

# iPECS

## UCS Client for PC

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### User Guide

Please read this manual carefully before operation. Retain it for future reference.

iPECS is an Ericsson-LG Brand





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# About This Guide

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This section describes the purpose, audience, organization, and conventions that are used in this iPECS UCS Client for PC User Guide.

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## NOTE

The screen may look different depending on which version of the OS (Operating System) and Installation Program you are using. All information in this guide is subject to change without prior notice.

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## Purpose

This guide introduces the iPECS UCS Client for PCs and explains how to correctly install and use the UCS Client. The figures and screen images used in this guide may be changed without notice

## Audience

This guide provides user-related information intended for users of the PC-based UCS Client.

## Document Organization

This guide consists of this about this guide, what's new, fifteen chapters and an appendix. The title of each chapter is as follows:

- About This Guide
- What's New
- Chapter 1. Introduction
- Chapter 2. Installation and Setup Installation and Setup
- Chapter 3. General Description General Description
- Chapter 4. Message & Status Bar Message & Status Bar
- Chapter 5. My Detail Information My Detail Information
- Chapter 6. Main Window Views Main Window Views
- Chapter 7. Quick Call Control Bar
- Chapter 8. Tools Menu Call Features

- Chapter 9. Scheduling Appointments – (P)
- Chapter 10. ICR (Individual Call Routing) Window – (P)
- Chapter 11. Collaborative Session Tools
- Chapter 12. Supplementary Features
- Chapter 13. Call View & Call Function
- Chapter 14. Audio Conference Manager
- Chapter 15. Visual Voicemail – (UCP/eMG)
- Appendix – A

## Document Conventions

This section describes text formatting conventions and important notice formats used in this guide.

### Text formatting

The narrative-text formatting conventions that are used as follows:

Convention	Description
<b>Bold text</b>	indicates a button, menu item, or dialog box option you can click or select
<i>Italic text</i>	a cross-reference, or an important term
<code>Code text</code>	a command prompt
<b>(P, S)</b>	indicates the applicable UCS license, Premium or Standard
<b>(UCP, CM)</b>	indicates the iPECS platform (UCP or CM) that supports the function. eMG system's function is exactly the same as the UCP system.

### Important notice

The following icons and notices are used in this guide to convey important cautions and notes.



#### CAUTION

A caution statement alerts you to situations that may cause damage to hardware, software, or data.

#### NOTE

A note provides additional explanations, emphasis on important information, or a reference to related information.

# What's New

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This document includes new and modified information for the iPECS UCS Client for PC User Guide. Click the links under each phase or version to see of what is new.

## UCS Phase 6

### Version 6.1.x

#### **User base license (Basic, Advanced, Power)**

Provides User base license to provide better user experience with simplicity and cost advantages. Three types of user licenses are available. Basic, Advance and Power user licenses.

[Refer to Unified v3 documents \(Introduction, Training, Manuals\) for details.](#)

#### **Multi-login support (Need Power user license)**

UCS user with power user license can log in to multiple devices at the same time.

[Link to Multi Device Login section](#)

#### **Enhanced UX of Call log sync & IM Continuity**

**Call log sync** — Call log sync is supported for a user with multiple devices.

**IM Continuity** — Instant Message (IM) can continue when changing UCS clients or newly log-in.

[Link to Multi Device Login section](#)

#### **Automatic failover to stand-by system in Geo-redundancy/ T-Net environment (UCS Premium clients)**

In addition to UCS Standard clients, UCS Premium clients from v6 support automatic failover to stand-by call server in Geo-redundancy / T-Net environment. System can send stand-by call server or LCM IP address to UCS clients when initializing so that UCS clients can failover when disconnected to primary call server.

[Link to System Failover section](#)

# Introduction

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This chapter is an overview of the UCS client.

## 1.1 Introduction of UCS Client for PCs

The iPECS UCS (Unified Communications Solution) Client is a PC based application, which operates in conjunction with the iPECS UC platform and UCS Server, expanding and enhancing the communication services of iPECS to dramatically improve business productivity and customer responsiveness.

In addition to the rich voice services available with the iPECS system, users of iPECS UCS Client have access to a wide range of video, text, collaborative and messaging services. Services available include Presence, Video Conferencing, Instant Messaging, Sharing (Application, Desktop and Whiteboard), Individual Call Routing (ICR), and more.

Employing a simple intuitive graphical user interface, the UCS Client has access to both private and shared scheduling and directory database applications, which are fully integrated with the various services available in the iPECS UC platform and UCS Server. The UCS Client user interface is highly flexible and can be customized to address the needs of the individual user.

Further, the UCS Client database applications can interoperate and synchronize with major personal information management applications and databases such as Outlook, ACT!, Goldmine, Excel and LDAP.

As an Internet Protocol (IP) solution, the UCS Client overcomes geographical limitations allowing access to services and databases while in the office or on the road.

## Chapter 2

# Installation and Setup

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Installation and set-up of the iPECS UCS Client is a simple four-step process:

- Step 1: Verify your hardware and operating system
- Step 2: Install the iPECS UCS Client application on the user's PC.
- Step 3: Adjust UCS Client login settings.
- Step 4: Login to complete registration of the iPECS UCS Client application to the iPECS system and UCS Server.

Completing the login and registration process may require assistance from the iPECS Administrator to adjust settings of the iPECS system and the UCS Server; both will require the client User ID and Password. iPECS UCS Client will require entry of the host iPECS system and UCS Server IP address.

Prior to installation, the PC and operating system should be verified for compatibility with the iPECS UCS Client application. Assure that the PC and Operating System (OS) comply with the minimum requirements of Section 2.1.

## 2.1 PC Hardware and OS Requirement

The UCS Client application software requires a PC with the minimum configuration defined below.

### 2.1.1 PC Hardware:

- **CPU:** Intel Core2 Duo 2.8 or higher (Normal UCS Operation: Voice Call, Presence, IM, etc.)  
Intel i3 or higher (Special UCS Operation: Point-to-Point 4CIF Video call)  
Intel i5 or higher (Special UCS Operation: Multiparty Video call)
- **RAM:** minimum 2 GB of DRAM, recommended 4GB; (4GB required for 4CIF usage)
- **Hard disk space:** 200 MB of HDD storage
- **Monitor:** 17" recommended, with a resolution of 1024 x 768
- **LAN card :** 100/1000 Base T NIC (Network Interface Card)
- CD ROM drive
- Standard Keyboard and Mouse

- Web Cam for Video Conference (optional)
  - Sound card and Microphone installed
  - USB headset (recommended)
- 

**NOTE**

Voice quality is highly dependent on the quality of the headset.

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## 2.1.2 Operating System:

- Windows 7 Professional
- Windows 8 Professional, Windows 8.1 Professional
- Windows 10

## 2.1.3 Client Virtualization:

For client Virtualization, UCS Client supports Virtual Desktop Infrastructure (VDI) and Remote Desktop Service (RDS). Client Virtualization has been tested in VMware Workstation 11.0 and Citrix XenDesktop 7.6 and XenApp 7.6 environment and Windows Server 2012 Remote Desktop Service.

### **Virtual desktop infrastructure (VDI):**

VDI is a process of running user desktops inside virtual machines that are hosted on data center servers. In a VDI environment, each user is allotted a dedicated virtual machine that runs a separate operating system. This flexibility provides an isolated environment for the user.

### **Remote Desktop Service (RDS):**

RDS sessions involve multiple users using the same VM and server OS. RDS, a proprietary protocol of Microsoft, allows users to connect remotely to a network with a graphic user interface. While the RDS client is installed on the user system, the RDS server software is installed on the server, and a remote connection is established with one or more terminal servers. While users in the RDS network connect to the server using a VM, this VM is shared with other users and operates on the same server operating system (OS) for all users.

---

**NOTE**

RDS is supported since UCS 5.5 version.

In RDS environment, the following are not supported: Call from outlook contacts, Video related functions (Video Call/ Video Conference/ Remote Monitoring).

For most virtualized environments Call Control Mode with no voice is recommended, as there are limitations with real-time audio and video.

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## 2.2 License and Lock Key

Prior to registration of iPECS UCS Clients with the host iPECS system and UCS Server, the host iPECS system will require installation of a UCS Client software license. The administrator must enter a lock-key code in the iPECS system.

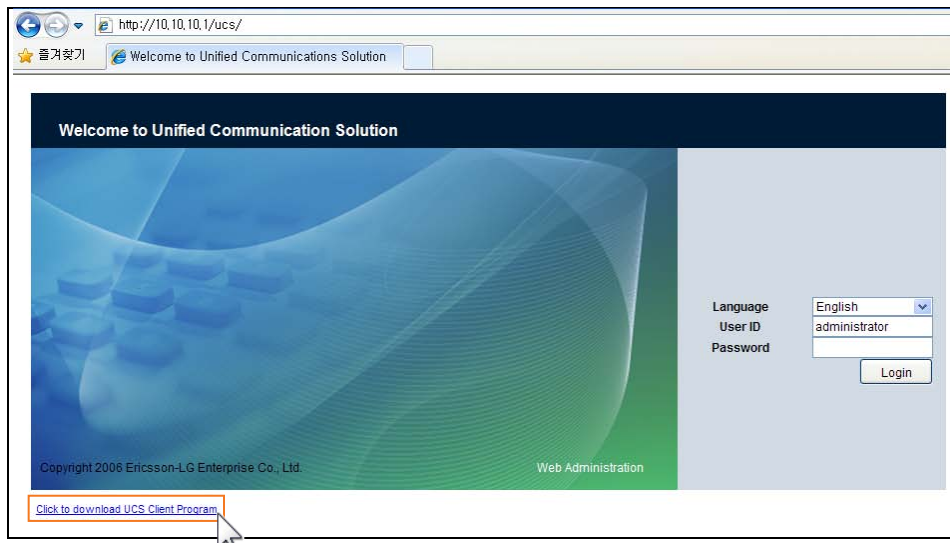
iPECS UCS employs a seat-based license scheme. In this scheme, the maximum number of registered UCS Clients is set in the installed lock-key. For information on Lock-keys, contact the local Ericsson-LG Enterprise distributor.

## 2.3 iPECS UCS Client Installation

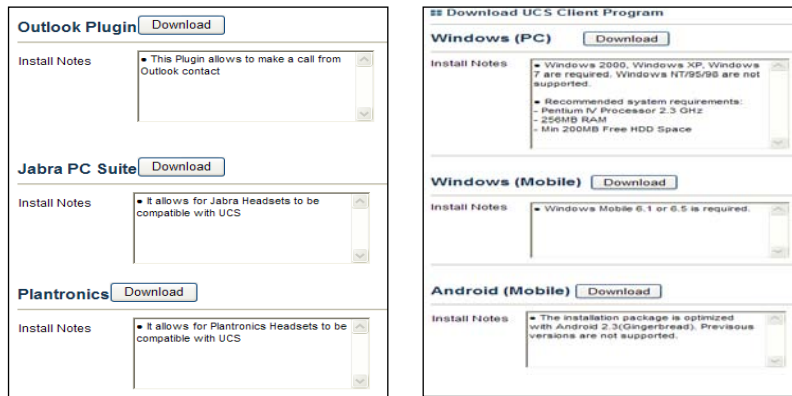
This section explains how to install the iPECS UCS Client. The software can be obtained by download from the iPECS UCS Web Admin Download Client Program window or from the iPECS UCS Client CD-ROM. Download from the iPECS UCS Web Admin may require assistance of your iPECS Administrator.

### 2.3.1 To obtain the software by download:

1. Open a browser on the PC.
2. Point the browser to *http://ip address of UCS Web Admin/UCS*, your iPECS Administrator should have the IP address.



3. Click the **Click to download UCS Client Program** link at the lower-left of the screen.
4. Select the Windows (PC) **Download** button. The Windows File Download Security screen displays:



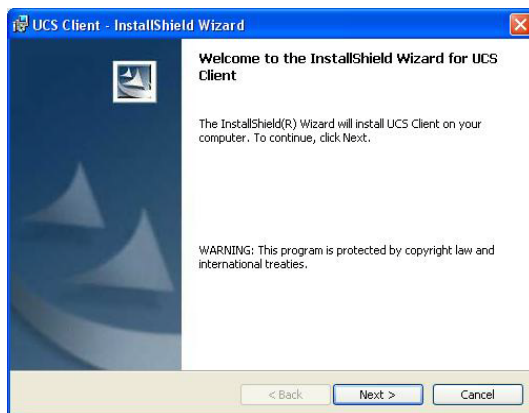
5. Select **Save** to save the UCS Client application in the designated directory, or select **Run** to install UCS client directly on the PC.



## 2.3.2 To install the UCS Client application:

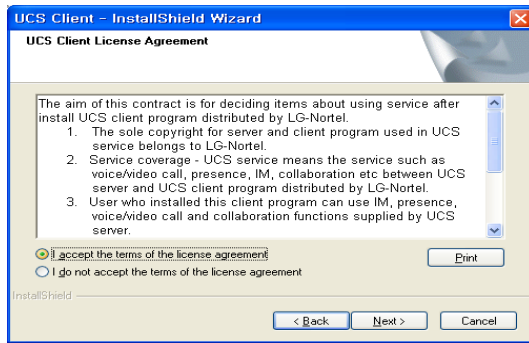
If “Run” was selected in step 5 above, the UCS Client Install Wizard appears. If “Save” was selected; find and run the *UCSClient.exe* file received during download.

1. The UCS Client Install Wizard should appear, click **Next** to continue.

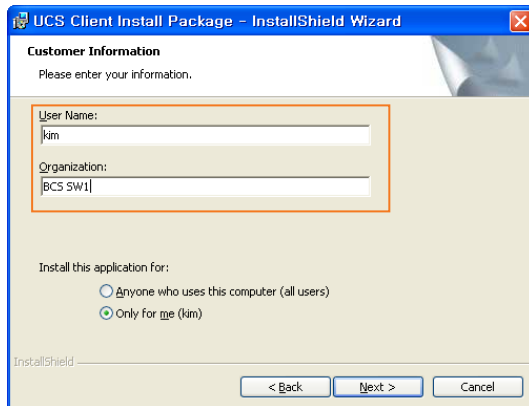


2. The software License Agreement window appears. Read and accept the license terms, and click **Next**.

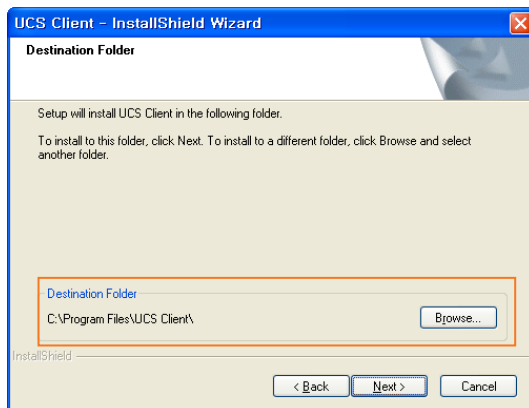




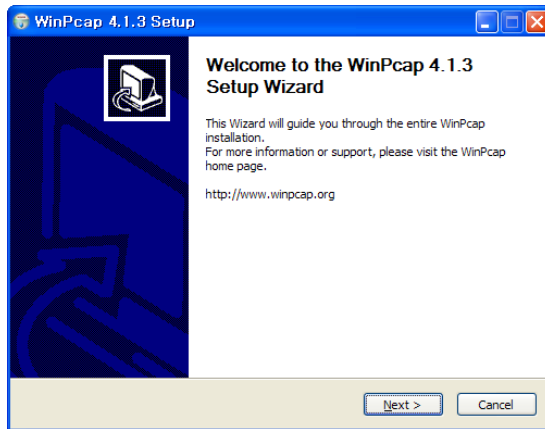
3. In the Customer Information window, enter your User Name and Organization; select the radial button for all users or “**Only for me**” then click **Next**.



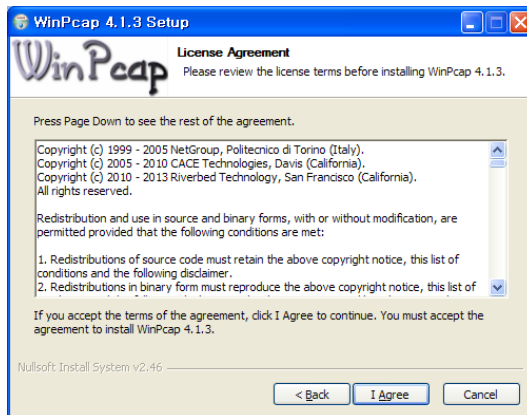
4. In the Destination Folder window, you may either accept the default destination (C:\Program Files\UCS Client), which is recommended or select **Browse** to locate a different directory or specify a directory. If you specify the directory, do not include spaces or special characters.



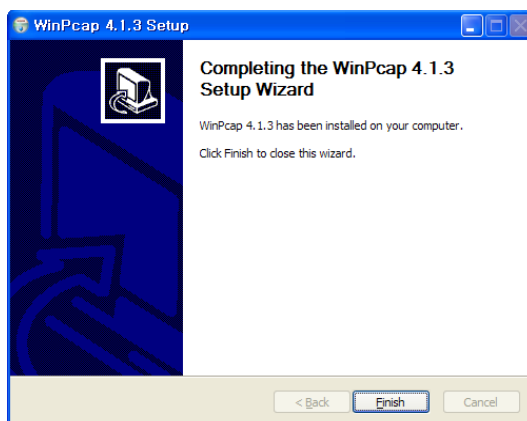
5. Click **Next** to install WinPcap 4.1.3. WinPcap is a standard tool for link-layer network access in the Windows environment. The WinPcap Installer is imbedded in the UCS Client Installer, and opens automatically.



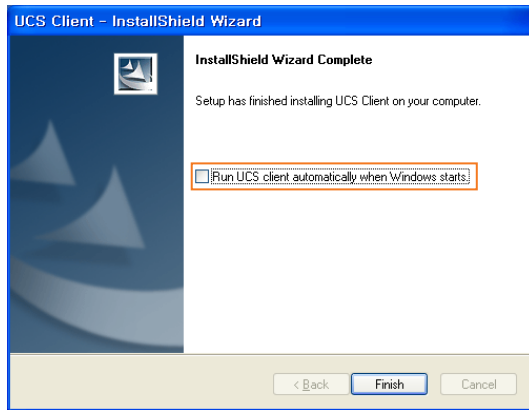
6. The WinPcap software License Agreement window appears. Read and click **I Agree** to continue the installation. The WinPcap installer begins copying files onto your hard disk.



7. After successful installation of WinPcap, click **Finish** to complete WinPcap installation.



8. When all files have been downloaded, the Installation Completed window is shown, click **Finish**. The iPECS UCS Client application can open automatically when Windows starts; click the box for "Run UCS client automatically when Windows starts" to enable.



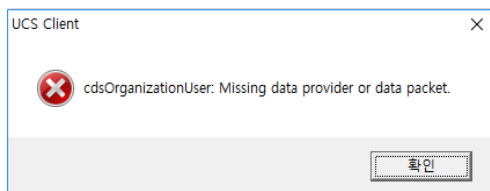
## 2.4 Initial Setup and Login

To setup the UCS Client application, perform the following steps:

1. After installation, click on UCS Client from the Programs listing in the Windows Start menu or click the desktop shortcut icon created during the software installation.

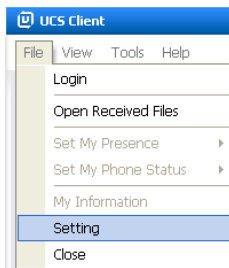


2. Restart your PC if you receive the following error message and cannot login to the UCS Client.

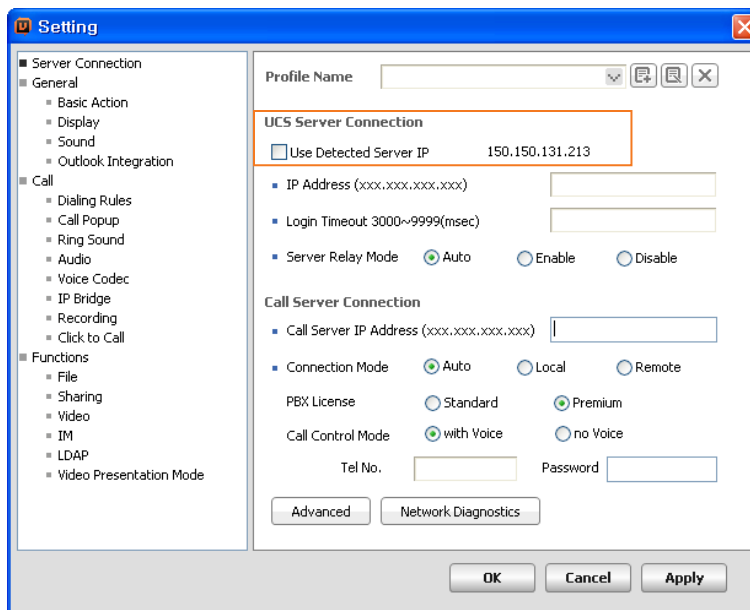


- When Windows OS needs to be updated, UCS Client might to have no access to write configuration files of UCS Client as above message and cannot be logged in
  - In this case, you need to restart Windows for UCS Client to access to those files and login successfully.
3. Once launched, the iPECS UCS Client Login screen will appear. For the initial installation, you must define the IP address and other basic parameters for the iPECS system, UCS Server and

client in the General Setting window. Select Setting from the File menu, the Server Connection window displays.



4. For **UCS Server Connection**, enter the IP Address of the UCS Server provided by your iPECS Administrator, or if already shown, check **Use Detected Server IP**.



- Select **OK** to save the new values.

5. When finished, login by entering your User ID and Password. Remember, the User ID and Password are case sensitive.



- The User ID and Password may be 2-12 alphanumeric characters and the Password may include symbol characters.
  - In a single user environment, use the Auto Login, Remember User ID and Password checkboxes, to automate login to the iPECS system and UCS Server every time the UCS Client application is launched.
6. Click **Login** to initiate the iPECS UCS Server and system login; the UCS Client Console should display.

---

#### NOTE

If no audio device is defined in the PC, a warning dialog is displayed and the UCS Client will not open. With Windows 7 and Windows Vista (not recommended as OS) the warning message is also displayed if the audio device is not connected. Clicking “Yes” in the Warning Dialog box will open UCS Client without audio capabilities.

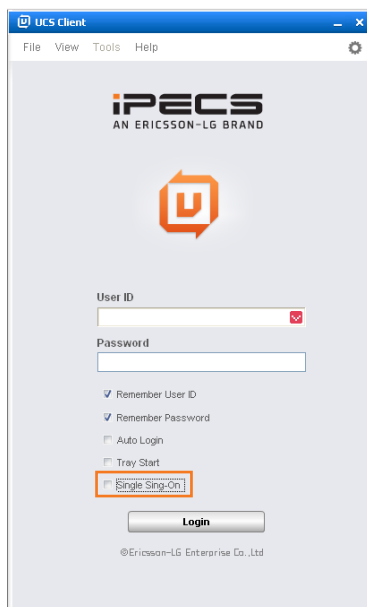
If the number of Login attempts reaches the threshold assigned by the UCS Server administrator, the User account is locked. To unlock the account, either the administrator must unlock the account or the assigned lockout duration timer must expire.

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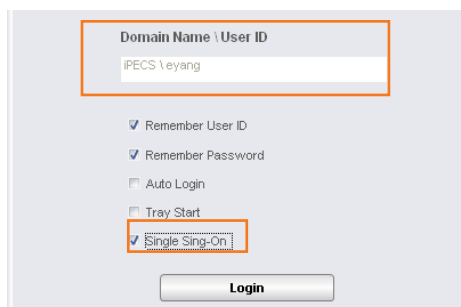
## 2.5 Single Sign-On

If user's Windows is joined in Active Directory, Single Sign-On (SSO) check box will be displayed on UCS Client login window. UCS User can login using joined Domain Name and User ID. When checking Single Sign-On check box on login window, joined Domain Name and user ID is displayed. Then, by clicking Login button, UCS user can login without user ID and password. ⓘ This function is supported in **Premium** license.

1. If user's Windows is joined in Active Directory, Single Sign-On check box will be displayed on UCS Client login window.



2. When checking Single Sign-On check box on login window, joined Domain Name and User ID is displayed. Click Login button, then user can login without user ID and password.



The screenshot shows a login dialog box with the following elements:

- A text field labeled "Domain Name \ User ID" containing the text "IPECS \ eyang".
- Four checkboxes: "Remember User ID" (checked), "Remember Password" (checked), "Auto Login" (unchecked), and "Tray Start" (unchecked).
- A checkbox labeled "Single Sign-On" which is checked.
- A "Login" button at the bottom center.

---

#### NOTE

For Single Sign-On, SSO property in UCS Web admin must be set to 'true'.

---

## 2.6 Multi Device Login

UCS Client can login in one of the different kinds of devices. It is allowed to login in maximum three kinds of different devices at the same time. The following is a description of the device type classification.

- **Desktop Type:** Windows(PC) / MAC Client
- **Mobile Type:** iPhone Mobile / Android Mobile Client
- **Tablet Type:** iPad Tablet / Android Tablet Client

---

#### NOTE

- 1) Multi Login is not allowed to login in with same kinds of device. That is to say if you are trying to login in Mac Client while logged in Windows PC Client simultaneously, the Windows PC Client is logged out, and then MAC Client is allowed to login in.
  - 2) For example, allows Multi Login Combination is 'Windows (PC)' + 'iPhone Mobile' + 'Android Tablet'.
- 

1. **Presence and Call Log Synchronization:** Multi-Login Devices share same presence and Call Log
2. **Simultaneous Ring Support:** When an incoming call is ringing, Multi-Login devices are ringing at the same time.
3. **IM Message Synchronization:** Multi-Login devices are received same IM message.

## Chapter 3

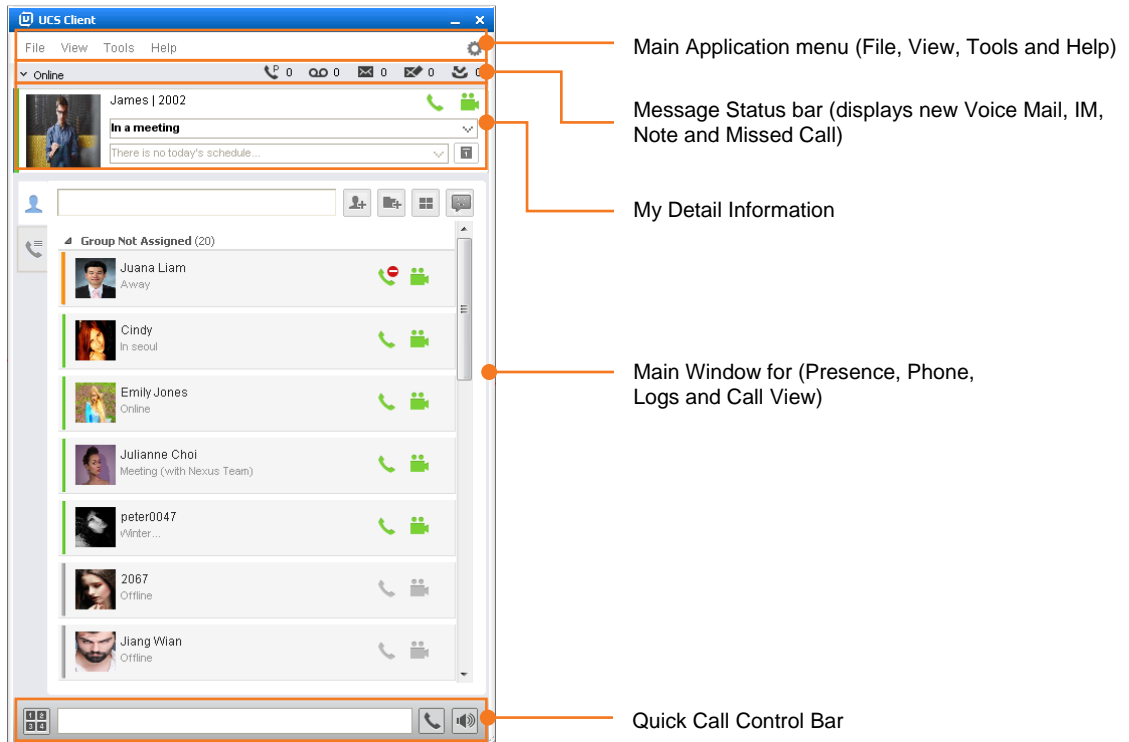
# General Description

### 3.1 PC Client Screen

The UCS Client Console consists of the Main application menu (File, View, Tools and Help), Message and Status bar, My Detail information, main window for Presence, Phone, Logs and Call View, and Quick Call Control bar.

The 5 parts of the UCS Console are described as follows:

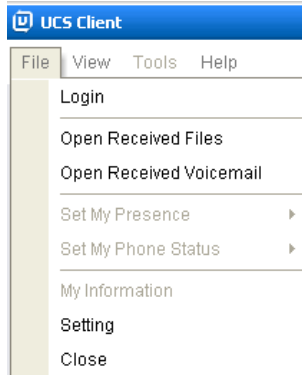
- The File, View, Tools and Help menus are discussed in Section 3.
- The Message Status bar is discussed in Section 4.
- The My Detail Information is discussed in Section 5.
- The main Window for Presence, Phone, Logs and active Call views is discussed in Section 6.
- The Quick Call Control bar is discussed in Section 7.



- UCS Client Main Screen

## 3.2 File Menu Selection

The Main Application menu at the top of the console includes menu selections for File, View, Tools and Help. Click on File to show the following selections:



- **Login/Logout** – initiates the login or logout process with the iPECS UCS Server and system, see section 2.4.
- **Open Received Files** – opens the folder where files received from other UCS Client users are stored.
- **Open Received Voicemail** – opens the folder where voicemails downloaded from System are stored. ⓘ This function is supported in **UCP/eMG** system.
- **Set My Presence** – defines your IM presence state.
- **Set My Phone Status** – sets the phone status.
- **My Information** - displays your detailed information.
- **Setting** – displays the Setting window, where you set up and customize the iPECS UCS Client.
- **Close** – minimizes the iPECS UCS Client application to the Windows notification tray.

### 3.2.1 Set My Presence

Presence establishes your availability to be part of an Instant Messaging (IM) session. iPECS UCS Server monitors and automatically updates your Presence as Online, Offline, Busy or In a Meeting. The presence of other users is also provided in the Presence window (refer to Section 6.1).

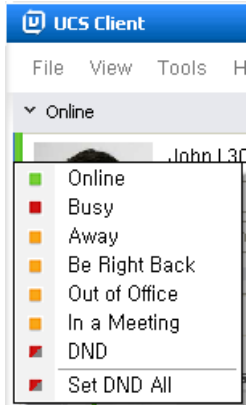
Your status is displayed by the IM Status icon, which is located on the left above your picture.

You may change the status with the Set My Presence selection in the File menu, or by clicking the IM Status icon.



### To change the UCS Client IM status:

1. Select Set My Presence from the File menu.



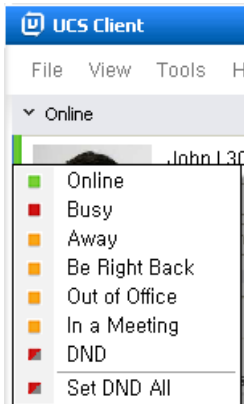
2. Select the IM status (presence) desired from the status window.

#### 3.2.1.1 Set or Release DND All

'Set/Release DND All' settings are used when you want to change my phone status, as well as even my presence together.

##### Set DND All:

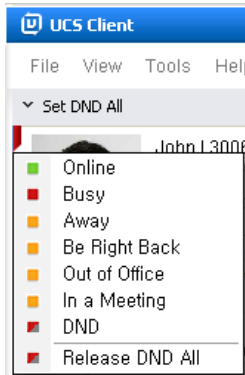
1. Select the 'Set DND All' from the status window.



2. My Phone status and My Presence status will be set also. And, 'Set DND All' button will be changed into 'Release DND All'.

##### Release DND All:

1. Select the 'Release DND All' from the status window.



2. My Phone status and My Presence status will be released at the same time. And, 'Release DND All' button will be changed into 'Set DND All'.

---

#### NOTE

Only when both My Presence status and My Phone Presence status are set into DND states, will 'Release DND All' Button be displayed. If one of their states is not in DND status, 'Set DND All' Button will be displayed.

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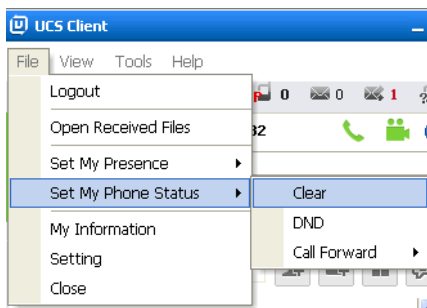
### 3.2.2 Set My Phone Status

Using Set My Phone Status, the UCS Client can be placed in a Do-Not-Disturb state or calls to the UCS Client may be sent (forward) to another destination. When in DND, internal callers receive a fast-busy tone and outside callers are routed based on iPECS system admin settings.

**Simple Call Forward** is activated from the phone allowing the user to define the type of Call Forward (all calls, busy, and no-answer) and destination for the calls.

**Remote Call Forward** or **Follow-me forward** is activated from a different phone allowing the user to define the type of calls to forward and the destination for the calls. For **Follow-me forward**, the user must also enter the station number and the password (Authentication code) to activate Remote Call Forward.

**Call Forward ICR** accesses the Individual Call Routing feature where the user can define various Call routing scenarios as discussed in Section 10.




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#### NOTE

When DND or Call Forward is activated, a confirmation window will be displayed at next login, DND or Call Forward can be deactivated in the confirmation window.

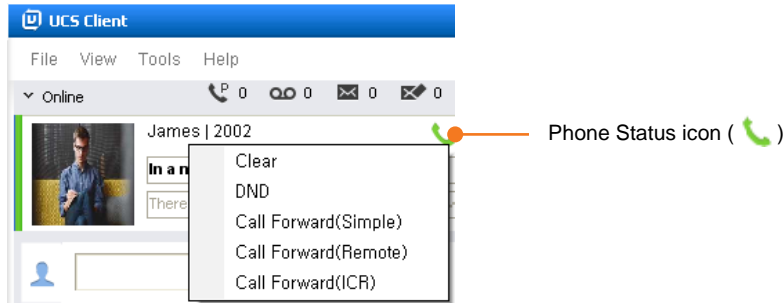
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### 3.2.2.1 Clear All

You may deactivate Call Forward or DND with the Clear selection in Set My Phone Status sub-menu of the File menu, or by selecting the Phone status icon.

