Alcatel-Lucent OpenTouch™ Conversation for PC

User guide
R2.0.2
1. OpenTouch™ Conversation for PC ................................................................. 3
2. Start OpenTouch™ Conversation ............................................................... 3
3. Homepage description ................................................................................. 4
4. Conversation wall ....................................................................................... 4
5. Favorites ........................................................................................................ 5
6. Call Routing .................................................................................................. 5
7. Presence ......................................................................................................... 5
8. Contact card .................................................................................................. 6
9. Meeting card .................................................................................................. 7
10. Add contact to favorites ............................................................................... 7
11. Make a Conversation ................................................................................... 8
12. Search a contact ......................................................................................... 9
13. Receiving a conversation .......................................................................... 9
14. During a conversation .............................................................................. 10
14.1 Screen description .................................................................................. 10
14.2 Add participants to a conversation: Conference ................................... 10
15. Visual Voice Mail ..................................................................................... 11
16. Meeting ..................................................................................................... 12
16.1 Create a meeting .................................................................................... 12
16.2 Secure access to the meeting ............................................................... 13
16.3 Consult the meeting list ........................................................................ 13
16.4 Modify a future meeting ....................................................................... 14
16.5 Modify information about the meeting ................................................. 14
16.6 Upload a document for a meeting ....................................................... 15
16.7 Join a meeting ....................................................................................... 16
16.8 During the meeting: ........................................................................... 16
16.9 Share a document during a meeting .................................................... 17
17. Settings .................................................................................................... 18
17.1 Add a photo for your avatar .................................................................... 18
17.2 Preferences ........................................................................................... 18
17.3 Predefined numbers ............................................................................. 19
17.4 Call routing profiles ............................................................................ 19
17.5 Call overflow .......................................................................................... 20
17.6 Ringing .................................................................................................... 20
17.7 Audio and Video device preferences .................................................... 20
18. OpenTouch™ Conversation for Microsoft© Outlook© ............................... 21
18.1 Supported versions of Office are: ....................................................... 21
18.2 Start OpenTouch Conversation integration ........................................ 21
18.3 OpenTouch Conversation services ...................................................... 21
18.4 Make a conversation ............................................................................. 22
18.5 Listen to a voice message .................................................................... 22
18.6 Recording a message .......................................................................... 23
18.7 Presence information .......................................................................... 23
18.8 User options ......................................................................................... 23
19. Microsoft© Lync™ user .......................................................................... 24
19.1 Supported version ................................................................................ 24
19.2 OpenTouch conversation features with a Lync contact ....................... 24
1. **OpenTouch™ Conversation for PC**

OpenTouch™ Conversation for PC combines voice, video and data services with media blending capabilities through a single, intuitive user interface.

2. **Start OpenTouch™ Conversation**

You can log on automatically when starting a Windows session. OpenTouch™ Conversation remains active throughout the Windows session.

Click the OpenTouch™ Conversation icon on your desktop to start the application.

Enter the username and password. Validate the *Remember password* checkbox to automatically sign in every time you start the application.

If you are outside your company, you have to enter OpenTouch remote access credentials and OpenTouch public server address.

When connected, the application is displayed on the screen.

Some features might appear grayed. This means that those features are not available on your system.
3. Homepage description

1. User Banner.
2. VoiceMail, Meeting, Directory PhoneBook, Keypad.
4. Community of Favorites: Quick access to your preferred contacts, including presence.

4. Conversation wall

The Conversation Wall contains the history of all your conversations and meetings (past and future meetings).

Each user contact or conference event is represented once by a contact card or a meeting card.

Swipe left to see future conversation events or right to see past conversation events.

The Wall is divided into 3 parts:

- Past conversations and meetings.
- Today's conversations and meetings.
- Future meeting.

The avatar of the person you are in communication with is displayed in the conversation area.

The badge contains the icon associated with the media used during conversation (phone, IM, meeting, voice mail).

Select a conversation to open the corresponding card.
5. Favorites

Favorites give you faster access to your preferred contacts.

- You can close or open the Favorites by clicking on the star.
- The presence of your contact is displayed under his/her avatar.
- Use the alphabetical list to find your preferred contacts quickly.
- Open the contact card of your contact by selecting your favorite caller.

6. Call Routing

1. Select the Current Profile (in the user banner).
2. Select a profile...
3. You can customize your current profile.
   a. Define which device will be used for the outgoing call.
   b. Select which devices will ring when you receive an incoming call.

