time, and activity diversion.

See Presence shortcut for information on the different options.

7.3.1.2 Future presence

You can schedule future presence events. See Future presence for more information.

7.3.1.3 Activity diversion

You can configure activity diversions that will automatically divert calls to your number based on your activity.

> ⚠ You need to have a call routing rule that directs received calls to active diversion number to make any diversion happen.

To add an activity diversion

1. Click on **+** button.
2. Select your activity.
3. Set a number to divert to.
4. Click **Save**.

7.3.1.4 Presence shortcut

You can configure your own presence shortcuts. The created presence shortcuts will be synchronised to all your devices. The presence shortcut is a quick way to set your presence with end time.

To add a new or edit a shortcut

1. Click your current activity in the activity area.
2. Click **Edit shortcuts**.
3. Click **+** to add a new activity or click a current activity to edit it.
4. Edit the shortcut on the following fields:
   - **Name** – Name of your shortcut.
   - **Activity** – Your activity.
   - **Availability** – If your state should be available (green) or Do not disturb (red).
   - **Duration** – Your end time. This can be either no end time, until next workday (calculated based on your working hours) or a set time period from 15 minutes to 1 day. The time is approximate and will adjust to closest 5 min-hour based on duration length.
   - **Activity diversion** – If you should override any diversion state. There are a few options:
     - **Use default diversion** – The active diversion will be the one mapped to the activity if such mapping exists, or another previously set diversion. An active diversion will be the activity diversion or previously set diversion if one of them is set, otherwise no diversion.
     - **Clear default diversion** – The will clear any previously set diversion. An active diversion will be no diversion.
     - **Override default diversion** – The active diversion will be the number set in the **Diversion number** field.
   - **Diversion number** – Set the number to divert to. If this is empty and **Activity diversion** is marked, any previous set diversion will be overridden and set to no diversion.
   - **Icon** – Choose an icon. It will only be visible to you.

> ⚠   If you have greyed-out shortcuts, it means that the activity mapped to the shortcut no longer exists on the system. Edit the shortcut and choose a valid activity.

7.3.2
Change another user's presence

You can change the presence information regarding activity, role, future presence and change the personal note if you have the authorization for it.

> ⚠   If you belong to a group that has only the right to see the future presence information of the contact, the menu only displays the **Future presence...** item. Click this item to see the current presence state of the contact.

To change another user's activity

1. On the desired user, click on the activity.
2. Select the new activity, or select **Set activity and end time** to set an end time to the activity.

To change another user's role

1. Expand the desired user contact card.
2. Click on the role.
3. Select the new role from the pop-up menu.

To change another user's future presence

1. On the desired user, click on the activity.
2. Select **Future presence** from the pop-up menu to see and set the future presence for the user.

To change another user's personal note

1. On the desired user, click on the personal note area.
2. Enter the new note.

7.4 Personal note

It is possible to add a personal note that will be visible to other users within the organization.

To add a personal note

- Click the note field on the user area and add the desired note.

8 Search directory

The directory includes all contacts in your organization.

To search for a contact in the directory

- Start entering characters of the contact name in the search field. The search results are updated automatically based on your input and the pause value setting configured in the advanced settings.

> ✅ You can search for contacts by first name, last name, department, any of the custom fields, or a combination. For example, if you want to search for "John" in "Sales", you can enter "Joh Sal" and all contacts that match will appear, including "John" in the "Sales" department.

> ⚠️ Search results are limited to 25 hits and are shown depending on the search string entered. Refine your search to narrow down your search.

See also Add contact by directory search.

9 Contacts

The Contacts tab shows all your contacts together with their presence information.

> ⓘ By default, your **Favourites** list is displayed and you can search for other directory contacts by entering their names in search field.

From the **Contacts** tab, you can:

- View contact details
- Add contact by directory search
- Remove favourites
- Delete local contact
- Edit contact information
- Exchange calendar status
- Send SMS
- Send group SMS
- Send group Email
- Start chat with contact
- Start intercom call
- Call contact

9.1 View contact details

Contact details show you extended contact information such as role, contact information (phone number and email), and other company information.

To view contact details

- Click on the contact name, contact picture, or press the expand button (❯) to view expanded contact card.

9.1.1 Contact card actions

From the contact card, you can perform additional actions on the contact card fields. These actions include:

- Call the contact on displayed number.
- Send an email to contact using your default email application.
- Search the local and organization directory using text or number displayed in contact field.
- Copy field information to clipboard.

To perform an action using contact card fields

1. Expand the contact card to view contact details.
2. On the desired field (e.g. mobile, email, department), click the additional actions button (❯).
3. Choose the desired action from pop-up.

9.2 Add contact by directory search

Your **Favourites** list is the default view in **Contacts** tab. A maximum of 40 favourited contacts are displayed in your contact list.

To add a contact by directory search

1. Search for the desired contact using the search field.
2. Expand the contact card.
3. Click the **Set this contact's state** button (☆).
4. Choose how the contact should be added, that is, as a favourite (★), contact (☆), VIP (♡), or blocked (⊘).

Local contacts

You can add, edit, and remove local contacts in your favourites list.

- If you want to edit a local contact, click on **Edit this contact** button (✎).

- If you want to delete a local contact permanently, you can click on the **Delete this contact** button (🗑). You can only delete local contacts. For more information, see Delete local contact(see page 47).

9.3 Remove favourites

To remove a contact from your favourites list

1. Expand the contact's card.
2. Press the **Set this contact's state** button (★).
3. Choose **Contact** (☆) from pop-up menu.
4. Confirm the action in dialogue box.

> ⓘ On the live aid area (under your contact name) you can view the notification if the contact was removed successfully.

9.4 Delete local contact

A local contact is a contact present locally in your contact list and is not available or searchable in the organization directory.

To delete a local contact

1. Expand the contact card of the desired local contact.
2. Click the **Delete this contact** button (🗑).
3. Confirm the action.

See also Add contact(see page 33).

9.5 Edit contact information

You can edit the contact information for contacts that you have created. You cannot edit the contact information for contacts within your organization.

To edit a contact's information

1. Expand the contact card of the desired contact.

2. Click the **Edit this contact** (✎) button.
3. Edit the desired information.
4. Click **OK** to save changes.

9.6 Exchange calendar status

If you are authorized, you can see the exchange calendar status for your contacts in the contact list.

- A blue icon (📅) is shown if the user is busy with a meeting in the next 60 minutes.
- A red icon (📅) is displayed if the Exchange calendar shows that the user is busy.

If you are authorized and the calendar is shared by the user with you, you can also click to see the user's calendar agenda for the current day.

9.7 Send SMS

You can send SMS messages to a contact or phone numbers with the desktop application. You can send SMS message to one or multiple contacts. Note that replies to SMS are not received in the desktop application.

You can also change the From number of the SMS message to a function number or ACD number, if you are authorized. This could be used if, for example, you want to send an SMS message from the ACD group instead of your own personal phone number.

To send an SMS message to a contact

1. On the desired contact, click the **Send SMS** button (📱).
2. From the drop-down list, choose the contact's number to which you want to send the SMS message (if there are multiple numbers to choose from).
3. Choose the number from which you want to send the SMS message (if there are multiple numbers to choose from).
4. Enter your message.
5. Click **Send**.

9.8 Send group SMS

To send an SMS message to a group

1. Select **Services** > **Send message to listed contacts** in menubar and select **SMS**. Alternatively, you can click the **Send SMS to this group** button (📱) on the **Favourites** banner, or **Contacts** banner if you are performing a search.
   The contacts in your current search with a mobile phone will be added to your messaging screen.
2. Choose the receiving number of the contacts (to which to send the message) by using the dropdown list.

   > ⓘ You can remove a contacts that you do not want to send the message to by pressing x next to the contact.

3. Enter your message.
4. Click **Send**.

9.9 Send group Email

The first time you use this service you will need to set whether you are using Microsoft Outlook or another email application. This is to configure whether to use semi-colon or comma to separate the addresses. See the **Email application** setting in Advanced(see page 27) for more information.

To send an email message to a group

1. From the menubar, select **Services** > **Send message to listed contacts**.
2. Select **Email**.
   The contacts in your current search with an email address will be added to the **To:** field in your default mail application.
3. Enter your email message.
4. Send the email.

9.10 Start chat with contact

To start chat with a contact

- On the desired contact in **Contacts** tab, click the **Start chat** button (⬜ or 🗒).
  The action redirects you to the **MiTeam** tab where chat and other collaboration activities can be performed.

> ⚠ It is now possible to start a chat session with a contact belonging to a linked organization.

For more information on chat and collaboration, see the MiTeam(see page 68) documentation.