#### To deactivate Call Forward or DND:

1. Select Set My Phone Status from the File menu or the Phone status icon.
2. Select Clear from the status window.

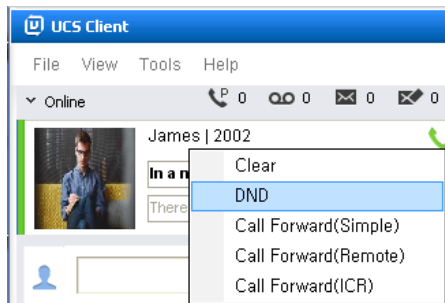


### 3.2.2.2 Set Do Not Disturb (DND)

You may activate DND with the Set My Phone Status selection in the File menu, or by selecting the Phone Status icon.

#### To activate DND:

1. Select Set My Phone Status from the File menu or the Phone status icon.
2. Select DND from the status window.

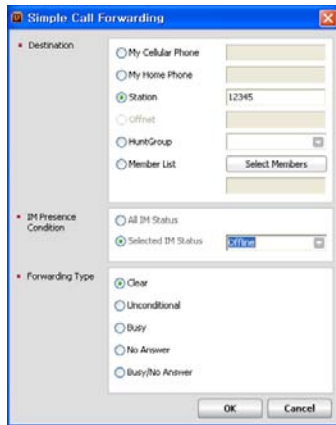


### 3.2.2.3 Set Simple Call Forwarding

You may select to re-route incoming calls to other stations, station groups, the system Voice Mail, or to an outside number. You may forward calls based on your IM presence state and define the forwarding type (condition) for calls.

#### To activate Call Forward:

1. Select Set My Phone Status from the File menu or the Phone status icon.
2. Select Call Forward (Simple), the Simple Call Forwarding window is displayed.

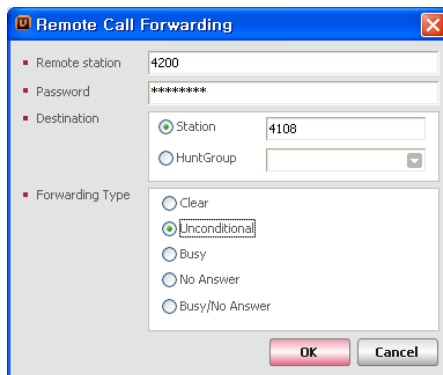


3. In this window click on and enter the Destination information (as needed).
4. Select the IM status required to forward calls or select All IM Status to forward calls regardless of the IM Presence state.
5. Select the Forwarding Type.
6. Click **OK** to activate Call Forward.

### 3.2.2.4 Set Remote Call Forwarding

To activate Call Forward, Remote (Follow-me):

1. Select **Set My Phone Status** from the File menu or select the Phone status icon.
2. Select **Call Forward (Remote)**, the Remote Call Forwarding window displays.



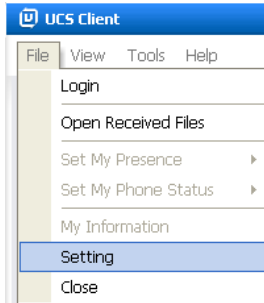
3. Input your Remote Station number.
4. Input your Station Authorization Code (Password)
5. Input the Station or Station Group to receive calls.
6. Select the desired Forwarding Type.
7. Click **OK** to activate Call Forward.

### 3.2.2.5 Set ICR (Individual Call Routing)

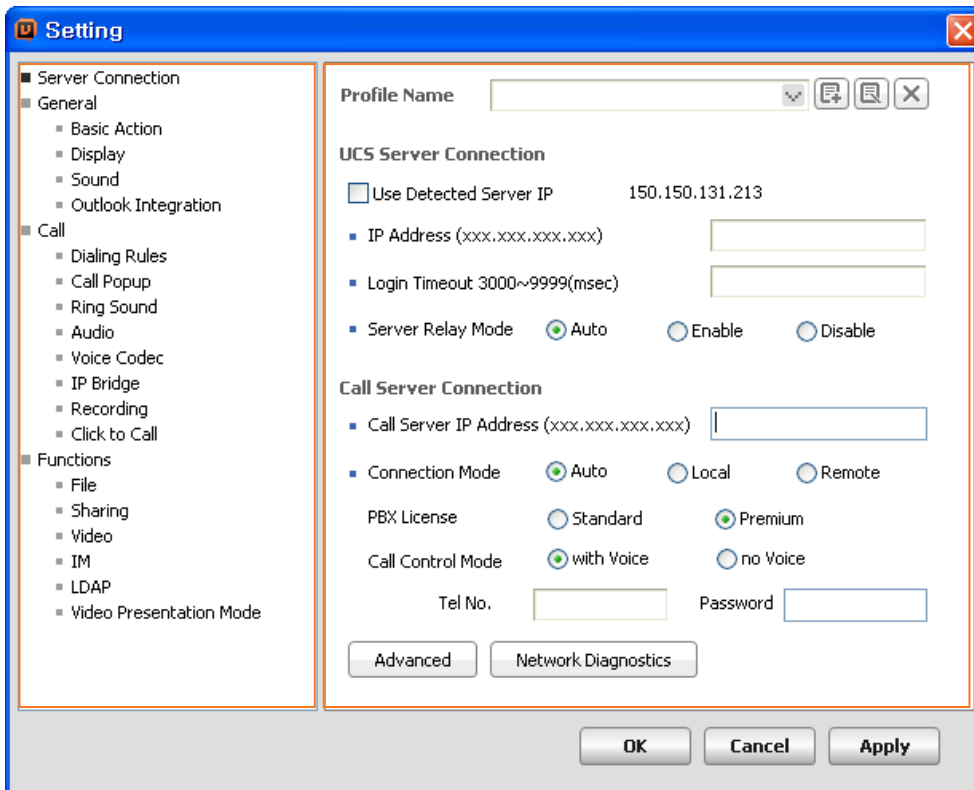
Setting Call Forward ICR (Individual Call Routing) is discussed in Section 10.

## 3.2.3 Setting

The Setting menu provides a number of pages to configure the UCS Server connection, UCS Client appearance, sound and other characteristics discussed in this section. When Setting is selected in the File menu, the first Setting page, Server Connection, will display.



The Setting window is divided into two screens, on the left is the Setting menu navigation pane and on the right is the data entry pane. Selecting a category in the navigation pane displays the associated data pane.



The options below can be configured after logging-in the Call Server because these functions need to receive configuration information from system:

- **Call** – Dialing Rules/ Call Popup/ Ring Sound/ Audio/ Voice Codec/ Recording
- **Functions** – LDAP

**NOTE**

Before logging-in, “**The selected option can be shown after logging in the Call Server. Please contact your Call Server first.**” message will be displayed.

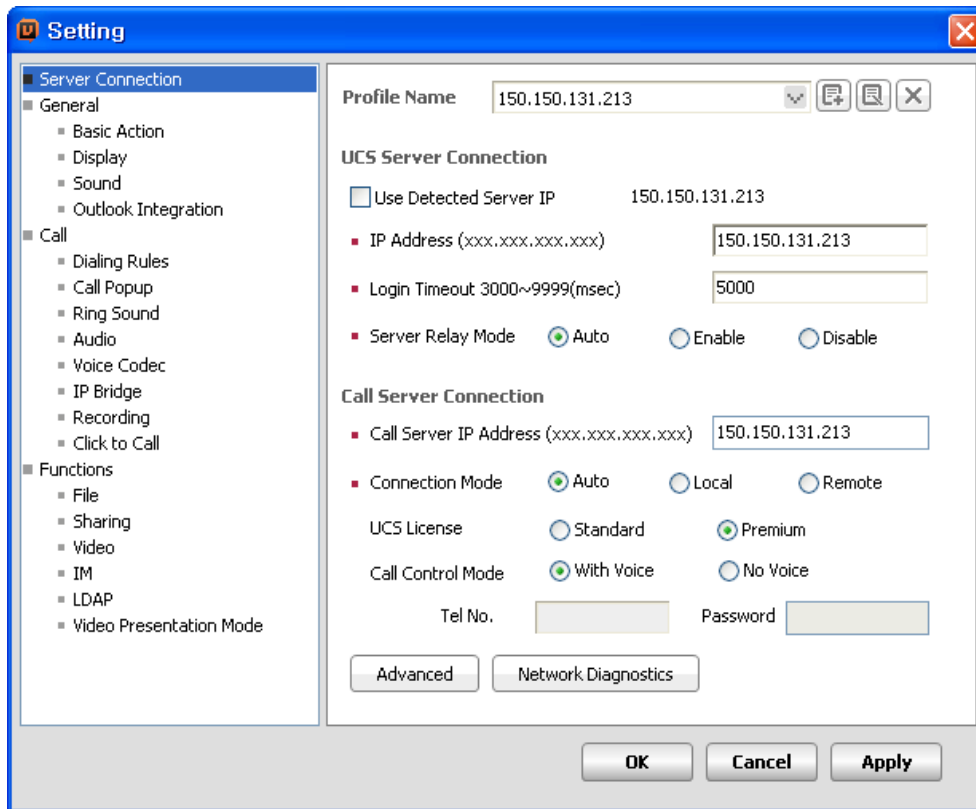
The following sections cover each data item in each category available from the navigation pane.

### 3.2.3.1 Server Connection

Normally, once the Server Connection items are entered during the initial installation further changes will not be required (refer to Section 2.4). In cases where the PC has multiple Network Interface Cards (NICs) or a Virtual Private Network (VPN), the proper Network adapter must be identified. The Network adapter is selected under the **Advanced** button of the Server Connection Setting window.

**To modify any of the Server Connection settings:**

Select **Setting** from the File menu, the Server Connection window displays.



1. Change the desired item(s).
2. Click **Apply** or **OK** to exit.

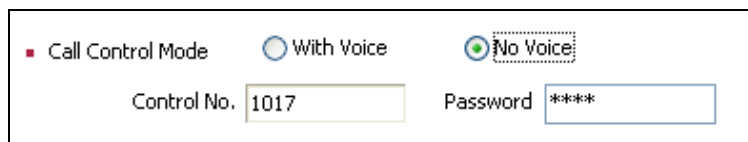
In the Server Connection screen, the selections are:

### UCS Server Connection

- **Use detected server IP** – when the UCS Client application is launched, it attempts to locate a local iPECS UC server. If found and this item is checked, the UCS Client will use the located UC server for services.
- **IP Address** – input box for the IP Address or domain name of the UC server.
- **Server Relay Mode** – relay mode between the UCS Clients; Auto is recommended.
  - **Auto** – Session connection is determined by the UCS Client automatically.
  - **Enable** – Implements the server relay function so that the UCS Client can establish a connection to others when separated by a firewall. In this case, the UC server acts as a relay to distribute session (IM, File Send and Sharing) packets to other users. This mode connects UCS Clients separated by a firewall.
  - **Disable** – Implements a peer-to-peer connection for the session.

### Call Server Connection

- **PBX IP Address** – IP address of the iPECS host system serving the iPECS UCS Client.
- **Connection Mode** – connection mode between the UCS Client and the iPECS; Auto Connection mode is recommended.
  - **Auto** – selects either Local or Remote automatically.
  - **Local** – connection is employed when the iPECS system and UCS Client are on the same LAN.
  - **Remote** – supports packet relay.
- **UCS License** – selects either Standard or Premium.
  - **Standard** – UC server is embedded in PBX and function is restricted compared to Premium.
  - **Premium** – UCS Server is installed in independent PC and enhanced functions are available.
- **Call Control Mode** – UCS Client can control desk phone which is configured in [Control No.] field. [Control No.] will be saved in each user's profile file and used to login UCS Client. Call Control selects either With Voice or No Voice.



■ Call Control Mode     With Voice     No Voice

Control No.     Password

- **With Voice** – UCS Client provides an audio path for voice, so you can call without a desk phone. In case of UCP /eMG system, UCS Client can control desk phone which is configured in [Control No.] field. But in CM system, [Control No.] will be ignored in With Voice mode, because CM system doesn't support call control in With voice mode.

- **No Voice** – UCS Client is employed for call control only; the client does not provide an audio path for voice. A desk phone is required. For No Voice, you must set the [Control No.] and [Password] fields.

---

#### NOTE

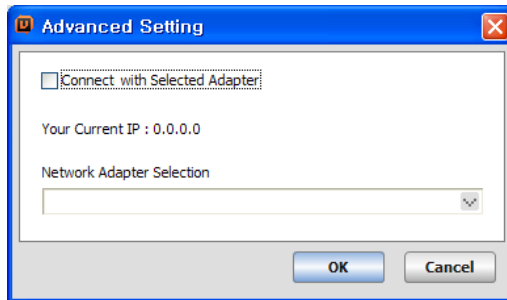
UCS Client may have some limitations in control call of SIP Phone.

For call control to operate correctly, UCP/eMG and CM systems need to be configured in web admin of each system. Please refer to system user manual for detailed information about call control configuration.

When No Voice mode is used in standard license of UCP/eMG system, video is not supported.

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### Advanced Settings

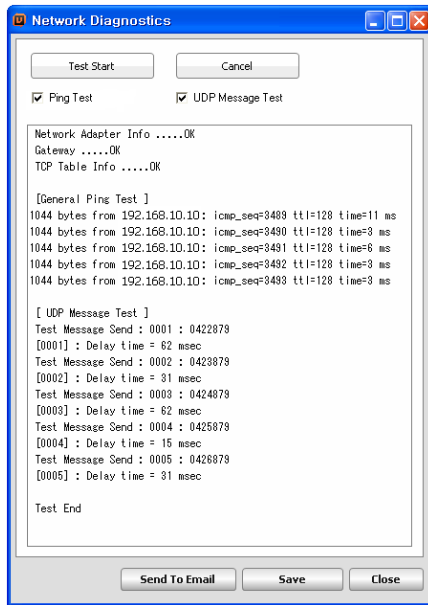


- **Connect with Selected Adapter** – enables selection of a specific network adapter.
- **Your Current IP** – displays current IP Address.
- **Network Adapter Selection** – displays network adapter list; select the desired network adapter.

### Network Diagnostics

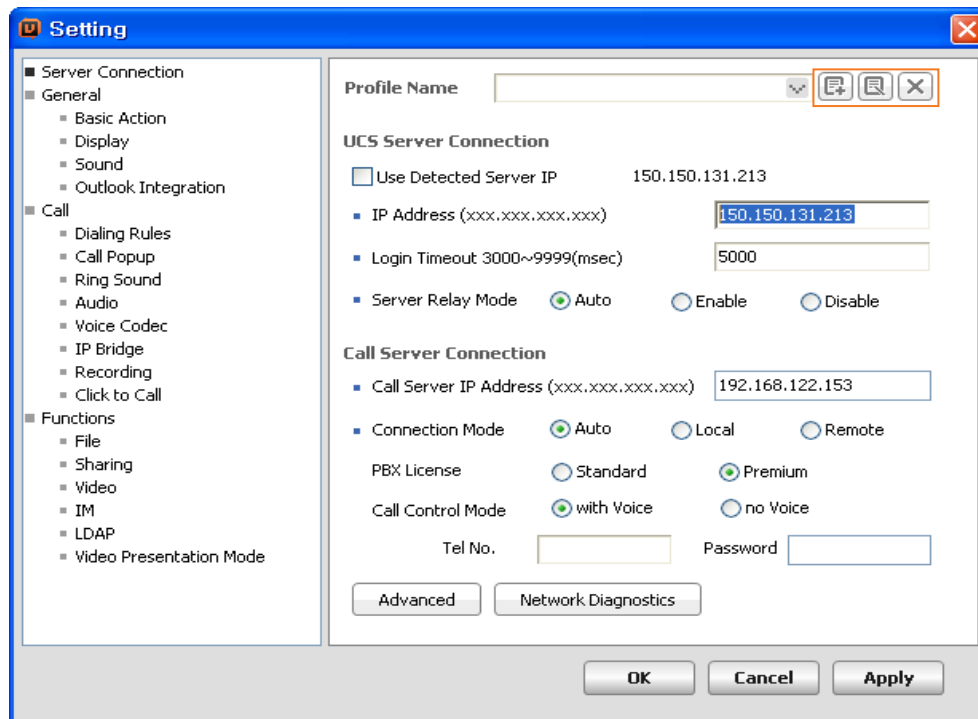
- ① This function is supported in **UCS Premium** license.





- **Test Start** – start network diagnostics
- **Cancel** – cancel network diagnostics
- **Ping Test** – ping test option between a UCS Client and UC server.
- **UDP Message Test** – application message test option between a UCS Client and UC server.
- **Send To Email** – sends the test results as an E-mail attachment.
- **Save** – saves the test result to a file.
- **Close** – exit network diagnostics.

Defined Profiles can be selected from the drop-down list or added/edited/deleted with the **Profile Name** Tool buttons:



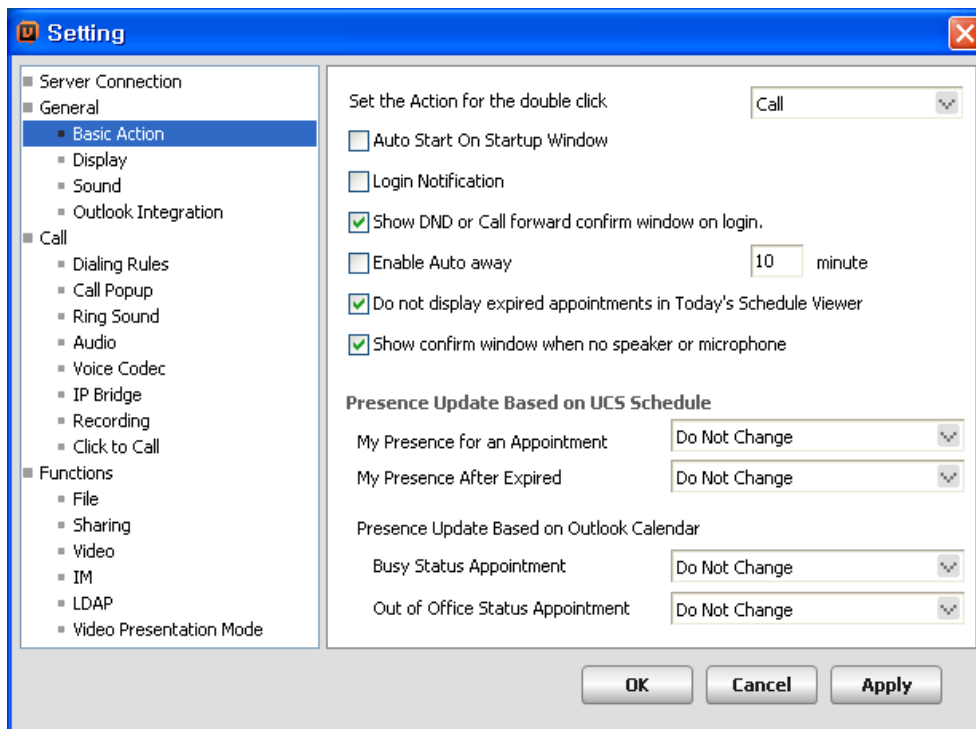
1. Select Profile Name.
2. Click on the **Add** or **Edit** tool button.
3. Click to select/deselect the Use Detected Server IP option.
4. Enter the IP address, Login Timeout.
5. Select the Server Relay Mode and Connection Mode.
6. Click on **OK**.

### 3.2.3.2 General

The General category consists of several sub-categories for the Basic Action, Display and Sound pages. Items on each page are discussed below. Note that the Theme and Presence color can be changed only if the client is not logged-in

#### To modify any of the General category settings:

1. Select Setting from the File menu, the Server Connection window displays.
2. Select the desired sub-category under the General heading.



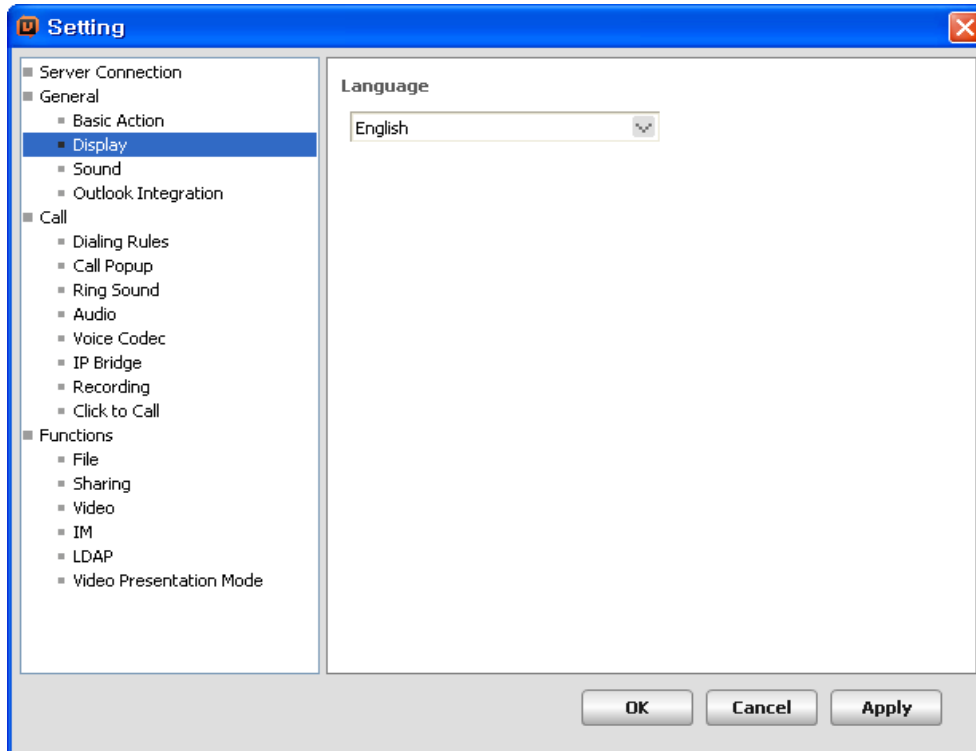
3. Change the desired item(s).
4. Click on the **Apply** or **OK** to exit settings.

### 3.2.3.2.1 Basic Action page

The Basic Action page includes the following items:

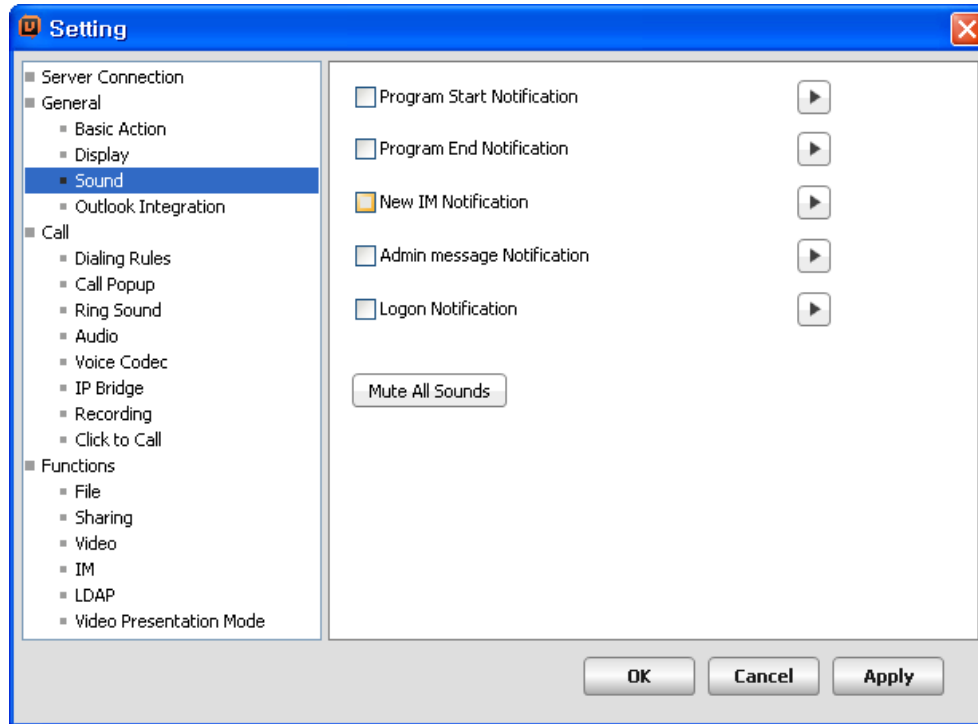
- **Set the action for double-clicking** – when double clicking on a user record in the Presence window, UCS Client will take the action selected from the drop-down list (Call, IM, Detail Information and No Action).
- **Auto-Start on Startup Window** – when enabled, UCS Client launches when Windows starts.
- **Login Notification** – if enabled, at login the login notification message is displayed.
- **Show DND or Call forward Confirm window on login** – if enabled, the DND or Call Forward confirm window is displayed at login.
- **Enable Auto away** – if enabled, when there is no activity on your computer for the Auto away time (minutes) you set, the IM status is set to Away.
- **Do not display expired appointments in Today's Schedule Viewer** – if enabled, once an appointment expires, the appointment is removed from the My Detailed Information window.
- **Show confirm window when no speaker or microphone** – if enabled, a warning message is shown when attempting to open UCS Client on a PC without a speaker or microphone. If disabled, UCS Client will open even if no audio devices are connected to the PC. However, calls cannot be placed from the UCS Client since no audio devices are available.
- **My presence for an Appointment** –the presence status changes to the entered status automatically at the start of a UCS schedule.
- **My presence After Expired** – the presence status changes to the entered status automatically at the completion of a UCS schedule.
- **Busy Status Appointment** – the presence of the UCS Client changes to the entered status at the start of an imported Outlook schedule where the presence has been set to “Busy”.
- **Out of Office Status Appointment** –the presence of the UCS Client changes to the entered status at the start an imported Outlook schedule where the presence has been set to “Out of Office”.

### 3.2.3.2.2 Display



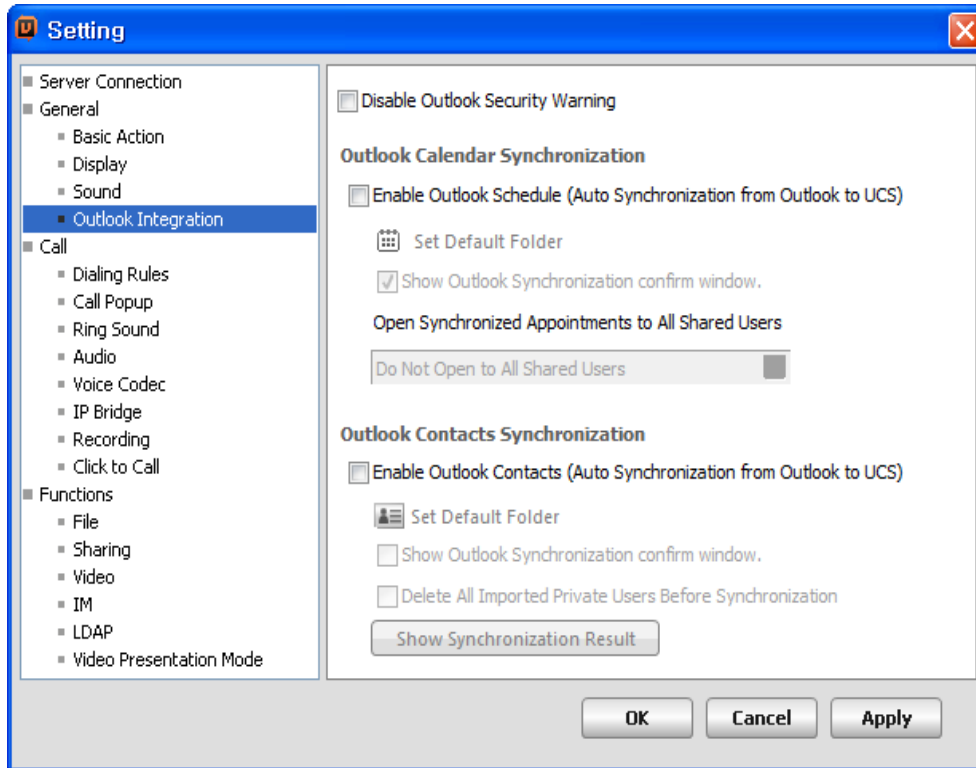
- **Language** – selects the display language (English or Local).

### 3.2.3.2.3 Sound



- **Program Start Notification** – when enabled, play the Program Start alert.
- **Program End Notification** – when enabled, play the Program End alert.
- **New IM Notification** – when a new IM message is received and notification is enabled, the new IM message warning tone is received. Note the warning tone is not received while the IM window is active.
- **Administrative message Notification** – when enabled and a message is received from UCS administrator, play the notify message Sound.
- **Logon Notification** – when enabled and the user logs in, play the logon notification sound.
- **Mute All Sounds** – click to deactivate all sounds.

### 3.2.3.2.4 Outlook Integration



- **Disable Outlook Security Warning** – when enabled if the UCS Client accesses Outlook information such as the address book, mail or appointments, the Outlook security window is bypassed and the information is displayed.
- **Enable Outlook Schedule (Auto Synchronization from Outlook to UCS)** – enables synchronization between iPECS UCS user's Private schedules and Outlook. At login, the UCS Client may present a confirmation window so that you may confirm synchronization with the Outlook schedules. If confirmed, UCS Client will download the schedules from Outlook. After login, if schedules are changed in UCS, the Outlook schedules are also modified.

---

#### NOTE

Only schedules for the current and next month are synchronized.

Schedules from the previous months, or beyond the next month are not synchronized.

---

- **Set Default Folder** – when checked, the UCS Client calendar is synchronized to the default Outlook calendar folder.
- **Show Outlook Synchronization Confirm window** – when Outlook calendar synchronization is enabled, a confirmation window can be presented allowing you to allow or disallow synchronization.

- **Open Synchronized Appointments to All Shared users** - when Outlook appointments are synchronized, the appointments are shared based on this selection. You may select 'Do Not Open to All Shared users', Open to All Shared Users or 'Follow the Property of Outlook'. Selecting 'Follow the Property of Outlook' option, shares appointments based on sharing options in the Outlook appointment.
- **Enable Outlook Contacts (Auto Synchronization from Outlook to UCS)** – when enabled, the UCS Client Private Directory and Outlook contacts synchronize during login. At login, the UCS Client may present a confirmation window so that you may confirm synchronization with the Outlook contacts. If confirmed, UCS Client will download the contacts from Outlook. After login, if the contacts in UCS are modified, the Outlook contacts are also modified.
- **Set Default Folder** – when checked, the UCS Client Private directory is synchronized to the default Outlook Contacts folder.
- **Show Outlook Synchronization Confirm window** – when Outlook contact synchronization is enabled, a confirmation window can be presented allowing you to confirm synchronization.
- **Delete All Imported Private Users Before Synchronization** – If enabled, at login all previously imported contacts will be deleted before synchronization.
- **Show Synchronization Result** - when enabled, you will be presented a window displaying the results from the synchronization.



### 3.2.3.3 Call

The Call category includes settings for Dialing rules, call pop-up boxes and several audio settings as discussed below.

#### To modify any of the Call category settings:

1. Select **Setting** from the File menu, the Server Connection window displays.
2. Select the desired sub-category under the Call heading.
3. Change the desired item(s).
4. Click **Apply** or **OK** to exit settings.

### 3.2.3.3.1 Dialing Rules

When placing an outside call from any of the UCS Client windows (e.g. Presence, Logs, etc.), certain digits may need to be included or removed to assure proper dialing through the iPECS system. When a number is selected from a window, the UCS Client will compare the number to the dialing rules.

---

#### NOTE

For ucs user to use Dialing Rules, below options need to be set to ON.

- 1) In case of UCS Standard License, [UCS DIALING RULE USE] option should be set to ON. You can find [UCS DIALING RULE USE] option in Unified Web Admin – PGM112.
- 2) In case of UCS Premium License, [Allow UCS Dialing Rule] option should be checked. You can find [Allow UCS Dialing Rule] option in UCS Server Web Admin – Use Feature Permission.

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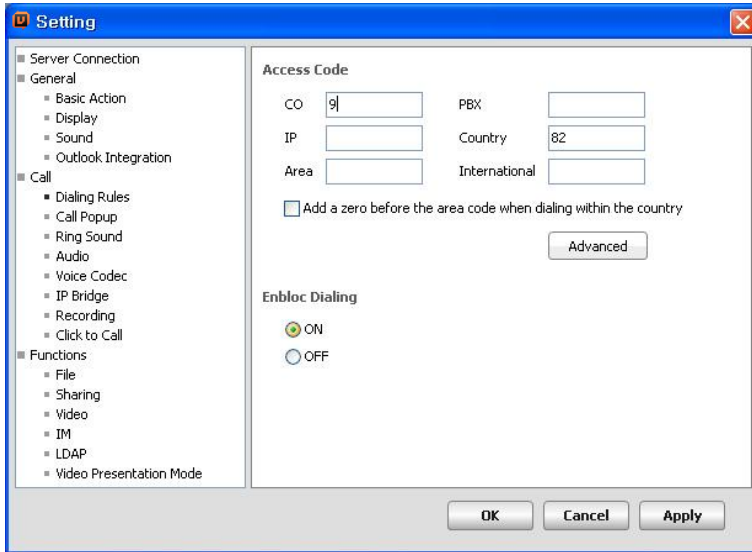
The dialing rules country and area codes are compared to the number, and if matched, are deleted from the number. If not matched, the appropriate Area (LD) or International codes will be inserted, preceded by the PBX, CO or IP line access codes.

#### [Lookup Number] menu will be displayed when [UCS Dialing Rule] is OFF

The screenshot shows a 'Setting' dialog box with a tree view on the left and a main content area on the right. The tree view is expanded to 'Call' > 'Dialing Rules'. The main content area has a 'Lookup Number' section with the following fields: CO (9), PBX, IP, Country (82), Area, and International. Below this is the 'Enbloc Dialing' section with radio buttons for ON (selected) and OFF. At the bottom are buttons for OK, Cancel, and Apply.

