



OmniTouch™ 8400 Instant Communications Suite

My Instant Communicator Desktop User guide

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My Instant Communicator for the Personal Computer

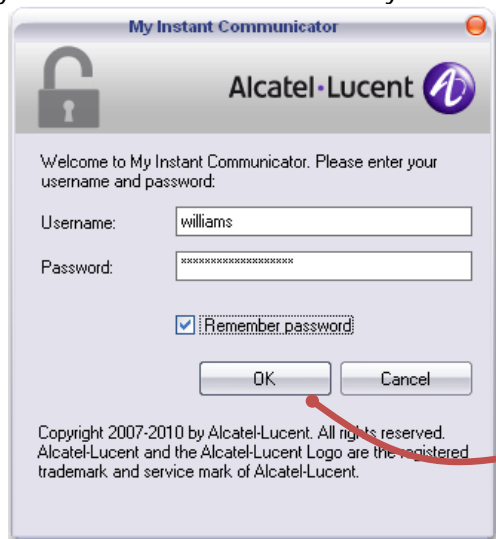
My Instant Communicator (MIC) for the Personal Computer combines voice, video and data services with media blending capabilities through a single, intuitive user interface. It either controls your hardphone or works in Softphone mode with high voice quality. My Instant Communicator helps you to:

- Easily manage your incoming and outgoing communications with rich presence information
- Get a snapshot of your activities (new voice mails, callback requests, missed calls)
- Simplify the management of your current communications
- Select the media of your choice for incoming and outgoing communications
- Quickly use advanced communication services (i.e. call routing, call logging, collaboration services)
- Quickly set your preferred phone set, presence status and personal options

Logging in

Logging in can be automatic when starting a Windows session. My Instant Communicator remains active throughout the Windows session.

Click the My Instant Communicator icon on your desktop to start the application:



Enter the username and password. Check the **Remember password** box to automatically sign in every time you start My Instant Communicator.



When connected, an icon in the status bar (System Tray) indicates incoming communications/events and your presence status:

Status/Information



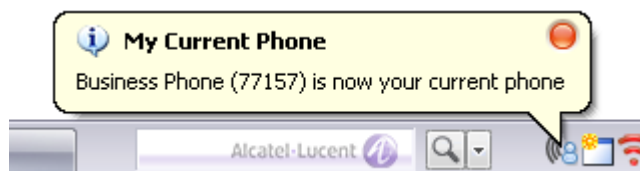
The My Instant Communicator icon provides immediate indication on the user and application status
Note: icons are theme dependant

- User is logged out
- User is logged in
- There is an incoming communication (e.g. voice call, instant message)
- There is an incoming event (new voice mail, missed call, callback request)
- There is no phone set associated
- User is away or out to lunch
- User is busy or on the phone
- User is offline
- Presence status is unknown

Hover the My Instant Communicator icon in the System Tray to display your current settings (presence status, preferred phone set, call forwarding):

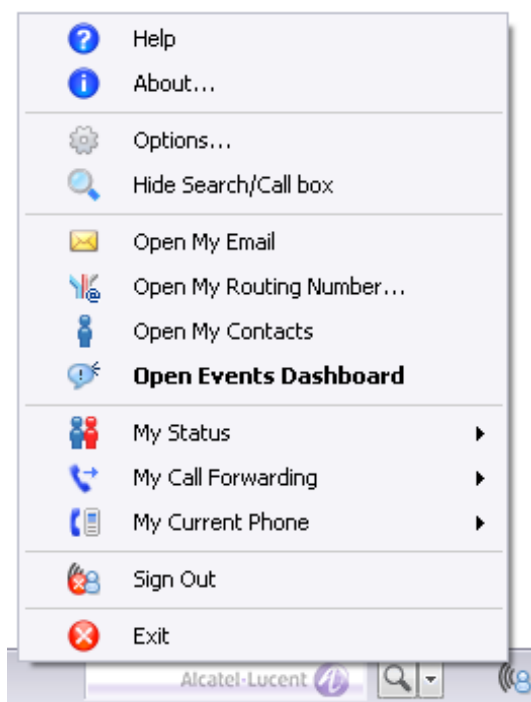


Bubble information is automatically displayed when setting your preferred phone set, routing rules or call forwarding:



Quick accesses to applications and settings

Left-click or right-click the System Tray icon to display the menu for quick accesses to applications and settings:



Help: open the help file
About: get product information

Options: set your preferences
Hide Search/Call box: view or hide the direct dial area