9.11 Start intercom call

See Intercom calling(see page 49) for information on this action.

9.12 Call contact

See Place a call(see page 49) for information on this action.

10 Calls

This section describes call related features:

- Call panel overview
- Line state
- Place a call
- Answer a call
- Hang up or reject a call
- Hold and resume a call
- Park a call
- Transfer a call
- Move call to another client
- Send DTMF tones
- Record a call
- Conference calls
- Call from Microsoft Office applications
- Volume control
- Remote call for calls with another phone

10.1 Call panel overview
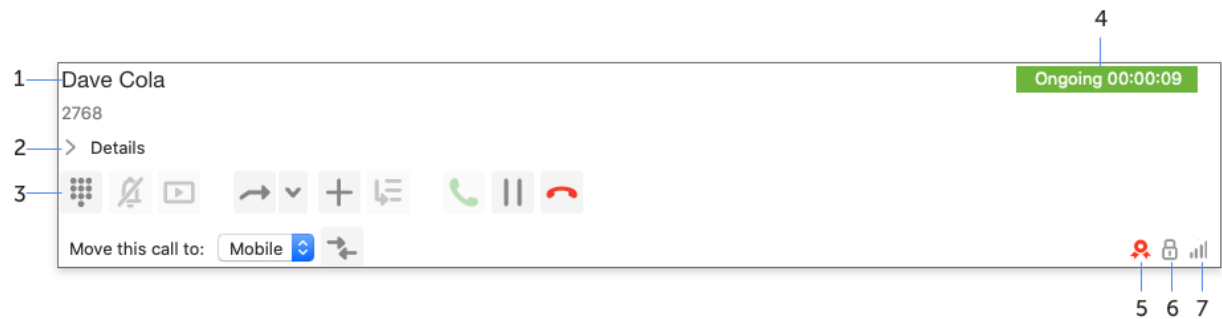
Call panel area	
1.	Connected party's name and number.
2.	Contact details including vCard. ⓘ Short number is presented if available.
3.	Mid-call options. Button and icons are described in User interface overview(see page 16).
4.	Call state and duration of call. The call state shows whether the call is ringing, connected, on hold, etc.

5.	Sign if the user is asserted by the system.
6.	Encryption status. The padlock indicates whether the call is encrypted (🔒) or not encrypted (🔓). ⚠ Encrypted calls is a security setting enabled by the system administrator.
7.	Network quality measured on the caller side as well as on the called party side.

10.2 Line state

When a contact is in call, this is indicated by the line busy icon (🚫) in the contact list.

10.3 Place a call

To make a call to a contact

- On the desired contact, click the **Call** button (📞).

To make a call using name or number search

1. Enter full or partial contact name or full number in the search field.
2. If needed, select the contact using arrows or mouse.
3. Press the return key.

The call button will change depending on which device that you will call with. For example, the desktop application, a deskphone, or mobile. See the Advanced calling options section for more information.

You can also call a contact directly from a chat session. See MiTeam chats documentation for more information.

> ⓘ You can also search for department or information in the free text fields. Your administrator sets which fields are available to search in. The search result will show what field or text you match on.

> ⓘ It is also possible to make a call even if there is an incoming call.

10.3.1 Intercom calling

An Intercom call allows a caller to make a one-way voice call to one or more receivers. The caller can speak but the receiver´s microphone is muted by default, so the caller can not hear the recipient.

To make an intercom call

- On the desired contact, click the **Start Intercom** button (🔘).

> ⚠ The **Intercom Call** button is only available when the contact has at least one device that supports Intercom. Supported devices include Mitel/Snom phones and desktop application.

10.3.2 Advanced calling options

The advanced call options for the application include:

The options are available in the **Call** menu option.

10.3.2.1 Bypass diversion rules for next call

Selecting **Bypass Diversion rules for next call** will override any diversion set on the calling party. This option is only effective for the next call and on the desktop application. It does not apply when you use the desktop application for CTI (i.e. using the desktop application to call from mobile).

10.3.2.2 Intrude ongoing call

Selecting **Intrude ongoing call** will intrude a call if the line is busy. This option is only effective for the next call.

> ⚠ Intrude ongoing call is not available for all users. The service is only available to users that are authorized to intrude ongoing calls.

10.3.2.3 Calling as

Calling with a role can be used when you want to make a call and want a specific number to be presented to the calling party. For example, if you work within a support division, it is possible to call with the role "support" and let the number associated with the support division be presented to the calling party instead of your own private number.

Select a role from the **Calling as** list to call with a role. This option is only effective for the next call. Once the call is made, the role is reverted back to the current role. See information on roles for more information.

10.3.2.4 Call with/Call using

> ⓘ You can see whether you have **Call with** or **Call Control** capabilities in the bottom left corner (device picker). If the title says **Call With**, you have **Call with** capability, and if the title is **Call Control,** then you will also be able to control the calls using the desktop application.

Call with can be used if you want to set up your call using the application but want to handle the actual call using another device, for example a mobile phone or a desktop phone.

You can see which device you will call with in the bottom left corner of the desktop application. In the following picture the user calls with mobile phone.
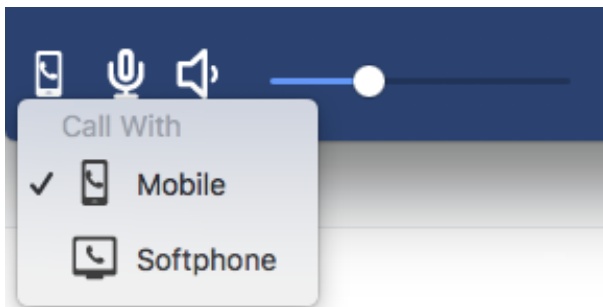
Click on the icon to choose which device you should call with. You can also configure **Call with** using the **Call** > **Call with** setting in the desktop application. For example, if you select to **Call with Mobile**, your mobile phone will ring. Pick up the call and the mobile phone will automatically connect to the called party. You can see the call setup progress in the **Calls** tab in the desktop application.

If enabled, you can also control the remote call from the softphone by calling using the Call Control feature. See Remote call for calls with another phone(see page 63) for more information.

10.3.3 Callto and Tel URL calls

A callto link or an Tel URL on a web page is a phone number as a link. Callto links and Tel URLs are supported with the desktop application. Click a number with a callto or tel link and desktop application will automatically call the number and connect you.

> ⚠ Click the **Handle callto** button to set up the callto: links in the **Advanced settings**. This will open the default programs in the Control panel in Windows. Choose the desktop application, then select **Set this program as default**. This will configure the application to call numbers when clicking on callto: and tel: links.

> ⚠ If you have Skype installed, it will try to override your callto setting and handle the call with Skype instead of with desktop application. Make sure to start desktop application after Skype is started, to solve this problem.

10.4 Answer a call

To answer a call

- When a call is received, click the **Answer Call** button (📞). Alternatively, you can answer the call by pressing the numeric **Enter** key on your keyboard. For more information, see **Answer with Enter** setting in General(see page 25).

> ⓘ You can also answer the call from the desktop application icon in the taskbar (Windows) or dock (OSX/macOS). Right-click the icon and select **Answer Call**.

You can mute the ring signal of an incoming call.

To mute ringer of an incoming call

- Click **Mute Ringer** button (⌀).

10.5 Hang up or reject a call

To Hang up or decline a call

- Click the hangup call icon (☎).

> ⓘ You can also decline or hang up a call using the application icon in the taskbar (Windows) or dock (OS X/ macOS). Right-click the icon and select **Decline** or **Hangup**.

10.6 Hold and resume a call

To hold an ongoing call

- Click the **Hold Call** button (❚❚) or place a new call using the main window.

> ⓘ Placing a new call will automatically put the ongoing call on hold. The held party will hear music on hold, spoken hold information in your locale, or another prompt depending on configuration in the system.

To resume a call

- Click the **Resume Call** button (▷).

> ⓘ If another call is active, clicking **Resume Call** will automatically put the active call on hold.

> ⚠ If a call is on hold, it will be resumed when you start to record a call_(see page 58).

10.7 Park a call

It is possible to park calls in the personal queue.

To park a call

- During an ongoing call, click the **Park Call** button (⤵). The call will be parked in the queue. If allowed, other users can also pick up the parked call.

> ⓘ Click **Pickup the call** button (☎) to pick up the parked call.

10.8 Transfer a call

This section describes call transfer functionality in the desktop application.

> ⚠ **Intruded Calls Transfer**
> Transfer of intruded calls is not allowed, i.e. if you intrude an ongoing call between two parties and then try to transfer the call to another party, the system does not allow such a transfer.