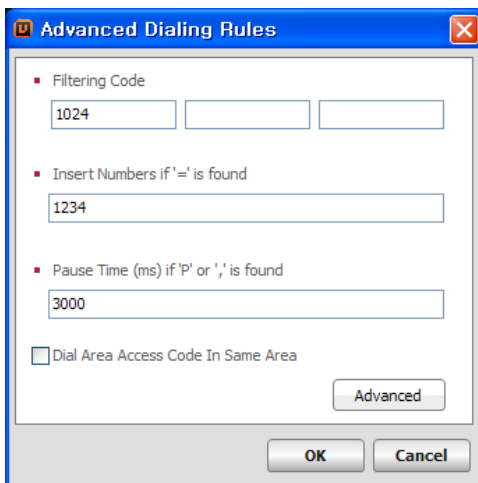
- **Lookup Number** is needed to search the user information from caller's phone number.

**[Access Code] menu will be displayed when [UCS Dialing Rule] is ON.**



- **Access Codes** – entered in the Dialing Rules window, along with local codes for comparison.
- **Add a zero before the area code when dialing within the country** – if enabled, includes the area code with the leading zero when dialing within the country.
- **Enbloc Dialing** – when enabled, digits dialed for a call are sent at one time rather than sending each digit as dialed. When IP Bridge mode is enabled, it is recommended that Enbloc Dialing be enabled. Note that for proper operation, Phonebook entries should follow normal conventions (ex., +country code (area code) number [ex., +41 (041) 4904636])

### Advanced Dialing Rules



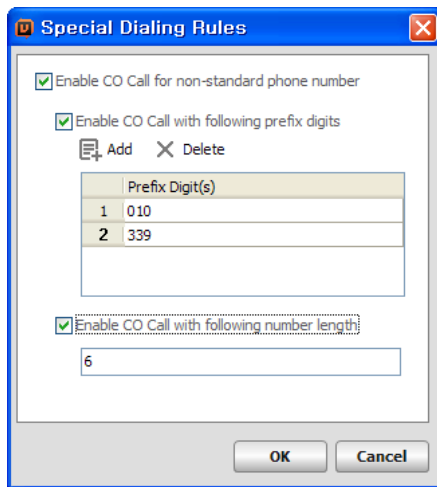
- **Filtering Code** – code is used for special cases to search contact directories. To add this code, please ask your system administrator.
- **Insert Numbers if '=' is found** – replaces '=' with the assigned number. This is useful to

dial a long number.

- **Pause Time (ms) if 'P' or ';' is found** – if a number includes the pause code, 'P' or ';', dialing pauses for the timer value in milliseconds set here.
- If the area code is required for local dialing, the **Dial Area Access Code In Same Area** option must be checked.

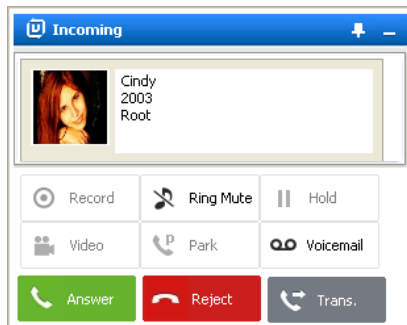
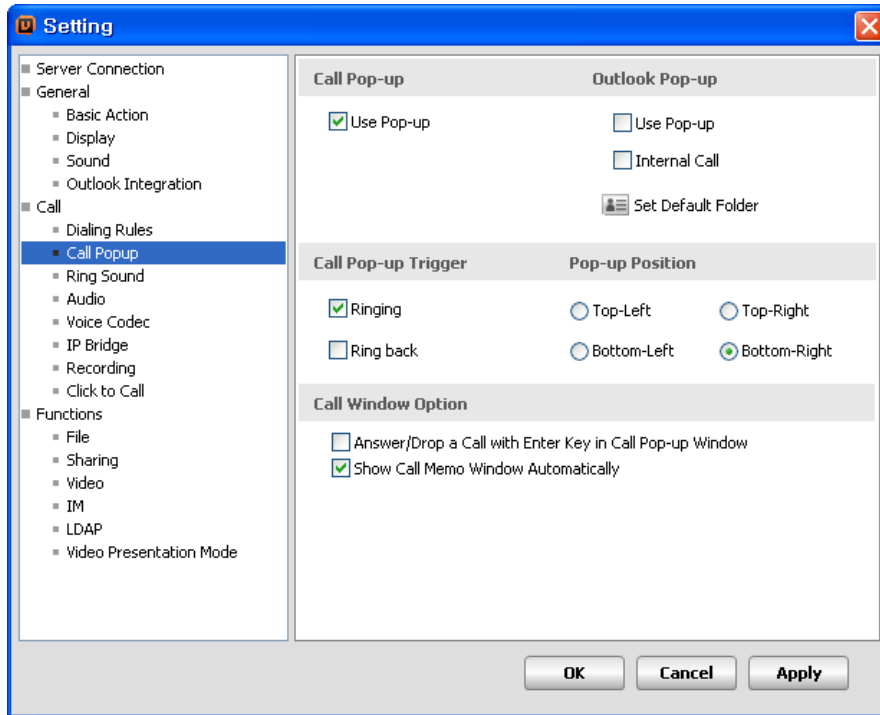
## Special Dialing Rules

Normally, dialed numbers that do not have an area or country code defined in the dialing rules are routed as an internal call. Using the Special Dialing Rules, dialed numbers matching the defined rules are routed as external CO calls.



- **Prefix Digits** – If the first digits in a dialed number match the assigned 'Prefix Digit(s)', the call is routed as an external CO call and the CO access code is added automatically.
- **Length** – If the length of the dialed number is longer than the defined length, the call is routed as an external CO call and the CO access code is added automatically.

### 3.2.3.3.2 Call Popup



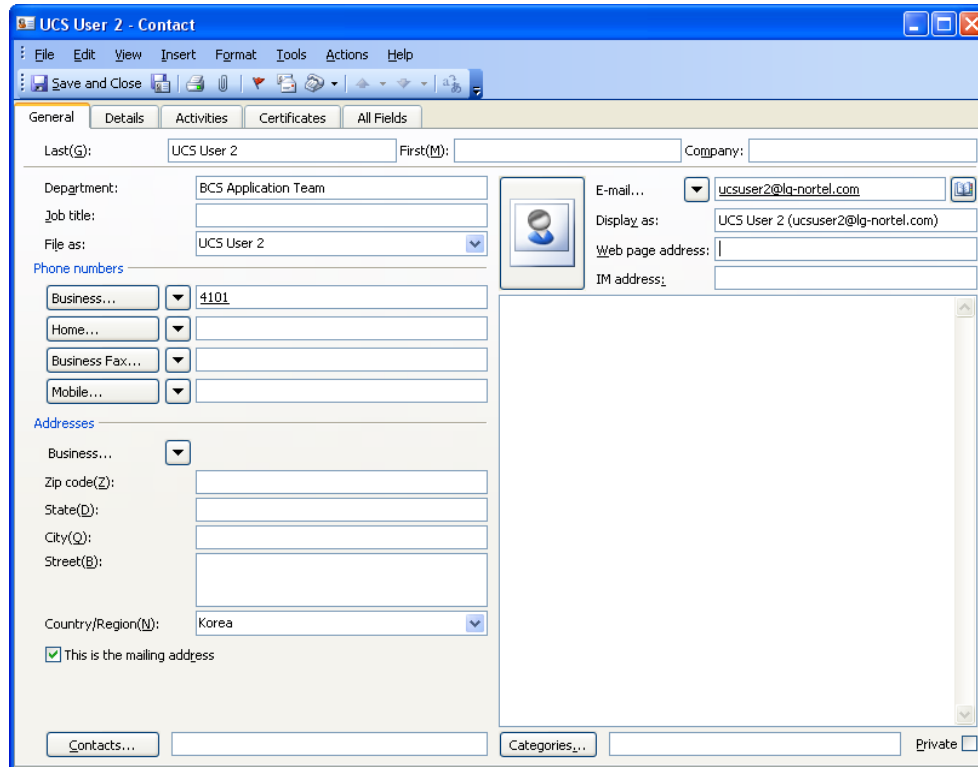
- **Call Pop-up** – check to enable the UCS version Call Popup.
- **Outlook Pop-up** – when Call pop-up is enabled, the client will display either the UCS popup shown above or the Outlook popup. Check to enable the Outlook Popup in place of the UCS popup. If you check Internal Call, the Outlook popup will also display for internal calls. The default folder for the Outlook contacts must be defined.

---

#### NOTE

For Outlook Pop-up function, Outlook Pop-up property in Web Admin must be set to 'True'.

---



- **Call Popup Trigger** – defines the event that will cause display of the selected popup, both incoming calls and outgoing calls may trigger the call popup.
- **Call Window Option** – the Call tab in the main window can be displayed when a call is connected or when a call is answered or dropped with Enter key in the popup window. When you set 'Display Registered Call Memo on Call Pop-up', incoming and outgoing calls are displayed in the Call Memo window. Also, if you want to activate the Call Memo window automatically when a call is received, select the 'Show Call Memo Window Automatically' option. For more information about the Call Memo window, refer to Section 8.8. Select the 'Show Flex Button Window when Phone Tab is open' to see the Flex Button window automatically when the Phone tab is selected.

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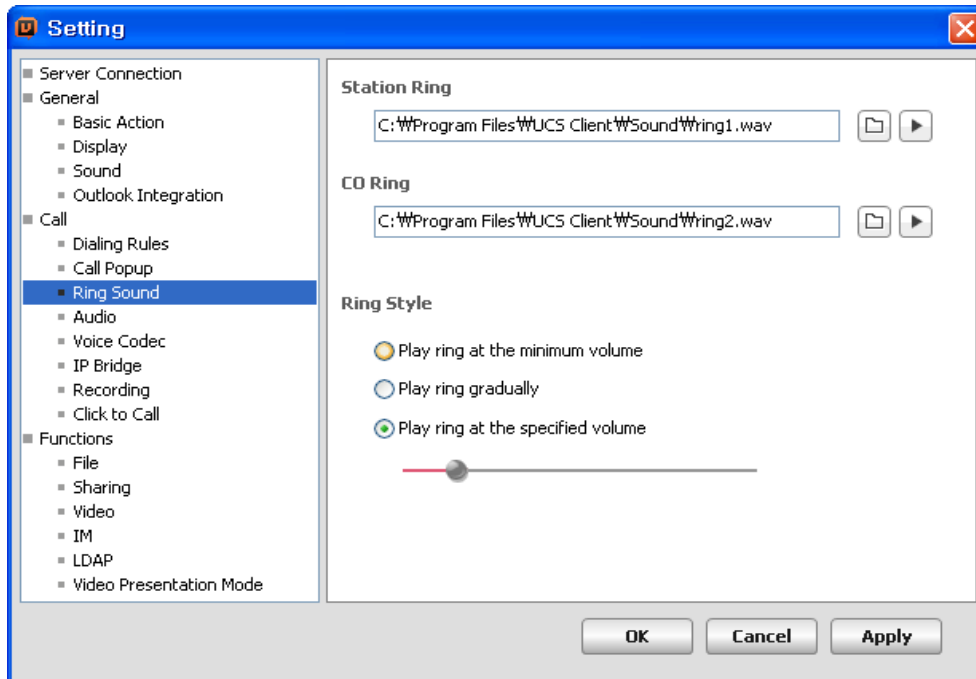
#### NOTE

For correct operation with 'Answer/Drop a Call with Enter Key in Call Pop-up Window' enabled, the UCS call popup must be the active window. If the Outlook call popup is selected or you select a different window while the UCS call popup is displayed the call cannot be answered or dropped with the Enter key.

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### 3.2.3.3.3 Ring Sound

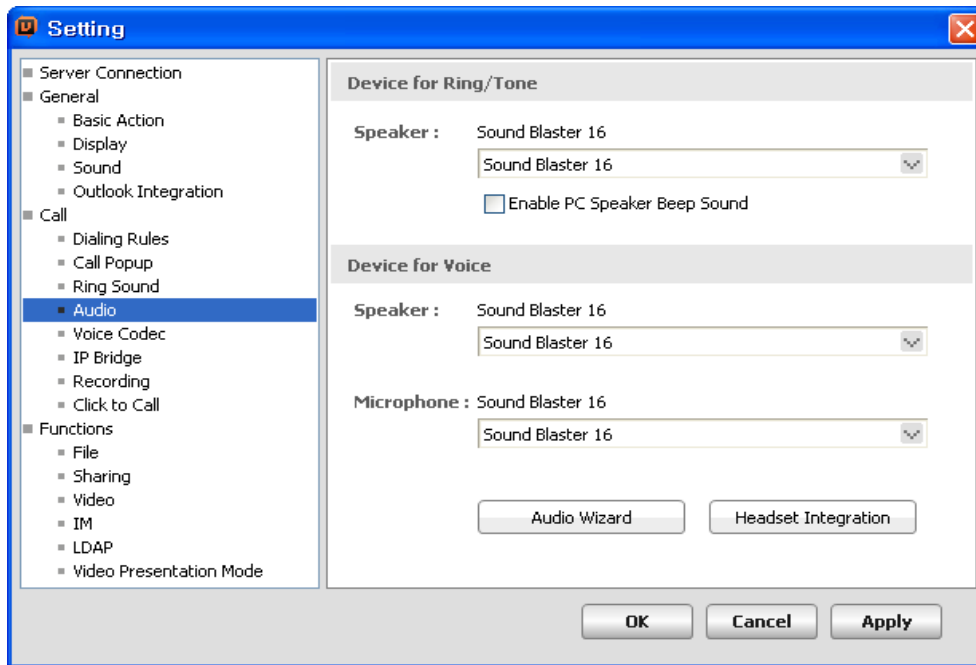
iPECS UCS Client can provide one of four (4) ring signals with separate assignments for internal and external calls. Each of the four (4) ring signals is contained in an \*.wav file. You may select one of the four \*.wav files (ring1.wav, ring2.wav, ring3.wav and ring4.wav) or replace any of these files with a desired \*.wav (PCM) or \*.mp3 file.



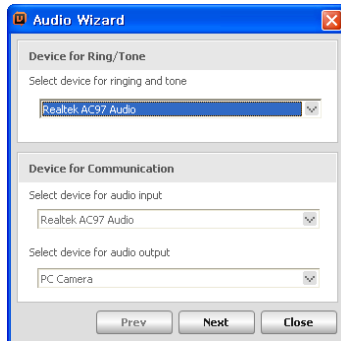
- **Station Ring** – selects the ring signal for internal calls. You can check the ring signal in advance.
- **CO Ring** – selects the ring signal for external calls. You can check the ring signal in advance.
- **Ring Style** – one of three ring volume treatments can be selected, minimum, gradually increase, or at the specified volume.

### 3.2.3.3.4 Audio

The UCS Client will deliver tone signals (ring) as well as voice signals to the defined device. Select a Speaker to receive Ring/DTMF and select a Speaker and a Microphone for voice communication. The Speaker is defined separately for voice and ring signals.



### Audio Wizard



- **Device for Ring/Tone** – defines the devices for ring and tones. PC Speaker Beep tone will sound for incoming calls if this option is enabled.
- **Device for Voice** – defines the devices, speaker and microphone, for voice communication.
- **Audio Tuning Wizard** – assists in adjusting the volumes for the Speaker/Microphone.

There are three ring styles for an incoming call ring signal, minimum, gradually increase, or at the specified volume. From the wizard, the style selected is played allowing you to determine if it is acceptable. If you check Enable PC Speaker Beep, the beep is played.



On the Communication Test page of the wizard, you can check the volume level of the speaker and microphone. Any sound picked up by the microphone is displayed under the microphone section of this page. The volume level varies if the PC sound devices are properly set. If you set 'Let UCS adjust microphone volume', Automatic Gain Control (AGC) is used to adjust the microphone volume.



These options can improve voice quality in noisy environments. By increasing the noise suppression, noise patterns are removed during conversation. For example, if you say 'Ah~', continuously, the pattern will be removed from the conversation.



- **Headset Integration** – when headset integration is enabled, operation of the headset hook-switch function for answering or dropping a call is recognized when using one of several headsets. The supported headsets with the hook-switch function include:





- Audio 910 Headset
- CS 50/60 USB Headset, press volume up or down button for more than 3 seconds to dial the assigned numbers.
- GN8120 Headset
- Common Devices – Plantronics
- Common Devices – GN Netcom (Jabra)

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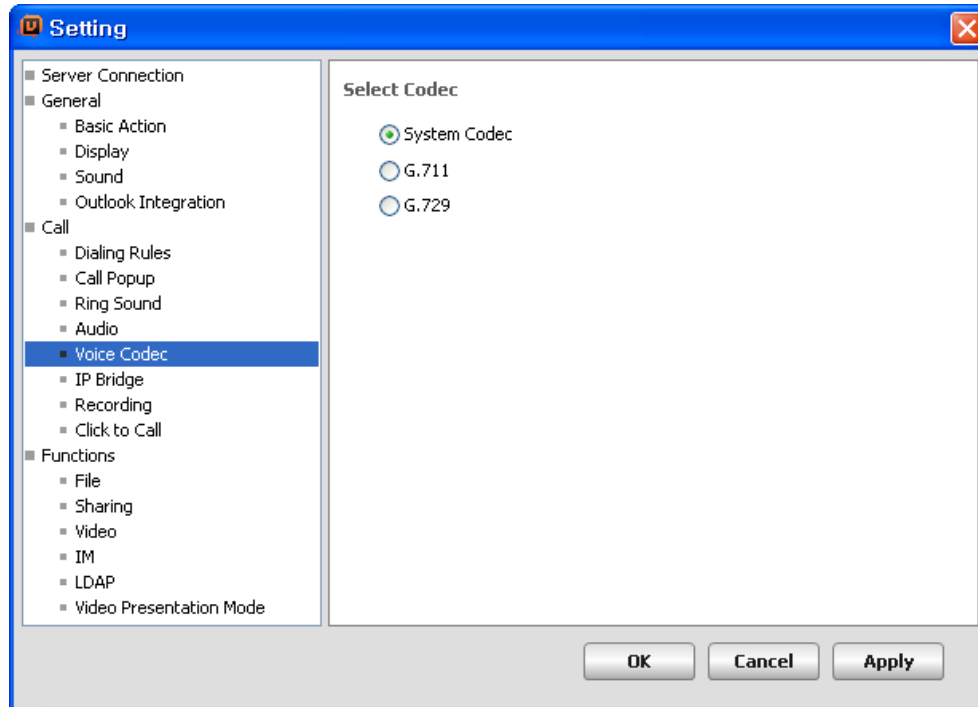
**NOTE**

The operation of remote hook-switch varies between headset manufacturers and models. To use one of the listed headsets with UCS Client, refer to the manual packaged with the headset.

---

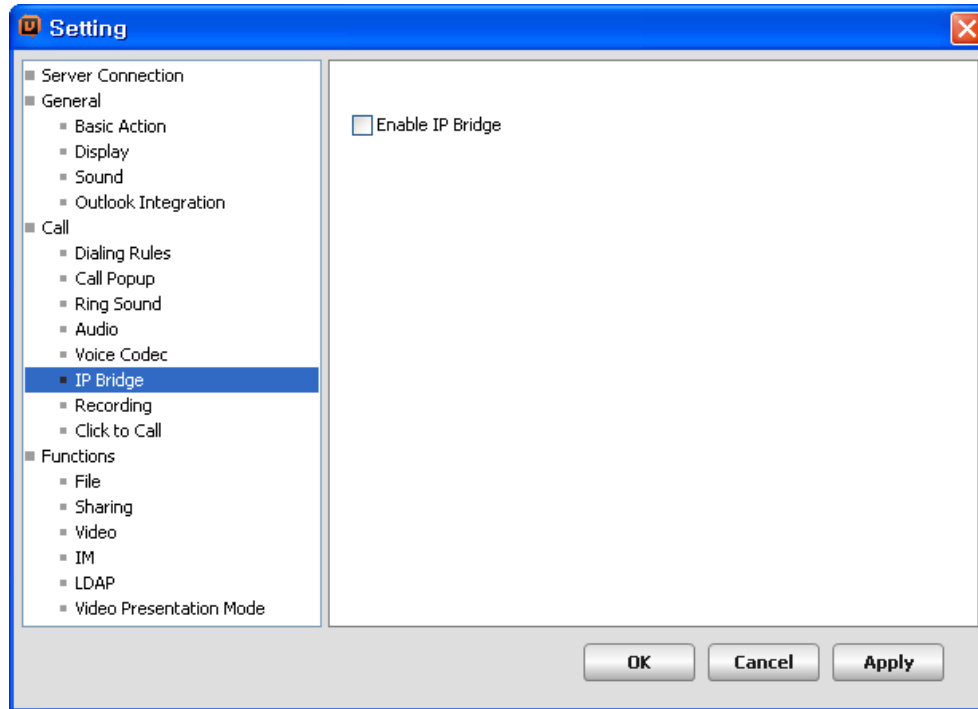
To use the hook-switch function when a “Common Device” is selected, special Windows drivers are required. These drivers are available on the UCS Server and may be downloaded using the link at the bottom of the Headset Integration page or from the Client download page accessed from the UCS Server login page. In addition, for the Plantronics Common Devices, Microsoft .Net Framework 3.5 or later is required. The UCS Client will check for this software and, if not installed, you will be prompted to download and install this software prior to installation of the drivers.

### 3.2.3.3.5 Voice Codec



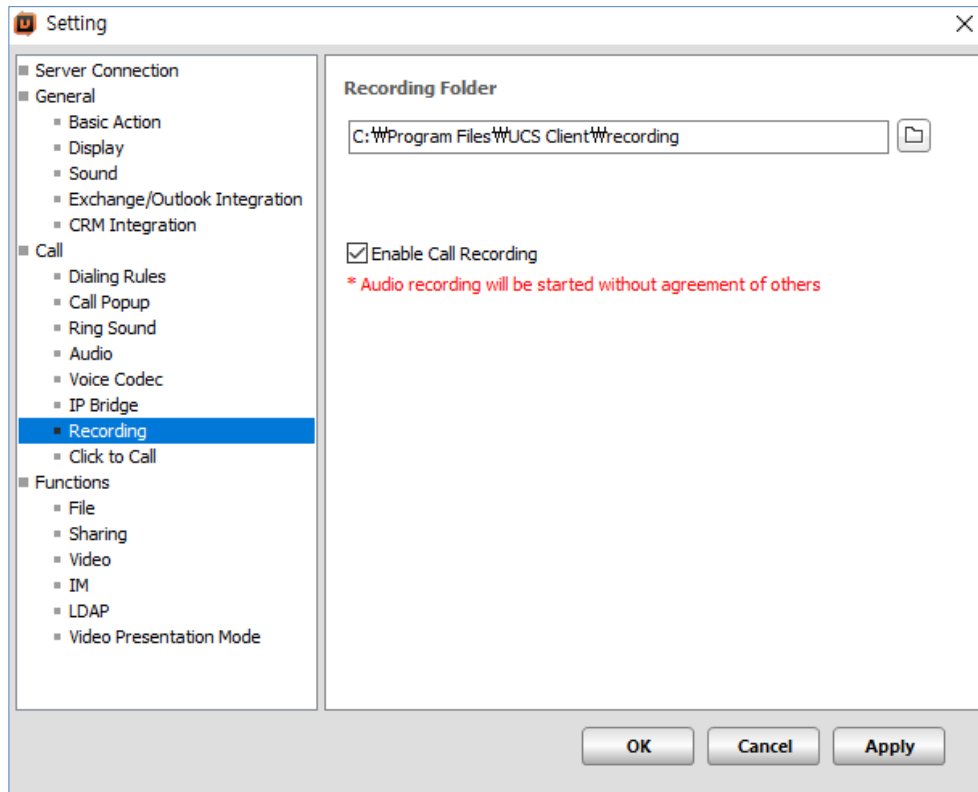
- **Select Codec** – defines the preferred codec (System codec, G.711 or G.729).

### 3.2.3.3.6 IP Bridge



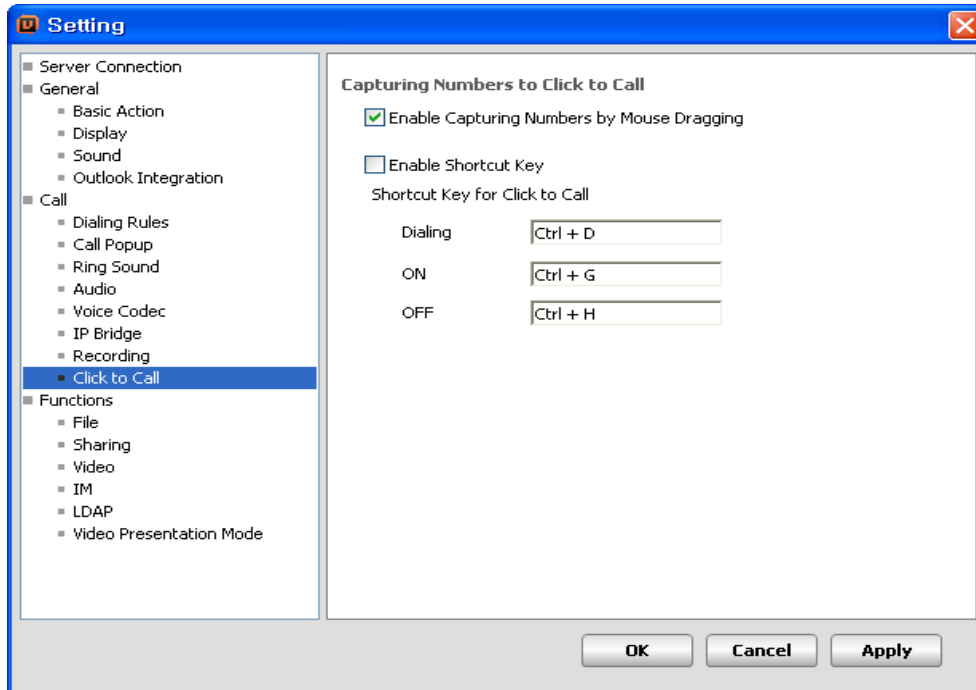
- **Enable IP Bridge** – the UCS Client can be linked with an iPECS desktop IP Phone so that a call can be placed from the client and the voice path established through the IP Phone by lifting the handset or pressing the Speaker button.

### 3.2.3.3.7 Recording

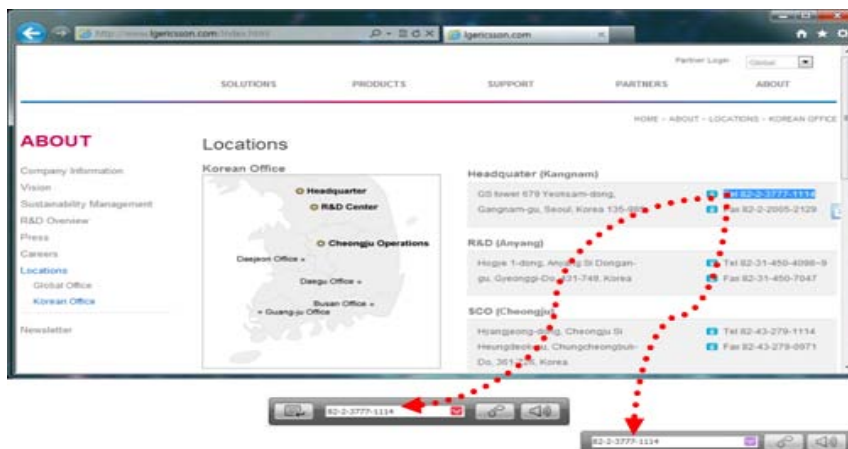


- **Recording Folder** – defines the folder where recorded call files are stored.
- **Enable Call Recording** – If Enable Call Recording is enable, **[Record]** button will be displayed on CallView window. Default value is Disable.

### 3.2.3.3.8 Click to Call



- **Enable Capturing Numbers by Mouse Dragging** - when you drag your mouse over a phone number in a browser window, the number is captured into the Quick Call Control Bar and the Call Assistance. However, capturing over several windows is not allowed. For example, capturing will not work if you click the left mouse button to start in one program window and release mouse button in another program window.
- **Enable Shortcut Key** – UCS Client support Shortcut Key such as below.
  - Dialing: call using configured Shortcut Key
  - ON: Click to Call function ON
  - Off: Click to Call function OFF



#### NOTE

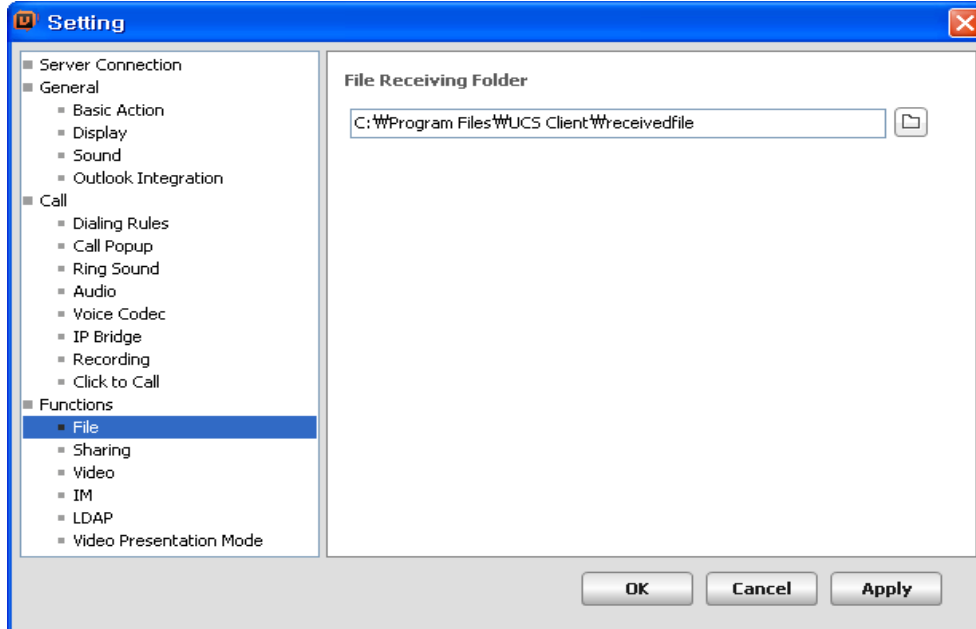
Characters captured can be numeric digits, '+' (plus sign), - (dash) and ',' (comma). If number capture fails, try restarting UCS Client to update Setting/Call/Click to Call configuration.

### 3.2.3.4 Functions

Under Functions, settings are available for Sharing, video, IM logging and database characteristics as discussed in detail below.

#### To modify any of the Function category settings:

1. Select **Setting** from the File menu, the Server Connection window displays.
2. Select the desired sub-category under the Function heading.



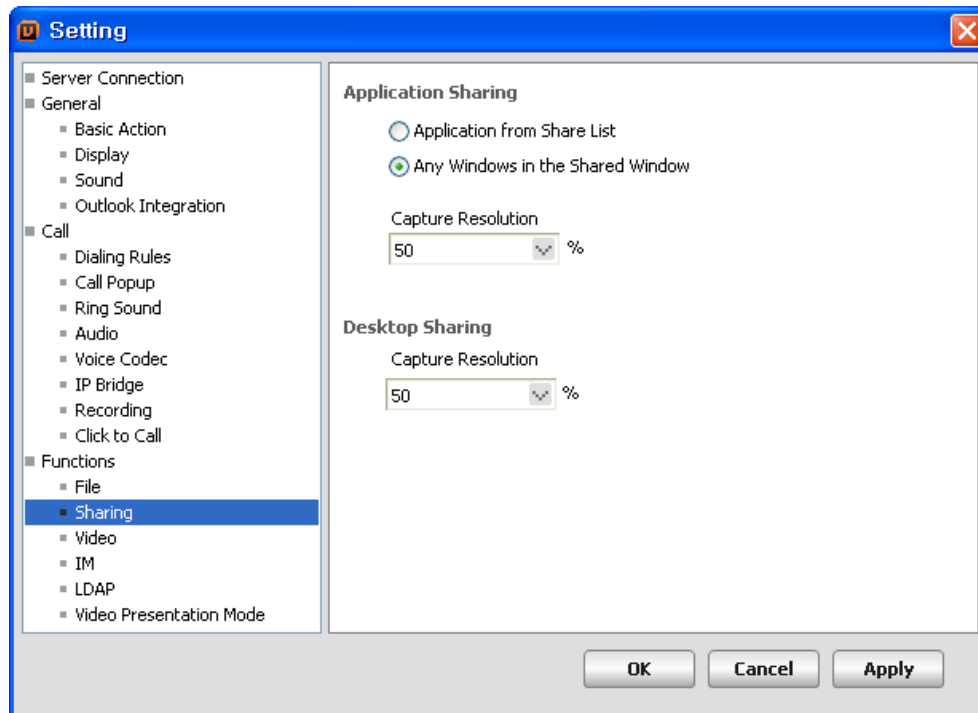
3. Change the desired item(s).
4. Click **Apply** or **OK** to exit settings.

#### 3.2.3.4.1 File

- **File Receiving Folder** – defines the folder where files received from other UCS Clients are stored.