   The selected Call Routing is displayed in the user banner (in red if incoming calls are not routed to your personal computer, otherwise in white).

You can access this feature from the system tray by selecting the OpenTouch Conversation icon.

7. Presence

The color bar under the avatar represents your current presence or the presence of your caller:

- Available.
- Busy/In conversation.
- Be right back.
- Offline.
Your presence is also displayed under your name.

1. To change your presence, select the User banner
2. Select your new Presence status

Your new presence status is displayed in the user banner.

You can access this feature from the system tray by selecting the OpenTouch Conversation icon.

8. Contact card

A contact card represents a person.

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

A card contains 3 pages:

- The first page displays the main information about your contact: picture or avatar, nickname or name, favorite icon. The presence of your contact is also displayed.
- Select left arrow to access the next page.
- The second page is your conversation history with this contact. If the history is empty, the page is not displayed. Unread events are in red. The contact card opens directly on History if you have any unread events (voicemail, missed call). From this page you can call back a missed call directly by selecting it.
- Select left arrow to access the next page.
- This page contains more information about your contact: full name, company name, job title, addresses, phone numbers, email,… The default phone number is displayed in bold.
- Open the menu to delete the current card from the conversation wall. Confirmation is requested if there are unread events with the contact.
- The picture or avatar of a federated contact such as a Lync contact is marked with a specific icon. In this case, the presence is displayed only if the contact has agreed to publish presence information.
- Close the card.
9. Meeting card

A meeting card represents a group of persons. Open a meeting card by selecting a meeting in the conversation wall. A card contains 2 pages:

- The first page displays random profiles of all participants of the meeting.
- Select left arrow to access the next page.
- The second page lists all participants of the meeting.
- From this card you can edit or delete the meeting.
- Close the card.

10. Add contact to favorites

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

- Select the star or the corresponding button.
- Your caller is added to your favorites.
- Unselect the star or select the corresponding button to remove the contact from your Favorites.
11. Make a Conversation

Open a contact card:

- By searching for your caller.
- By using the wall or the favorites.

When the contact card is opened, you can set up the types of conversation that are enabled (depends on the contact and the system).

- Send an instant message.
- Make an Audio call...
- Make a Video call...

You can key in a contact's number directly:

- by entering the number in the textbox (with <Enter> key).
- by using the keypad:
  1. Open the keypad.
  2. Enter your caller's number.
  3. Make an Audio call... / Video call.
12. **Search a contact**

- Enter the name of your caller.
- Search is immediately done on local contacts.
- To perform a search on your business phonebook, press the <Enter> key in the search bar.
- For detailed information on the user and access to other options, click on the search result picture to open the contact card.

13. **Receiving a conversation**

You receive a conversation. A pop-up appears on screen.

- Accept audio conversation.
- Accept video conversation.
- Accept Instant message conversation.
- Divert the incoming call to voicemail.
- Reply with an Instant Message or divert the incoming call to a predefined number.
14. During a conversation

14.1 Screen description

You are in conversation:

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Hang up the conversation.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Divert the conversation to a predefined device (mobile, desktop phone).</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Silence, so that your caller can not hear you.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Start a video conversation with your caller.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Start Instant Messaging with your caller.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Share document.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Create a meeting.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Add a participant to the conversation.</td>
</tr>
<tr>
<td>🔧</td>
</tr>
<tr>
<td>Settings.</td>
</tr>
<tr>
<td>📞</td>
</tr>
<tr>
<td>Send DTMF.</td>
</tr>
<tr>
<td>🔊</td>
</tr>
<tr>
<td>Set the volume.</td>
</tr>
</tbody>
</table>

During the conversation you can consult the conversation wall (information in a contact card, meeting details, etc.) by closing the conversation screen. Select the current conversation in the Conversation Wall to go back to the conversation screen.

14.2 Add participants to a conversation: Conference

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

1. 🌐 Add a participant by creating a new conversation.
2. Call a new participant by using your favorites or by entering a name (search) or number in the text field.
   - Open the person’s contact card.
   - Add the contact to the conference.
You are in conference with all participants.