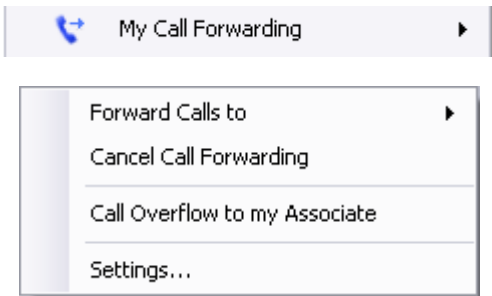
Open My Email: access your e-mail application
Open My Routing Number: open your call routing application
Open My Contacts: open your personal contact list (buddy list)
Open Events Dashboard: open your events dashboard (ongoing communications, notifications, call history); this is the default action when you double-click the MIC icon

My Status: set your presence status (online, busy, away, etc.)
My Call Forwarding: set where you want to forward your incoming calls
My Current Phone: set your preferred phone number for incoming/outgoing calls and conferences

Sign Out: log out
Exit: exit from My Instant Communicator application

Forward your calls

From the My Instant Communicator menu, indicate how you want to forward your incoming calls:



Forward Calls to: forward your incoming calls to the voicemail or another phone number (professional or personal number)

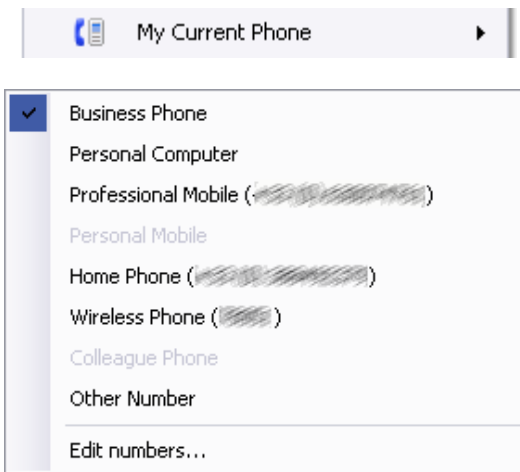
Cancel Call Forwarding: cancel the call forwarding
□□□□□□□□

Call Overflow to my Associate / Cancel Call Overflow to my Associate: incoming calls are forwarded to your associate / Call overflow to your associate is cancelled
□□□□□□□□

Settings: open your preferences for the call forwarding

Set your preferred phone

From the My Instant Communicator menu, set your preferred phone number for all incoming/outgoing calls and conferences:



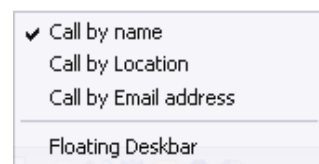
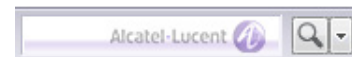
Use one of your professional or personal devices (or define any phone number) to set your preferred phone number for all incoming and outgoing calls, and keep your business phone identity

Direct dial area - Finding a party

To call a contact, either by number or by name, go to the search box on the status bar.

Type in the desired number or name, or drag and drop it from another application. Click on the magnifying glass icon (or press the Enter key) to start searching.

Call by name is the default search option. Use any other available option (defined by your administrator) to launch a search by department or skill (job title, branch office, etc.).



Floating Deskbar

The floating deskbar is the draggable version of the deskbar. It looks and works just like the deskbar, except you can drag it to anywhere you want on your desktop. It will always float above all other windows, so it's always visible and easily accessible.

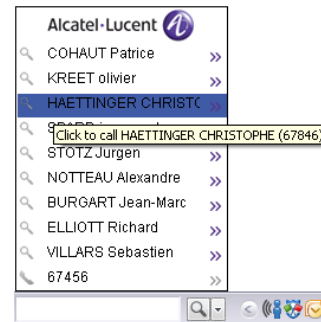
Use the same sequence key (e.g. CTRL+CTRL) to display/hide the deskbar on the desktop for on-demand accesses (sequence key can be customized via the *Options* menu).



Redial list

My Instant Communicator automatically displays a redial list (your last 10 entries) when clicking into the deskbar area.

Click to call the contact or the number you have selected. Click on >> to display the contact information card.



Predictive search

My Instant Communicator search engine provides a predictive function, where it will suggest contacts you might be looking for in advance of you completing your query.

Click to call the contact or the number you have selected. Click on >> to display the contact information card.










When calling by name, skill or department, the system performs directory lookups and provides a search result.

Results are retrieved from Microsoft Outlook contacts and corporate directories (LDAP directories, OmniTouch 8400 ICS database and PBX phonebook).