### 3.2.3.4.2 Sharing

#### Application Sharing

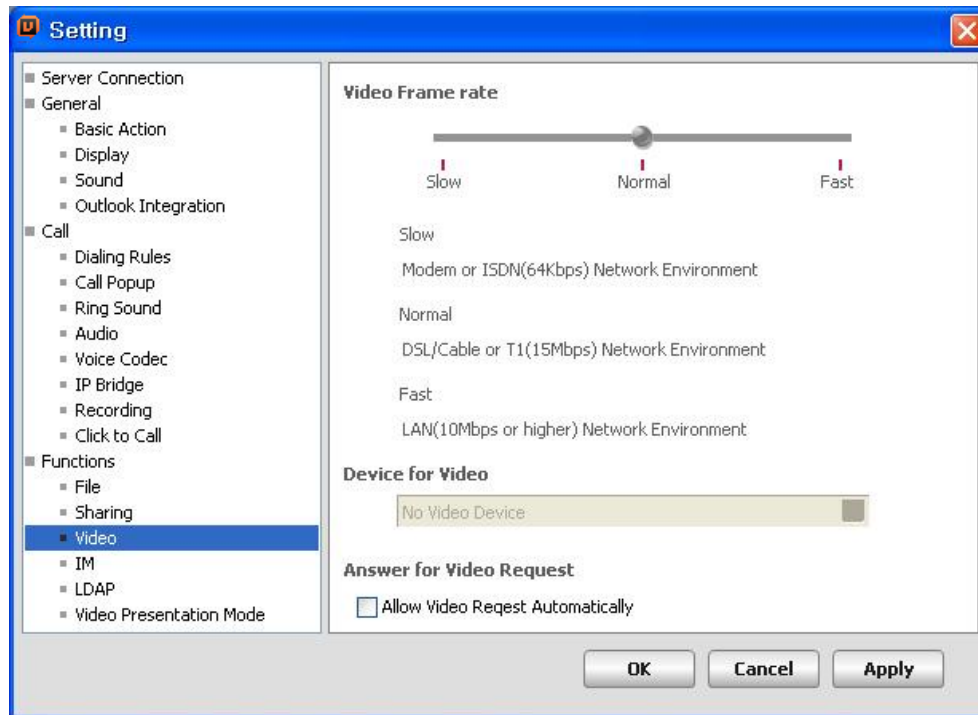


- **Application from Share List** – only shares files from the Shared List during a sharing session (refer to Section 11.3.3).
- **Any windows in the Shared Window** – shares all windows that are moved or displayed in the Sharing window including files in the Shared List, refer to Section 11.3.3. Certain types of files such as Internet browsers may not be recognized by the sharing module as applicable to sharing. In this case, selecting Any Windows in the Shared Window allows a window to be drag to the Sharing window for display to participants.
- **Capture Resolution** – sets the capture resolution (10, 20, 50, 80, and 100%). Higher resolution improves quality but can significantly increase LAN traffic.

#### Desktop Sharing

- **Capture Resolution** – sets the capture resolution (10, 20, 50, 80, and 100%). Higher resolution improves quality but can significantly increase LAN traffic.

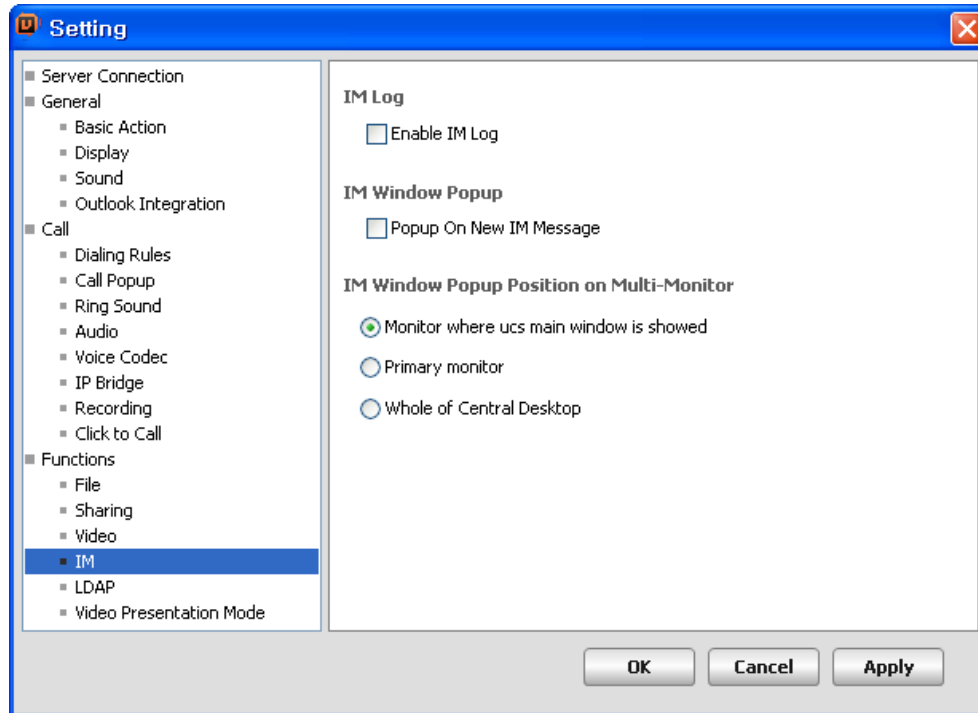
### 3.2.3.4.3 Video



- **Video Frame rate** – sets the video frame rate (Slow, Normal, and Fast). Because added processing time is required, faster frame rates may affect quality.
- **Device for Video** – sets the video input device. If there are more than two devices, the user may select a device from the list.
- **Allow Video Request Automatically** – when enabled, automatically answer all incoming video requests.



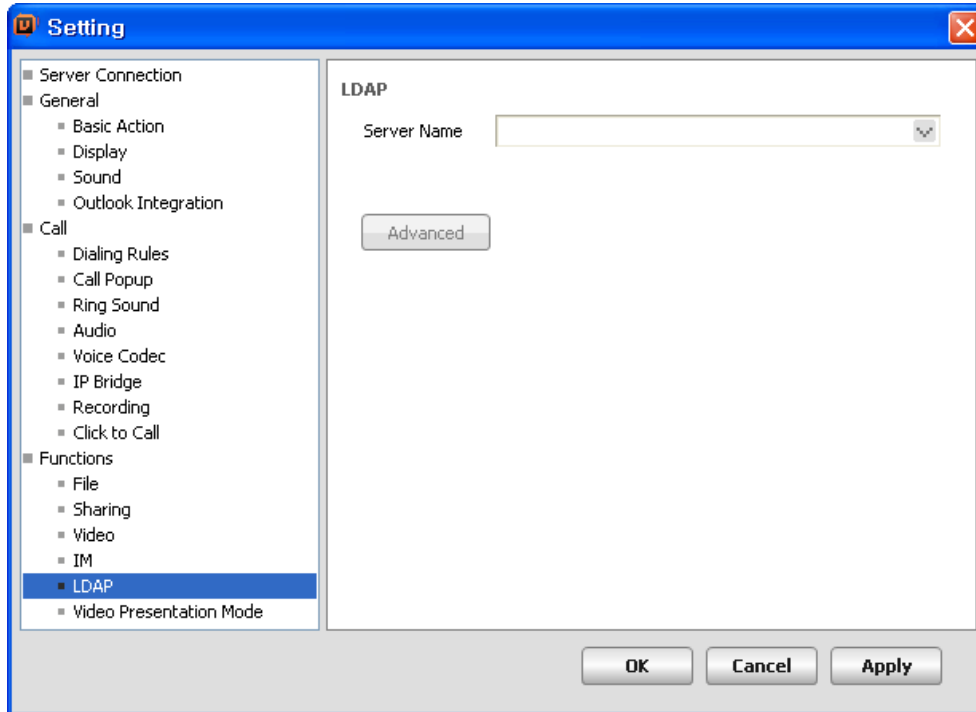
### 3.2.3.4.4 IM



- **Enable IM Log** – enables the IM Log, all IM sessions are stored until erased, refer to Section 6.3.
- **Popup On New IM Message** – enables the minimized or hidden IM window to popup when a new IM message is received.
- **IM Window Popup Position on Multi-Monitor** – sets the popup position of the IM window in Multi-monitor environments.
  - **Monitor where UCS main window is shown** – IM Window will be displayed at the monitor where the UCS Client main window is shown.
  - **Primary monitor** – IM window will be displayed at the primary monitor where Start Menu and Desktop Shortcuts are displayed by Windows.
  - **Whole of Central Desktop** – IM window will be displayed in the center of the screen.

### 3.2.3.4.5 LDAP

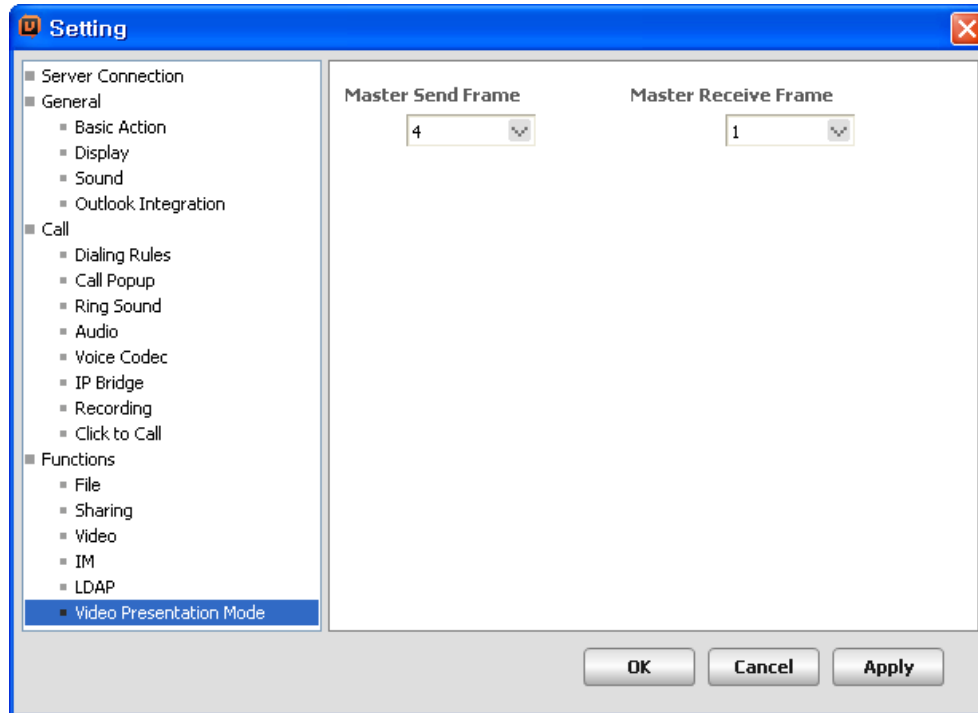
LDAP Server information is transferred from UCS Sever during login. Therefore, after logging-in UCS Client, UCS user can choose LDAP Server.



- **Server Name** – identifies the LDAP Server. A LDAP server defines the server where UCS Server databases reside.
  - **Advanced** – to view the advanced LDAP Setting window.



### 3.2.3.4.6 Video Presentation Mode



- **Master Send Frame** – maximum number of frames that can be sent by the organizer.
- **Master Receive Frame** – maximum number of frames that can be sent by the participants.

---

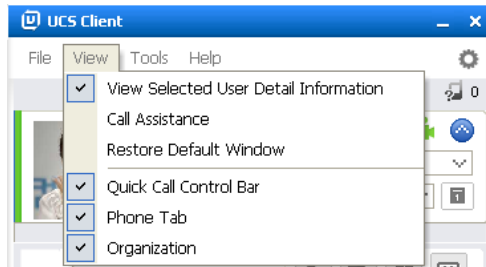
#### NOTE

The organizer PC in presentation mode should have considerable CPU power to process video frames received from up to 32 users. Using higher frame rates requires higher CPU power to process the video frames.

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## 3.3 View Menu Selection

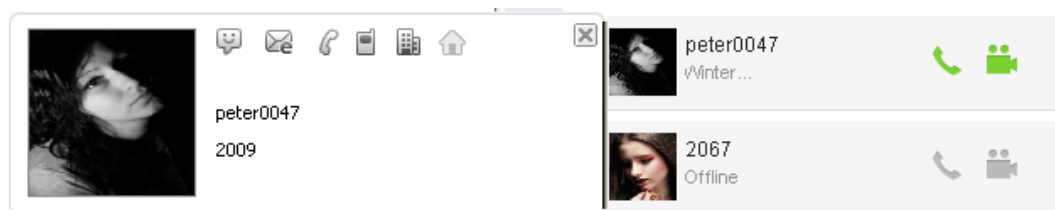
Selecting View shows the following selections:










- **View Selected User Detail Information** – displays detail information window for selected user in the Presence or Log window.
- **Call Assistance** – displays the Call Assistance window.
- **Restore Default Window** – returns UCS Client main window to the default appearance.
- **Quick Call Control Bar** – determines if the Quick Call Control Bar will be hidden or shown.
- **Phone Tab** – determines if the Phone Tab will be hidden or shown.
- **Organization** – determines if the Organization Tab will be hidden or shown (options set by Server Admin.).

### 3.3.1 View Contact Detail

When a contact is selected in the Presence or Log window, basic information about the selected contact will display along with an iconic view of the communication modes available. Icons for available communication modes are highlighted while modes not available are shaded. Icons and the represented communication are:

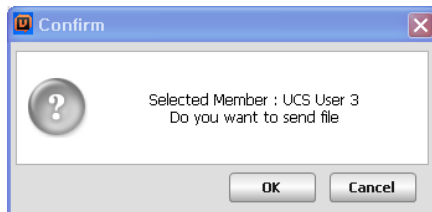


-  Start an IM session with selected user.
-  Send E-mail to selected user.
-  Make a call to the desktop phone of a selected user.
-  Make a call to the cell phone of a selected user.
-  Make a call to the office phone of a selected user.
-  Make a call to the home phone of a selected user.
-  Display other menus.

- Initiate File Send, Sharing, Web Push or Video call with the selected user.



To send files to a selected contact, drag and drop the appropriate file from its folder window to the Contact Detail window.

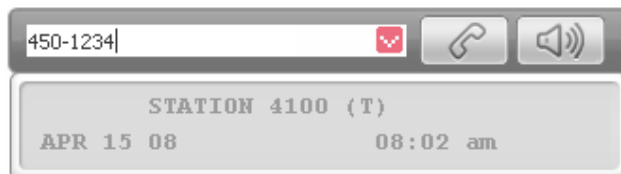


### 3.3.2 Call Assistance

The Call Assistance bar is always shown on top of other desktop screens to allow instant voice communications. The bar is semi-transparent and may be dragged and dropped to an unobtrusive location on the desktop screen.

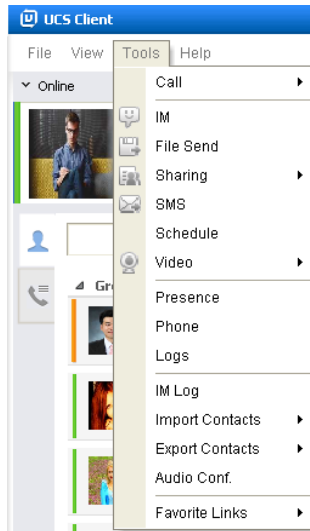


Additionally, you may activate display of the Station LCD; right click on the Call Assistant and select 'Display LCD' to view the Station LCD display along with the Call Assistant.



## 3.4 Tools Menu Selection

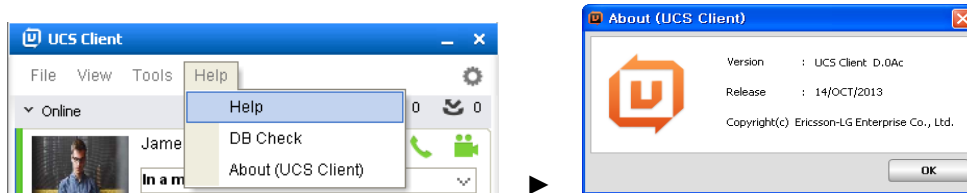
The Tools menu provides direct access to UCS Client collaboration, database and communication services. Each of the Tools menu items can be accessed from other menus and is discussed further in other sections of this guide as noted below.



- **Call** – displays the Call menu, refer to Section 8.
- **IM** – displays the IM window, refer to Section 11.1.
- **File Send** – displays the File Send window, refer to Section 11.2.
- **Sharing** – contains the selections for Application Sharing, Desktop Sharing, Whiteboard, Web Push, refer to Section 11.3 and 11.4.
- **SMS** – displays the SMS window, refer to section 11.6
- **Schedule** – displays the Schedule window, refer to Section 9.
- **Video** – contains selections for Video (Normal Mode), and Video (Presentation Mode), refer to Section 11.5.
- **Chat Room** – displays the Chat Room window, refer to Section 11.1.2.
- **IM Log** – displays the IM Log window, refer to Section 6.3.
- **Import Contacts** – import the contents from other contact database tools, refer to Section 6.1.1.4.
- **Export Contacts** – export the contents of the user's contacts to other database tools, refer to Section 6.1.1.4.
- **Audio Conference** – establish ad hoc conferences and manage conference rooms, refer to section 14.
- **Favorite Links** – displays the Program & Web Link window.

## 3.5 Help Menu Selection

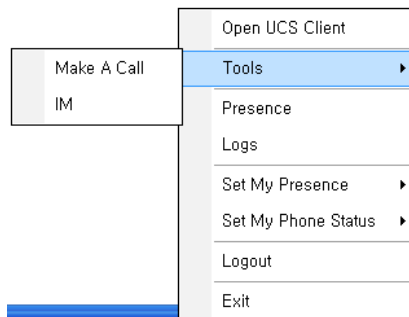
The Help menu displays this user guide in PDF format and the About screen, which contains general information on the UCS Client application including the version and release date. To display the user guide, Adobe Acrobat Reader, which is available from the Adobe web site, is required.



## 3.6 Tray Menu

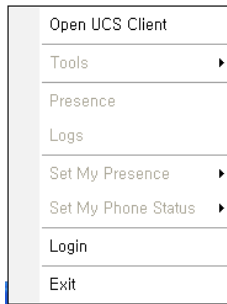
UCS Client places a short cut button in the right notification tray. Right clicking on the short cut displays one of two menus depending on the login state of the UCS Client.

### After Login



- **Open UCS Client** – opens the UCS Client with the last displayed main window.
- **Tools** – opens the Selected Member window to either 'Make a call' or 'IM'.
- **Presence** – opens the UCS Client with presence in the main window.
- **Logs** – opens the UCS Client with the Logs window.
- **Set My Presence** – change my presence, refer to Section 3.2.1.
- **Set My Phone Status** – change my phone status, refer to Section 3.2.2.
- **Logout** – log out of the UCS Client.
- **Exit** – closes and exits the UCS Client.

## Before Login



- **Open UCS Client** – opens the UCS Client Login window.
- **Login** – opens the UCS Client Login window.
- **Exit** – closes and exits the UCS Client.

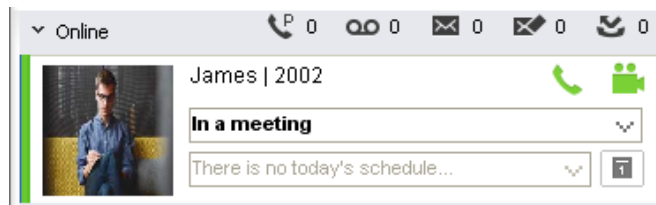


## Chapter 4

# Message & Status Bar

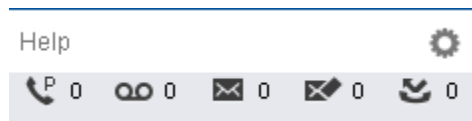
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The Message icons for Voice Mail, SMS, Notes and Missed calls are shown at the right above the main window. These icons indicate the number of unheard or unread messages, and give access to Voice Mail and message log windows.



## 4.1 Message Icons

The Message icons for Voice Mail, SMS, Notes and Missed calls are shown at the right above the main window. These icons indicate the number of unheard or unread messages, and give access to Voice Mail and message log windows.

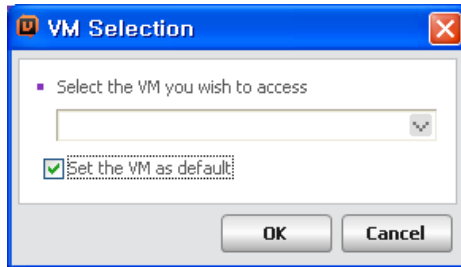


Press the desired message icon:

- Parked Calls
- Voice mail, refer to Section 4.1.1.
- SMS, refer to Section 4.1.2.
- Notes, refer to Section 4.1.3.
- Missed Calls, refer to Section 4.1.4

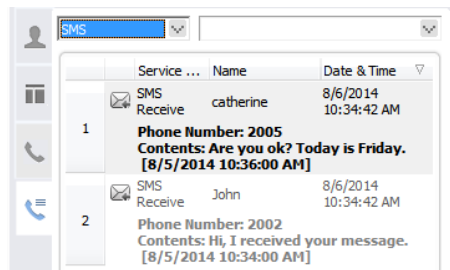
## 4.1.1 Voice Mail

The Voice Mail selection will access your assigned Voice mail server. If you have multiple Voice mail servers and 'Set the VM as Default' is checked, the VM Selection window appears and you may select a VM server. If "Set the VM as Default" is not checked, the VM Selection window is available from the Call menu under the Tools main menu. The Voice mail icon is displayed even though no Voice mail server is assigned to your station.



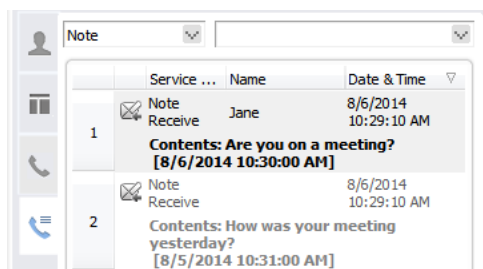
## 4.1.2 SMS

Up to ten (10) incoming SMS messages are stored in the iPECS. The SMS message log is retrieved from iPECS by clicking the SMS icon in the UCS Client. The main window then displays a log of the SMS messages.



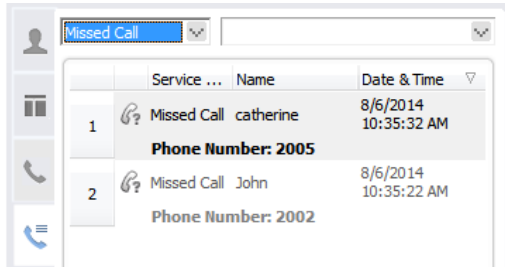
## 4.1.3 Notes

Notes left by other users are retrieved from the UCS Server by clicking on the Notes icon in the UCS Client. The main window displays all received Notes.



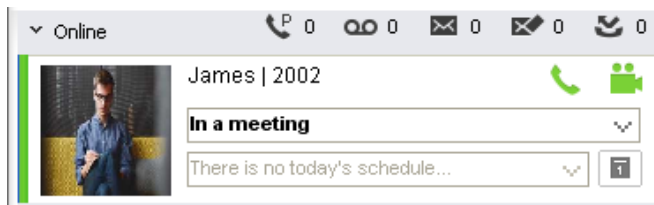
## 4.1.4 Missed Calls

Missed call information is displayed by clicking the Missed Calls icon. The main window displays detailed logs for each missed call.











## 4.2 Status Icons





UCS Server monitors and displays your IM Presence, Phone and Video status icons, updating the icons automatically as your status changes. These icons are displayed on the right side of the "My Detailed Information" area of the UCS Client window. In addition, the Presence and Phone icons can be used to modify your status as outlined in Sections 3.2.1 and 3.2.2. The Presence and Phone status can also be changed manually under the File selection of the Main menu. Icons and the represented status are shown below.






The Presence icons are:

-  : Offline
-  : Online
-  : Busy
-  : Away
-  : Be Right Back
-  : Out of Office
-  : In a Meeting
-  : DND

The iPECS Phone status icons are:

-  : Idle
-  : Busy
-  : DND
-  : Call Forward

The Webcam status icons are:

-  : Offline
-  : Online
-  : Unavailable

## Chapter 5

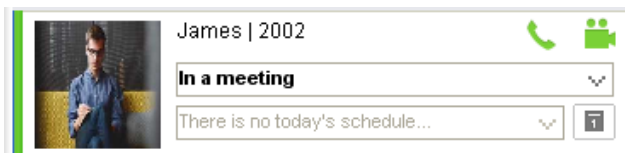
# My Detail Information

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You can view and modify the information in the 'My Information' window including today's message, 'My picture' and the day's appointments. In addition, your detailed information and password can be modified using the 'My Information' window.

## 5.1 Setting My Picture

The 'My Information' window includes a user-defined picture shown to other users in the Shared Directory and during certain IM sessions. The picture must be a .jpeg file, which will be resized to fit in the 'My Picture' area.



### To change the picture:

1. Select the **Picture Change** button (down arrow).
2. From the Windows file directory, locate and select the desired file.
3. Click Open to apply the selection as the **My Picture** file.

## 5.2 My Information and Password – (P)

The UCS Client sends the User ID and Password to the iPECS system and UCS Server during login to authenticate the client. The password can be changed from the My Information window or in the UC server Web Admin. ⓘ This function is supported in **Premium** license.

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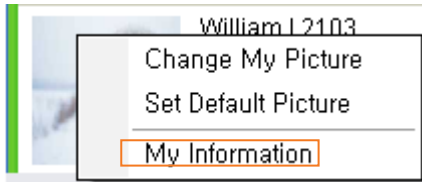
### NOTE

In cases where Single Sign-On is set by Web Admin, [Change Password] menu will be disabled because exchange server sets user's password automatically.

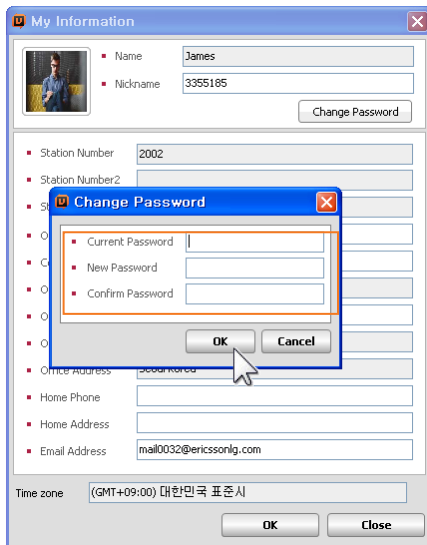
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### To change your password:

1. Click on the **My Picture** to display your detailed information, then select [My Information]



2. Select **Change Password**, the Change Password window displays.
3. Enter the current password.



4. Enter and confirm the desired password in the New Password and Confirm Password boxes.
5. Select **OK** to save the change.

---

#### NOTE

The new password length must be equal to or greater than the minimum password length permitted by the UCS Administrator.

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### To change My Information:

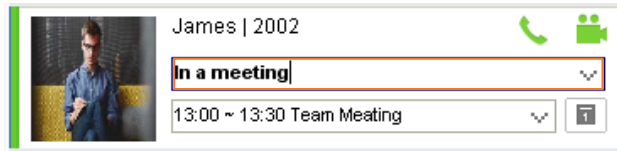
1. Click on the **My Picture** to display your detailed information, then select [My Information]
2. Edit contents of any editable field.
  - Editable fields are set by UCS Administrator.
3. Press **OK** to save the changes.

## 5.3 User Defined Message

You can write a message to display to other UCS Clients.

### To post your message:

1. Input the message.



2. Press Enter button on the PC, the message is displayed in bold font.

## 5.4 Today's Appointments – (P)

My Information window includes a display of today's appointments. The time and name of the next appointment is shown in the window. If there is more than one appointment, the down arrow button will display all appointments for the day. In addition, appointments can be viewed, added or modified as discussed in Section 10 by clicking on the calendar to the right of the appointment display. ⓘ This function is supported in **UCS Premium** license.



## Chapter 6

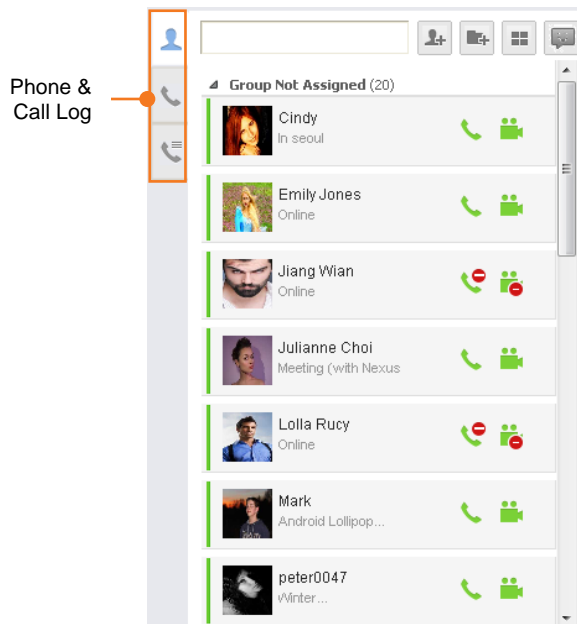
# Main Window Views

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The main window has three views (Presence, Phone, Logs) selectable with the tabs at the top of the window. The Phone tab can be hidden, see Section 3.2.3.2.

## 6.1 Presence Window Introduction

The Presence window displays the status of contacts you select from one of two directories available with UCS. The contacts in the Shared directory, which is managed by the UCS Administrator, are available to all users. You also have access to contacts in a second directory called the Private User directory. A separate Private User directory, which is managed by you and stored in the UCS Client PC, is available to you only. The Presence window displays the status of the UCS Client, iPECS desktop phone, Webcam, Schedule and Remote Monitoring for listed contacts using icons. For contacts not monitored by UCS, for example external Shared or Private User contacts, no status is available to UCS and a single icon displays their status. The tool and status icons employed in the Presence window are shown below.












### The tool icons are:

-  : Add Contact
-  : Add Group




### The Presence icons are:

-  : Offline
-  : Online
-  : Busy
-  : Away
-  : Be Right Back
-  : Out of Office
-  : In a Meeting
-  : DND
-  : Phone User (Presence status is blank)

As in picture below, Phone user's status is blank because there is no presence status for phone user and Phone image is used for distinguishing Phone users from UCS users.





### The iPECS Phone status icons are:

-  : Idle
-  : Busy
-  : DND
-  : Call Forward

### The Webcam status icons are:

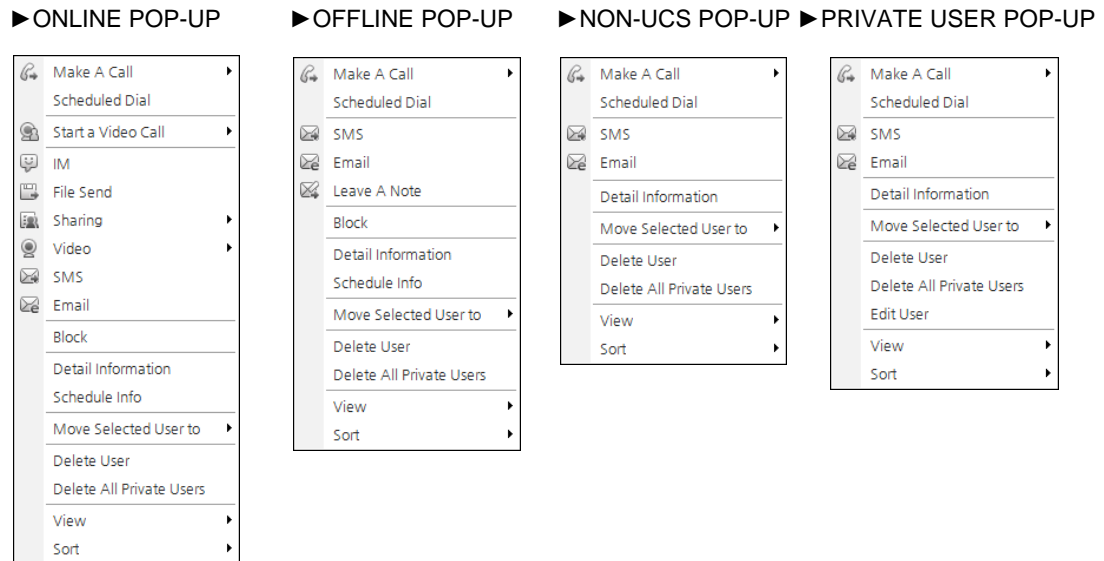
-  : Offline
-  : Online
-  : Offline
-  : Online

The Schedule status icon (  ) displays after the contact if the Contact has established a 'Today's Schedule'.

The Remote Monitoring status icon (  ) displays after the contact if the Remote Monitoring has been allowed by the monitored user.

When a contact is selected, the contact's information displays in the 'Selected Contact' window just below the Presence window, refer to Section 6.5. In addition, icons are available in the window for each available communication mode.

The Presence window can be used to establish communication with the listed contacts. By right clicking the mouse on a contact, one of four collaboration and management popup menus will display. The popup displayed is based on status and type of the contact as below.



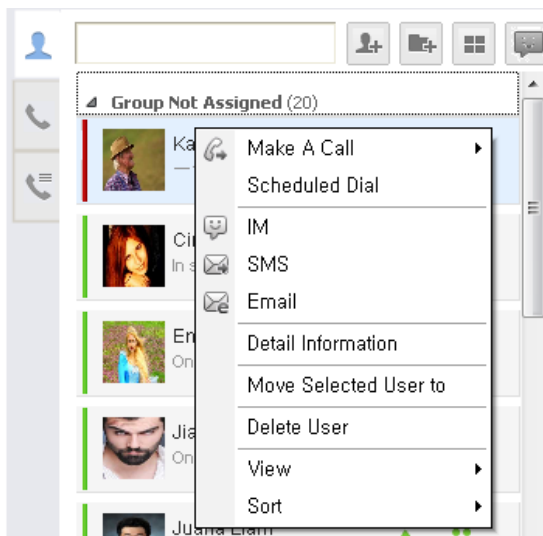
From these menus, you may select Make a Call to call the contact, initiate a collaborative session (IM, File Send, Sharing, Web Push, etc., see section 11) with the contact, block the selected user from receiving you presence and status information (select **Block**), remove the contact from your Presence window (**Delete User**) or view detail contact information (**Detail Information**). In addition, for offline contacts, you may **Leave a Note**. The following describes menu items:

- **Make a Call** – places a call to the selected contact
- **Scheduled Dial** – registers a Schedule Dial to the selected contact
- **Start a Video Call** – Video with call (Normal/Presentation Mode)
- **IM** – starts IM session to the selected contact
- **File Send** – starts File Send to the selected contact
- **Sharing** – Initiates a sharing session with the selected contact (Application Sharing/Desktop Sharing/Whiteboard/Web Push)
- **Clicking popup item** – starts one click sharing session with the selected contact and includes selected item.
- **Video** – starts a Video call to the selected contact
- **SMS** – sends an SMS to the selected contact
- **Email** – sends an Email to the selected contact
- **Leave a Note** – leaves a note to the selected offline contact

- **Block** – blocks the selected user from receiving your presence
- **Detail Information** – opens the selected user's detail information box
- **Today's Schedule Info** – displays the selected user's today's schedule information
- **Move Selected User to** – moves the selected user to another group
- **Delete User** – deletes the selected user from the Presence window
- **Delete All Private Users** – deletes all private users from the Presence window

In addition to selecting a single contact, you can select multiple contacts or grouped contacts for activation of a function from the menu. To select multiple contacts:

1. Select a contact.
2. Select additional users using the mouse and Ctrl or Shift key.
3. Right-click your mouse on the contact records and selects the appropriate function in the popup menu.