10.8.1 Blind transfer

Blind transfer allows the calling party to be transferred to another party. When a call is blind transferred, the remote party will be transferred directly. If the transfer fails because of no answer or a busy line, the transferred party can connect with the party that transferred the call again.

> ⚠ During a transfer, new incoming calls are placed in your personal queue, if no other call routing rules apply. You can pick up a new call in the queue by clicking on the **Pickup the call** button.

To make a blind transfer

1. During a connected call, click the **Activate Transfer** button (↗).
2. Search for or dial the contact to transfer the call to.
3. Click the **Transfer to here** button (↗) on the contact to transfer the call to.

To make a blind transfer, bypassing any diversion rules

> ⚠ Transfer with diversion bypass may not be available for all users. The service is only available to users that are authorized to do so.

1. Click the **Transfer Options** button (⌄).
2. Select **Bypass Diversion Rules**.
3. Search or dial the contact to transfer the call to.
4. Click the **Transfer to here** button (↗) on the contact to transfer the call to.

To make a blind transfer to a contact's voicemail

> ⚠ Transfer to voicemail may not be available for all users. The service is only available to users that are authorized to do so.

1. Click the **Activate Transfer** button (↗) and search for or dial the contact to transfer the call to.
2. Click the **Transfer to here** button (↗) on the contact to transfer the call to, and then select **Transfer to voicemail** as the number to transfer to.

10.8.2 Attended transfer

Attended transfer makes it possible to transfer a call, while first getting the option to talk to the party where the call is being transferred. If the called party accepts the transfer, the remote party will be connected with the new party and it is possible to leave the call.

1. During a connected call, place another call. The (first) connected call will be placed on hold.
2. Wait for the party to answer.
3. Switch back to the first call and click the **Activate Transfer** button (↗) to start transferring the call.
4. Click the **Transfer to here** button (↗) on the called party.

It is also possible to drag and drop a call to another in the call panel.

10.8.3 Camp-on

Camp-on is an Attendant functionality which allows you to transfer a call to a busy user. If the user is busy with a call, a personal queue is created, which the transferred call is put on hold in. When the user's first call is ended, the transferred call in the personal queue is connected. See Camp-on_(see page 70) for more information.

10.8.4 Failed transfer

Whenever a transfer or camp-on has failed, you will get notified and can pick up the call again. This could be, for example, if the contact you transferred the call to, declined to answer. The call will be placed on hold, and the call will flash in the call view of your application to let you know that this call requires immediate attention.

10.9 Move call to another client

It is possible to move an ongoing call in the application to another client, for example a mobile phone or a desktop phone.

To move a call to another client

1. Select a device from the **Move this call to** drop-down list.
2. Click the **Move Call** button (   ).

10.10 Send DTMF tones

If you call a voicemail or any other interactive voice response service where telephone tone dialing (DTMF tones) is required, it is possible to open a keypad from the active call panel. You can also use the numeric keypad on your keyboard to send the tones.

To send DTMF tone

1. When connected in a call, click the **Open Keypad** button (⠿) in the active call panel to open the keypad.
2. Click the numbers to send.

> ⚠ DTMF tones are sent as soon as you start pressing digits on the keypad. You may remove numbers (one by one) using the **Backspace** key or use **Escape** key to clear the entire keypad screen, but any DTMF tones already sent will not be affected.

10.11 Record a call

During an ongoing call, it is possible to record and save the conversation to a file.

Note that the availability of call recording functionality, the type of call recording configured, and associated buttons can vary depending on the type of call recording configured by your administrator. If you do not see call recording buttons in your desktop application, it means that your administrator has not enabled call recording for you.

Depending on the call recording type configured, you as a user can obtain call recordings by using either manual recording or automatic recording.

10.11.1 Manual recording

With manual recording you control the recording of calls yourself, using start/stop buttons.

To manually record a call

1. Press the **Start Record** button (⦿) to start the recording.
2. Press the **Stop Record** button (▣) to end the recording.

Go to Inbox(see page 33) under **Log** to listen to the recorded call.

> ⚠ If a call is on hold, it will be resumed when you start to record a call.

10.11.2 Automatic recording (UC Analytics)

With the UC analytics supported call recording, call recording takes place automatically as soon as a call starts and you as a user do not need to start or stop the recording. You, however, can choose to save the call recording, pause it, resume it, or discard it.

Recorded calls can be accessed via the UC Analytics portal accessible under the **Tools**(see page 31) menu.

> ⚠ Putting a call on hold does not pause or stop the recording. Recording continues regardless.

To save a call recording

- Press the **Save** button (⬚).

To discard a call recording

- Press the **Discard** button (⬚).

> ⚠ The **Discard** option is available only after pressing **Save**. If you do not save a call recording, it is automatically discarded.

To pause a call recording

- Press the **Pause** button (⬚).

Pausing temporarily stops the call recording until manually resumed. Media created during the pause duration is excluded from the call recording.

To resume a call recording

- Press the **Resume** button (⬚).

10.12 Conference calls

10.12.1 Create a conference call

The following steps describe how to set up a local conference call.

To set up a conference call

1. Receive or place a call.
2. When the call is connected, click the **Add Call to Meet** button (+).
   The Conference call panel is opened, containing the active call. Additional calls can now be added to the conference.
3. Place another call. The active call will be placed on hold.
4. When the new call is connected, click the **Add Call to Meet** button (+) to add the call to the conference.
5. Repeat placing new calls and add to the conference to add more participants.

> ⓘ A maximum of six participants including the host can participate in an ad-hoc conference. This is a system limit and is not dependent on any license requirements. Ad-hoc conference uses DSP channels from the media server.

10.12.2 Disconnect participants

The conference call panel displays all connected participants in the conference.

To disconnect a participant from the conference

- Click on the selected participant to disconnect or to put a participant on hold.

10.12.3 End a conference call

A conference call is ended when the conference organizer disconnects the call, or when all participants has been removed from the conference call.

To end a conference call

- Click **Hangup** button (🔻) to terminate the conference call.

The conference organizer will have the option to allow the rest of the participants to continue conferencing when disconnecting. Allowing this will move all other participants to the conference server.

> ⚠️ Monitoring of conference calls by the organizer is not possible once the conference organizer hangs up the call.

10.13 Call from Microsoft Office applications

> ⚠️ For supported versions of add-in in Microsoft Office, please see the *Compatibility information.*

> ⚠️   **Call <select a contact>** and **Call with mobile** must be visible on the toolbar in Microsoft Outlook. To activate the **Call <select a contact>**, press the **Contacts** button.

To make a call using Microsoft Outlook

1. Start your desktop application and check that it is running.
2. In the left navigation pane, select the **Contacts** button. The contact numbers can be seen in different views.
3. In the menu bar, select **Call (select a contact)**.

Select the phone number to call from the call button dropdown menu. The application should appear and start to call the phone number that was selected.

> ⚠️ If the button is grayed out, the application is not running. To activate it, either start the application or click on the **Contacts** button in Microsoft Outlook.

To select different options

1. Start the desktop application and check that it is running.
2. In the left navigation pane, select the **Contacts** button.
3. Select the device that will be used for subsequent calls. In the dropdown menu next to the **Call <name of contact>** there is a button called **call with...**, select one of the following options:
   - Call with Mobile
   - Call with SIP desktop phone
   - Call with desktop application

⚠ It is possible to click to dial from Microsoft Office applications such as Word, Excel, and PowerPoint. The application installs an add in that is loaded by Microsoft Office. The application must be installed on the computer before the add in can be seen in Microsoft Office. The `OutlookAddin.dll` file is installed with the application. The add in will appear as a toolbar in Microsoft Outlook.
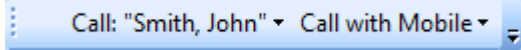
> ⚠ The calling option depends on how the server has been configured. To adjust these options, contact the server administrator.

To call using the smart tag in a Microsoft Office application

1. Enter the phone number in the correct format into the selected Microsoft application.
2. Click on the i icon and select the Smart tag Options in the dropdown menu.
   - Call:(phonenumber)
   - (Productname)
   - Remove this Smart Tag
   - Stop recognizing "(phonenumber)"
   - Smart Tag Options...
3. Place your cursor over the phone number until the **i** icon appears and in the drop down menu select the option.
4. The desktop application name should appear and automatically dial the phone number.

A few examples of accepted phone number formats

- 08-7687230
- 2021212222

> ⚠ If the i icon does not appear when the cursor is placed over a phone number, then the phone number format is not acceptable.

If the smart tag option is selected in the drop down menu

1. Under the tab **Smart Tags**, check the check box label data with smart tags.
2. Under recognizers check the check boxes that apply (this will differ in Word, Excel and PowerPoint).