	Personal contact from Microsoft Outlook
	Contact from the PBX phonebook or OmniTouch 8400 ICS database
	Contact from LDAP directories

Select the contact of your choice to display his/her ID card. Following services are proposed:

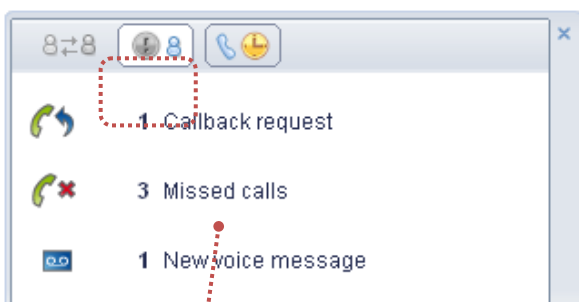
	Call the office phone. Use the presence indicator to check if the contact is on the phone or not.
	Send an instant message and use collaboration services. Use the presence indicator to check the contact's availability.
	Launch a video call (feature not available)
	Leave a voice mail to the party
	Call the party on a number different from their office phone (mobile, home, etc.)
	Add the party to your contact list (buddy list)
	Send an email



Events dashboard

Double-click the My Instant Communicator icon in the System Tray icon to open the events dashboard (or select **Open Events Dashboard** from the menu)

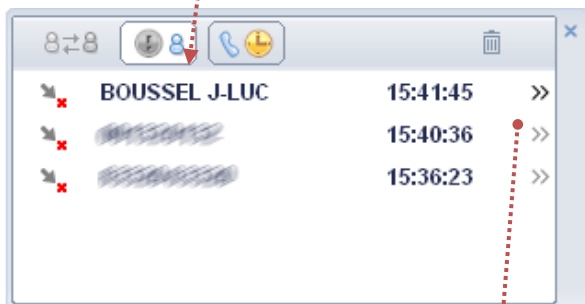
Notifications



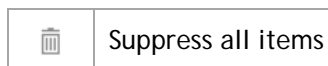
Click the notification icon to display the number of:

- Callback requests
- Missed calls
- New voice messages

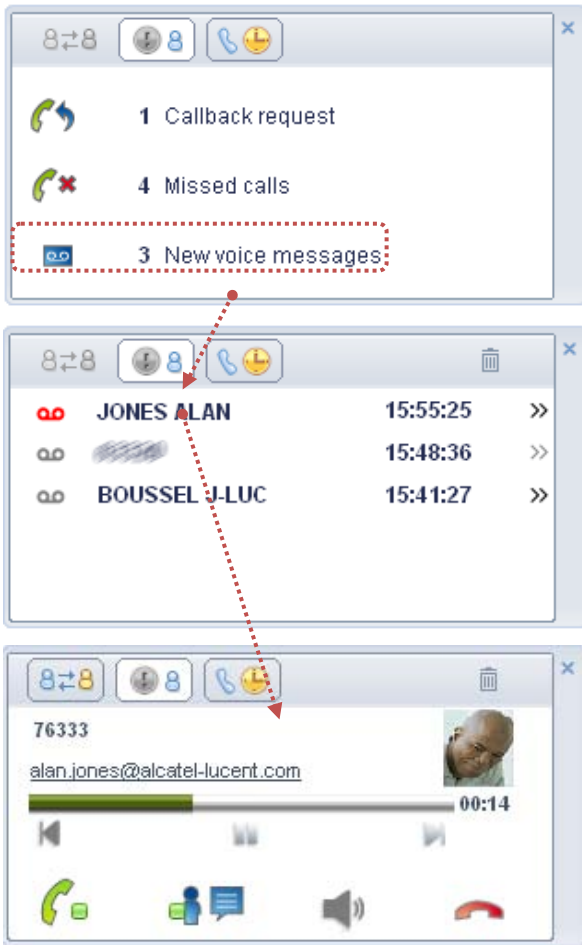
Click an item to display the corresponding list of events (example below with missed calls).



Select an entry to call the contact back or click on >> to display the contact information card for rich presence information and more services (send an IM, send an email, leave a voice message, etc.).



Visual voicemail



Click the number of new voice messages to instantly see the list of your corporate messages and select which ones to listen to or delete, without having to listen to prior messages or voice instructions.