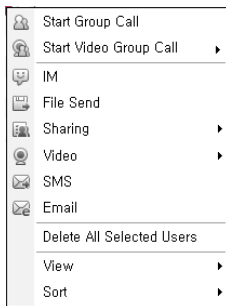

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**NOTE.**

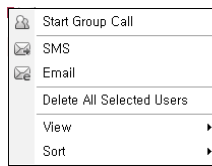
If more than five (5) online users are selected, the offline popup menu is displayed in place of the online menu. Certain functions available from the online popup are not available to more than six (6) users. For example, the maximum number of users in a Video Conference is six, you and 5 other users.

---

► MULTI SELECT ONLINE POP-UP

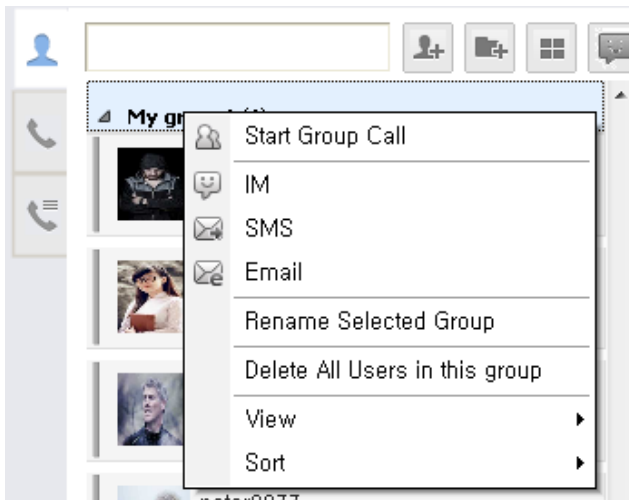


► MULTI SELECT OFFLINE POP-UP

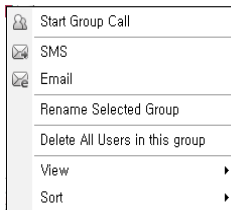


**To select contacts in a group:**

1. Select a group.
2. Right-click on the contact records then select a function from the popup menu displayed.



► Group Offline Menu

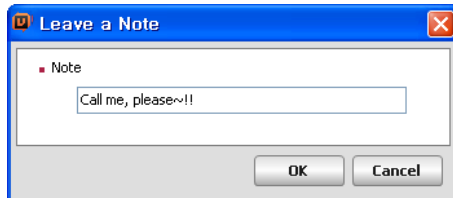


The following is a brief description of menu items available.

- **Start Group Call** – places a call to the selected group of contacts
- **Start Video Group Call** – places a video call to the selected group contacts
- **Delete All Selected Users** – deletes the selected users from the Presence window
- **Delete All Users in this group** – deletes all users in the selected group from the Presence window

### To Leave a Note to an offline contact:

1. Right-click on a contact record.
2. Select **Leave a Note** (only available for offline contacts).
3. Enter your note in the Leave a Note window, maximum 100 characters.



4. Click **OK** to send the Note.

You can customize the Presence window appearance with the **View** selection.

- **All** – displays all Presence contacts
- **Share** – displays only Shared contacts
- **Online** – displays only online contacts
- **Blocked** – displays only blocked contacts
- **Private** – displays only private contacts

Also, you can define the sorting order of contacts in the Presence window with the Sort selection.

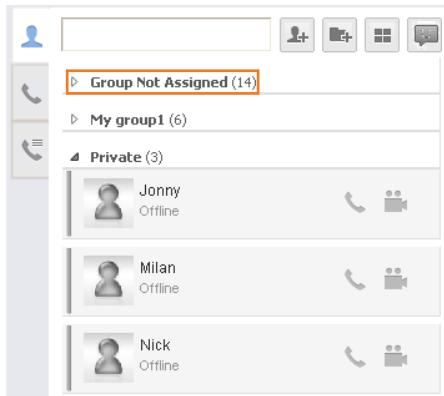
- **IM** – sort by IM status
- **Phone** – sort by Phone status
- **Name** – sort alphabetically by Contact name

## 6.1.1 Managing the Presence Window

The Presence window has a number of tools to manage contacts, groups, appearance and order of contacts.

### 6.1.1.1 Adding and Deleting Contacts

Contacts in the Shared directory may be added to or deleted from the Presence window. The Presence window also displays the Private directory and contacts may be added or deleted. The Shared contacts directory is stored in the UC server and is managed by your iPECS Administrator.



You manage the Private directory, which includes the following information for each contact:

- Name and Nickname
- Cellular Phone
- Office Phone, Name, Department, FAX and Office Address
- Home Telephone, Address and Email.


---

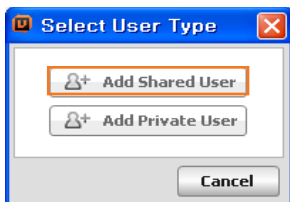
#### NOTE

When adding a Private User contact, the contact name and Office Phone are required, the remaining fields are optional.

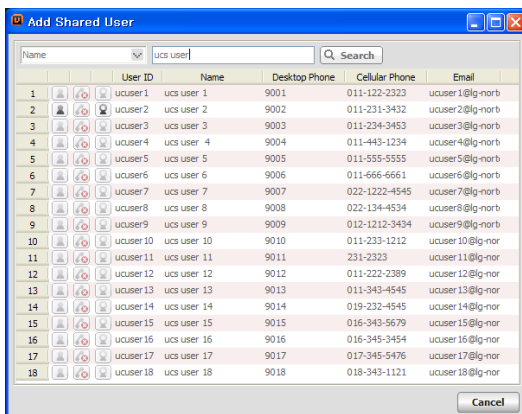
---

#### To add a contact from the Shared directory:

1. Select the **Add Contact** icon (  ) in the upper left side of the window.
2. In the Select User Type window, select **Add Shared User**.



3. In the Add Shared User window, select the field to search using the drop-down menu.



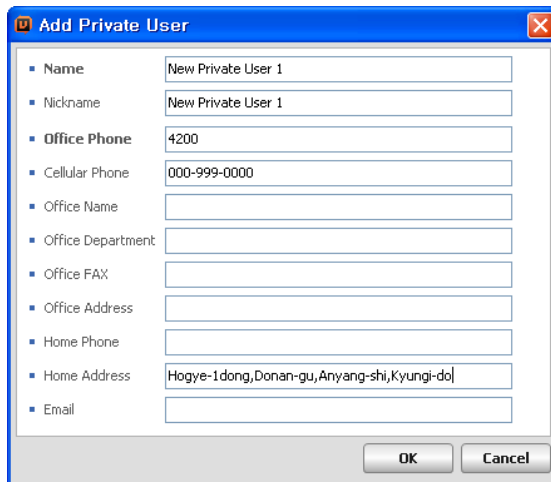
4. Enter the appropriate text to search within the field.
5. Click **Search** to display matching records.
6. Select the user to add and click **Add**; the contact record is displayed in the Not Assigned Group in the Presence window.

**To add a new Private User:**

1. Select the **Add Contact** icon in the upper left side of the window.
2. In the Select User Type window, select **Add Private User**.



3. In the Add Private User window enter the contact information (Name and Office Phone are the required fields).



4. Click **OK** to store and display the contact record. The new contact is shown under the Private group and stored in the Private User directory.

**To delete a contact from the Presence window:**

1. Right-click on the desired record.
2. In the popup menu, select **Delete User**.
3. Click **'Yes'** to confirm the deletion.

---

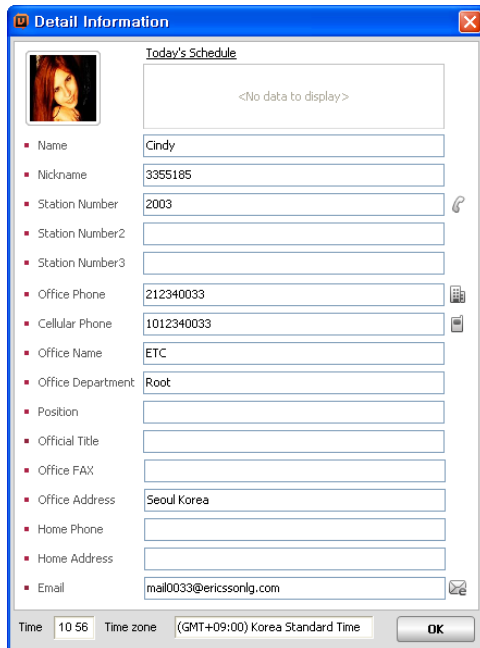
**NOTE**

Deleting a Private contact from the Presence window also deletes the record from the Private User directory. Deleting a Shared contact only removes the record from your Presence window.

---

You may also view all the information on the contact. To view Detailed Information:

1. Right-click over the desired record,
2. Select **Detail Information** to display the contact's Detail Information screen. The information for a Shared user includes the user's picture and schedule for the day. The information in the window is the same as the Add Private User window shown above.



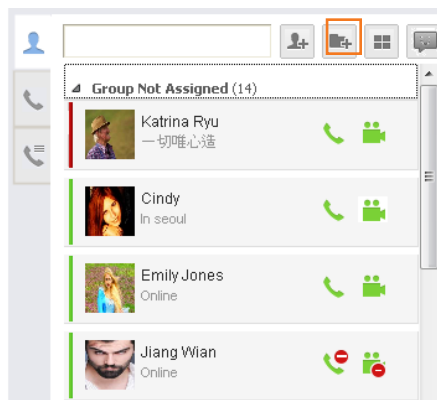
The screenshot shows a window titled "Detail Information" with a blue border. On the left, there is a small profile picture of a woman. To the right of the picture is a section titled "Today's Schedule" which contains the text "<No data to display>". Below this is a list of fields for contact information, each with a red square bullet point on the left:

- Name: Cindy
- Nickname: 3355185
- Station Number: 2003
- Station Number2: (empty)
- Station Number3: (empty)
- Office Phone: 212340033
- Cellular Phone: 1012340033
- Office Name: ETC
- Office Department: Root
- Position: (empty)
- Official Title: (empty)
- Office FAX: (empty)
- Office Address: Seoul Korea
- Home Phone: (empty)
- Home Address: (empty)
- Email: mail0033@ericssonlg.com

At the bottom of the window, there is a status bar showing "Time 10:56", "Time zone (GMT+09:00) Korea Standard Time", and an "OK" button.

### 6.1.1.2 Organizing Contacts by Group – (P)

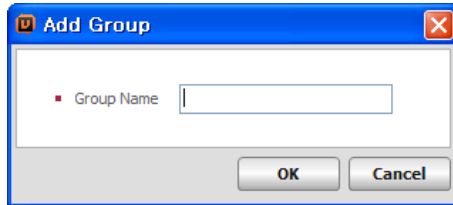
For easier management, the Presence contact list can be divided into groups. Groups can be added, deleted, renamed and contacts moved from one group to another. Initially, all Shared contacts are placed in the Not Assigned Group and Private contacts are displayed in the Private group. ⓘ This function is supported in **UCS Premium** license.





### To add a group:

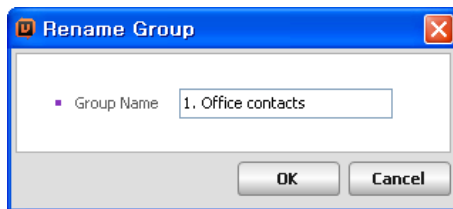
1. Select the **Add Group** icon.
2. Type the new group name desired.



3. Click **OK** to add the new group.

### To rename a group:

1. Right-click on the desired group, the pop-up menu will display.
2. Select **Rename Selected Group**.



3. Enter the new group name and click **OK** button.

### To delete group:

1. Right-click on the desired group, the popup menu will display.
2. Select **Delete Selected Group**.

---

#### NOTE

All contacts must be removed from the group before it can be deleted. Note the predefined Not Assigned Group cannot be deleted.

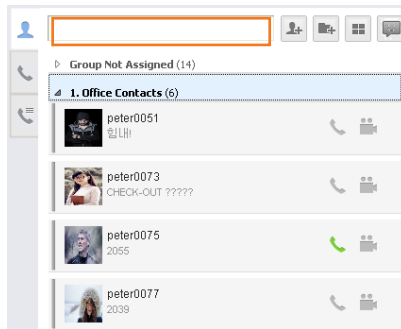
---

### To move a user to another group:

1. Right-click on the desired user, the pop-up menu will display.
2. Select **Move Selected user to**.
3. Select the group where the contact is to be moved,  
OR
4. Drag and drop the user name to the desired group.

### 6.1.1.3 Searching the Presence Window

You may query the Presence window to locate a contact quickly. The UCS Client will search the contacts listed in the window. Text entered in the search box is compared to the Name, Today's message and Desktop Phone 1 fields in each record. If no matching records are found, you can extend the search to all records in the Shared directory or, if enabled, in the LDAP database.



---

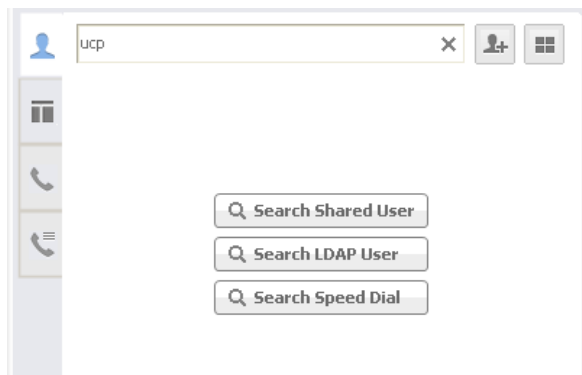
#### NOTE

[Search Speed Dial] function is supported in UCP/eMG system.

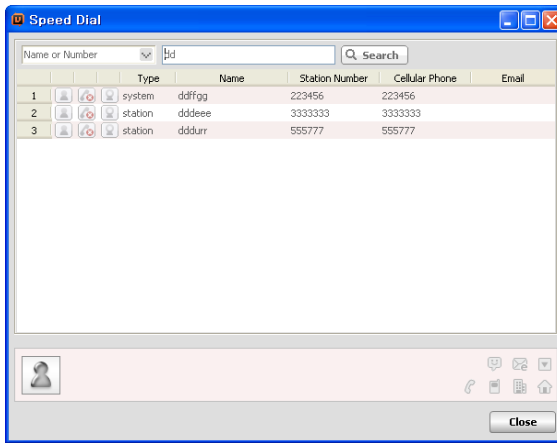
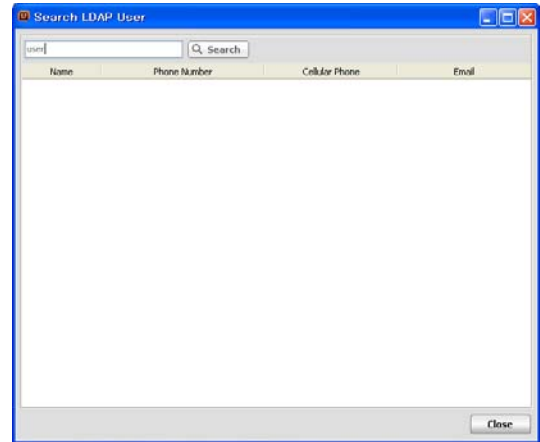
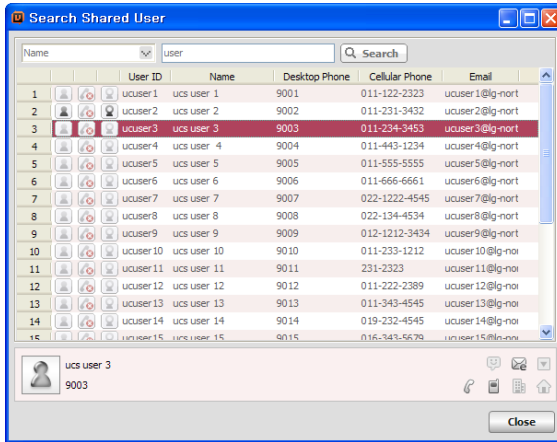
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#### To search users in the Presence window:

1. Enter the appropriate text to search.



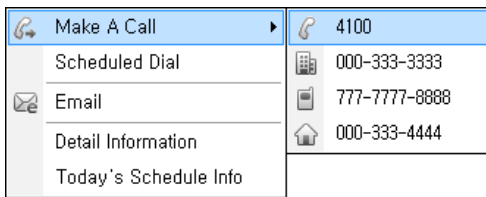
- If no matching records are found, extend the search to the Shared or LDAP database:
2. Select Search Shared User, Search LDAP User or Search Speed Dial.



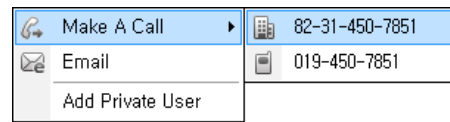
- The search results window displays.

3. From the results window, right click to display the actions popup menu as shown below.

► SHARED USER POP-UP

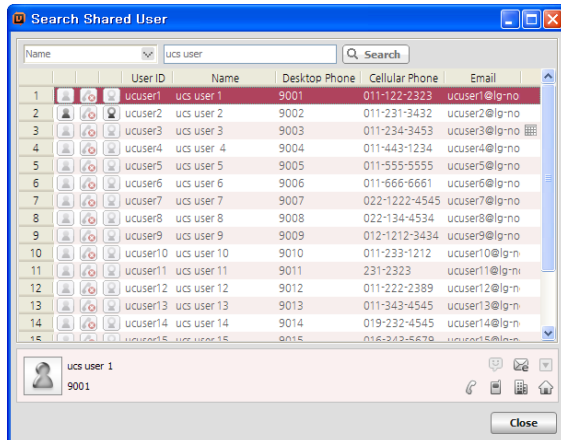


► LDAP POP-UP



### 6.1.1.3.1 Search Shared User

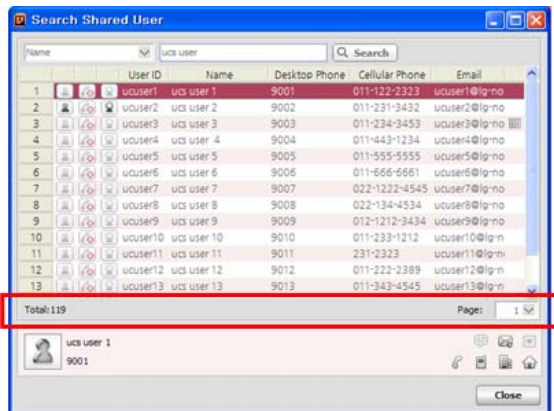
The Search Shared User window shows IM status, phone status, Webcam status, User ID, Name, Desktop Phone, Cellular Phone, Email and schedule status and features of the Presence window.



#### NOTE

Presence status in the Shared and LDAP windows does not automatically update, the display indicates the status when the user queried the database.

If the number of queried users exceeds 100, the first 100 results will be shown, and any other results will be shown on subsequent pages.



### 6.1.1.4 Managing the Private User Directory

The Private User directory is a list of contacts you can enter or import from an external Contacts database. When initially entered, these contacts are listed in the Private group of the Presence window. In addition to adding and deleting a Private User contact, these contacts can be edited, all Private User contacts can be deleted and the contacts imported or exported to databases including Outlook, Excel, Goldmine or ACT!.

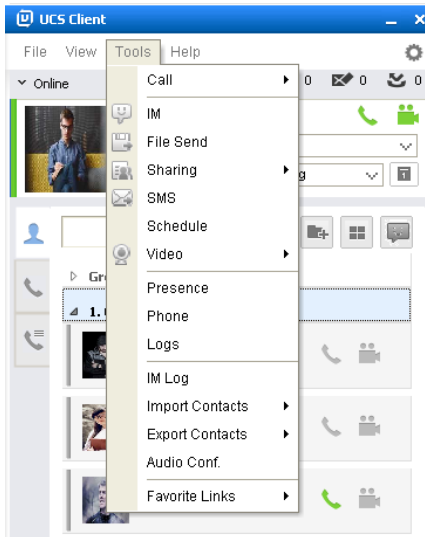


#### 6.1.1.4.1 Importing and Exporting Contacts

Private User contacts can be imported from and exported to other contact databases such as Outlook, ACT!, Goldmine and Excel. When contacts are imported, the contact records are placed in the Private group and can be moved to a different group as desired.

##### To import contacts from ACT!, Goldmine, Excel or Phontage:

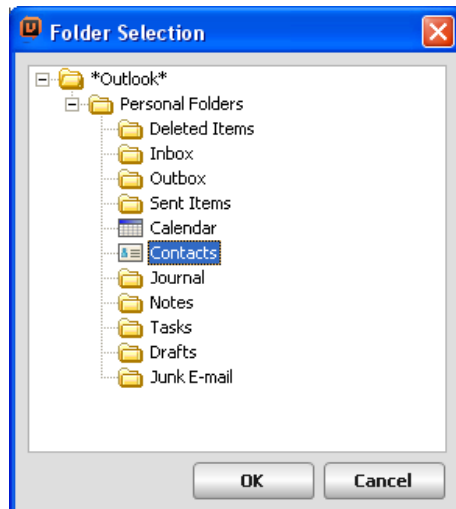
1. Select **Import Contacts** from the Tools menu.



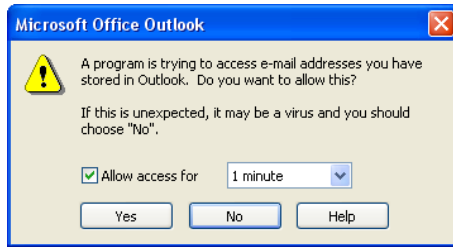
2. Select the database type.
3. After importing, the Import Result window displays and the imported contacts are displayed in the Private group.

##### To import contacts from Outlook:

1. Select **Import Contacts** from the Tools menu.
2. Select **Outlook**.
3. Select the Outlook contact folder, the Outlook access popup displays.



4. Check **Allow access for**, select a time and click **Yes**.



5. The Import Result window displays and the imported contacts are displayed in the Private group.

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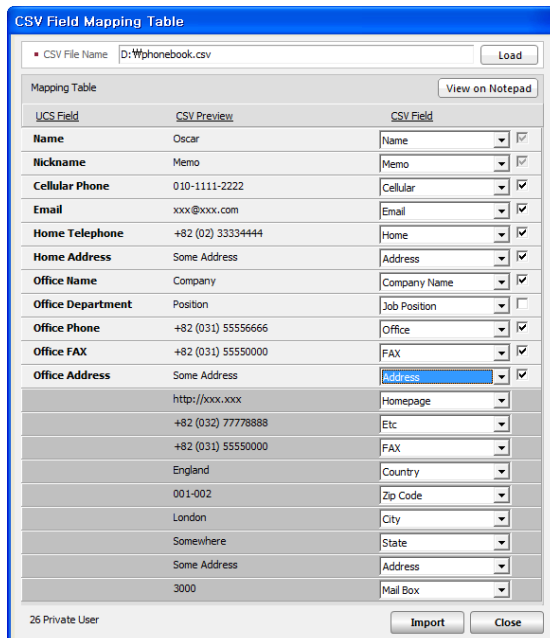
#### NOTE

If No is selected in the Outlook access popup window, the import will fail and you will receive an 'Unknown Error' notification.

---

#### To import contacts from a CSV file:

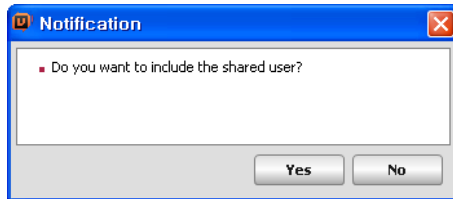
1. Select **Import Contacts** from the Tools menu.
2. Select **CSV**.
3. Select the CSV file to import. The CSV Field Mapping Table window is shown.



4. Arrange the CSV Fields.
5. Uncheck fields not to import.
6. Click the **Import** button.

### To export contacts to ACT!, Goldmine, Excel, or CSV:

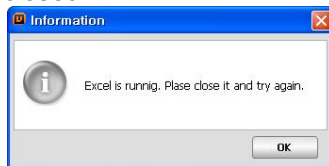
1. Select **Export Contacts** from the Tools menu.
2. In the popup Notification window, select **Yes** to include Shared User contacts or **No** to export Private User contacts only.
3. Select the database type. The export process starts and a notification window appears when completed.



---

### NOTE

When using Excel reporting, the Excel program must be closed before starting to export data. If the program is not closed, the user will receive a popup message requesting Excel to be closed.



---

### To export contacts to Outlook:

1. Select **Export Contacts** from the Tools menu.
2. In the popup Notification window, select **Yes** to include Shared User contacts or **No** to export Private User contacts only.
3. Select **Outlook** for the database type.
4. Select the desired Outlook contact folder, Outlook access popup displays.
5. Check **Allow access for**, select time, and click **Yes**. The export process starts; a notification window displays when completed. The export process starts; a notification window displays when completed.



## 6.2 Phone Window View

With the Phone mode enabled, refer to see Section 3.2.3.2, you have access to all of the iPECS system features as well as the features available to traditional iPECS IP Phones, with the few exceptions based on the differences discussed below. The fixed feature keys operate in the same manner as in the iPECS IP Phones except the mouse is used to select dial pad and feature buttons. For operation of the features, refer to the iPECS IP Phone User Guide.



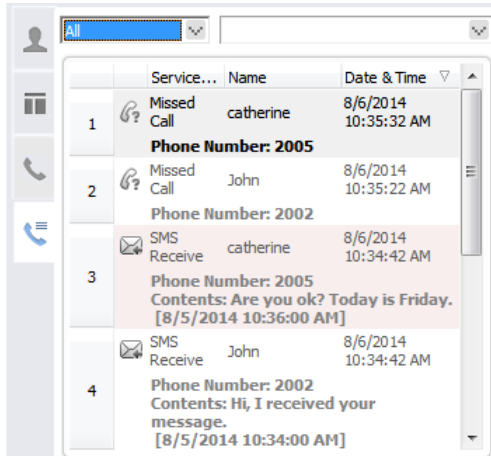
With the exception of the following User Programming items, the Phone window screen allows complete access to all the features and resources of the iPECS host system.

- **Station Answer mode** – only Privacy for the Station Answer mode; Intercom Call Announce is not supported for the UCS Client.
- **Station Ring Download** – UCS Client users can change the ring tone files stored in the iPECS UCS Client folder; ring tone files cannot be downloaded from the iPECS system.
- **Audio source control** – UCS has a single audio path, and cannot support the dual path (headset and speaker) controls available with the traditional iPECS IP Phone.

There are three Speaker volume settings for ring, internal call volume, and external call volume; the three volumes are saved and retrieved according to phone status.

## 6.3 Logs Window

The Logs window displays the log of UCS services used by the UCS Client. The log identifies the service type, name of connected party and time the service was employed. These logs are stored on the UCS Client PC and can be searched or archived as a backup file in the UCS Client folder.



In addition, by right clicking on a record, the popup menu similar to the Presence popup is displayed, see Section 6.1.

### Services logged are:

- Call (Incoming, Outgoing, Conference Room)
- Instant Messaging (IM)
- Application Sharing
- Desktop Sharing
- Whiteboard
- Video
- Presentation
- Remote Monitoring (Requesting)
- Remote Monitoring (Be requested)
- Web Push
- File Send
- SMS
- Note
- Missed Call
- Memo

### To search the Logs window:

1. Select the **Service Type** from the drop-down menu.
2. Enter the appropriate text to search.

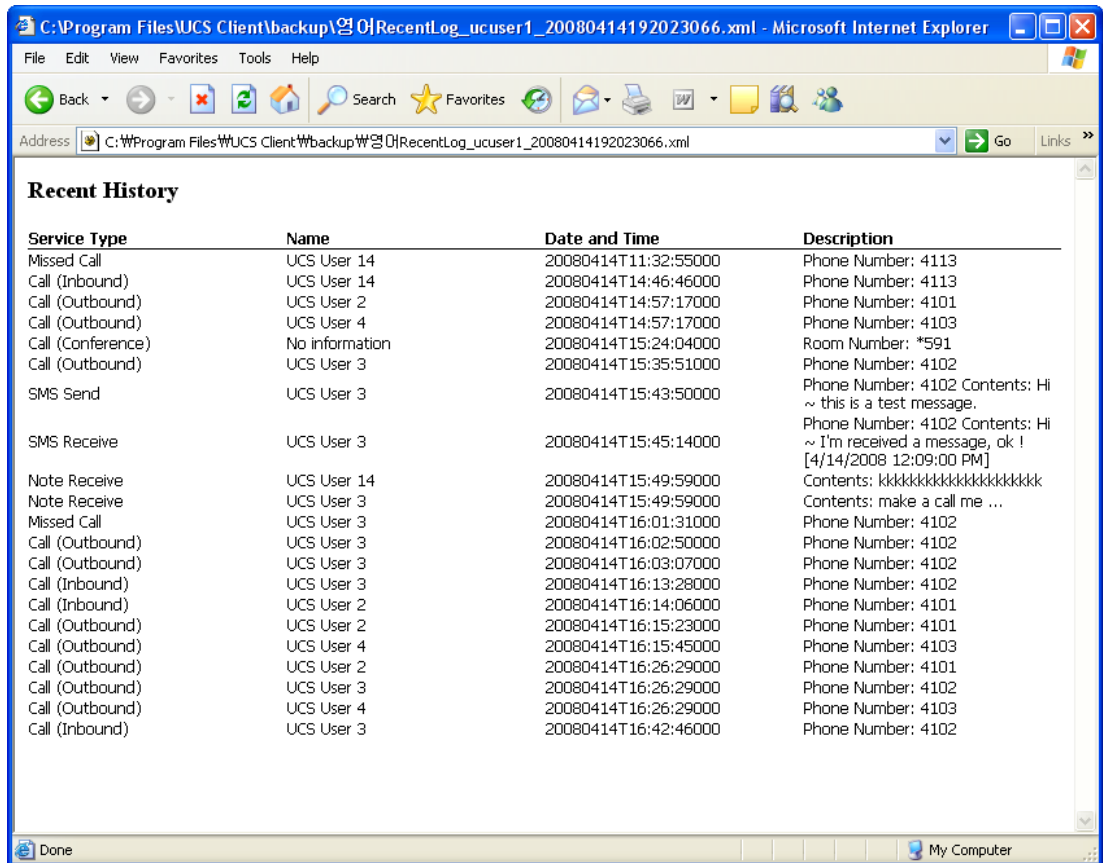
---

### NOTE

If more than 2000 records are stored, when you login a Backup window will display indicating the Logs window should be archived. This is required to minimize any effect a large number of logs may have on performance of the UCS Client and other Windows applications. The archive file is named and saved to a backup directory in the UCS client folder. The backup file name includes the date as in the following example, 20080325143309092.xml

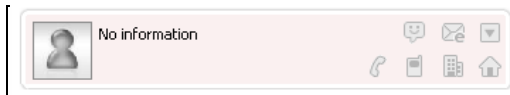
To view the backup file, double click the file name in the UCS Client folder. The file is displayed with the default browser as below.

---





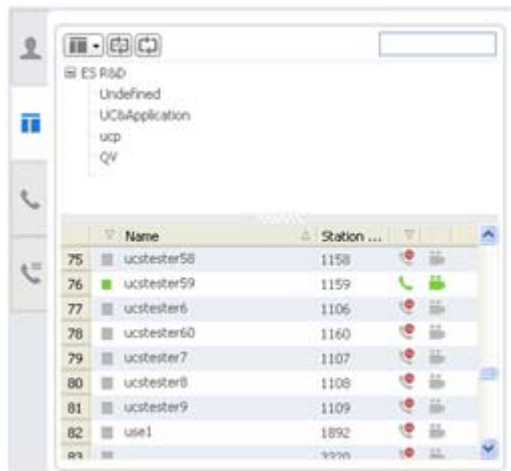
## 6.4 Selected Contact Window

The Selected Contact window displays immediately below the main window and provides basic information about the highlighted contact. The window includes icons to establish a collaborative session with the contact. Highlighted icons indicate the communication modes available to the contact. Selecting an icon initiates the communication. The Selected Contact window can be disabled if more space is desired in the main window, see Section 3.3.1.



## 6.5 Organization Window – (P)

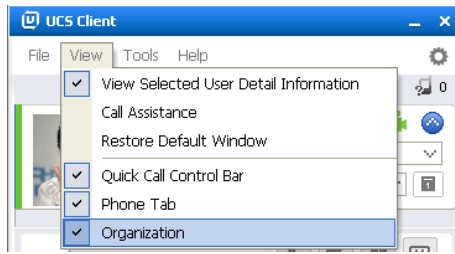
The Organization window displays the Organization Chart from the UCS Server in a split screen showing the Organization hierarchy tree and organization members. Members are shown in a tabular format with presence status. Tools allow you to customize the view with the organization tree to the left, right, above or below the member table. In addition, the various presence states (IM, phone, video, etc.) can be eliminated from the view and a sorting order for the members (IM, Phone or Name) can be selected. Manual and immediate refresh buttons () permit the user to refresh the display immediately or allow timed updates.  This function is supported in **UCS Premium** license.



To use the Organization window, the Organization Chart must be established and use authorized by the iPECS UCS administrator.

### To view the Organization window:

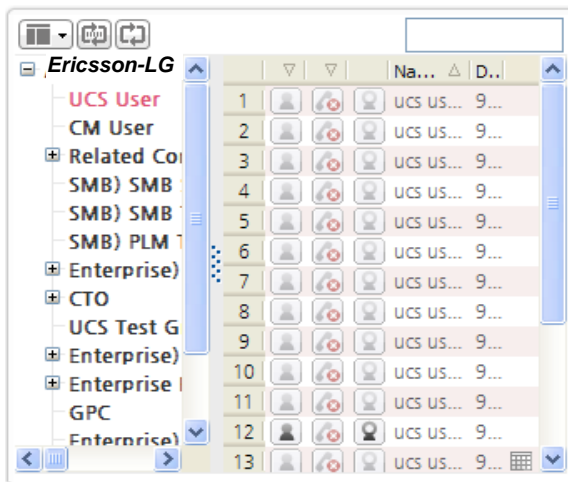
1. From the View menu, select **Organization**.