To search for a contact in Outlook from the contact list in desktop application

1. A user can search for a contact in Microsoft Outlook by going to the desktop application and entering the name of the contact that is being searched for in the dial number field.
2. Enter the first letter of the contacts name of the full name of the contact and hit return. The contact will appear under the Outlook Search Result List. Desktop application can pick up contacts from Outlooks contact list.

10.13.1 Set up the desktop application in Microsoft Word, Powerpoint, or Excel

To activate the smart tag option in a Microsoft application

1. Go to the Microsoft Office icon in the upper left hand corner of your application and click **Office.**
2. Click **Word/Powerpoint/Excel Options**.
3. In the left navigation bar, select **Proofing**.
4. In the AutoCorrect window, click on the **AutoCorrect Options**.
5. Mark the checkbox **Label text with smart tags**.
6. Mark the checkbox **Call (Softphone+ telephone number smart tag recognizer)**.
7. Click **OK** in the **AutoCorrect** window.
8. Click **OK** in the **Word/Powerpoint/Excel Options** window.

To re-enable the desktop application add-in

1. Go to the **Tools** menu in Microsoft Outlook and select **Trust Center**.

> ⚠ If the i icon does not appear when the cursor is placed over a phone number then the phone number format is not acceptable.

2. In the **Trust Center** window under the menu on the left, select **Add-ins**.
3. In the main window look for the application Add-in. If it does not appear in the list then go to the bottom of the list and under **Manage**, select **Disabled Items** from the drop down menu.
4. Press **Go**.
5. Select the add-ins that will be enabled and click on the **Enable** button.

> ⚠ Outlook may need to be restarted in order for these changes to take effect.

10.14 Volume control

You can control the volume for a call and switch between headset mode and speaker mode from the bottom area of the desktop application.

You can mute your microphone by clicking on the **Mute Microphone** button (🎤).

> ✅ You can also mute the microphone from the taskbar/dock icon. Right-click the desktop application icon and select **Mute Microphone**.
> To unmute, select **Unmute Microphone**.

10.15 Remote call for calls with another phone

You can call with another mobile or deskphone, but control the call using the desktop application. You initiate a call using the desktop application and can control call transfers, park/pickups, and so on, using the user interface of the desktop application. After initiating the call on the desktop application you need to answer it manually on the device that you want to control. The remote call control feature needs to be enabled by your service provider.

To choose which device to call with or control, click the device button (that is, the **Call Using** button) in the bottom left of your app window.
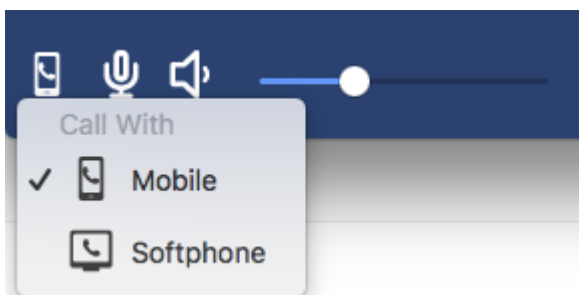
You can see whether you have call with or call control capabilities in the bottom left corner device picker. If the title says "**Call With**", you have call-with capabilities, and if the title is "**Call Control**" then you will also be able to control the calls using the desktop application.

> ⚠ This setting can be changed from the **Advanced Settings** dialog in Softphone Plus.

- If you call using **Call With**, the call will be initiated as a call-back call and you will have full functionality on the call on the device, but no call control from the desktop application.
- If you call using **Call control**, the call will also be initiated as a call-back call and you will have call control from the desktop application. However, some limitations are on the capabilities of the call, compared to when calling using **Call With**, see Supported features and limitations(see page 64).

To place a call with remote call control

1. Click the device button (☎ / 📱 / 📱).
2. Select the device that you want to call from.
3. Search for a contact, or enter a phone number and place the call as you would normally do.
   The server will initiate a call-back call to your selected device.
4. Answer the call on your selected device.
5. The calls view will open up in the desktop application and you can control the call from there.

10.15.1 Supported features and limitations

The following features can be performed on a remotely controlled call:

Supported features

- Blind Transfer. (For more information, see Blind transfer(see page 55)).
- Park/pickup call.

Limitations

- Multiple outbound calls at the same time is not supported.
- Calls cannot be parked by remote participant.
- Calls cannot be parked if calling to external participant.

11 Log

The Log(see page 16) tab shows placed, received, missed calls, recordings, and fax messages. The time and duration of the events are also shown. The tab bar badge icon shows the number of missed calls.

From the **Log** tab you can:

- Filter log items
- Delete log items
- View fax message
- Listen to call recordings (native), see Inbox(see page 33).

> ✅ It is also possible to place calls using the log. Click the **Call Using Softphone** button (📞) on the desired log item to place the call.

> ⚠ For performance reasons, the call log is hard coded to only show the 100 last entries.

11.1 Filter log items

You can filter the log by all calls, missed calls, or inbox items.

The following filter buttons are shown in the **Log** tab:

- **All** - Shows all calls and inbox items.
- **Missed calls** - Shows only missed calls.
- **Inbox** - Shows only inbox items.

To filter log items

- Click on the desired filter button to view items in your preferred filter.

11.2 Delete log items

You can delete a single or all log items shown in your **Log** filter.

To delete a single log item

1. Click on an item to expand it.
2. Click the **Delete item** button (🗑).

To delete all log items

1. Choose the desired filter that shows the items you want to delete.
2. Click the **Delete all items** button (🗑).

11.3 View fax message

To view a fax message

- Click to download the fax message.
  The fax message is in PDF format and your preferred PDF reader will be opened automatically to show the message.

12 Voicemail

The Voicemail tab shows all the voicemail messages left in your inbox by your contacts. From the voicemail tab, you can:

- Play and pause voicemail messages
- Delete voicemail messages
- Mark the contact who left the voicemail as favourite
- Call the contact who left the voicemail message.

To listen to a voicemail message

- Click the **Play** button (▷) on the desired item.

To delete a voicemail message

- Click the **Delete** button (🗑) on the desired item.

To mark a sender of the voicemail message as favourite

- Click the **Favorite** button (☆) on the desired item.

To call the contact who left the voicemail message

- Click the **Call** button (📞) on the desired item.

13 MiTeam

The MiTeam(see page 16) tab provides features for enhanced collaboration, such as chats, streams, and meets.

Documentation for MiTeam is released separately, accessible from under the **MiTeam** menu in documentation portal.

For information on desktop application compatibility, see the *Compatibility Information.*

14 Premium Attendant

The **Premium Attendant** tab provides enhanced features and functionality for Attendant.

Documentation for Premium Attendant is released separately, accessible from under the **Premium Attendant** menu in documentation portal.

For information on desktop application compatibility, see the *Compatibility Information.*

15 Attendant functionality

15.1 Attendant view

The attendant view contains:

- The contact list to the left
- The calling view to the right
- The queue buttons below the calls view

You also have possibility for:

- Extended search(see page 70)
- Queue handling(see page 70)
- Group login(see page 70)
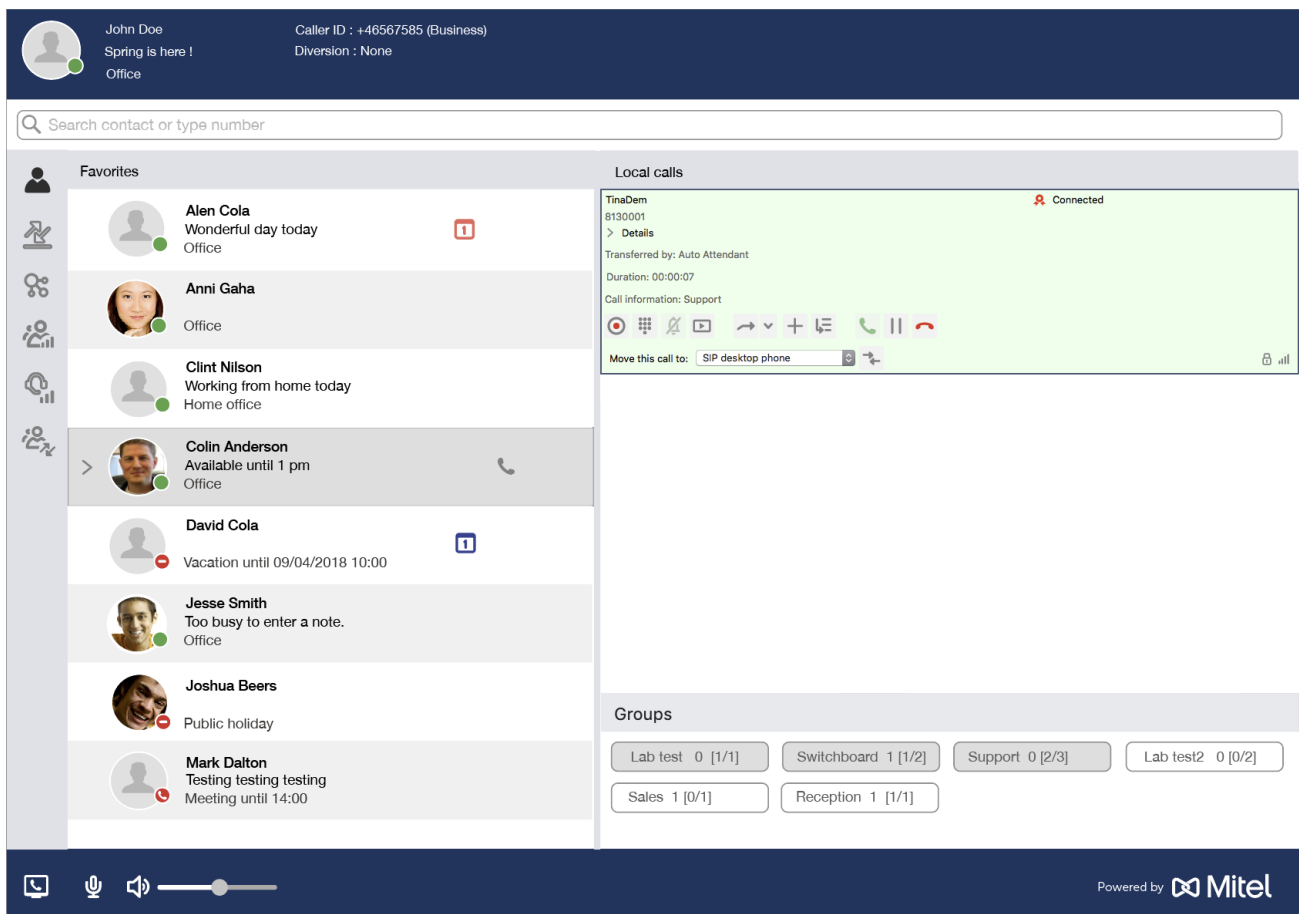
The call handling function is the same in the attendant view as in the standard view. However, as an attendant you can also camp-on calls to busy extensions.

To switch to the attendant view

- In the menubar, select **View** > **Attendant view**.

15.2 Extended search

When logged into a distribution group, you also have the extended search feature activated by default as an attendant. This will enable you to quickly find who you are looking for as you see what field that matches from your search query on your search results.

Extended search is enabled on both **Standard view** and **Attendant view**. You can enable or disable the extended search from **Advanced Settings** in **Options/Preferences**.

15.3 Queue handling

The bottom of the view shows:

- The attendant and ACD groups that you belong to
- If you are logged in or logged out
- Agent status

The number of available agents and calls in queue are displayed in in the form *(number of calls waiting [logged in agents/available agents])*. If calls are in queue in a group, the waiting time for the first call is also shown. If you have logged in to an attendant group you are able to pick up calls for the attendant group. It is also possible to see the number of calls in the queue and the time for the first call in the queue, see figure below.

15.3.1 Queue distribution

There are a few settings that affect how the queue is being handled and how calls are being distributed. These settings are controlled by the administrator.

This table below lists a few of these settings.

Setting	Description
Destination of calls	The administrator can set which types of devices the calls are distributed to. Your own personal call routing rules will not apply for distribution of calls.
Distribution of calls	The administrator can set after how many seconds the call should go to the next attendant or agent.
	Also if the presence state affects the distribution of the calls. That means if no attendants or agents are logged in and in the **Available** presence state, the call will be forwarded to a pre-set number.

Setting	Description
Queue overflow for incoming calls	Queue overflow happens when a pre-set amount of users in the queue are exceeded, or if the maximum waiting time is exceeded. When any of this happens the incoming call either gets a busy tone or is forwarded to another pre-set number.
Handling of queued calls	Queued calls can be forwarded to a pre-set number when the caller has been waiting in queue more than a set number of minutes. If no attendant or agent is logged in and is in the available state, the queued call can also be forwarded to a set number. If the configured number of distribution attempts have been exceeded, the queued call can be forwarded to the no attendant number.
Missed calls	The administrator can set so after a number of missed calls you are logged out of the distribution group.

15.4 Group login

You can see your login status on the group buttons on top of the application window, and log in or log out by pressing these buttons.

The log in/log out buttons are highlighted for the groups you are logged into:

Support 1 (2/3)	You are logged in to the group. Click to log out.
Reception 1 (2/3)	You are logged out from the group. Click to log in.

15.5 Call transfer

There are certain keyboard shortcuts that are only available when viewing the application in **Attendant view**. They are meant to speed up the call handling. All keyboard shortcuts are customizable in **Options/ Preferences > General > Keyboard…**.

There are two different options to transfer calls, that is, blind transfer and attended transfer.

> ⚠ In the macOS version of the application, the default keyboard shortcuts for the call transfer options are:
> - Blind transfer: ⌘*
> - Attended transfer: ⌘-

15.5.1 Blind transfer

When answering a call, the focus will automatically be set to the search field. To start a blind transfer, search for a contact or enter a number that the call should be transferred to.

- If the search result is only one contact or number, then press the **Blind Transfer** key to transfer the call.

- If the search result returns multiple contacts, then navigate the contact list using the **Navigate Contacts Up/ Down** keys and make sure that the contact you want to transfer to has the selection marker. Press the **Blind Transfer** key to transfer the call.

> ⚠ If you have multiple ongoing calls when doing a blind transfer, it will pick the active call to transfer. If there are no active calls, you have to select the call by using the **Navigate Calls Up/Down** keys.

15.5.2 Attended transfer

When answering a call the focus will automatically be set to the search field. To start an attended transfer, place a call to a contact or a number that the first call should be transferred to.

- If there are only two ongoing calls, then press the **Attended Transfer** key to transfer the calls.

- If there are multiple ongoing calls, then navigate the calls list using the **Navigate Calls Up/ Down** keys and make sure that the call you want to transfer to has the selection marker. Press the **Attended Transfer** key to transfer the call.

15.5.3 Transferred calls behaviour

During a transfer, new incoming calls are placed in the queue.

For attended transfers, new incoming calls are not automatically routed to you until the impending transfer is complete. You can however pick up a new call in the queue by clicking the pick up button.

If a transfer has failed during attended transfer, you get notified and can pick up the call again. This could be, for example, if the contact you transferred the call to declined to answer. The call is then placed on hold, and the call flashes in the call view to let you know this call requires immediate attention.

With blind transfers, the transferred call is by default[1] released from the transferring agent as soon as transfer is initiated and the agent can start attending other calls. The purpose of this behaviour is to relieve the transferring agent of being tied to a call and instead have all agents available for it in case it returns. If the transferred call is not answered by the target party within the transfer timeout period, the call is returned to all available agents, anyone of whom can attend to it. Moreover if camp-on is enabled, the target party information for returned calls is shown to all logged-in agents.

> ⚠ [1] There is an option to keep the call under supervision rather than releasing it: "Keep blind transferred calls in attendant view until completed". See further Settings / Advance.

15.6 Camp-on

Camp-on is an attendant functionality which allows you to transfer a call to a busy user. If the user is busy with a call, a personal queue is created, which the transferred call is put on hold in. When the user's first call is ended, the transferred call in the personal queue is connected.

It is possible for an administrator to set a maximum waiting time, for the transferred calls that have not been picked up, before the attendant is notified that the call has not been picked up. It is also possible to notify all attendants in the attendant group after a set maximum waiting time.

If the call remains on hold too long in the queue, and an attendant picks up the call, it is possible to re-camp the call into the queue again. The call is then put back in the queue in the kept queuing position.

> ⚠ Camp-on is only possible to do for calls that have been made to an attendant group number, and activated for that specific attendant group. This setting is set by the administrator.

Camping-on a call is made the same way as a normal transfer. The only difference is that a camp-on icon is displayed on busy extensions instead of the normal transfer call icon.

15.6.1 Camp-on calls

To camp-on a call, do as described in example below

1. The B party calls you (A party i.e. Attendant).
2. Search for a contact (party C) using the contact list and click the **Click call** icon to the right, from the contact panel, or type the name or number in the search field and press the **Return** key.
3. Click **Call Transfer** and search or dial the contact (party C) to transfer the call to.
4. (i). If the C party is free, click **Transfer** to the right of the contact (party C).
   (ii). If the C party is busy, click **Camp-On** to the right of the contact (party C). The B party is put to a queue. When the C party is free, the call will be transfered to the C party.