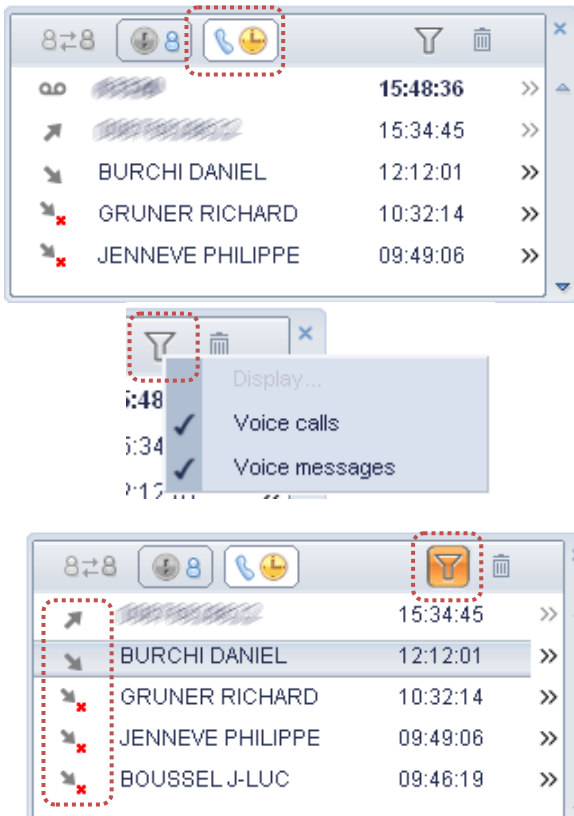
Select an entry to listen to the message (and more) or click on >> to display the contact information card for rich presence information and more services.

Right-click an entry allows you to suppress the message or accessing to the contact information card.

	Urgent messages have a red icon
	Suppress all items

	Playback bar to move forward or backward into the message
	Previous message, Next message
	Pause the message, Play/Resume the message
	Call the sender (use the presence indicator to check if the contact is on the phone or not)
	Send an IM (use the presence indicator to check the contact's availability)
	Send an email
	Activate/deactivate the speakerphone when using voice over IP on the PC
	Hang up the voice session
	Suppress the message

Call history



Click the call history button to display all of your incoming and outgoing calls.

- Click an entry to call the contact back
- Click on >> to display the contact information card for rich presence information and more services (send an IM, send an email, leave a voice message, etc.)

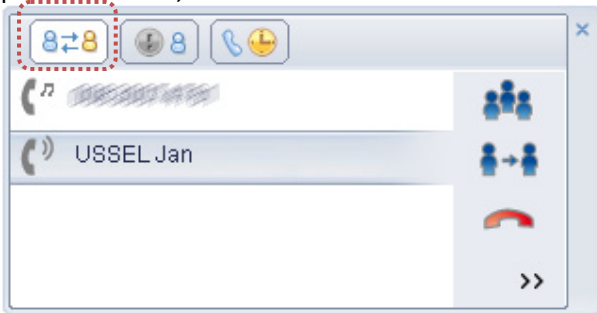
Click the filter button to display:

- Voice calls and voice messages
- Voice calls only
- Voice messages only

E.g. filtering activated for displaying voice calls only

In case of one or several undergoing communications, the same window provides an **overview of all current communications**

Example with two voice calls (one active, one placed on hold)



Example with one voice call and one instant message



Management of all simultaneous communication flows is exposed in a single interface. You will be able to:

- Display presence information
- Display the call state

	Destination party is busy
	Call is in progress
	Call is established
	Call is placed on hold
	Call is muted
	Call is released
	Call is encrypted

- Use telephony and data services

	End an active call
	Ask for a callback
	Leave a voice message
	Transfer an active call to a pre-defined number
	Make a 3-party conference call
	Make a 3-party conference call by selecting the participants (when there are more than 2 simultaneous voice communications)
	End a 3-party conference call
	Remove the latest participant of a conference call

	Leave a conference and connect the other participants of a 3-party conference call
	Place a call on hold (double-click an active call)
	Retrieve a held call (double-click a call placed on hold)
	Switch between active and held calls (select the new active call)
	Use this icon to: <ul style="list-style-type: none"> • Mute (Unmute) a call (when using voice over IP on the Personal Computer) • Use DTMF when reaching a voicemail or an IVR system • Send an email
	Start/Send an instant message and use collaboration services
	Place an IM session in foreground






DTMF dialog box



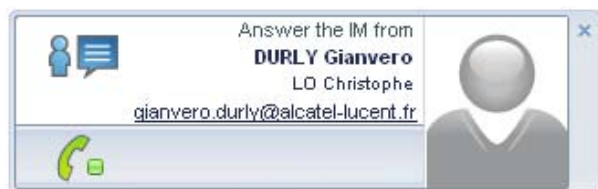
Manage incoming communications or events




Incoming voice call



-  Take the call
-  Answer with an IM (use the presence indicator to check the contact's availability)
-  Send an email
-  Transfer the call to your voice mail
-  Transfer the call to another device (mobile, home, etc.)