- Logout of the UCS Client and log back in; the Organization tab will be shown in UCS Client automatically.

## 6.5.1 Searching the Organization Chart

A department may be selected to view all the users in a department. In the upper right of the Organization window is the Search text entry box. To search for a particular user, enter search characters in the box and matching entries will be shown in the Organization window. You may right click on a contact to receive popup menus as with the Presence window, Section 6.1.




---

### NOTE

The UCS Client searches for a match in the Name, Desktop Phone, User ID and Cellular Phone fields, in order.

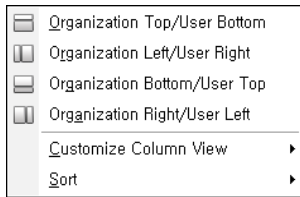
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## 6.5.2 Window Appearance

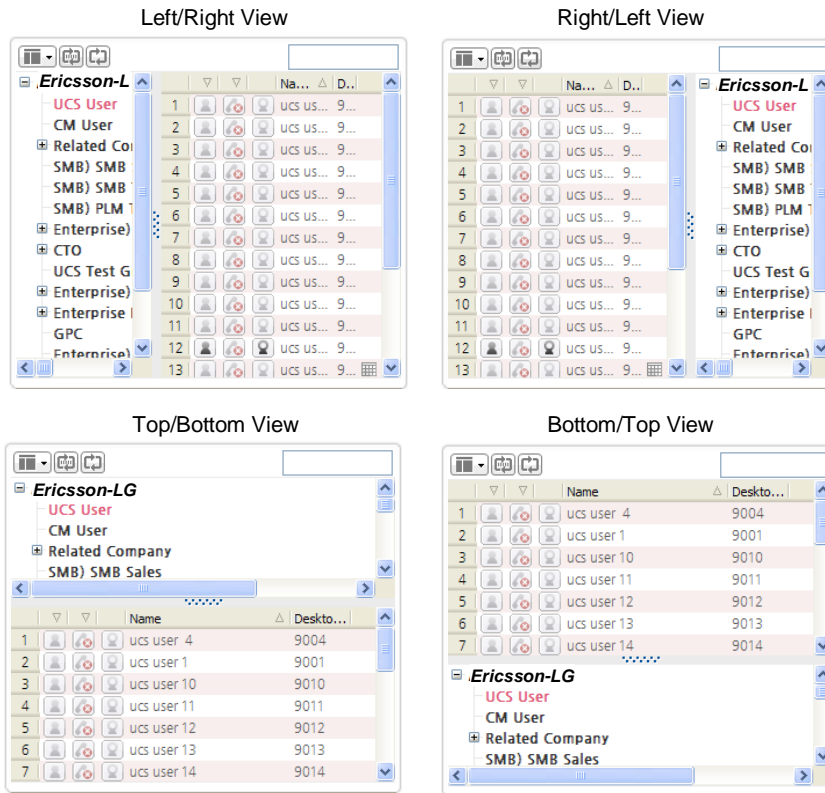
Tools in the Organization window allow the user to change the appearance of the window as well as the presence information shown for each contact.

### To modify the appearance:

- Select the **Screen tool** at the upper left.



- From the Screen tool menu, select the desired screen orientation. The Organization window will display with the orientation selected.



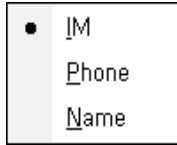
**To modify the presence information shown in the window,**

- Select the **Screen tool** at the upper left of the window.
- From the Screen tool menu, select **Customize Column View**.
- In the popup menu, check the box in front of each item to display for the contacts.



**To change the sorting of the window,**

1. Select the **Screen tool** at the upper left of the window.
2. From the Screen tool menu, select **Sort**.
3. In the popup menu, click the sorting column.



## Chapter 7

# Quick Call Control Bar

---

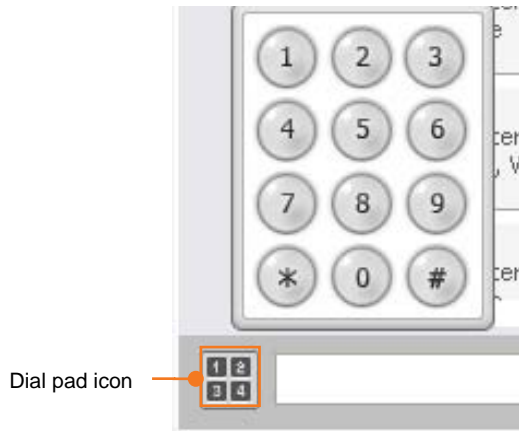
With the Quick Call Control Bar at the bottom of the main window, you can make and receive calls. The text box displays the names and numbers from contacts in the Presence window or you may dial a number from the Simple dial pad popup. This control bar consists of the Simple dial pad icon, drop down contact list, and Call and Speaker controls.

## 7.1 Placing a call

Placing a call from the Quick Call bar is quick and efficient.

### To place a call using the Simple dial pad popup:

1. Launch the simple dial-pad popup using the dial pad icon.
2. Click on digits to dial the number. The digits display in the pre-dial box.



3. Press the Call button to place the call.

### To place a call using the drop down contact list (shows a list of contacts from the Presence window):

1. Click on the drop down arrow to access the contact list.
2. Click to select the desired contact.

### To end the call:

1. Click on the speaker button.
2. Calls can be placed from other applications while the UCS Client is active or minimized.



**To place a call from another application:**

1. Copy the desired digit string (Ctrl + C).
2. Press the "Ctrl + Shift + D".

Or

With the Call Assistant displayed, drag the mouse over a number while holding the right mouse button.

## 7.2 Receiving a Call

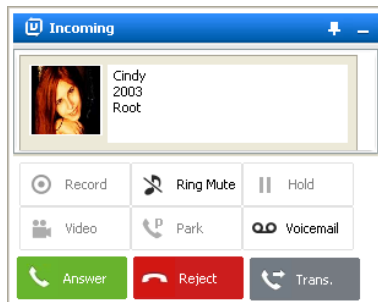
When a call is received, the phone will 'ring' and the selected caller id popup will appear. The window shows the caller id delivered from the iPECS and the name associated from the Presence window. If the UCS Client is minimized, the popup will display the incoming call information or the iPECS UCS Client icon in the Windows tray will flash to indicate the new call. In the latter case, iPECS UCS Client must be activated to answer the call.

**To answer a call with the UCS Client active:**

1. Click on the speaker (🔊) button.

**To answer the call with the iPECS UCS Client minimized:**

1. From the Caller Id popup, click the **Answer** button.

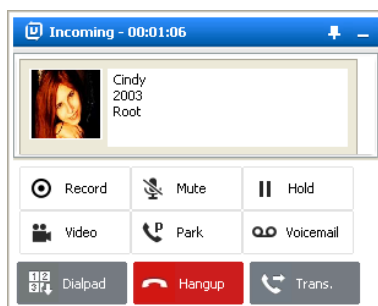


**To end the call with the iPECS UCS Client minimized:**

1. Click the Reject button.

Or

Activate the UCS Client and click the **Hangup** button.



## Chapter 8

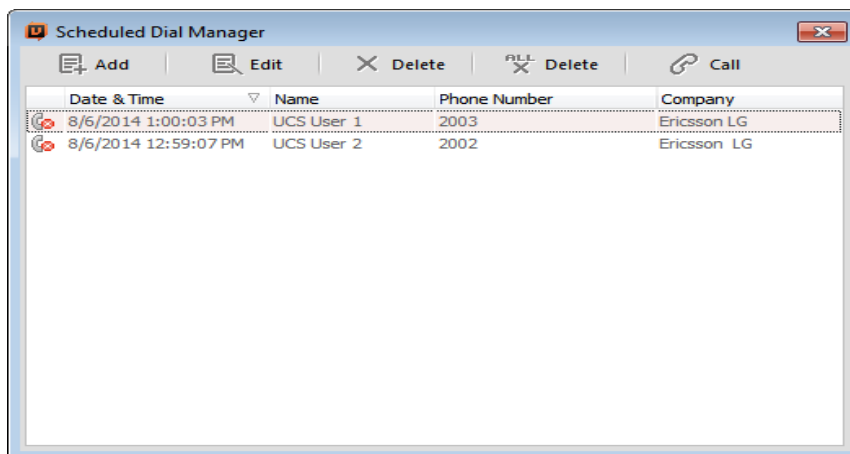
# Tools Menu Call Features

---

From the Tools menu of the main application, you can access the Call menu. In this menu are tools designed to enhance group collaboration and simplify use of calling features.

## 8.1 Scheduled Dial

Scheduled Dialing permits you to enter a phone number for dialing at a later scheduled time. When the scheduled time is reached, the Confirm window appears, you must confirm before dialing will begin. The Scheduled Dial window contains a list of the phone numbers and schedules entered. The window includes icon tools to manage scheduled calls.

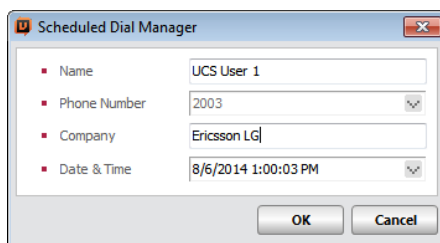


### To access the Scheduled Dial window:

1. From the Tools menu, select **Call**.
2. From the Call menu, select **Scheduled Dial** to display the window.

### To add or edit a Scheduled Dial:

1. Click the **Add** or **Edit** icon on the Scheduled Dial window; the Scheduled Dial Manager popup appears.



2. Enter the Name and Company.
3. Enter or use the drop down menu and select a Phone number (required entry).
4. Use the pull-down to schedule a Date & Time.
5. Click **OK** to save.

---

**NOTE**

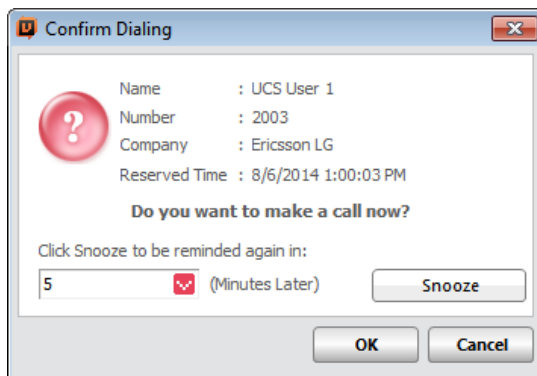
Each Scheduled Dial must have a unique scheduled time. Duplicate schedule times are not allowed.

---

**To delete an entry from the Scheduled Dial window:**

1. Select **Delete** or **Delete All**; confirm the record deletion.
2. Click **OK**.

When the scheduled time is reached, the Confirm window will appear. You must confirm by selecting **OK** before dialing will begin. You can select **Snooze** to delay the call.



## 8.2 Recorded Call Playback

The UCS Client allows you to record a conversation onto the client PC hard drive. Recorded conversations can be reviewed after recording. In addition, text or voice comments can be added to the recording and sent via email as attached .wav files. Using the tool icons at the top of the Recorded Call window, you can delete, add a comment and E-mail recordings.

Calls are recorded with controls in the Call View, see section 13.

**To playback a recorded call:**

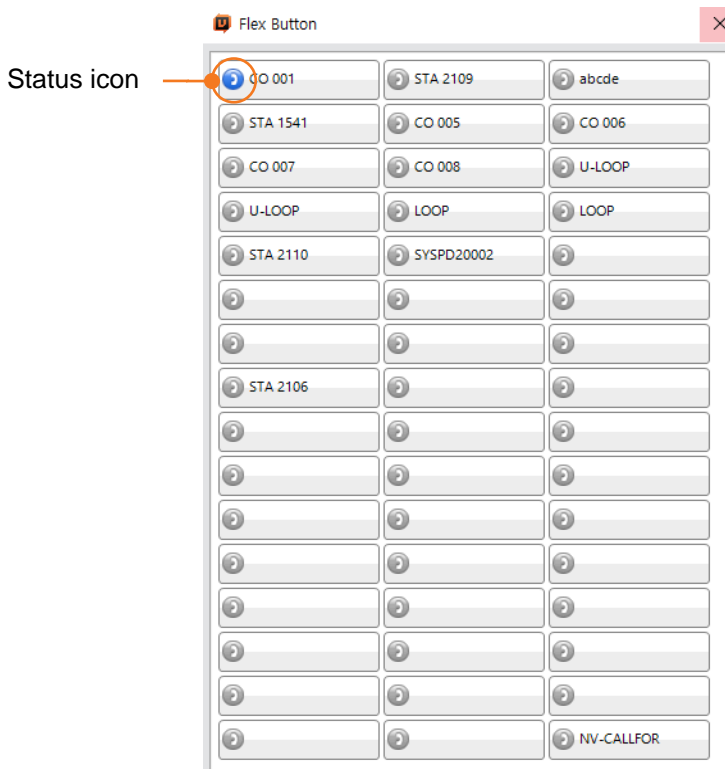
3. From the Tools menu, select **Call**.
4. From the Call menu, select **Recorded Call** to display the Recorded Call window.
5. Select the desired recording.
6. Use the reverse, play, pause, forward and stop playback icons to control the playback.

## 8.3 Auto Call Recording

When enabled in the iPECS system, conversations of the UCS Client and/or other iPECS users are recorded to the hard drive of the UCS Client PC. Other stations in the system may be assigned to record conversations to the UCS Client, "3rd party recording". For proper 3rd party recording, the iPECS UCS Client must be idle.

## 8.4 Flex Buttons

The Flex Button window provides access to 48 Flex buttons. Each button has a status icon, which displays the status of the CO Line or station associated with the button. The button also displays a designation from the iPECS system database, such as CO 001, LOOP, etc. Flex buttons of the UCS Client may be assigned to activate other iPECS system features such as dial a Station Speed Dial.



### To enter and assign a Station Speed Dial to a Flex button:

1. Right click on an assigned Flex button.
2. Select **Set Attribute**; the Flexible Button program screen will display.
3. Enter the number to be dialed.
4. Click the **CO Call** checkbox if the input number is not a station number.
5. Enter an optional Description (display) label for the Flex button.
6. Click the **Save** button.

---

## NOTE

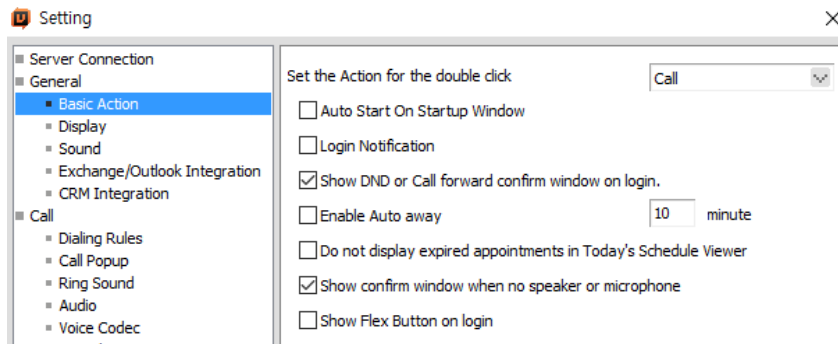
If a Flex button is assigned for Paging, the UCS Client must be off-hook prior to selecting the Page button. The UCS Client must be in the idle mode to assign a Flex button.

When UCS Client's Flex button is clicked with No Voice mode, Flex button of controlled hard phone will be worked.

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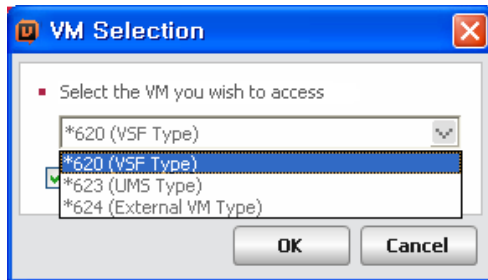
### To Show Flex Button on login:

For Flex Button to show on login, check **Setting > Basic Action - [Show Flex Button on login]**



## 8.5 Voice Mail Server Selection – (P-CM)

When multiple voice mail servers are associated with the UCS Client, the VM Selection window permits access to the various mail servers. ⓘ This function is supported in **CM Premium** license.



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## NOTE

A server can be selected as default, in which case this window is not shown when selecting the VM icon in the Message and Status icon tool bar.

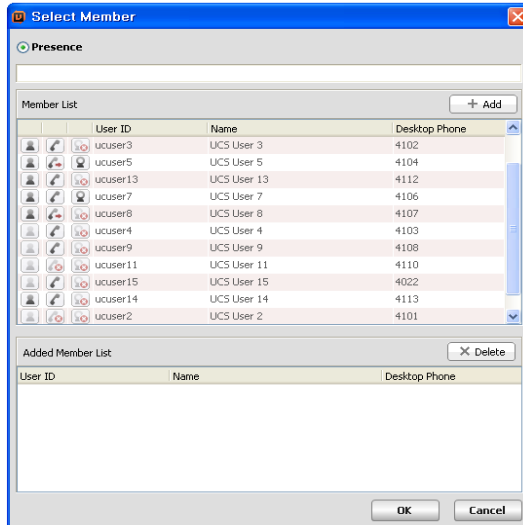
---

### To access the VM Selection window:

1. From the Tools menu, select **Call**.
2. From the Call menu, select **VM Selection** to display the VM Selection window.
3. Select the desired Voice Mail server from the drop down list.

## 8.6 Favorite Contacts

Favorite Contacts allows you to call and transfer calls easily using the Call window.

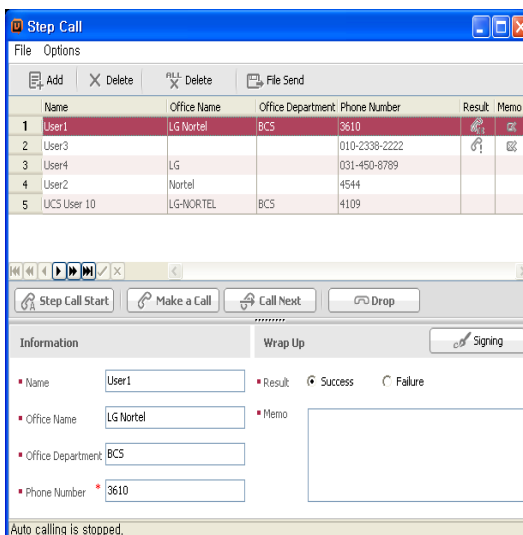


### To add lists to Favorite Contacts:

1. From the Tools menu, select **Call > Favorite Contacts**, the Select Member window will be shown.
2. Select the desired Member(s) and press the **Add** button. The contacts are added at the bottom of the Select Member window.

## 8.7 Step Call

Step Call allows the user to make calls to numbers from a contact list sequentially. Users create a list of contacts for outbound calling, which can be added one-by-one or imported from a file where the file extension is '.scd' or '.csv'.

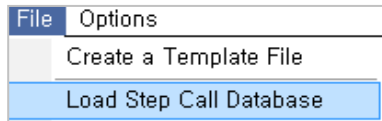


### To add contact(s):

1. Click the **Add** button in the toolbar.
2. Enter values into the edit box at the bottom of the Step Call Information window.

### To add contact(s) from a database:

1. From the File menu, select **Load Step Call Database**.
2. Select a Step Call Database.



---

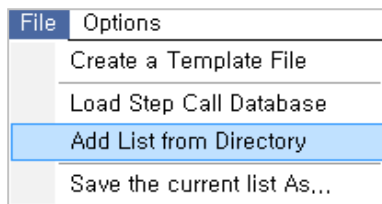
### NOTE

You can create a Step Call Database template file with a file extension of .csv (select File > Create a Template File).





---

### To add contact(s) from the Directory:

1. From the File menu, select **Add List from Directory**, the Select Member window will be displayed.
2. Select and add the desired contact(s) from the Select Member window.




### To make an outbound Step Call:

1. Select a record in the outbound calling list.
2. Press the Step Call Start button.
3. The phone number of the selected record will be dialed.
4. After the call is completed, the 'Result' and 'Memo' can be created; the interval between calls is set as shown.
  - Result input selections include:
    - Success: 
    - Failure: 
  - If a memo is saved, the  symbol will be displayed.
  - If  is pressed, the current time and user name will be entered automatically.


The next record on the list will be selected automatically.

5. Step calling stops when the end of the calling list is reached,

OR

Step call can be stopped by pressing the  button.

#### **Alternate method for making a Step Call:**

1. Select a record from the outbound calling list.
2. Press the **Make a Call** button  the call will be initiated.
3. When the call is terminated, the user can enter the 'Result' and 'Memo', if necessary.

#### **To end a Step Call:**

1. Press the 'Drop' button .



### To create a Template File:

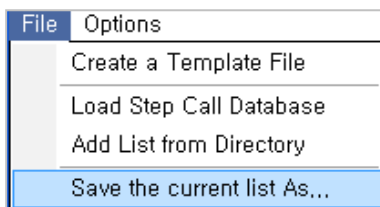
1. From the File menu, select '**Save the current List As...**'.
2. In the dialog box displayed, enter the desired file name and click on the OK button.
3. A .csv file will be created with the designated name.

### To use the created Template file:

1. Open the template with 'Excel', 'Notepad', etc.
2. Enter values (Name, Company, Department and Phone number).
3. When finished, click **Save**.
4. Refer to **Load Step Call Database** (.scd, .csv) above to download the file.

### To save the current Calling List to a file:

1. From the File menu, select '**Save the current list As...**'.



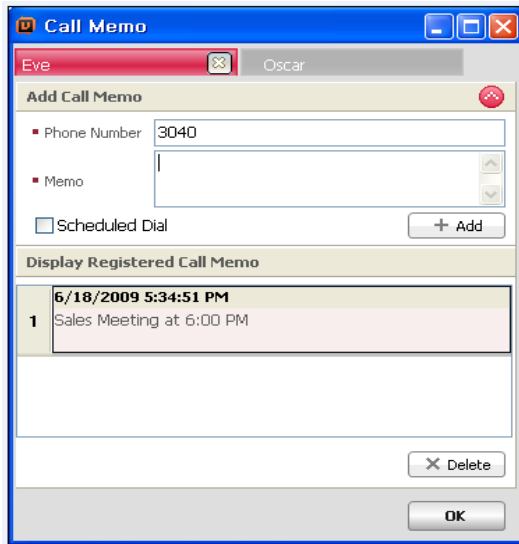
2. In the dialog displayed, enter the desired file name.
3. Click the OK button.

### To send the current Calling List to others:

1. From the toolbar, select File Send.
2. The UCS Client will save the current list as a temp file and attach it as the file to send in the File Send window.

## 8.8 Call Memo

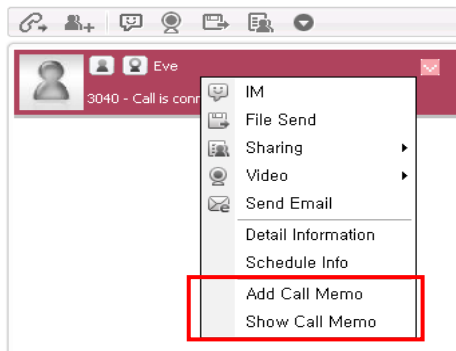
The Call memo is designed for noting important information during a call so that the information can be referenced later. The Call memo is retained in the recent Logs. You can confirm and modify the memo in the Call Memo window. The following methods can be used for activating the Call Memo window:



1. From the File menu, select **Setting > Call Popup > Show Call Memo Window Automatically**.
2. When a call is placed, the Call Memo window will automatically display.

#### To activate the Call Memo window from the Call Tab:

1. Click on the **Call** tab when on a call in UCS Client.
2. Select '**Add Call Memo**' or '**Show call memo**'.



- **Add Call memo** –a call memo can be added with CID information.
- **Show Call memo** – displays call memos already created.

#### To activate a Call Memo window:

1. If the option 'Call pop-up' is set and the UCS Client has Call memos regarding the current call, the Call Memo window can be activated by clicking on the icon at the bottom-right of the call pop-up window.




---

#### NOTE


Prior to closing the Call Memo window, the memo content is summarized on the screen.

---

### To add a new Call Memo:

1. Open the New Call Memo area.
  -  Open this area.
  -  Close this area.
2. Enter the memo contents.
3. Click on the **Add** button  .
4. The saved memo will be located in recent Logs, and can be viewed when a call is placed from the UCS client.

### Using Scheduled Dial:

1. Verify the 'Scheduled Dial' checkbox is checked  .
2. Click on the **Add** button.

---

#### NOTE


The Scheduled dial will be activated with the user name, phone number and company name in the Call memo; saved Call memos also will display in this area, and can be modified or deleted.

---

### To modify a saved Call Memo:


1. Click on a Call memo to be modified; the memo will be opened for editing.
2. Modify the content.
3. Changes will immediately update in the Call memo.

### To delete a registered Call Memo:

1. Select the Call memo.
2. Click on the **Delete** button  .

The Call Memo tab can be used to manage comments from multiple users such as during a conference call. Each user is separated with a tab in the Call Memo window.

### To Close a Tab:

1. Click on the **Close** button,  , within the appropriate tab.

---

#### NOTE

If only one tab is open, the close button will not be visible.

---

### To select a different opened tab:

1. Click on another tab to add Call memos for others on the call; changes are saved and displayed in a new Call Memo window.

## 8.9 ACD Manager – (UCP/eMG)

ACD(Automatic Call Distribution) Manager supports functions which login/logout and on/off-duty on ACD Group. ⓘ This function is supported in **UCP/eMG Premium** license.

- Display ACD Group list and user status
- ACD Group login/logout
- ACD Group on/off duty

---

### NOTE

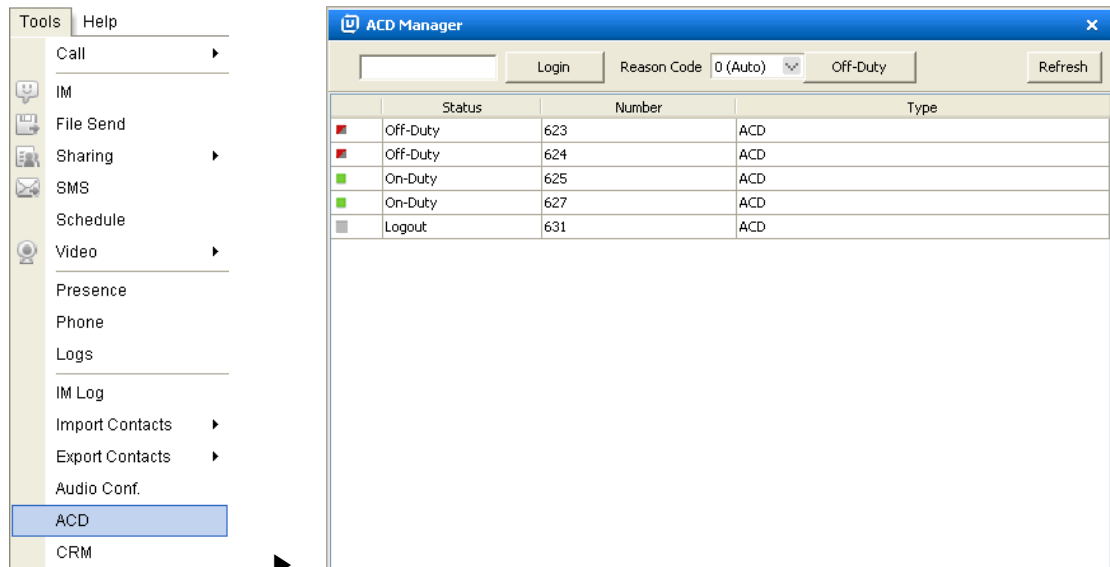
For ucs user to use ACD function, below settings are needed:

1) In case of UCS Standard License, [UCS ACD USE] option should be set to ON. You can find [UCS ACD USE] option in Unified Web Admin – PGM112.

2) In case of UCS Premium License, [Allow ACD Logon] option should be checked. You can find [Allow ACD Logon] option in UCS Server Web Admin – Use Feature Permission.

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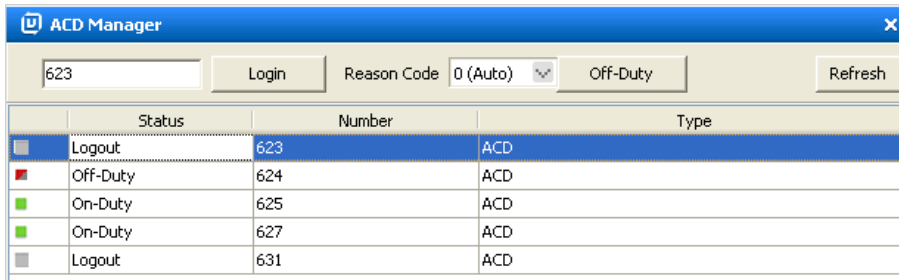
### Display ACD Group list and user status:



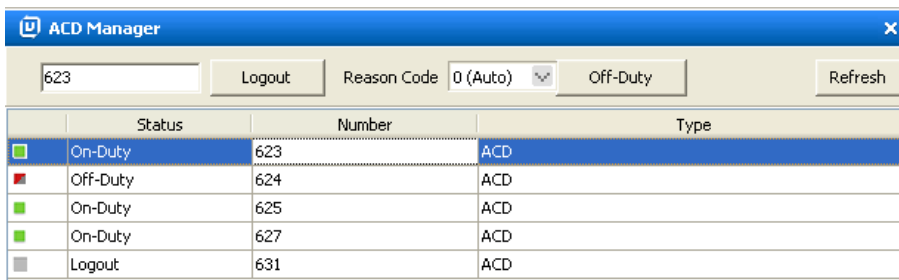
1. Click **Tools > ACD** menu.
2. ACD Group list is displayed on ACD Manager.
  - ACD Group status
    - **Logout** ( ■ ): user is a logout status in ACD Group.
    - **On-Duty** ( ■ ): user is a login/on-duty status in ACD Group.
    - **Off-Duty** ( ■ ): user is a login/off-duty status in ACD Group.

### ACD Group Login/ Logout:

1. Select ACD Group on ACD Group list, then click Login button.

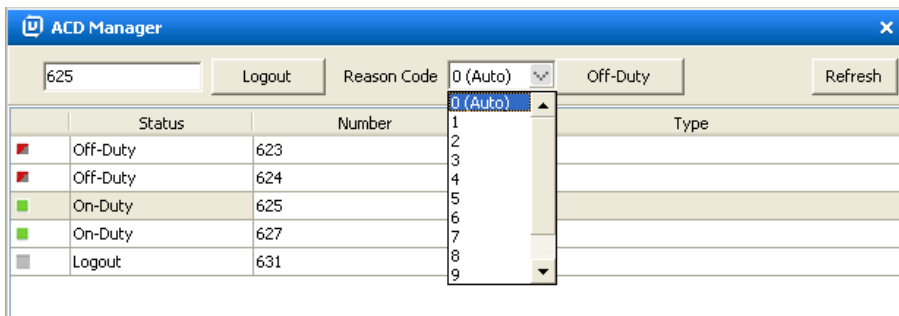


2. ACD Group status is changed into On-Duty status like below.

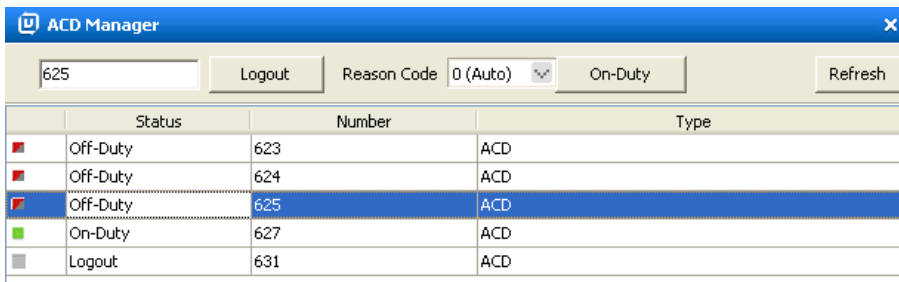


### ACD Group On/ Off-duty:

1. Select Off-Duty Reason Code, then click Off duty button.



2. ACD Group status is changed into Off duty status.



## Chapter 9

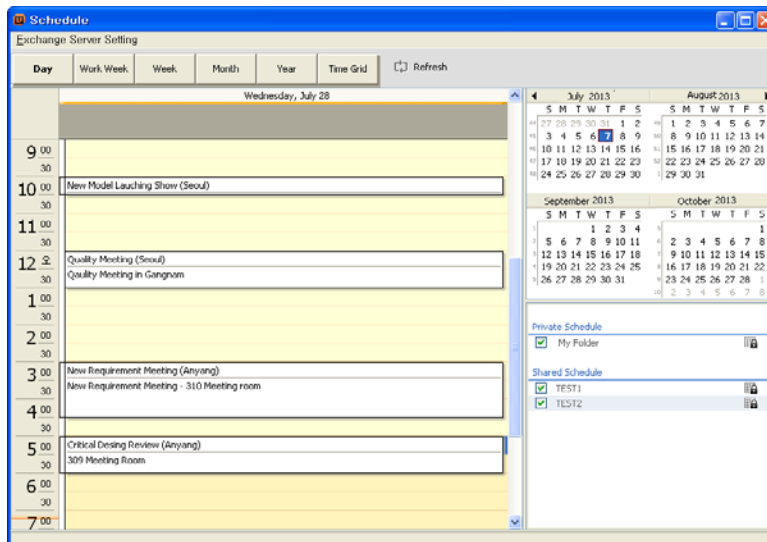
# Scheduling Appointments – (P)

UCS user can view UCS schedule, Outlook schedule and Exchange link server's schedule. When Exchange link server is used, Outlook schedule will not synchronize with UCS Client. For UCS user to use Outlook schedule rather than Exchange link server schedule, in UCS Server WebAdmin, Use "Exchange Link Server" checkbox of Exchange Link Server must be unchecked.

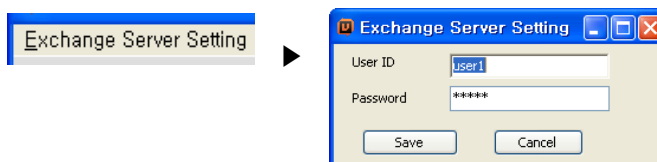
Please refer to UCS Server manual to configure Exchange Link Server settings in more detail.