   > ⚠ Inbound rule which is ignored when doing Camp-On from attendant: When a call is received and in call is true then call will be directed to voicemail.

If you (A party) re-attend a camped-on call and want to return it to the busy user again, you can use the re-camp function. The call is returned to the busy user's personal queue.

To re-camp a call

- Click . You can also press the **Return** key on your keyboard.

> ⚠ If you camp-on the call normally and not via the re-camp button, the call will not keep its queuing position and will be placed last in the queue.

15.7 Group log (attendant)

The **Group log** tab displays the call log for attendant groups that you are member of.

To view the attendant group log

- Click the **Group log** tab to view a summary of all, missed, forwarded, and answered calls. Call details per call are listed in the right pane. Click a call item in the list to view queue and call duration information for it. It is also possible to filter the list by groups or assignee.

  > ⚠ Group log entries are shown for a maximum of 14 days, after which they are removed.

This view displays, in the left pane:

- A summary of the total number of calls, and number of calls in each status category, surrounded by a color-coded circle displaying the proportion of calls in each category:
  - **All Calls**
  - **Missed** – color-coded in red
  - **Forwarded** – color-coded in orange

- **Answered** – color-coded in green
- Option to filter the list of log items by group.
- Option to filter the list of log items by assignee.

The right pane contains a list of log items, displaying the following fields:

- The phone number of the caller, and under this field the number of calls to the group with the same status and from the same number or caller.
- The group name. If a watch icon is displayed, it indicates that the call was forwarded because the queue was scheduled as closed at the time of the call.
- The recipient, showing the state of the call, that is, unhandled, in progress (being handled), or handled.
  - Unhandled state shows only the handle button (⬆).

  > ⓘ   As an agent, you can assign the item to yourself. As a supervisor, you can assign the item to any agent.

  - If an assignee with white cell background is shown, it means that the call is being handled.
  - A grey cell with assignee means that the call has been handled.
- A phone handset icon, surrounded by a circle in the color indicating the call status (as described above), and the time or date of the last call.
- A note regarding the log item. A **+** sign on the note icon is shown if the note is empty and can be entered. Up to 255 characters are allowed in a note.

To filter the list by a given status

- Click the the corresponding circle in the left pane.

To display the unfiltered list

- Click the **All Calls** circle at the top of the left pane.

To filter the list by a given group

- Open the drop-down list in the left pane and select the desired group.

To filter the list by an assignee

- Open the drop-down list in the left pane and select the desired assignee.

To assign an item to yourself

- Click the handle button (⬆) on the desired item and then click **Assign to me**.

To assign an item to an agent (as a supervisor)

- Click the handle button (⬆) on the desired item and then choose the desired agent and click **Assign**.

To call from the group number call log

- Click the handset icon at the right of a log item.

> ⚠   Calling from the group number call log has the following effects:
> The **from** number is set as configured on the server. If this feature is enabled on the server, calling from a **Missed log** item sets the item to **In progress**. If the call is unassigned, it will be assigned to the agent who initiates the call. If the call is already assigned to an agent, the assigned agent will not change.

⚠ When the schedule is set to closed, an icon (⊖) is displayed. In this case, callers who try to reach the group are not included in the group log.
The closed state is not supported in some versions of the system.

15.8 Queue statistics and Agent statistics (attendant)

An ACD supervisor who is authorized to supervise specific groups, can see the widgets **Queue statistics** and **Agent statistics** for these groups. They appear as extra tabs in the **Standard view** and the **Attendant view**.

Using these widgets, the supervisor can see the statistics for the groups, and log in and log out the agents to these groups.

15.8.1 Queue statistics

The **Queue statistics** widget shows all the ACD and attendant groups that you are authorized to supervise, and lets you log in and log out agents to these groups. The statistics are presented in the administrator configured running time span.

- **Group –** The name of the group. Click on the group to expand it. When expanded, the group provides:
    - Agent members of the group, with logged out agents having names in grey.
    - Agent status.
    - Skill, where skill 1 is the highest and 5 the lowest skill.
    - A button to log in or log out the agent to or from the group.

- **# in queue –** Number of persons in the queue.
- **Last wait –** The time in minutes: seconds the last picked up call waited before the call was picked up.
- **Avg wait –** The time in minutes:seconds the average call in the configured time span waited before the call was picked up.
- **Dropped –** The number of calls that were hang up by the callers before they were picked up.

15.8.2 Agent statistics

The **Agent statistics** widget shows all the info provided by the **Queue statistics** widget, but it is sorted by the agent name instead of group name.

15.9 SMS and email messages

15.9.1 SMS messages

You can send SMS messages with the attendant number as from number, if this is configured on the server. See Send SMS(see page 48), Send group SMS(see page 48), and Send group Email(see page 49) for more information.

15.9.2 Send email and SMS to a contact using call message templates

This is an attendant functionality which allows you to send an email or SMS to a contact with pre-filled information about the current call. The pre-defined template text that is used for this can be changed in the **Options** dialog.

The email will be created with your default email client application, and will have the email template text pre-filled in its subject and content. The SMS will be sent using the functionality in the application, and will be pre-filled with the SMS template text.

15.9.2.1   Send email or SMS when received a diverted call

When you receive a call from a contact that tried to reach another contact that diverted the call to you, you can click

the ⬛ button to create a new email, or the ⬛ button to create a new SMS in the call panel.

15.9.2.2   Send email or SMS during an ongoing call

During an ongoing call, you can send an email or SMS using the ⬛ button to create a new email, or the ⬛ button to create an SMS for a contact in your contact list. You can also use the search functionality to send to a contact that is not currently in your contact list.

16 ACD functionality (MS Windows only)

16.1 ACD agent view

The ACD agent view contains the menu and the call information field with the possibility to dock the field to the top or the bottom of the screen. The call handling function is the same in the ACD agent view as in the **Standard view**.
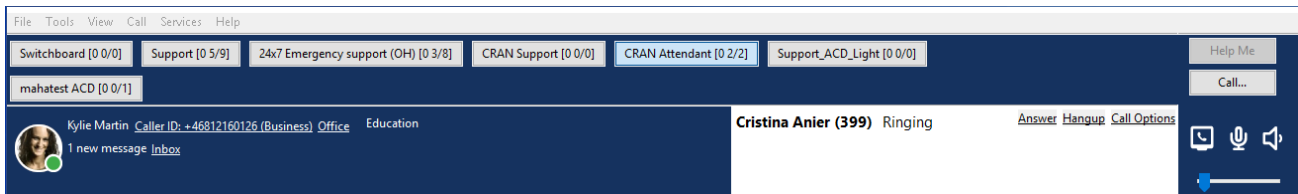
To switch to the ACD agent view

- In the menubar, select **View** > **ACD Agent view**.

> ⓘ From the ACD view, it is possible to switch to MiTeam view by clicking the MiTeam icon.

You also have possibility for:

- Queue handling(see page 78)
- Group login(see page 79)
- Manager assistance(see page 79)
- SMS messages(see page 79)

16.2 Queue handling

The top of the view presents the attendant and ACD groups you belong to, if you are logged in or out, and agent status. The number of available agents and calls in queue are displayed in in the form (number of calls waiting [logged in agents/available agents]). If calls are in queue in a group, the waiting time for the first call is also shown. If you have logged in to an attendant group you are able to pick up calls for the attendant group. It is also possible to see the number of calls in the queue and the time for the first call in the queue.
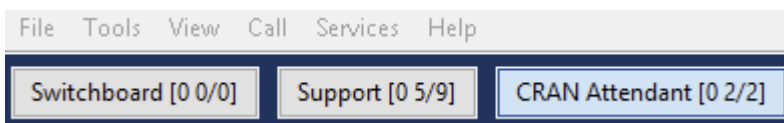
16.2.1 Queue distribution

There are a few settings that affect how the queue is being handled and how calls are being distributed. These settings are controlled by the administrator. This section lists a few of these settings.
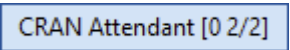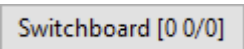
Setting	Description
Destination of calls	The administrator can set which types of devices the calls are distributed to. Your own personal call routing rules will not apply for distribution of calls.

Setting	Description
Distribution of calls	The administrator can set after how many seconds the call should go to the next attendant or agent. Also if the presence state affects the distribution of the calls. That means if no attendants or agents are logged in and in the **Available** presence state, the call will be forwarded to a pre-set number.
Queue overflow for incoming calls	Queue overflow happens when a pre-set amount of users in the queue are exceeded, or if the maximum waiting time is exceeded. When any of this happens, the incoming call either gets a busy tone or is forwarded to another pre-set number.
Handling of queued calls	Queued calls can be forwarded to a pre-set number when the caller has been waiting in queue more than a set number of minutes. If no attendant or agent is logged in and is in the **Available** state, the queued call can also be forwarded to a set number. If the configured number of distribution attempts have been exceeded, the queued call can be forwarded to the no attendant number.
Missed calls	The administrator can set so after a number of missed calls you are logged out of the distribution group.