Incoming instant message



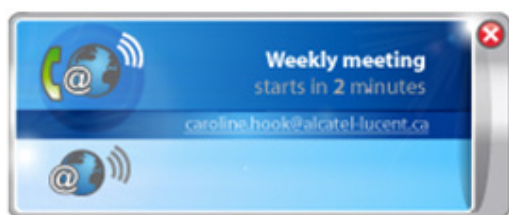
-  Reply to the instant message (first characters of the message are displayed)
-  Answer by voice (use the presence indicator to check if the contact is on the phone or not)
-  Send an email




A contact signs in



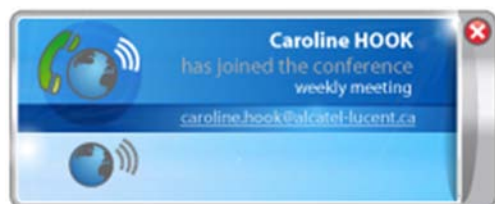
-  Send an instant message
-  Call the contact (use the presence indicator to check if the contact is on the phone or not)
-  Send an email




A scheduled conference is starting



-  Join the conference in web and audio
-  Join the conference in web only
-  Send an email

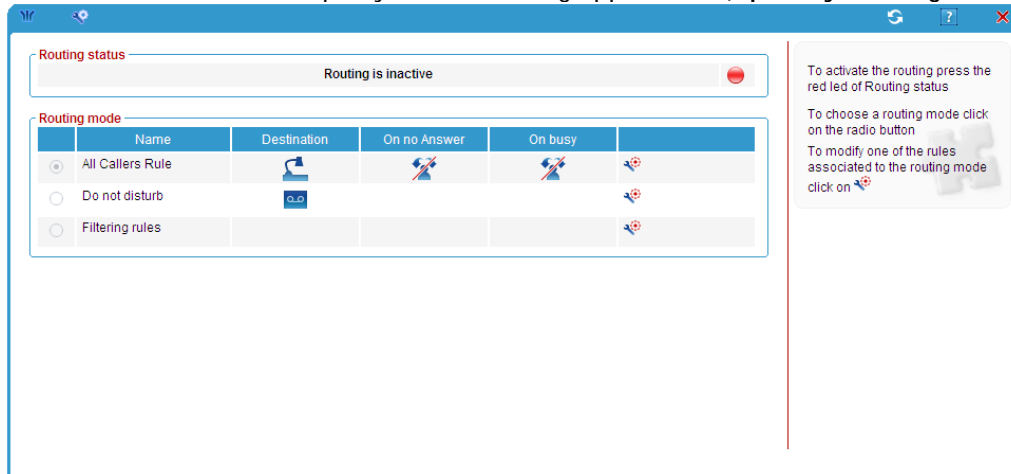
Someone joins a conference



-  Join the conference in web and audio
-  Join the conference in web only
-  Send an email

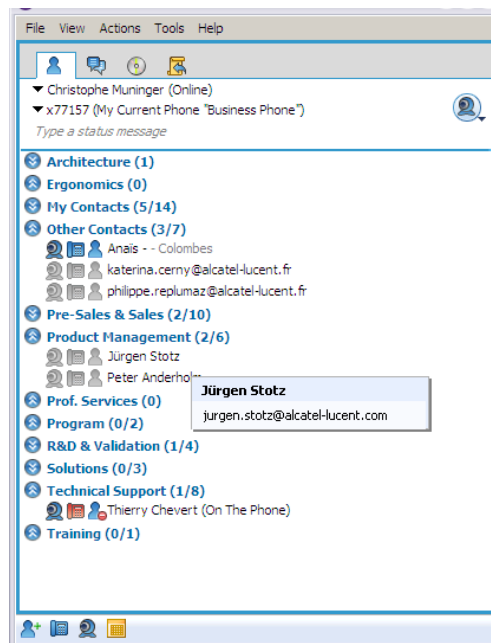
Open your call routing application

From the My Instant Communicator menu, open your call routing application (Open My Routing Number):



Open your contacts and collaboration application

From the My Instant Communicator menu, open your contacts and collaboration application (Open My Contacts):



Getting started

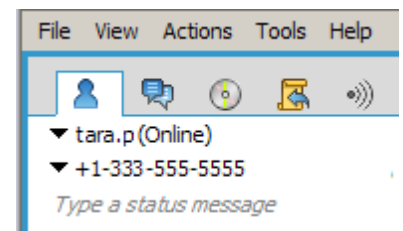
Use a telephone to make and receive calls

The phone number that appears at the top of the main Contacts window is the number used to make and receive calls.

When you use the teamwork services to make calls, this phone number rings first. When you answer your phone, your outgoing call is placed.