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a new participant.</td>
</tr>
<tr>
<td>List all conference participants.</td>
</tr>
<tr>
<td>Remove a participant from the conference.</td>
</tr>
<tr>
<td>Hang up the conversation.</td>
</tr>
<tr>
<td>Divert the conversation to a predefined device (mobile, desktop phone).</td>
</tr>
<tr>
<td>Silence, so that your caller can not hear you.</td>
</tr>
<tr>
<td>Start a video conversation with your caller.</td>
</tr>
<tr>
<td>Start Instant Messaging with your caller.</td>
</tr>
<tr>
<td>Share document.</td>
</tr>
<tr>
<td>Create a meeting with all participants.</td>
</tr>
<tr>
<td>Settings.</td>
</tr>
<tr>
<td>Send DTMF.</td>
</tr>
<tr>
<td>Set the volume.</td>
</tr>
</tbody>
</table>

15. Visual Voice Mail

1. You have new voice messages (the number of new messages is displayed).
2. Open your visual voicemail.

All read and unread messages are displayed.

3. Select the message to listen to.
   - Listen to the messages / Resume playing the message.
   - Pause listening to the message.
   - Delete the message.

4. Delete all voicemails.
5. Consulting your voice mailbox
16. Meeting

16.1 Create a meeting

- Create a meeting from the wall
  - Select the meeting icon.
- Create a meeting from a contact card
  - Select the create meeting menu.
- During a conversation or a conference create a meeting with the same participants
  - Select the meeting icon.

Depending on the way the meeting is created, the meeting parameter form is filled with the associated users.

- Confirm the meeting.
16.2 Secure access to the meeting

You can secure access to the meeting using a password.

- Select the password tab.
- Set the audio and online meeting passwords.
- Confirm the meeting.

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

- Display the password policy.

16.3 Consult the meeting list

The meeting list is displayed by selecting the meeting icon. The meeting list contains your own meetings (scheduled and reservationless) and meeting invitations from other users. To display details of the meeting (meeting card), double click on the meeting.
16.4 Modify a future meeting

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

![Meeting card and meeting list](image)

16.5 Modify information about the meeting

The first tab enables the user to modify the main meeting information: name, date, etc.

![Schedule an OpenTouch meeting](image)

The details tab contains all the information you need to join the meeting without the OpenTouch Conversation for PC application: URL to join the online meeting, number to join the meeting by phone and access codes. From this page you can send an email containing all the information needed to join the meeting to any contacts (OpenTouch user, external user or federated user such as Lync user).
Add or remove a participant from an upcoming meeting

1. Select the tab which lists all participants.
2. Add a participant by selecting them in your favorites or by entering their name or email address.
3. Define a participant as meeting leader. Drag and drop the avatar to make them a participant or leader. A meeting leader can add or remove a participant, share a document, and cancel the meeting.
4. Remove a selected participant.
5. Update the meeting.

16.6 Upload a document for a meeting

1. Select the tab which lists all shared documents.
2. Add a document for an upcoming meeting.
3. Remove a document from the list.
4. Update the meeting.
16.7 Join a meeting

When the meeting is started, you receive notification.

- Join a meeting.
- Join the meeting without audio.
- Repeat the notification in 5 minutes.
- Dismiss the notification.

You can join the meeting from the conversation wall by opening the meeting card:

- Join a meeting.

The meeting is started with the multimedia device (OpenTouch Conversation for PC) for its capability to use instant messaging, video and audio features during the meeting.

If you don't have access to your OpenTouch Conversation for PC application, you can join the meeting online using the meeting URL, or by phone using the phone number and access codes. You can find this information in the details tab of the meeting settings.

16.8 During the meeting:

- End the meeting.
- Add a new participant.
- Start a video conversation (system dependent).
- Start Instant Messaging (system dependent).
- Share a document during a meeting.
- Mute/unmute the selected participant.
- Remove the participant.

The name of the speaker is displayed under the conversation card and their avatar is highlighted in the participants view.
16.9 Share a document during a meeting

- Share a document during a meeting.
- Share the uploaded document.
- Download the document to your personal computer.
- Delete the document.

- Display the document in full screen mode.
- Display thumbnails of document pages.
- Add a new document to shared documents.
17. Settings
Open the settings page by selecting your current avatar/photo in the user banner.