16.3 Group login

You can see your login status on the group buttons on top of the application window, and log in or log out by pressing the buttons.

The login/logout buttons are highlighted for the groups you are logged into:

- CRAN Attendant [0 2/2] – You are logged in to the group. Click to log out.
- Switchboard [0 0/0] – You are logged out from the group. Click to log in.

16.4 Manager assistance

When logged on as an ACD agent, it is possible to request assistance from a manager by calling a predefined number.

Click **Help Me** in the ACD agent view to call for manager assistance.

16.5 SMS messages

You can send SMS messages with the ACD number as from number, if this is configured on the server. See Send SMS(see page 48), Send group SMS(see page 48), and Send group Email(see page 49) for more information.

16.6 Group log (ACD)

The **Group log** view displays the call log for ACD groups that you are member of.

For more information, see Group log.

To view the ACD group log

- Click the **Group log** tab in the desktop application.

16.7 Queue statistics and Agent statistics (ACD)

An ACD supervisor who is authorized to supervise specific groups, can see the widgets **Queue statistics** and **Agent statistics** for these groups. They appear as extra tabs in the **Standard view** and the **Attendant view**. Using the widgets, the supervisor can see the statistics for the groups, and log in and log out agents to these groups.

16.7.1 Queue statistics

The **Queue statistics** widget shows all the ACD and attendant groups you are authorized to supervise, and lets you log in and log out agents to these groups. The statistics is presented in the administrator configured running time span.

- **Group** – The name of the group. Click on the group to expand it. When expanded, the group provides:
  - Agent members of the group, with logged out agents having names in grey.
  - Agent status.
  - Skill, where skill 1 is the highest and 5 the lowest skill.
  - A button to log in or log out the agent to or from the group.
- **# in queue** – Number of persons in the queue.
- **Last wait** – The time in minutes:seconds the last picked up call waited before the call was picked up.
- **Avg wait** – The time in minutes:seconds the average call in the configured time span waited before the call was picked up.
- **Dropped** – The number of calls that were hang up by the callers before they were picked up.

16.7.2 Agent statistics

The **Agent statistics** widget shows all the info provided by the **Queue statistics** widget, but it is sorted by agent name instead of group name.

17 Troubleshooting

This section describes issues you may encounter and how to resolve them.

My administrator has added me to an ACD or Attendant group but I cannot see the login button.

You need to restart your application for the updates to load.

18 Desktop application product specification

18.1 **Functionality**

The table below lists the functionality that is included in the desktop applications. It indicates the functions that are provided with the different license types available for the solution and also the devices that are possible to use with the function.

Service Node License - Call Routing		
Function	**Desktop application for PC and Mac**	**Web application**
Presence related call routing rules	x	x
Night mode call routing rules	x	x
User/group specific called number conversions	x	
Service Node License - Trunk and Device Configuration		
Function	**Desktop application for PC and Mac**	**Web application**
Desktop application for PC and Mac distribution	x	
Desktop application for PC and Mac configuration	x	
Automatic software updates	x	
Provisioning of Diffserv/TOS QoS settings	x	
Service Node License - General		
Function	**Desktop application for PC and Mac**	**Web application**
Custom login identifier	x	x
Service Node License - Media Services		

Function	Desktop application for PC and Mac	Web application
Recording of prompts through phone	x	
User/group specific music on hold	x	
Voicemail personal greeting configuration	x	
Service Node License - Presence and Call-state Services		
Function	**Desktop application for PC and Mac**	**Web application**
Contact list management	x	x
Service Node License - Group Numbers		
Function	**Desktop application for PC and Mac**	**Web application**
Selection of hunt group target device type	x	
Sequential hunting	x	
Parallel hunting	x	
Sequential parallel hunting	x	
UC User License - General		
Function	**Desktop application for PC and Mac**	**Web application**
New voicemail indication	x	
Missed call indication	x	
UC User License - General		
Function	**Desktop application for PC and Mac**	**Web application**
ACD Agent login/logout	x	

| ACD Light login/logout | x | |
| Attendant login/logout | x | |

UC User License - Call Routing Functions

Function	Desktop application for PC and Mac	Web application
Callback from personal queue	x	
Call intrusion	x	
Directed Call pickup	x	
Common Call pickup	x	
User configured call routing rules	x	x
Diversion bypass	x	
Take active call from other device	x	
Move call to other device	x	
Night mode override	x	
Set active diversion number	x	
Intercom call	x	

UC User License - Presence and Call handling

Function	Desktop application for PC and Mac	Web application
Update presence information	x	x
View active calls	x	
Delegated right to set other users' presence	x	

Microsoft exchange calendar information display	x	

UC User License - Unified Messaging

Function	Desktop application for PC and Mac	Web application
Initiate call recording	x	
Access to recorded calls	x	x
Fax message retrieval	x	x
Voicemail retrieval	x	x
Chat	x	x

Business Line User License - General

Function	Desktop application for PC and Mac	Web application
New voicemail indication	x	
Missed call indication	x	
ACD Agent login/logout		
ACD Light login/logout		
Attendant login/logout		

Business Line User License - Call Routing Functions

Function	Desktop application for PC and Mac	Web application
Callback from personal queue	x	
Call intrusion		

Directed Call pickup		
Common Call pickup		
User configured call routing rules		

Business Line User License - Call Routing Functions		
Function	**Desktop application for PC and Mac**	**Web application**
Diversion bypass		
Take active call from other device	x	
Move call to other device	x	
Night mode override	x	
Set active diversion number	x	
Intercom call		

Business Line User License - Presence and Call handling		
Presence can be set, but is not visible for Business Line Users.		
Function	**Desktop application for PC and Mac**	**Web application**
Update presence information	x	
View active calls		

Business Line User License - Unified Messaging		
Function	**Desktop application for PC and Mac**	**Web application**
Initiate call recording	x	

Access to recorded calls	x	x
Fax message retrieval	x	x
Voicemail retrieval	x	x
Chat		
MiTeam User License		
Function	**Desktop application for PC and Mac**	**Web application**
Peer-to-peer chat	x	
Group chat	x	
Follow-me chat history	x	
Add files/pages in chats	x	
Annotate files/pages in chats	x	
Comment on files/pages in chats	x	
To do/tasks in chats	x	
Start and attend Instant Meets	x	
Start and attend scheduled Meets	x	
Meet - text chat	x	
Meet - To do/task handling	x	
Meet - Screen share	x	
Meet - File share	x	
Meet - Whiteboard share	x	

Meet - Stream file share	x	
Meet - Voice meet option via dial in	x	
Meet - Video meet option	x	
External guest invitation	x	

Voice meet License		
Function	**Desktop application for PC and Mac**	**Web application**
Voice meet dial in numbers configuration		
Voice meet booking	x	x
Scheduled voice meet notification		
Click to dial link in voice meet invitations		

Attendant License		
Function	**Desktop application for PC and Mac**	**Web application**
Attendant distribution considering agent presence	x	
Attendant group numbers	x	
Skill based attendant routing	x	
Group associated manager assistance	x	
Attendant group related call information display	x	
Automatic agent logout after maximum missed calls	x	
Queue fallback based on longest waiting time	x	

Queue fallback based on queue length	x	
Camp on	x	
Multiple attendant group login support	x	
Welcome message prompt	x	
Placed in queue message prompt	x	
Queue progress message prompt	x	
Queue waiting message prompt	x	

ACD Light License

Function	Desktop application for PC and Mac	Web application
ACD agent distribution considering agent presence	x	
ACD agent group numbers	x	
Skill based ACD agent routing		
Group associated manager assistance		
ACD agent group related call information display		
Automatic agent logout after maximum missed calls		
Queue fallback based on longest waiting time		
Queue fallback based on queue length	x	
Multiple ACD agent group login support	x	

Welcome message prompt	x	
Placed in queue message prompt		
Queue progress message prompt with configurable repeat interval	x	
Queue waiting message prompt		
Queue position prompt		
Send SMS from group number		

ACD Agent License

Function	Desktop application for PC and Mac	Web application
ACD agent distribution considering agent presence	x	
ACD agent group numbers	x	
Skill based ACD agent routing	x	
Group associated manager assistance	x	
ACD agent group related call information display	x	
Automatic agent logout after maximum missed calls	x	
Queue fallback based on longest waiting time	x	
Queue fallback based on queue length	x	
Multiple ACD agent group login support	x	
Welcome message prompt	x	

Placed in queue message prompt	x	
Queue progress message prompt with configurable repeat interval	x	
Queue waiting message prompt	x	
Queue position prompt	x	
Send SMS from group number	x	

ACD/Attendant Supervisor License		
Function	**Desktop application for PC and Mac**	**Web application**
ACD group statistics widget	x	
ACD agent statistics widget	x	
ACD supervisor login/logout of agents	x	
Override of group nightmode settings	x	

Outbound Caller ID		
Function	**Desktop application for PC and Mac**	**Web application**
Possibility to set outbound Caller ID	x	

18.2
Device Functionality

The table below list the functionality that is available from the different PC and mobile applications provided by MiCloud Telepo for Service Providers.