When someone else calls you using teamwork services (for example, by double-clicking the phone icon next to your name), this number rings. This number is called your registered phone number or dialback number. It is important to keep this number up to date so other people can connect with you.

You can change your dial-back number to your cell phone, a conference room, or any place where you want to make and receive calls.



Change your phone number


1. Click your phone number at the top of the screen.
2. Select the number that you want, or select Add a **New Number** from the menu that appears.

Select your computer as the place where you make and receive calls

1. Click your phone number at the top of the main contact window.
2. Select **Use my computer for phone calls when I am signed in**.
Your phone calls will go to your computer. When you sign out, your calls will go to the number that appears at the top of the main window, next to **My Computer**.


Scheduling conference calls

Schedule a conference call

1. Select Schedule a Conference from the Actions menu, or click the Schedule a Conference icon  at the bottom of the window.
2. Type a name for the conference, select either a scheduled or reservationless conference, and the times when you want the conference to begin and end.
3. Click Next>.
4. Type the number of people you expect to join the audio conference and click Submit.
5. You can:
 - Invite others to the conference using Lotus Notes or Outlook email or Microsoft Outlook calendar invitations. Click any of the buttons (Leaders..., Participants..., Both...) under Invitations in the middle of the Date Time and Invitations screen.
 - Select conference options on either the Audio Conference tab or the Web Conference tab.

Join a scheduled conference call

If you scheduled the conference:


1. Double-click the conference in the **Scheduled Conferences** tab ,
2. Select **Joining the Conference** and select whether you want to join both the web conference and the audio conference call, or just the web conference (**Audio conference alert** or **Web conference alert** or both).
3. Click **Join...**

If someone else scheduled the conference

You will not see the conference on your Scheduled Conference tab. You will have to join the conference from an email invitation or a Microsoft Outlook calendar appointment. Click the conference link and follow the instructions.

Adding contacts and groups

Add a contact

1. Click the **Add a contact** icon  at the bottom of the contacts window.
2. Select how you want to add the contact:
 - **By user ID:** If another person has a teamwork services account, you should search the contacts directory by their user ID.
 - **By phone number (speed dial):** If you want to make calls to someone who is not a provisioned teamwork services user (for example, an external contact), you can add outside contacts to your list by phone number.
3. Type the User ID or phone number of the person you would like to add and specify the group that you want to add the contact to, then click **OK**.
 - To search for a contact, type the first few letters of a user ID and click **Search**.

Set up a group



1. Select **Add a Group** from the **Tools** menu in the main Contacts window.
2. Type a name for the group and click **OK**.

Add contacts to a group

1. Right-click the name of a contact and select **Copy to Group** in the main Contacts window.
2. Select the group you want, or type the name of a new group and click **OK**.

Making phone calls and conference calls

Call a contact

1. Double-click the telephone icon  next to the contact's name in either the contact list or from an active conversation window.
Important! If the phone icon next to a contact's name is red , the contact is on another call. If you call them, you may reach your contact's voicemail. Your phone rings. When you answer, the system places a call to the contact's current phone number.


Call several people at once

1. Hold down the CTRL key while clicking on the names of the people in your contact list.
2. Right-click and select **Call** from the menu.
Your phone rings. When you answer, the system places calls, one by one, to all of the contacts that you selected.

Call all contacts in a group

1. Click the name of a group in your contact list to select all contacts in the group.
2. Right-click the group name and select **Call**.
Your phone rings. When you answer, the system places calls, one by one, to all of the contacts in the group.

Call someone who is not on your contact list

1. Click the **Make a call** icon  at the bottom of the contact list and enter a phone number or user ID in the **Call this number** box.
2. Click the call icon next to the box, or press **Enter**. When you answer the phone, a call is placed to the phone number or user ID you entered.

Add someone to an existing call


There are two ways to add someone to an existing call from the conversation window. It depends upon whether you want to add an internal or external contact.

- For a provisioned user, select **Invite a contact** and then select the contact from the list, and then double-click the contact's phone icon.
- For external contacts, enter the telephone number of the contact into the dial out call field.

The new person is added to the existing call.

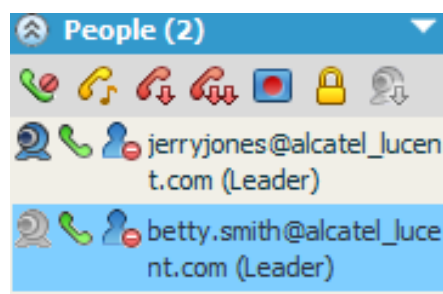
Sending instant messages

Send an instant message

1. Double-click the icon next to the name of the person in either the main Contacts window or in a Conversation window.
Important! If the icon is red , the contact is offline and cannot immediately receive messages. However, the messages can be stored and delivered when the user signs in.
2. Type your message in the bottom of the Conversation window
3. Press **Enter**, or click **Send**.