17.1 Add a photo for your avatar

1. Select the relevant tab.
2. Choose a photo in the list or browse your computer to find a new photo.

17.2 Preferences

Define preferences for OpenTouch™ Conversation:
- Automatically start the application when logging on to Windows.
- Automatically sign in to the application when it starts.
- Display order: choose how to display the name.
- Language.
- Predefined professional and personal numbers.
- Call routing profiles.
- Call overflow.
- Audio and Video device preferences.
17.3 Predefined numbers

Define professional and personal numbers. Use these predefined numbers to define or customize profiles or to divert a conversation.

17.4 Call routing profiles

1. Create a new profile.
2. Customize existing profile.
17.5 Call overflow

Define how to manage a call when you do not reply and/or are busy.

17.6 Ringing

1. Define the ringtone.
2. Define the ringtone volume.

17.7 Audio and Video device preferences

Select the webcam, microphone and speakers you want to use for video and audio calls.
18. **OpenTouch™ Conversation for Microsoft© Outlook©**

The OpenTouch Conversation provides a high level of service when associated to Microsoft Outlook. Integration is performed through an “add-in” client, telephony and messaging services and personal contact search capabilities.

18.1 **Supported versions of Office are:**

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

The screenshots are examples, provided from Outlook 2013.

18.2 **Start OpenTouch Conversation integration**

1. Check that OpenTouch Conversation for PC is started

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

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

18.3 **OpenTouch Conversation services**

OpenTouch Conversation services are depended on user’s permission and context. The corresponding button is displayed only if the associated action is currently possible.

<table>
<thead>
<tr>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make an audio call</td>
</tr>
<tr>
<td>Make a video call</td>
</tr>
<tr>
<td>Send an instant message</td>
</tr>
<tr>
<td>Play/replay a voice message (received or recorded)</td>
</tr>
<tr>
<td>End the active conversation</td>
</tr>
<tr>
<td>Record a voice message to send by email</td>
</tr>
<tr>
<td>Reply with an instant message</td>
</tr>
</tbody>
</table>

OpenTouch Conversation is integrated to Outlook interface:
• In the Outlook ribbon of the home tab, the contact tab or of the message window

• In the contextual menu by right clicking on email, contact, ....

• In the respond menu of Outlook

• In contact card

18.4 Make a conversation

According user’s permission and Opentouch Conversation for PC configuration, you are able to start a video, audio or instant message conversation with Outlook contacts. All conversations are managed by the OpenTouch Conversation for PC.

You can make a conversation from:

• An email with the sender or any recipients
• A contact card

The phone number to dial can be selected if several numbers are available.

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

18.5 Listen to a voice message

• 🎧: indicates a voice message received via email (when using the unified messaging store based on the email server).
• Select the email
• ▶ Play/replay a voice message (contextual menu or ribbon)
18.6 Recording a message

- : add a voice message (.wav file) to an email (new mail, reply or forward).
- The current phone will ring and you will be able to record the message.
- The current recording ends (see also below) when the recording is attached to the email, replayed, cancelled, or if a new recording is started. Several recordings can be added to an email.

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

18.7 Presence information

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

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

18.8 User options

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

Once you have accessed the user options, you can select or populate the below fields:

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

2. When receiving an incoming call, an Outlook contact card can be displayed if the calling party can be identified from Outlook Personal Folders or the Exchange Global Address List. Contact cards can be created for calling parties that are not recognized.
19. **Microsoft© Lync™ user**

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

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

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

19.1 **Supported version**

- Microsoft© Lync™ server 2013
- Microsoft© Lync™ 2013

19.2 **OpenTouch conversation features with a Lync contact**

Use your OpenTouch conversation application with a Lync user as another contact.

<table>
<thead>
<tr>
<th>![Icon]</th>
<th>The picture or avatar of a Lync contact is marked with a specific icon.</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Your presence and the presence of the Lync contact are displayed in Lync and OpenTouch Conversation if you and the Lync contact have agreed to publish presence information when prompted.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>All types of conversations are possible but depend on the configuration of the Lync contact (instant messaging, audio, video, email). Features appear grayed if not available.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>During conversation with the Lync contact, features depend on the configuration of the Lync contact. Features appear grayed if not available. If you can start another type of conversation, this conversation won’t be correlated with the current conversation. Two conversations are displayed on the wall. It’s not possible to add a participant during a conversation with a Lync contact.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>During a conversation with an OpenTouch contact, you can add a Lync contact only as an audio participant if the Lync contact has a defined phone number.</td>
</tr>
</tbody>
</table>

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