The list contain functionality that may require use of functionality that require separate licenses from the Business Communication Server. For example the ACD supervisor related functions will require an ACD supervisor license.

General			
Function	**Desktop application for Windows**	**Desktop application for Mac**	**Web application**

Support for multiple network interfaces	x	x	x
Support for laptop standby/hibernate	x	x	x
Automatic user login	x	x	
Support for multiple Windows user accounts	x		
Remote configuration	x	x	x
Online help	x	x	x
Automatic application start	x	x	
Configurable keyboard command shortcuts	x	x	
Use behind NAT	x	x	x
Automatic login to service	x	x	x
Automatic software update notification	x	x	x
Easy access via bookmarks in browser			x
Configuration of QoS IP TOS/Diffserv values	x	x	x

Call handling

Function	Desktop application for PC	Desktop application for Mac	Web application
Multiple active calls	x	x	
Call pickup	x	x	
Call park/resume	x	x	
Call hold/resume	x	x	

Decline calls	x	x	
Call transfer unattended	x	x	
Call transfer attended	x	x	
Call recording	x	x	
Auto answer	x	x	
Conference calls	x	x	
DTMF	x	x	
Call notification	x	x	
Place Desktop application for PC and Mac call from MS Office	x		
Place mobile call from MS Office	x		
Place desk phone call from MS Office	x		
Place call	x	x	
Move local conference mixing to server	x	x	
Move active call to mobile	x	x	
Move active call to desk phone	x	x	
Diversion bypass indication	x	x	
Place call as user role	x	x	
Intercom call setup	x	x	
Call routing rule editor	x	x	
Conference call booking	x	x	

Night mode override	x	x	
Short number dialing	x	x	
Retrieve active mobile call	x	x	
Retrieve active desk phone call	x	x	
Initiate call-back call to mobile phone	x	x	x
Initiate call-back call to desk phone	x	x	x
Initiate call-back call to Desktop application for PC and Mac			x
Initiate direct calls when run from iPhone, Android or Windows Phone web browser			x

Call related information display

Function	Desktop application for PC	Desktop application for Mac	Web application
Screen pop with Outlook contact info	x	x	
Call transferrer information	x	x	
Call diversion information	x	x	
SIP subject information	x	x	
Remote party name	x	x	
Remote party number	x	x	
Voice quality indicator	x	x	
Asserted remote identity indication	x	x	
Media encryption indication	x	x	

Audio

Function	Desktop application for PC	Desktop application for Mac	Web application
Acoustic echo cancellation	x	x	
Enhanced background noise reduction	x	x	
Speaker-phone audio profile	x	x	
Headset audio profile	x	x	
Mute	x	x	
Microphone mute detection	x	x	
Speaker mute detection	x	x	
Volume control	x	x	
Automatic selection of the best codec	x	x	
Automatic gain control	x	x	
Ringer device configuration	x	x	
Communication log			
Function	Desktop application for PC	Desktop application for Mac	Web application
Missed call history	x	x	
Received call history	x	x	
Placed call history	x	x	
Time and date in communication log	x	x	
Re-dial from communication log	x	x	
Add contact from log entry	x	x	

Presence and directory and messaging			
Function	**Desktop application for PC**	**Desktop application for Mac**	**Web application**
Message waiting indicator	x	x	
Missed call indicator	x	x	
Directory search with presence information	x	x	x
Contact photo	x	x	x
Contact business card information	x	x	x
Contact in-call information	x	x	x
Contact activity information	x	x	x
Contact activity expiration information	x	x	x
Contact role information	x	x	x
Contact personal note information	x	x	x
Contact do not disturb information	x	x	x
Contact idle indication	x	x	x
Update personal presence information	x	x	x
Auto completion directory search	x	x	x
Multiple field free text search	x	x	x
Voicemail inbox access	x	x	x
Fax inbox access	x	x	x
Recorded call access	x	x	x

Contact list management	x	x	x
Server stored contact list	x	x	x
Chat	x	x	x
Chat time stamps	x	x	x
Local outlook contact search	x		
Notification of expired presence activity	x	x	x
Send SMS	x	x	x
Send email	x	x	x

MiTeam User License			
Function	**Desktop application for PC**	**Desktop application for Mac**	**Web application**
Peer-to-peer chat	x	x	
Group chat	x	x	
Follow-me chat history	x	x	
Add files/pages in chats	x	x	
Annotate files/pages in chats	x	x	
Comment on files/pages in chats	x	x	
To do / tasks in chats	x	x	
Start and attend Instant Meets	x	x	
Start and attend scheduled Meets	x	x	
Meet - text chat	x	x	

Meet - To do / task handling	x	x	
Meet - Screen share	x	x	
Meet - File share	x	x	
Meet - Whiteboard share	x	x	
Meet - Stream file share	x	x	
Meet - Voice meet option via dial in	x	x	
Meet - Video meet option	x	x	
External guest invitation	x	x	

Security

Function	Desktop application for PC	Desktop application for Mac	Web application
HTTPS configuration	x	x	x
SIP/TLS	x	x	
SIP authentication	x	x	
HTTP authentication	x	x	x
Emergency call warning for unknown locations	x	x	

ACD/Attendant

Function	Desktop application for PC	Desktop application for Mac	Web application
Keyboard shortcut commands	x	x	
ACD view	x		
ACD manager assistance help button	x		

Attendant view	x	x	
Drag and drop call transfer	x	x	
Queue monitoring	x	x	
Pick up selected call from queue	x	x	
Queue statistics information	x	x	
ACD agent/attendant login/logout	x	x	
Microsoft Exchange calendar information display of contacts/directory search results	x	x	
Queue statistics information of groups to which agent belong	x	x	
Delegated right to update of other users' presence information	x	x	
Camp on	x	x	

Voice Codec support

Function	Desktop application for PC	Desktop application for Mac	Web application
G.711 µLaw	x	x	
G.711 aLaw	x	x	
iLBC	x	x	
G.722	x	x	
ISAC	x	x	
AMR	x	x	
AMR Wideband	x	x	

Opus	x	x	
DTMF out of band support	x	x	
Outbound Caller ID			
Function	**Desktop application for PC**	**Desktop application for Mac**	**Web application**
Possibility to set Outbound Caller ID	x	x	

18.3 App Requirements

18.3.1 Setup

> ⚠ For supported versions of Windows, macOS, OS X, Exchange calendar and Outlook plugin, please see the
> *Compatibility Matrix, on Solution level.*

The app runs on both PC and Mac (Intel). Minimum requirements for PC is 30 MB free hard drive space and a sound card.

We recommend using a USB headset since many built in sound cards have poor microphone connections.

18.3.1.1 Headsets

The application works with most headsets, USB connected or wireless. However, if you also want to use features (apart from volume control) from a headset to control the calls, headsets from Plantronics and from Jabra are supported. In addition, other headsets may support call control through integration by the vendor. Please check with your headset vendor whether this is the case of your headset.

Plantronics headset support is included for PC and Mac, and Jabra headset support is included for PC. Note that Plantronics does not support Bluetooth connection with PC or Mac, and that Jabra headsets are not supported on Mac. Depending on headset model, you will get different supported features. All headsets support answering call, hanging up a call and receiving a second incoming call. Depending on model, you can also have functions such as reject call, hold, swap between ongoing calls, mute, ringtone in headset, and caller ID, in addition to the headset volume control.

> ⚠ Connecting multiple headsets to a computer is not supported.
> Dialing from a headset is not supported.

18.3.1.2 Web app requirements

The web app does not need to be installed on the user's local machine and runs in the web browser. Softphone Light has been tested to run properly in the web browsers Mozilla Firefox, Google Chrome, Safari and Microsoft Internet Explorer.

> ⓘ For supported versions of web browsers, please see the *Compatibility Matrix, on Solution level.*