Turn an instant message into a phone call

1. Double-click the phone icon next to the person's name in the Conversation window.
Your phone rings.
2. Answer your phone to place the call



Setting up your video and audio software

Do you have video capabilities?

To see if your account has video conferencing enabled, look at your main contact list. If your contacts have video camera icons, either  or , next to their names, then the video feature is enabled for your account. You can only use the video feature with contacts who have a blue video icon  next to their names.

What you need

You must have a web camera connected to your computer. If you do not want to use your phone for audio, you will also need a microphone and speakers connected to your computer.

View video in your browser

- You must have Microsoft® Internet Explorer 7.0 or 8.0, running on Windows® Vista or Windows® 7.
- You must be able to download and run ActiveX controls.

Use external software or a video device such as a videophone or a room system:

- Any of the supported browsers can be used with external software or devices.
- Check your system to see which software and devices are supported.




Set up an external device or video software for video conferencing:

1. Select **Tools > Options...**, then **Video and Audio** on the main screen.
2. Select **External software or video device** in **Video > Where do you want to view video?**
3. Enter a video endpoint in the **Video phone number** box. If you are not sure what to enter, check with your system administrator.
4. Select whether you want to use your computer or your phone for audio during video conferences in the **Audio** section. You may have to enter additional settings in your external software or device.

Configure your video and audio settings:

1. Select **Tools > Options**, then select **Video and Audio**.
2. Select **Browser** under **Video > Where do you want to view video?**
3. Select whether you want the system to automatically configure your settings.
 - **If the system configures your settings for you**, then you can make video calls to other people only if they are in the same network. If you choose this setting, you do not have to enter any other settings.
 - **If you configure your own settings**, you can make video calls to people outside of your network. If you choose this setting, you must enter a video phone number. Check with your system administrator whether you have to complete more settings.
1. Select whether you want to use your computer or your phone for audio in the **Audio** section.
2. Click **OK**.

An icon in the upper right corner of your main contact list will tell you whether you are correctly configured:

Icon	Description
	You are ready to make and receive video calls. If you have had the system configure your settings for you, you will only be able to make video calls with people who are in the same network.
	You are not connected to make or receive video calls. If you see this icon and you have had the system try to configure your settings for you, you may be in a different network from the video conference server.
	You may need to install the video conference software. For more information, hold your mouse cursor over the icon and read the tool tip that appears.

Starting a video conference

Steps to start a video conference:

1. You can only video conference with people on your contact list who have a blue video icon next to their names.
2. If you are using external video software, start your software and make sure that it is ready to send and receive video.
3. In either the contact list or a conversation window, doubleclick the video icon next to the contact you want to call.
4. Depending on how you save set your audio preferences, either your phone will ring, or an audio connection will be set up on your computer.
5. The other person will have to accept your invitation to join the video conference.
6. When both you and the other person have accepted both audio and video connections, the video conference will begin.
7. If you are using Microsoft Internet Explorer, the Video panel will appear in the upper right corner of your conversation window.



Conducting polls

You can create multiple choice polls and gather responses during a conference.

Create a poll before a conference

1. After you have scheduled a conference, select **Presentations, Attachments and Polls** on the left side of the screen.
2. Click **New...** under **Polls**.
3. Complete the form that opens and click **OK**.
 - To allow participants to see the results of the poll as responses are gathered, select **Automatically Share Results with Participants**. When you join the conference, the poll will appear on the right side of the screen, under **Documents**.
1. Double-click the Poll name in the **Documents** panel to view the contents of the poll.
2. Double-click the Poll name in the **Documents** panel and click **Launch Poll**.

Create a poll during a conference

1. Click **Start a Poll** in the conversation window, under **I Want To...**
2. Complete the form that opens.
 - To allow participants to see the results of the poll as responses are gathered, select **Automatically Share Results with Participants**.
 - To immediately launch the poll so that others may respond, click **Save and Launch Poll**.
 - To save the poll to launch later, click **OK**.

Share the results of a poll

Control when the results of a poll are shared with participants:

After you have created and launched a poll, others in the conference may respond to the poll. The results of the poll will be visible to leaders on the **Poll** tab. The results will be updated every few seconds.

1. Click **Share Results** above the bar chart to share the results with participants.
2. Click **Stop Sharing** to stop sharing the results with participants.