 This function is supported in **UCS Premium** license.

In the Schedule window, you can view, add and modify scheduled appointments. Appointments can be viewable by and E-mailed to other UCS Client users. Appointments are displayed in the Schedule window, which is divided into 4 main components. At the top of the window are the appointment management tools. In the upper right is the monthly calendar, used to select appointment dates. In the right left is the folder selection area used to select appointment folders to display in the Appointment window. Finally, to the right of the Appointment window displays the summary of the day's appointments.



The Schedule window can be accessed from the main application Tools menu or by clicking on the calendar icon to the right side of the My Detail Information.



To synchronize Exchange link server's schedule with UCS Client, type Exchange Server's User ID and Password, then click save button. If user is authenticated, Exchange link server's schedule will be synchronized with UCS Client.

---

#### NOTE

In cases where Single Sign-On is set by Web Admin, [Exchange Server Setting] menu will not appear because exchange server sets user's password automatically.

---

## 9.1 Managing Appointments

You can add, modify, delete and copy your private appointments or shared schedule appointments in the Schedule Item window. For your private schedules, you have all access rights to read, add, modify, delete and copy appointments. For shared schedules, you can read all appointments and may have the authority to add, edit and delete Shared schedules as well as your private schedules. In this window, the appointment is identified, scheduled and other users identified for notification. In addition, a location and meeting content can be defined.

#### To add an appointment:

1. Select a date in the monthly calendar and click on the **Add** icon to display the Schedule Item - New window.
2. In the Schedule Item window, complete all required fields.

**Schedule Item - New**

Folder Name: My Folder

Subject: New Appointment Subject

Location: New Appointment Location

Attendee(s): Member List (2) [ + Add ] [ X Delete ] [ Others ]

Name	Email
Abigail	ucp2106@ucp.com
Emma	ucp2102@ucp.com

Send Email to Attendee(s)

Start Date & Time: 2015-12-03 10:30 오전

End Date & Time: 2015-12-03 11:00 오전

Open This Schedule to All Shared Users  Private

My Presence for an Appointment: Do Not Change

My Presence After Expired: Do Not Change

New Appointment Contacts

OK Cancel Delete Recurrence

- The Subject and Location fields can be a maximum of 255 characters.
  - Contents field can be a maximum of 450 characters.
  - Up to 20 attendees can be listed. Each attendee must have unique E-mail address.
3. Set the action for automatic My Presence update for this appointment. UCS Client will change and return My Presence to the status selected from the 'My Presence for an Appointment' and 'My Presence After Expired' fields.
  4. Click **OK**; the new schedule will be displayed on the calendar.

If the 'Send Email Now?' box is checked, the schedule is added and your default E-mail client opens with the attendees listed as receivers and the schedule attached. If MS Outlook is set as the default E-mail client, 'New appointment' is displayed instead of 'New email'.

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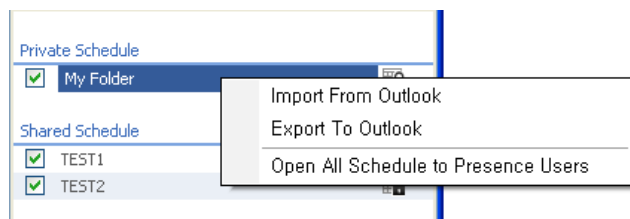
#### NOTE

When there are several appointments that change My Presence at one time, the lower schedule in the Today's appointments list has higher priority.

---

Other UCS Client users can view your private schedules when you allow it by checking the "Open This Schedule to All Shared Users" box. If you check this box, other UCS Client users can view your schedule and use it for presence information. If the date of the appointment is today, your presence members can see that you have an appointment today as shown.

You can allow other UCS Client users to view all your private schedules by checking the popup menu of your private schedule folder.

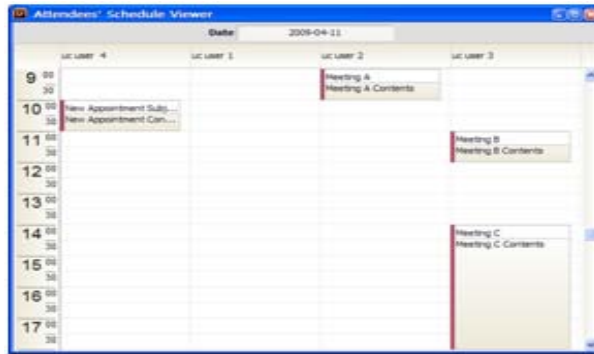


If you want to arrange the schedule with attendees, click the **Others** button, a popup menu appears where you can start an IM session, Make a Call or check attendee schedules.

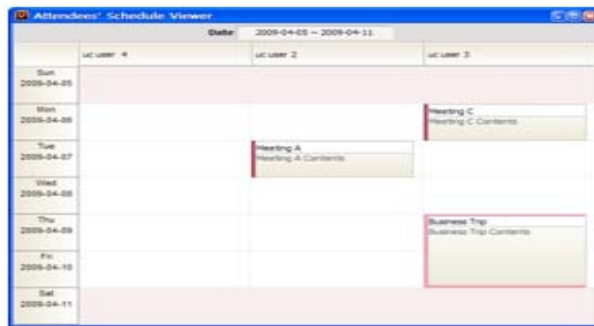
#### To view an attendee schedules:

1. Click the Add icon.
2. Select **Attendees** for the schedule using the Select Member window.





3. Click the icon of another user; the popup menu will display.
4. Click on a particular **Attendee's Schedule Viewer**; the Viewer will display.
5. If the start date and end date of the appointment are the same date, the window will show the day's schedule of all attendees. Otherwise, it will show the day period schedule.



#### To edit a schedule:

1. Double click on the appointment in the Appointment window or select the appointment and click the highlighted **Edit** icon.
2. Select the **Edit** icon button to display the Appointment window
3. Modify the information in the window, see Adding an appointment above.
4. Select **OK**, the modified appointment is displayed in the appointment list.

---

#### NOTE

When you edit an appointment that changes My Presence, you cannot select options from [My Presence for an Appointment] and [My Presence After Expired] drop-down list.

---

#### To delete an appointment:

1. Select the appointment from the Appointment window; if you have permission to delete the appointment the **Delete** icon will highlight.
2. Click the highlighted **Delete** icon.
3. Confirm to complete the deletion.

---

**NOTE**

When you delete the appointment that changes My Presence, a confirmation window will display. If you click the 'Yes' button, My Presence will be changed to 'My Presence After Expired' for the appointment.

---

**To copy a schedule to another date:**

1. Select the appointment from the Appointment window; if you have permission to edit the appointment the **Copy** icon will highlight.
  2. Select the highlighted **Copy** icon to display the Copy Schedule popup.
  3. Input any appointment edits and select new dates; the start and end dates and time are required fields.
  4. Select **OK**, to copy the appointment.
- 

**NOTE**

If the difference between start and end date exceeds 7 days or if the range includes selected appointment dates, an error message displays.

---

An ICR scenario can be added to a schedule to be used as needed for routing incoming calls at designated times.

**To add an ICR scenario for a schedule:**

1. Right-click on an appointment where the ICR scenario will be added.
2. Select **Add ICR Scenario**; the ICR Wizard window will display.
3. Enter Scenario Name and assign a scenario destination (refer to Section 10.4.5).
4. Click on the **OK** button.

**To remove an ICR scenario from a schedule:**

1. Right-click on the appointment containing the ICR scenario.
2. Select **Remove ICR Scenario**.
3. Click to confirm the deletion.

## 9.2 Folder List Display

iPECS UCS Server maintains two lists of schedule folders, a shared schedule and your private schedule folders. Schedules in the shared folder are managed in the UCS Web Administration by allowed users only. Schedules in My Folder are your private schedules, which you maintain and manage. Appointments from the selected folders are shown in the Appointment window. To select a folder check the box next to the folder name. For each day, the window shows the appointments for all checked folders organized by date. The list for each date can be minimized or expanded to display the summary.

## 9.3 Importing and Exporting the Calendar

The appointments for the current month contained in a schedule folder and displayed in the calendar can be imported from or exported to Outlook. If you want to import or export schedules for other months, simply change the month displayed in the Monthly calendar. Items contained in an unchecked schedule folder cannot be imported or exported. Shared schedules not managed by you cannot be imported to or from your shared schedule folder.

### To import a schedule:

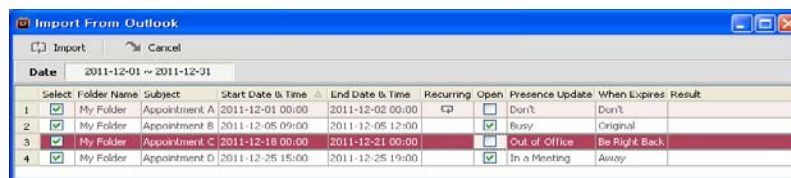
1. Right-click on a checked schedule folder.
2. Select **Import From Outlook**.
3. Select the Outlook schedule folder to import and click **OK**; the Import from Outlook window will display.

---

### NOTE

The Recurring column indicates that it is a recurring appointment.

---



4. Select each checkbox for the schedules you want to import.
5. Click on the **Open** checkbox of other UCS Client schedules that you want to view.

---

### NOTE

If 'Open All Schedule to Shared Users' is unchecked in the personal schedule settings, the 'Open' column of Import from Outlook will not appear.

---

6. Set the action for automatic My Presence change for this appointment. The UCS Client will change and return the My Presence selected from the Presence Update and When Expired drop-down list. When finished making selections, click **Import**.
7. The Import status displays in the Result column of the Import from Outlook window.

---

### NOTE

If imported appointments contain text in HTML or Rich Text format, the text will be displayed in plain text format.

---

### To export the contents to Outlook:

1. Right-click on the checked schedule folder that will be exported.
2. Click **Export To Outlook**; the Export To Outlook window displays.
3. Click on the checkbox for the schedules to export.

4. When finished, click the **Export** button; the Folder Selection window displays.
5. Click on the target Outlook calendar folder to receive the export.
6. Click **OK** to export the schedule, updating Outlook schedules.
7. Export status displays in the Result column on the Export to Outlook window.

---

**NOTE**

Recurring appointments cannot be exported to Outlook because of the possibility of conflict with existing appointments.

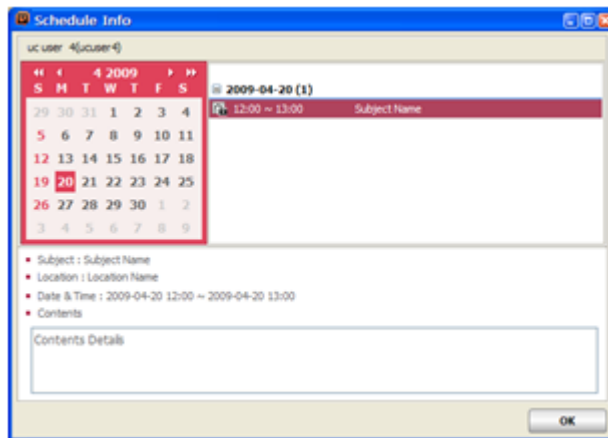
---

## 9.4 View Other UCS Client User Schedules

You can check other UCS Client user schedules if the schedules are enabled for viewing by checking the 'Open This Schedule to All Shared Users' box. To find UCS Client Schedules available, click on all selections: Presence, Organization, Logs and Phone windows in the main window or Search Shared User window.

**To view other UCS Client user schedules:**

1. Right-click on a contact's schedule.
2. Select **Schedule Info**; the Schedule Info window will display.

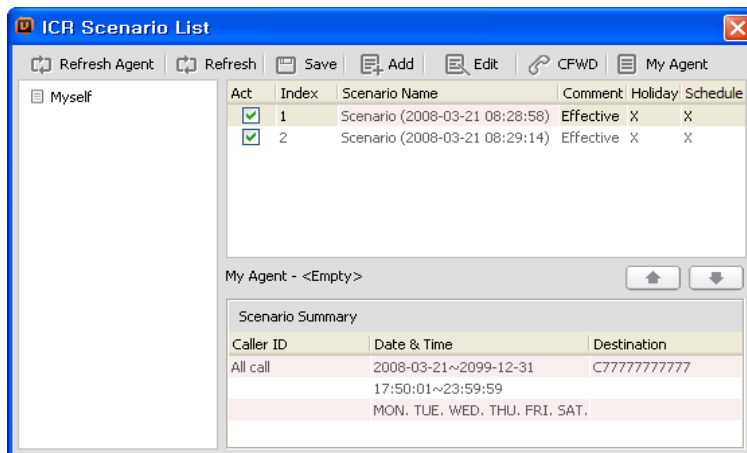


3. Select the month to view by navigating forward and backward from the current position using the arrow buttons in the upper-left part of the window.
4. Select a date in the mini-calendar on the left side.
5. Click on the schedule to view the schedule details.
6. Click **OK** to close the window after viewing the schedule.

## Chapter 10

# ICR (Individual Call Routing) Window – (P)

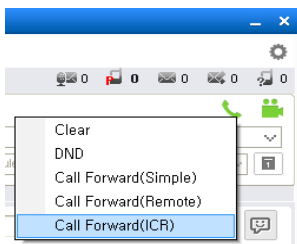
With iPECS UCS Client, you can establish scenarios to route incoming calls. Each scenario defines rules to route incoming calls, time, day of week, date and caller ID to a destination you define. Up to 10 scenarios can be established using the UCS Client ICR Wizard and the relative priority of each can be set. You can select another UCS Client user as an Agent, who is then able to view and modify your scenarios. When an incoming call is received, the iPECS notifies the UCS Server, which queries your ICR scenarios. iPECS UCS Server will compare the incoming call parameters to those of the scenarios. The call is then routed to the destination in the matching scenario with the highest priority. ⓘ This function is supported in **UCS Premium** license.



The ICR Scenario window consists of three (3) major components: the User list on the left the Scenario and Summary screen on the right and the ICR icon tools at the top.

### To access the ICR window:

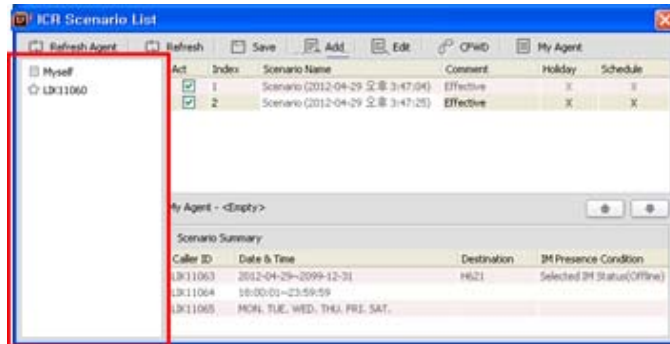
1. Click **Set My Phone Status** from the File menu or the Phone status icon from the main window.
2. Select **Call Forward (ICR)** from the menu.





The following sections discuss how to establish and activate ICR scenarios.

## 10.1 ICR User List

The User list, left side of the window, displays a list of scenarios accessible by you. In addition to your own scenarios (default=Myself), you may be registered as an Agent for other UCS users which permits you access to their scenarios. Selecting a user from the list displays the corresponding scenarios.



### NOTE

The  icon represents your scenario list and the  icon represents scenarios of users that registered you as an agent.

## 10.2 Scenario & Summary Screen

The Scenario & Summary window is a list of scenarios for the selected user and a summary of the call parameters for the scenario. In this screen, the priority of the scenario can be adjusted with the up/down arrows. The scenario listing includes:

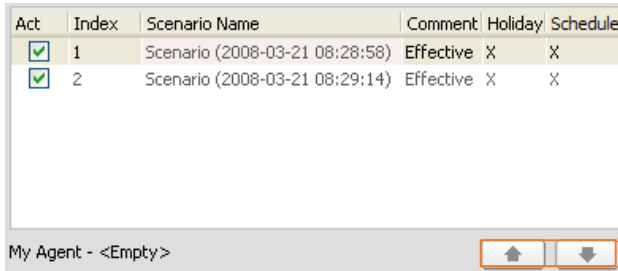
- **Act** – check box shows the status of the scenario (checked is active).
- **Index** – defines the priority of the scenario.
- **Scenario Name** – name assigned to the scenario.
- **Comment** – timing status of the scenario:
  - **Effective** – timing of scenario is active or future,
  - **Expired** – timing of scenario has expired.
- **Holiday** – indicates the scenario is for a holiday schedule.
- **Schedule** – indicates the scenario is from your schedule

The Scenario Summary at the lower part of the window displays the call parameters for the highlighted scenario:

- **Caller ID** – Caller ID or Phone number that applies to the scenario.
- **Date & Time** – the day, date and time to apply the scenario.
- **Destination** – the destination User ID or Phone number.
- **IM Presence Condition** – the IM presence state that applies to the scenario.

### To adjust the priority of a scenario:

1. Select a scenario in the list.
2. Select Up/Down arrows to move the scenario in the list.



Act	Index	Scenario Name	Comment	Holiday	Schedule
<input checked="" type="checkbox"/>	1	Scenario (2008-03-21 08:28:58)	Effective	X	X
<input checked="" type="checkbox"/>	2	Scenario (2008-03-21 08:29:14)	Effective	X	X

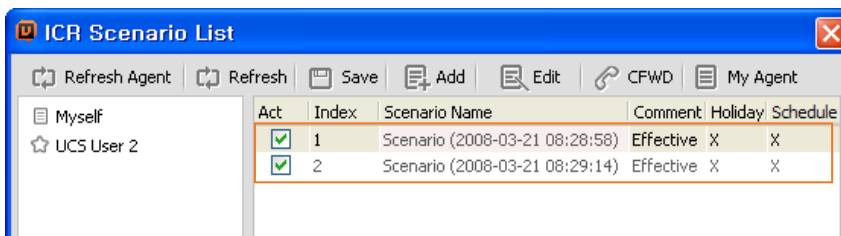
My Agent - <Empty>


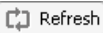




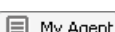
↑ ↓

3. Click **Save** to store the new priorities.

## 10.3 ICR Icon Tools

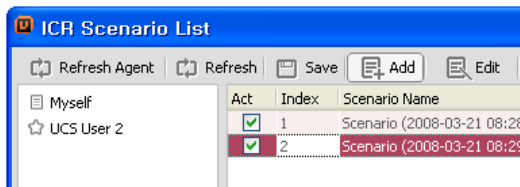
The ICR tools are used to manage the User Scenarios. Icons refresh the ICR window and save, add, or edit scenarios. Using the CFWD icon, you can forward your traditional iPECS terminal using a scenario. Finally, with the My Agent icon, you can register or delete Agent definitions. The following list identifies the icons, and provides a reference for more detailed information on operation of the icons (as applicable).



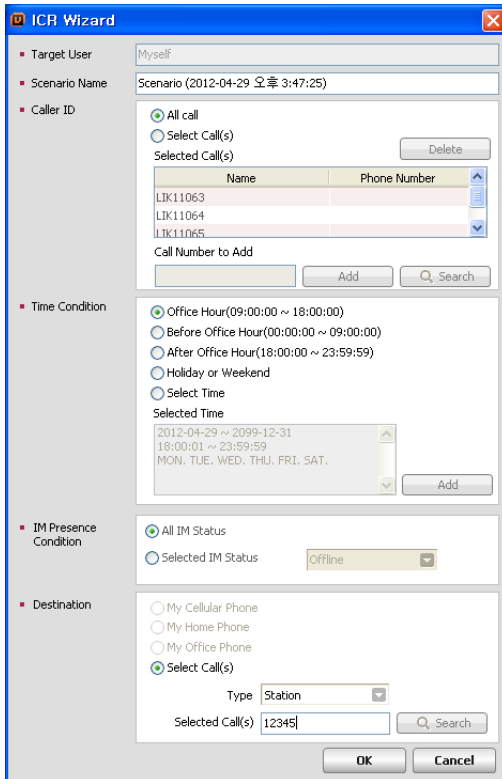
-  Refresh Agent refreshes the user list (refer to Section 10.1).
-  Refresh refreshes the displayed scenario list.
-  Save saves the scenario.
-  Add adds a new scenario (refer to section 10.4).
-  Edit edits the selected scenario (refer to section 10.4).
-  CFWD activates ICR Call Forward for the user's iPECS terminal (refer to section 10.5).
-  My Agent registers or deletes agent (refer to section 10.6).

## 10.4 ICR Wizard

The ICR Wizard guides you through setting the parameters for a scenario. In the wizard, you will assign a name, the Caller IDs that apply to the scenario, the scenario timing and the destination(s) to receive the call.



To access the wizard, select **Add** or **Edit** from the ICR Scenario List window or select from the popup Scenario menu (refer to Section 10.7).

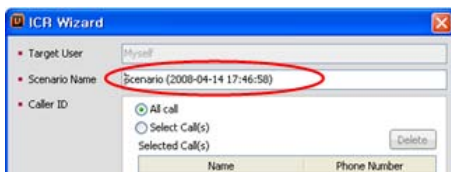


## 10.4.1 Entering a Scenario Name

A Scenario Name with the current date and time is automatically generated when **Add** is selected. The name can be modified at any time.

**To add scenario name:**

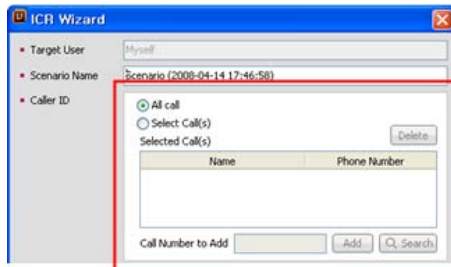
1. Enter a name in the Scenario Name box.





## 10.4.2 Defining the Scenario Caller ID

Each Scenario applies to all calls, only calls from specific Callers, or another UCS Client. Your Private directory or the UCS Shared directory can be searched to select callers, or you may directly enter Caller IDs that are subject to the Scenario routing.

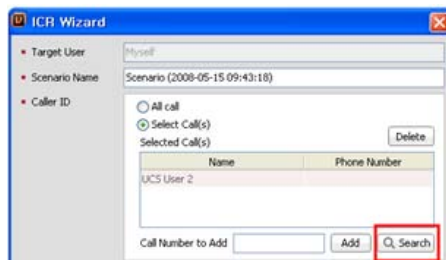


**To apply the Scenario to all calls:**

1. Select the **All call** button.

**To search both the Presence and Shared directory:**

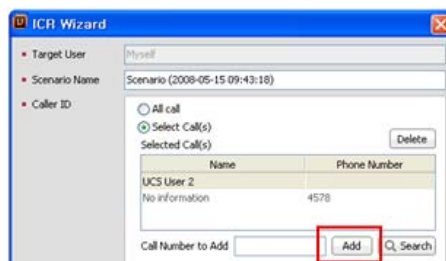
1. Select the **Select Call(s)** button.



2. Click on the **Spyglass** search icon; the Select Member window displays.
3. Select members to add.
4. Click **OK** to add the member.

**To enter a specific number:**

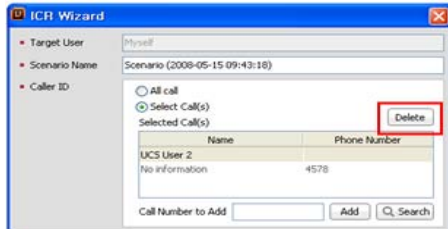
1. Enter a number in the **Call Number to Add** box.
2. Select the **Add** icon to add the number to the Caller Id list.



**To remove a Caller ID from the list:**

1. Highlight the desired Caller Id(s) by clicking on each.

2. Select the **Delete** icon.

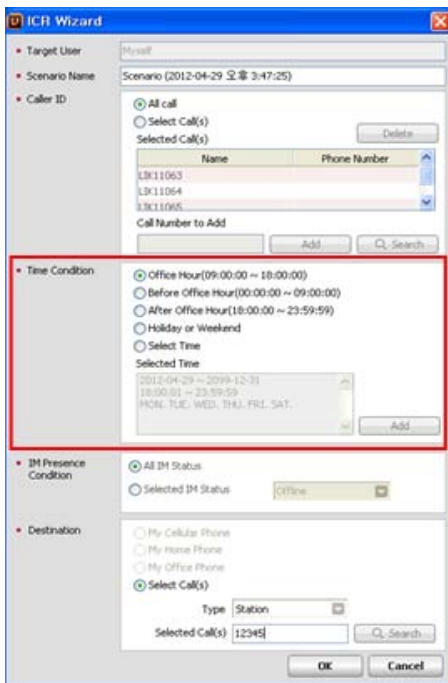


### 10.4.3 Setting the Scenario Timing

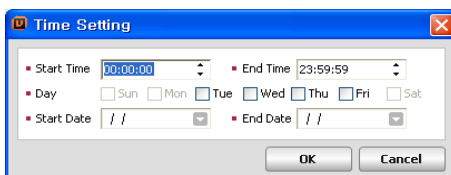
You can specify a period (day, date, and time) when a Scenario will be effective. You may select from several pre-defined periods, Work, Off Time, Holiday or Weekend, or define a timing specific to the scenario.

#### To set Scenario timing:

1. Select one of the predefined times or select **Time** and click **Add** button.



2. Select the desired start and end times; check the days of the week for the scenario and select a start and end date.



3. Select **OK** to save update.

## 10.4.4 Setting the IM Presence Condition

You can specify the IM Presence when a Scenario will be effective. You may make a scenario active regardless of IM Presence or select an IM Presence, Offline, Online, Busy, Away, Be Right Back, Out of Office or In a Meeting.

### To apply the IM Status to a Scenario:

1. Select the **All IM Status** button.

### To apply the Scenario to a specific IM Status:

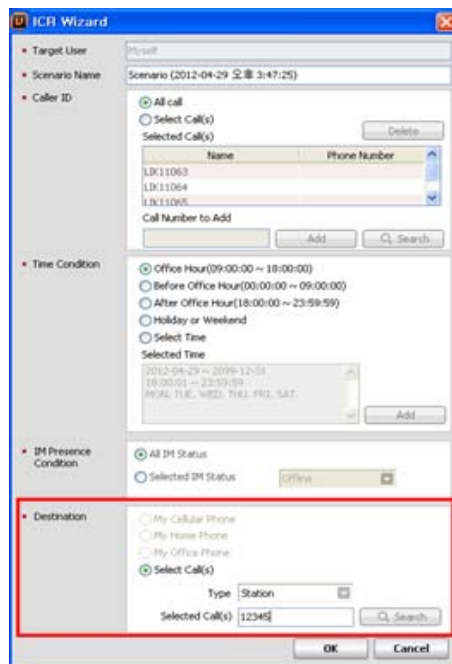
1. Select the **Selected IM Status** button.
2. Select an IM Presence (Offline, Online, Busy, Away, Be Right Back, Out of Office or In a Meeting) from drop-down Type menu.

## 10.4.5 Assigning a Scenario Destination

The Destination area establishes the routing of calls that meet the parameters of the scenario. Destinations include your cellular phone, home phone or office phone already registered. Additionally, your Private directory or the UCS Shared directories can be searched or you may directly enter a destination to receive the call.

### To search either the Private or UCS Shared directory:

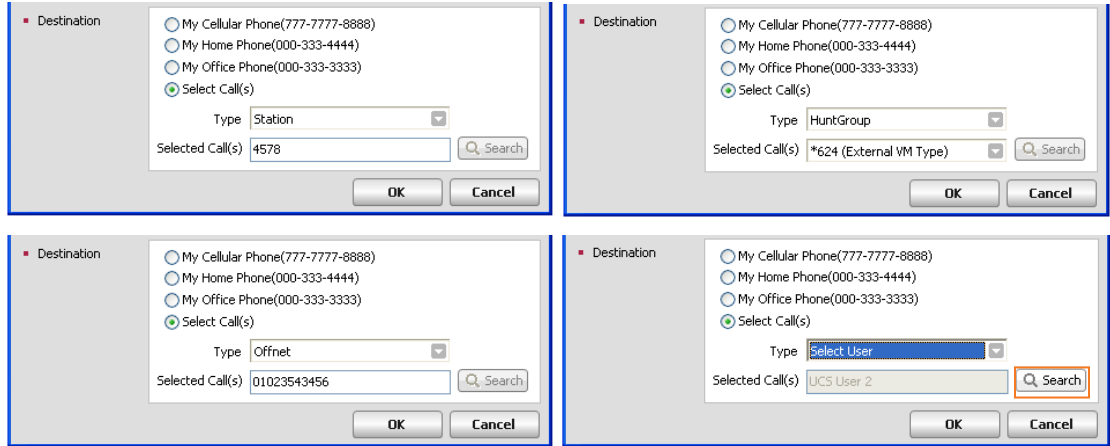
1. Click the **Select Call(s)** button.



2. Click to **Select User** from the drop-down Type menu.
3. Click **Search**.
4. Select a destination from the Select Member window.

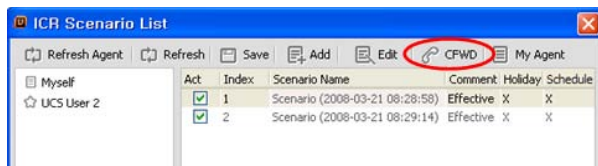
**To enter a specific destination:**

1. Check the **Select Call(s)** button.
2. Select a **Type** (Station, Hunt group, Offnet) from drop-down Type menu; a specific Hunt group can be selected from the list.
3. Enter the appropriate number in the Selected Call(s) box.
4. Click **OK** to save the new or modified scenario(s).



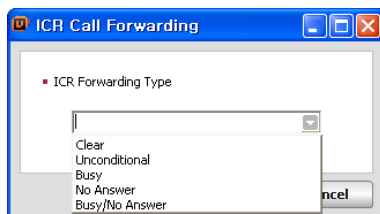
## 10.5 Activating ICR Call Forward

Once scenarios are saved, the ICR feature can be activated to forward your calls using the scenarios. When a call is received, to your iPECS phone the UCS Server compares the call parameters to scenarios and routes the call appropriately.



**To activate the ICR Call Forward feature:**

1. In the ICR window, select the **Scenario(s)** by clicking to highlight.
2. Click on the **CFWD** icon tool.
3. Select the **Forwarding Type** from the drop-down menu. Available choices include:



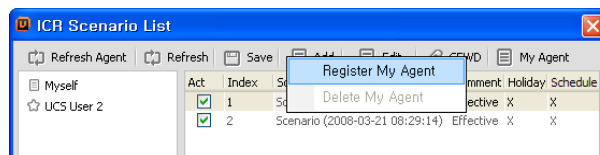
- Clear
  - Unconditional
  - Busy
  - No Answer
  - Busy/No Answer
4. Click on the **OK** button activate ICR.

## 10.6 Using My Agent Control

You can define another UCS Client user as an Agent that can view and modify your scenarios. You can register only one Agent, but can be the Agent for multiple other UCS Client users.

### To manage Agent definitions:

1. Select the **My Agent** icon; the My Agent popup menu displays.
2. Select **Register My Agent** to assign an Agent,  
OR
3. Select **Delete My Agent** to remove your Agent.

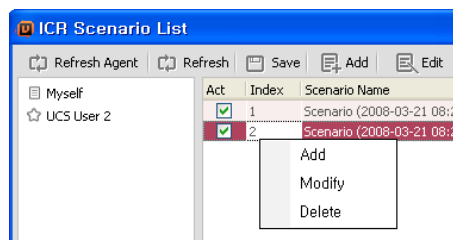


## 10.7 Scenario Menu

In addition to the ICR icon tools, the Scenario menu can access the Scenario Wizard. From the Scenario menu, you can add, edit and delete a scenario. Adding and editing a scenario is discussed in Section 10.4

### To delete a scenario:

1. Right-click on a scenario in the Scenario list, the Scenario menu appears.



2. Click **Delete**; a confirmation window appears.
3. Select **OK** to delete the scenario.

# Collaborative Session Tools

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Other collaboration tools include Instant Messaging (IM), Sending files, Sharing, Web Push and Video Conferencing. In conjunction with the Voice and Video communication, a complete multi-media communication session involving text and graphic messages, sharing, Web Push, and sending files can be established with the UCS Client. The tools are under the main application Tools menu, in right click popups (Presence, Log and Call windows), and the Selected Contact window. This section covers the use of each of the collaborative session tools.

## 11.1 Instant Messaging Introduction

IM is an IP-based near real-time communication service for text information. You can create and send a message to other UCS Client users in the IM session. Other users can create and send responses as they desire.

An IM session can be created as a 1:1 Chatting session, or Multi Chatting session can be established. Message dialog can be stored locally as a Rich Text Format (RTF) file.

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### NOTE

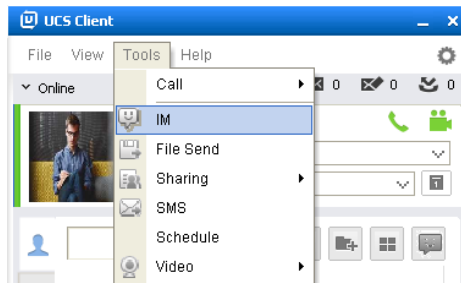
You must be online to initiate, be invited to, or to join an IM session.

Basic emoticon(Unicode emoticon) used in Mobile Client is not supported in Windows Client.

---

### 11.1.1 Initiating 1:1 Chatting

For 1:1 Chatting, the IM window may be opened from the main window Tools menu as part of an active call or video conference using the IM icon tool. Once an IM window is opened, additional participants may be added using Invite from the IM menu.

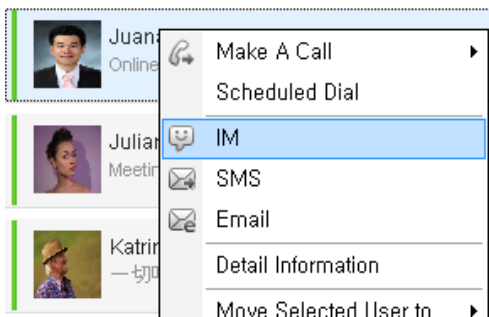


### To start an IM session from the main application menu:

1. Select **IM** from the Tools menu, which displays the Select Member window.
2. Select the desired members from the Member List area, and click **Add** to list the member in the Added Member List.
3. Select **OK** to display the IM window (refer to Section 11.1.3).