Share results of the poll automatically:

- Select **Automatically Share Results with Participants** on the form you use to create the poll. Participants will see the results of the poll as responses are gathered. Results will be updated every few seconds.

Sharing an application on your desktop

Use Application/Desktop Sharing to:

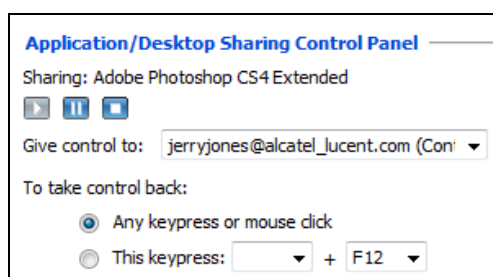
- Enable others to edit an application file that is running on your computer, such as a spreadsheet, a word processing file, or a diagram.
- Show others a file for consultation and discussion.
- Share your entire desktop.

When another person is viewing your shared application or desktop, you can pass the application control to them and allow them to edit files that are on your computer.

Share an application or your desktop

Note: To share applications or your desktop, you must use a browser that allows ActiveX controls, such as Microsoft Internet Explorer 7 or 8.

1. Start a conversation with the person or people with whom you want to collaborate.
2. Select **Share an Application** in the conversation window, under **I want to...**
If you have not used application sharing before on your computer, you will see a window that asks you to accept the Application Sharing Components.
3. Click **Yes**.
4. Select the application that you want to share and click **OK**.
The application that you selected is outlined in red while it is being shared.
5. Use the application sharing toolbar to pause or stop sharing:



View someone else's shared application

Note: You must use a browser that supports either ActiveX (preferred) or Java to view shared applications.

1. Click the **Show Shared Application** link in the IM panel of the conversation window. You will have to wait a few minutes for the shared application to appear.
2. Select **Yes** if you are asked to accept a Java applet.
3. Click the **View Shared Application** link again if the person sharing an application stops sharing and then restarts the sharing.

Select the person whose application you want to view when two people are sharing applications at the same time:

1. Click the Shared Applications tab.
2. Select View, then Show Presentation if you do not see the Shared Applications tab.
3. Select the person whose application you want to view from the dropdown menu in the upper right corner.

Working with presentations

Note: Presentations and attachments may be uploaded when scheduling a conference or during a live event.

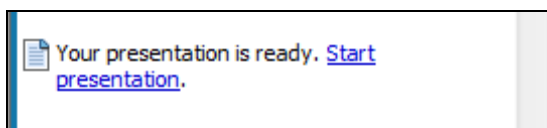
Make a presentation

1. Click **Make a Presentation** under **I want to...** in the conversation window.
2. Use the **Browse** button to select a file from your computer, and click **OK**.

Note: You may only present Microsoft Word, PowerPoint, or Excel files. The file takes a few minutes to be ready for presentation.

Show your presentation to others in the conversation

- Click **Start Presentation** in the IM panel.



Your conversation window expands so that you can see your presentation. If you do not see your presentation, your file may not have finished converting into the presentation format. This takes a few minutes. If others do not see your presentation, ask them to click the **View Presentation** link in the IM panel.

Uploading attachments

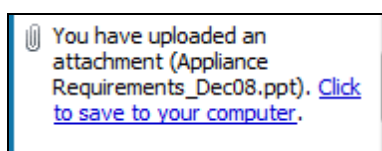
To attach a file to a conversation

1. Click **Upload an Attachment** under **I want to...** or click the **Attach file** icon under **Documents**.
Note: Any application file type may be shared.
2. Use the **Browse** button to select a file from your computer.
3. Click **OK**.

After the file is uploaded, all participants see the resultant file in the **Documents** panel.

Save an attachment to your computer

After someone uploads an attachment, a link (**Click to save to your computer**) appears in the instant message panel of the conversation window.



1. Click the link and select **Save Target As...**, or **Save Link Target As...** (depending on your browser). On a Macintosh, hold down the Control key while you click the file name, and then select **Save Link Target As...**
2. Select the location where you would like to save the file, and click **OK**.

User Customization

Right-click the My Instant Communicator icon in the System Tray and select **Options** to configure your preferences.

Decide anytime you want to change:

Whether My Instant Communicator is automatically launched and active when logging in to your PC

Your languages and passwords (GUI and TUI)

Your professional and personal phone numbers

Your voicemail settings

Your email and SMS notifications

Your call forwarding settings

The duration of popup alerts (incoming communications and IM contact logging in) and notification display

The general aspect of the application (theme)

Application update options

Your SIP parameters (if allowed)

Your Media and Quality of Services (QoS) parameters (if allowed)

Etc.