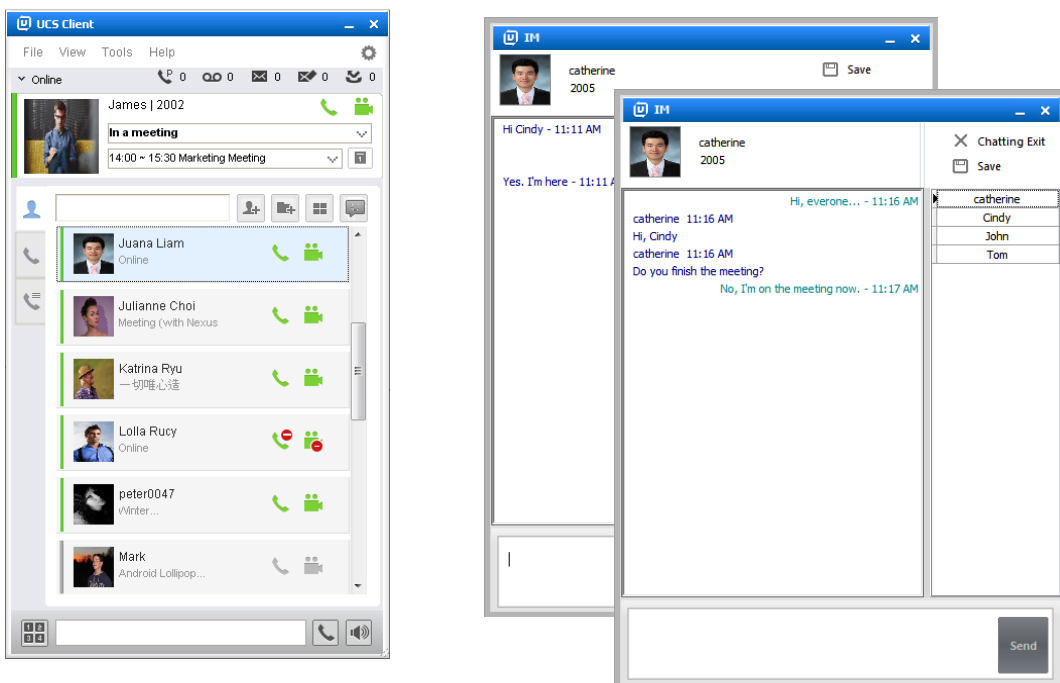
### To start an IM session from any of the Main, video or other windows or popup menus:

1. Right-click on an online user; the popup menu will display.
2. Select **IM** from the popup menu.



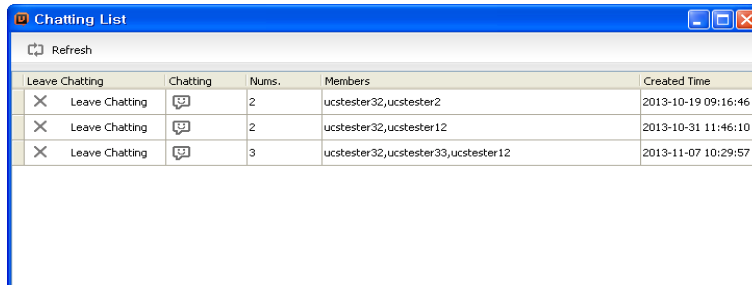
## 11.1.2 Initiating Multi Chatting – (P)

Multi Chatting permits an IM session with multiple users, up to 50 at one time. During 1:1 Chatting, you can initiate multi chatting by dragging any user from Presence View into IM window. ⓘ This function is supported in **UCS Premium** license.



### 11.1.3 Initiating Multi Chatting from Chatting List – (P)

You can retrieve the chatting list created before entering a chat room by selecting any chat room from chatting list. ⓘ This function is supported in **UCS Premium** license.



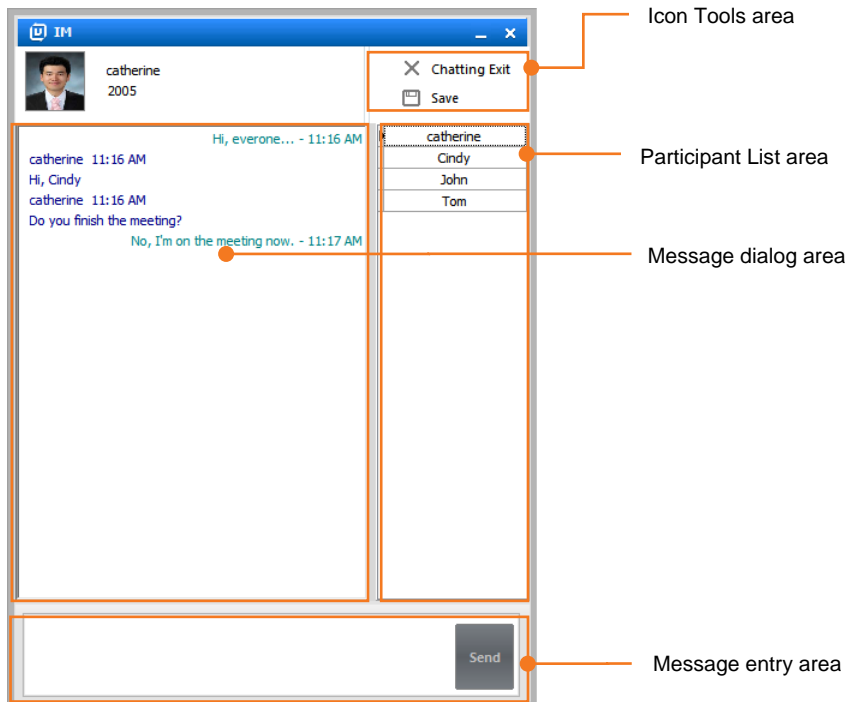
Leave Chatting	Chatting	Nums.	Members	Created Time
✕ Leave Chatting	🗨️	2	ucstester32,ucstester2	2013-10-19 09:16:46
✕ Leave Chatting	🗨️	2	ucstester32,ucstester12	2013-10-31 11:46:10
✕ Leave Chatting	🗨️	3	ucstester32,ucstester33,ucstester12	2013-11-07 10:29:57

**To enter a Chat Room:**

1. Select the Chat Room from Chatting List.

### 11.1.4 IM Window Introduction

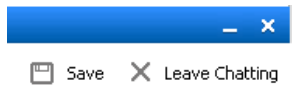
The IM window is comprised of a number of areas including icon tools, Participant List area, message dialog area and message entry area.



#### 11.1.4.1 IM Icon Tools

As with other windows, the IM window includes icon tools to place a call, start a video conference and tools to initiate other collaborative sessions with other participants in the IM session.





When ending a session, text from the IM message dialog can be saved locally as an RTF file. To save an IM message dialog:

1. Select **Save** from the IM window.
2. In the File menu, select **Save**.
3. In the popup, select the location and file name.
4. Click **OK** to store the file.

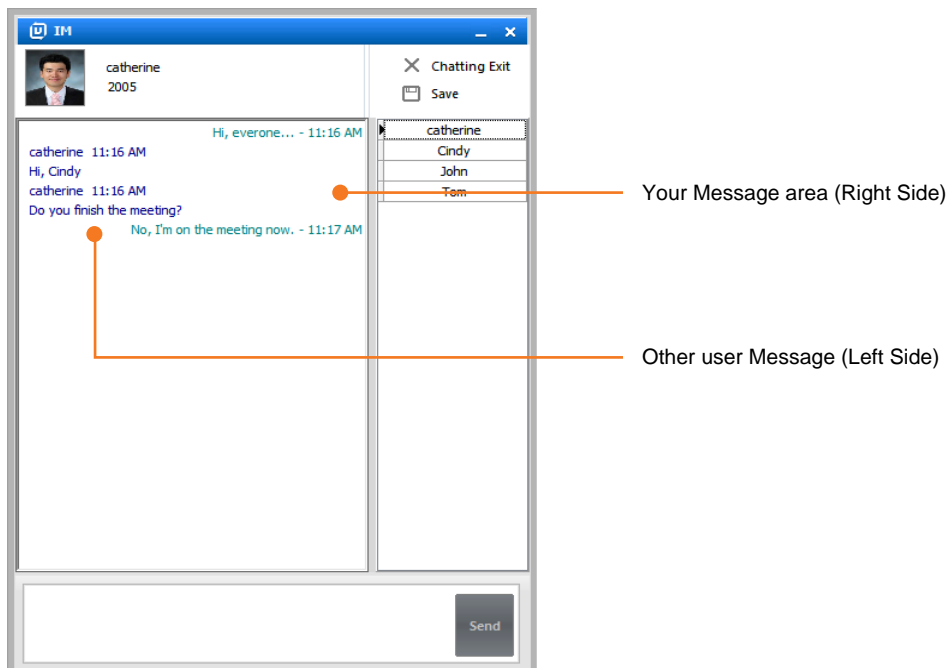
### 11.1.4.2 IM Participant List

The Participant List area displays the participants in the session. You may display summary information about individual participants.



### 11.1.4.3 Sending IM Messages

With the IM window displayed, you can send and receive messages.

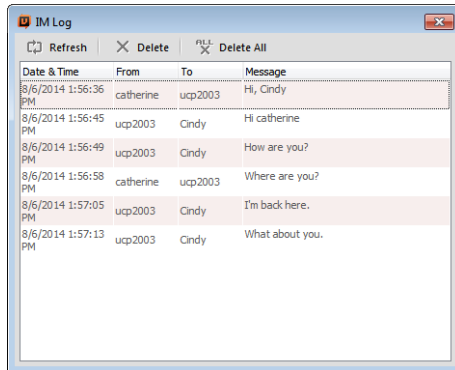


**To send a text message:**

1. Enter the desired text in the message entry area at the bottom of the IM window.
2. Click on **Send** to send the message to other participants.

## 11.1.5 IM Log

If enabled, each IM sent is stored in the IM Log. To enable the IM Log, refer to Section 3.2.3.4. The IM Log includes the date, time, sender, and receiver(s) of the message as well as the message text. The Log can be searched by any of the columns shown in the IM Log window.

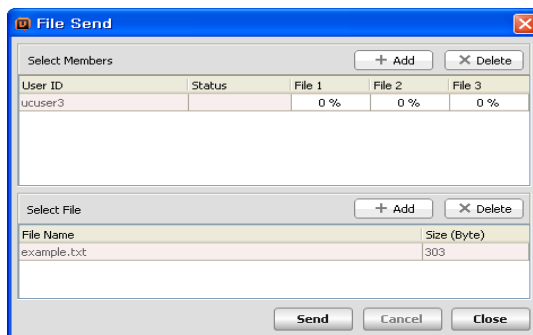


## 11.2 File Send Introduction – (P)

You may send files located on your PC to other UCS Clients. Up to three files can be sent to up to five selected UCS Clients at a time. The maximum file size that can be sent is 1000MB. The receiving UCS Clients must be online and authorize receipt of the file before the file is sent. Received files are stored in the UCS Client PC directory defined in Setting window, refer to Section 3.2.3.4. ⓘ This function is supported in **UCS Premium** license.

### 11.2.1 File Send Window

The File Send window manages the transfer of files. The window includes the list of users (maximum 5) to receive the files and the files (maximum 3) being sent. Icons allow you to add or delete recipients and files as well as initiate or cancel a file transfer. The recipient list includes a status display indicating the file transfer status and the percentage of each file transferred.



**To access the File Send window:**

1. Select **File Send** from the main, video or sharing windows, or various popup menus.

**To send files from the File Send window:**

1. Click the **Add** members icon.

2. Select recipients from the Select Member window (refer to Section 11.2.1.1).
3. Click the **Add** files icon.
4. Select files from the Browse for Folder window (refer to Section 11.2.1.2).
5. Click on **Send**, the File column shows the transfer status.

**Status indications in the Status column are:**

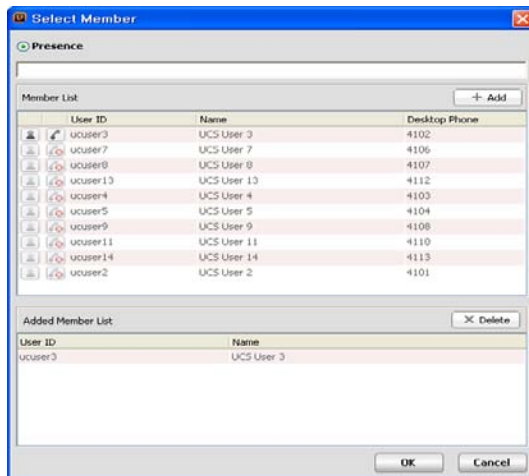
- **Requesting** – Indicates the recipient has received the request to transfer files.
- **Allowed** – Indicates the recipient has accepted the file transfer and the files are being sent.
- **Denied** – Indicates the recipient has rejected the file transfer and the files are not sent.
- **Failed** – Indicates no response from the recipient or an error occurred
- **Completed** – Indicates the file transfer has been completed.
- **Canceled** – Indicates the recipient has rejected the file transfer.

### 11.2.1.1 Adding Member Recipients

When you select the **Add** member icon, the ‘Select Member’ window is displayed. From this window, you may select members to receive files. A user must be online to be selected as a recipient.

**To select users to receive files:**

1. Select recipients from the Member List.



2. Click on **Add** to move members to the Added Member List.
3. Click **OK** to add the users as recipients and return to the File Send window.

OR

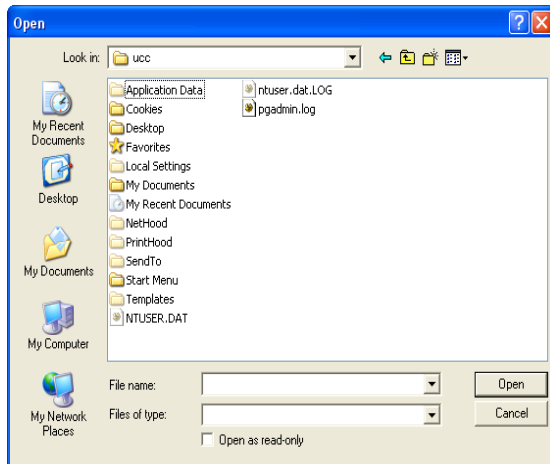
4. Recipients can also be added by selecting them from a main window then drag and drop them to the Select Members list in the File Send window.

### 11.2.1.2 Adding Files to Send

When you select the Add files icon, the Open file window is displayed. From this window, you may browse folders in the PC to locate the files you wish to send.

#### To select files to send:

1. Select the **Add** icon.
2. Browse to locate the appropriate files on your PC.



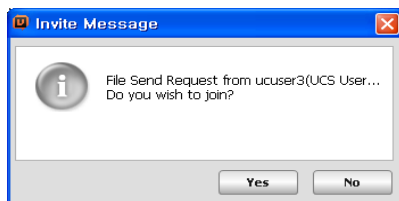
3. Select the desired file, and click **OK** to add the file to be sent.

OR

Files can also be added from a directory screen by dragging and dropping to the Select File area of the File Send window.

## 11.2.2 Recipient Authorization

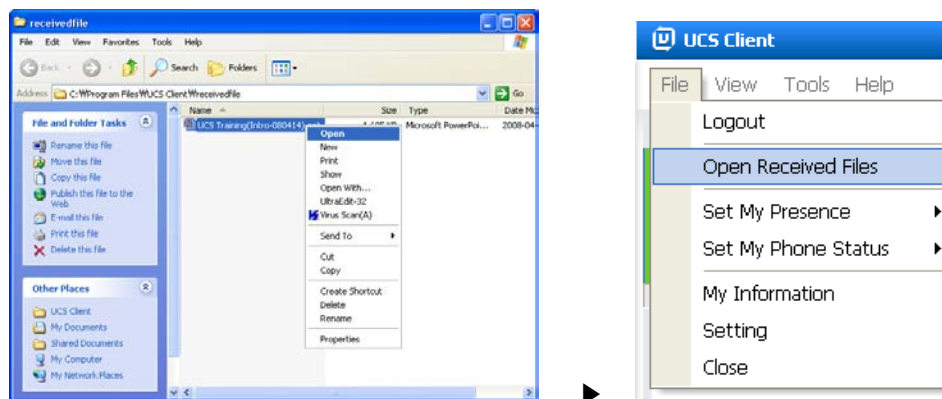
When you select Send in the File Send window, recipients receive a popup notification that another user is attempting to send files to them. The popup lists the name of the user attempting to send files. The recipient may accept or reject the file transfer. If the invited user accepts the file transfer, the File Send window displays and both the sender and receiver see the file transfer progress. If the recipient rejects the transfer, your File Send window will show the file transfer status as denied and files are not sent.



## 11.2.3 Opening Received File

When files are received, they are stored in the directory defined under Section 3.2.3.4. The files can be opened immediately from the File Receive popup, using the normal PC file open sequence or from the UCS Client File menu:

1. Select **Open Received Files** from the File menu.
2. Double click on the desired file.



## 11.3 Application Sharing – (P)

The application sharing function permits iPECS UCS Clients to share the information displayed in the Sharing Master Page with up to five (5) other UCS Client users. You can share documents, spreadsheets, presentations and drawings in real-time. The initiator or master maintains control of the shared material and can edit the material, which is immediately shown to other UCS Clients in the sharing session. The master can pass control to another user in the session, permitting the new master full session control.

Once the sharing session begins, any information that may appear in the master's Sharing window, such as an incoming call popup, will be displayed to other users depending on sharing options, see Section 3.2.3.4. To participate in a sharing session the user must be online. ⓘ This function is supported in **UCS Premium** license.

---

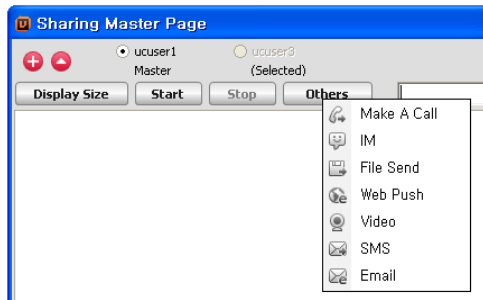
### NOTE

The 'Any windows' selection in the Application Sharing window must be enabled to share a browser in the Sharing window, see Section 3.2.3.4. As you move the browser window to the Sharing Master Page, other users in the sharing session see the web page.

---

### 11.3.1 Application Sharing Window

The Sharing Master Page window manages the Application Sharing function. At the top of the window is the sharing participant list with the controlling participant indicated by the marked radial button. Icon tools are provided to add participants and files as well as to start and stop the sharing session. The master can call and initiate other collaborative sessions with a selected participant by selecting from the 'Others' tool menu.



### To initiate an Application Sharing session:

1. Open the Sharing Master Page by selecting **Application Sharing** from any of the main, video or other windows or popup menus.
2. Select participants for the sharing session (refer to Section 11.3.1.1).
3. Select files to be shared (refer to Section 11.3.1.2).
4. Click on **Start** to begin the session; this will send an invite message to the selected participants.
5. If the invitation is accepted, files are shared in the Participant Application Sharing window (refer to Section 11.3.4).

The sharing master can pass control to another participant. The participant becomes the master and can then edit documents displayed. To change control to another participant, click the radial button next to the participant name.

---

### NOTE

Use One-click application sharing in the Tools menu (IM/Video/Call Tab), by clicking on the desired Tools menu item; a sharing session will begin with the selected contact and item.


---

## 11.3.1.1 Adding Application Sharing Session Participants

Selecting the Add member icon from the Application Sharing window, opens the Select Member window. From this window, you can select up to five other participants for the session. A user must be online to be selected as a participant.



### To select participants:


1. Select the **Add** member icon (  ).
2. Select participants from the Select Member window.
3. Click **OK** to add the user as a file recipient and return to the Application Sharing window.

### 11.3.1.2 Adding Files to Share

Up to five (5) files from the Open Sharing List can be shared at any one time. The master can add and delete files from the list and multiple file types, documents, spreadsheets, slide shows, etc., can be selected. Multiple files can be opened in the window simultaneously with the active file displayed on the top of the screen.



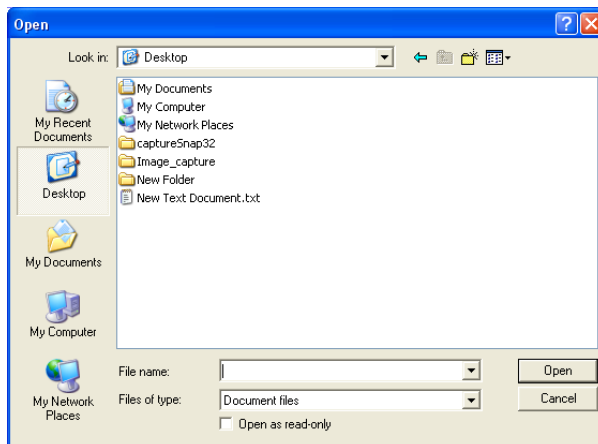
#### To select files at any time during the session:

1. Click the **Open** (  ) icon, the Open Sharing List opens displaying available opened and minimized files.
2. Select files to be shared from the list.
3. Click on **OK** to accept the change.

Additional files can be added to the list from the Open Sharing List window.

#### To select other documents:

1. Click on the Open New Selection List.



2. Select the document type, **Document** or **Paint Board** can be selected. Selecting Paint Board opens a blank paint file. If **Document** is selected, the Open window is displayed.
3. From the Open window, browse folders in the PC to select files to share.
4. Select the desired file(s).
5. Click **OK** to add the file to the Sharing List.

Certain types of files such as Internet browsers may not be recognized by the sharing module as applicable to sharing. In this case, selecting 'Any Windows in the Shared window' allows a window to be dragged to the Sharing window for display to participants, see Section 3.2.3.4.

---

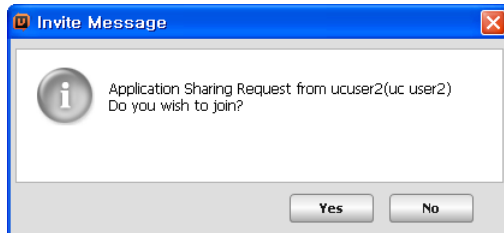
## NOTE

Modifying the 'Any Windows in the Shared window' setting will not affect an active sharing session. To allow sharing all windows, you must terminate the active session and restart the sharing function.

---

### 11.3.2 Application Sharing Participant Window

When the initiator (Master) begins a sharing session by selecting Start, selected participants receive the Invite Message popup. The invited user may then select **Yes** to join the session or reject the invitation by selecting **No**.



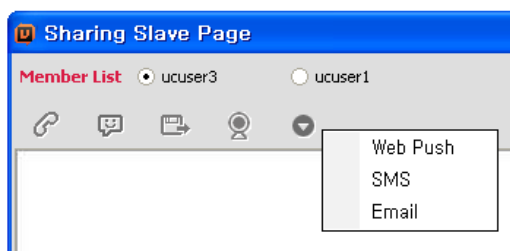
If the user selects **Yes** to join the session, the Sharing Participant window is displayed. This page displays the Member List at the top of the window. The radial buttons in the master's window indicates the controlling party. The window displays the active shared file shown in the master's window.



At any time, a participant can leave the sharing session by selecting **Stop** in the upper right corner of the window.

### 11.3.3 Other Participant Tools

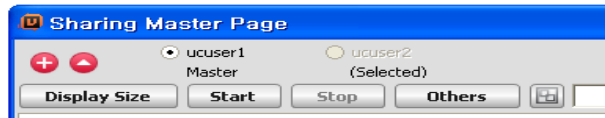
The window includes icon tools so the participant can call and initiate other collaborative sessions with a selected participant by selecting the appropriate icon tool.










## 11.3.4 Drawing in Program Sharing mode

Drawing tools are included for creating drawings such as free-form lines. During an application sharing session, clicking one of the **Drawing** mode icons next to the **Others** button selects a drawing activity.



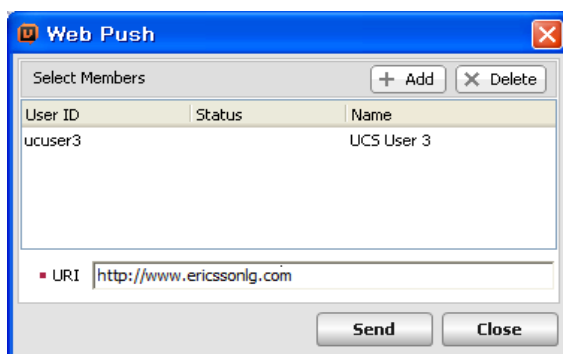
-  : sets color
-  : sets line width
-  : selects a picture
-  : free-form line
-  : straight line
-  : ellipse
-  : rectangle
-  : clear all
-  : Exit

## 11.4 Web Push – (P)

Web Push service permits you to control Web Page views for other users. In Web Push, you send or push a Web Page address (URI) to the online UCS Client of selected users; up to five (5) users may be selected. After the selected users accept the Web Push, their PC's Default Web browser opens and displays the Web page. ⓘ This function is supported in **UCS Premium** license.

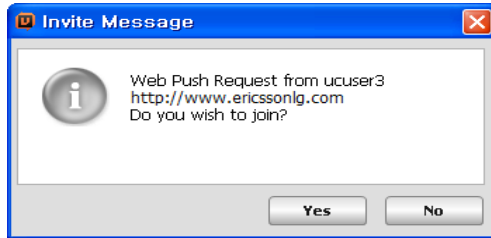
### To push a Web page to other UCS Client users:

1. Click **Web Push** from any of the main, video or other windows or popup menus.



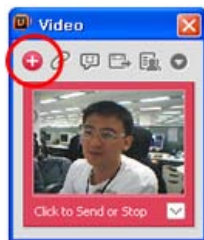
2. Click the **Add** member icon in the top right of the Web Push window.
3. Select the desired recipients (maximum 5) from the list of users displayed.
4. Enter the Web page address (URI).
5. Click **Send** to send the request to the recipients.

Each recipient receives an invitation message and can accept or reject the invitation. If the invitation is accepted, the recipient's web browser opens and displays the pushed Web page. To accept the invitation, select **Yes** in the Invite Message popup.



## 11.5 Video Conferencing and Broadcast – (P)

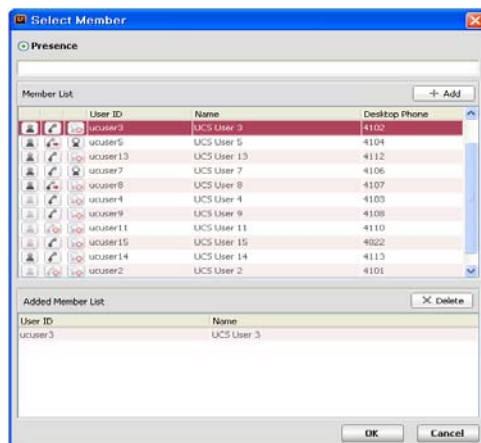
The UCS Client uses a Web Cam and application to implement real-time video communications over an IP-based network. Two types of video conference are available, the normal mode and the presentation mode. In the normal video conference, each member sends and receives video from other members. Up to nine (9) UCS Client users, including the initiator may be included in a normal Video Conference. ⓘ This function is supported in **UCP/eMG Premium** license.



In the presentation mode, the initiator broadcasts video to all members and members send video only to the initiator. The initiator can broadcast video to 31 parties and will receive video from all 31 members of the conference. Note that in the presentation mode, the initiator will need a more powerful CPU to provide quality video.

### To initiate a Video Conference:

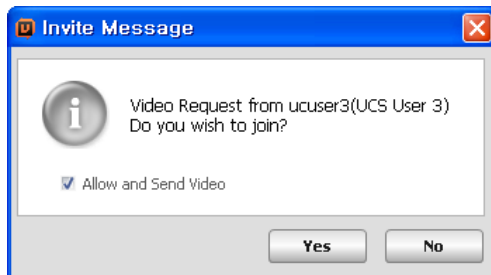
1. Click **Video** or **Video (Presentation Mode)** from any of the main, video, or other windows or popups.



2. Click on the **Add** icon from the Video window to display the Select Member window.
3. Select the desired parties from the Member List.
4. Click **OK**; each selected party will receive a video call Invite Message popup and the inviting party will receive the Invite Status Message. The status can be Accepted, Denied or No response.
5. If the invitation is accepted, click on **Send** from the Invite Status Message window to transmit video.
6. To add additional parties, repeat steps 2 through 6.

UCS Client users without a Web Cam may be invited to a Video Conference and will receive video from the conference, but will not send video. When receiving a video call, the invited user receives an Invite Message:

7. Click **Yes**; the Video preview window will open with a preview of the PC Cam output.
8. Click **Send** from the preview window to transmit video.



### To turn video transmission On or Off,

1. Right-click below "My image".
2. Click on the **Stop** button.



The Video window displays all parties, maximum 9, in your video conference. You can display a single party if desired. To display video from a single party in the Video Conference, double click the video frame of the desired party.

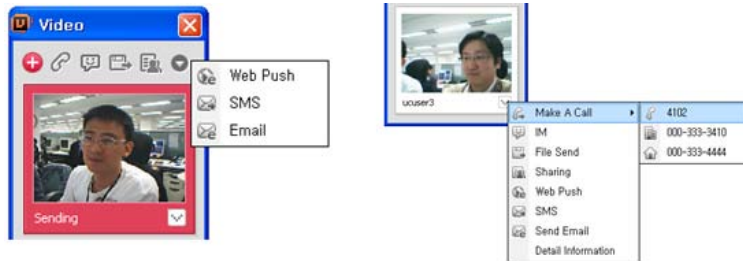
---

### NOTE

Resize the Video window by clicking on the lower-right corner and drag to the desired size.

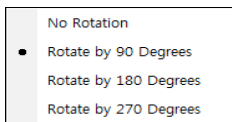
---

You also have access to tools to place calls or initiate other collaborative sessions with the video session participants. Icon tools are located at the top of the Video window of the initiator or for other participants, right click on your picture.



**To rotate a video image:**

1. Right-click on the video image.
2. Select the desired video frame rotation.

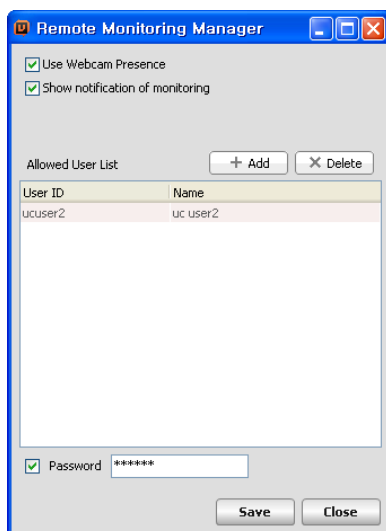


## 11.5.1 Video – Remote Monitoring

A UCS Client located at a remote site can view the web camera output of another client. To be able to monitor another client remotely, that client must be configured to allow monitoring and the monitoring client must be configured in the list of users allowed monitoring of the client. If the client is set for you to be monitored, the remote monitoring presence icon will display on the right side of the contact record in the Presence window.

**To allow remote monitoring:**

1. Click on the **Remote Monitoring Manager** from the Video menu under the Tools main menu.



2. Check **Use Webcam Presence**, and **Show notification of monitoring** to notify the client of the monitoring status.

3. Click on the **Add** button to add a user in the Allowed list.
4. To password protect monitoring of the client, click the **Password** checkbox and enter a password.
5. Click the **Save** button.

**To start remote monitoring:**

1. Click **Start a Remote Monitoring** from the Video selection in various menus and popups, the Remote Monitoring window will display.

**To start recording:**

1. Click the **Recording** button at the bottom of the Remote monitoring screen.
2. To end recording, click on the **Close** button in the bottom of the screen.



**NOTE**

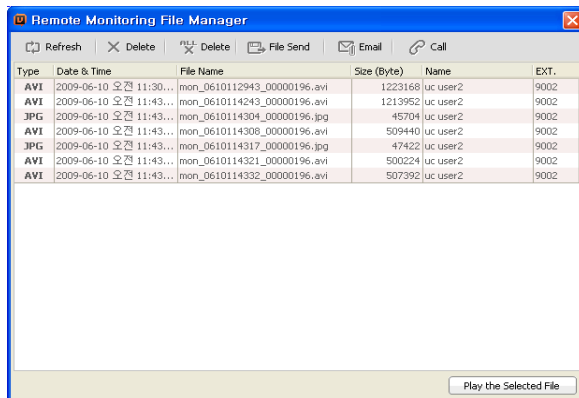
The recording capacity of your PC is limited only by the amount of free space on your hard disk, if your PC has sufficient free hard disk capacity, the recording will be saved.

**To start monitoring capture:**

1. Click on the **Capture** button at the bottom of the Remote monitor screen.

**Using Remote Monitoring to manage Recorded files:**

1. Select the Remote Monitoring File Manager from the Video selection of the Tools menu and other menus, the Remote Monitoring File Manager window will display.



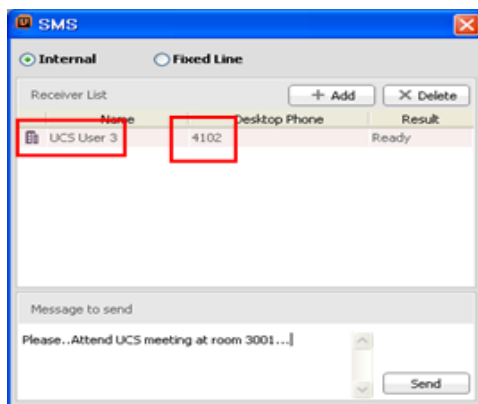
- **Refresh** – update the file list.
- **Delete** – to delete the selected file.

- **All Delete** – to delete all the files.
- **File Send** – send a file to other users.
- **Email** – send an E-mail to the selected user with the file attached.
- **Call** – make a call (remote monitoring of the target).

## 11.6 Short Message Service (SMS)

Short Message Service (SMS) allows you to send and receive text messages with other internal iPECS system users or external SMS users. The UCS Client stores up to ten received messages; additional new messages are ignored. Received messages are stored in the Log window after selecting the SMS icon in the main window. There are two types of SMS, one internal SMS and the other Fixed Line (external) SMS.

The iPECS system must be equipped and enabled to send and receive external SMS (Fixed Line SMS). Internal SMS is for internal users only. All terminals including UCS Clients, iPECS Communicator and Ericsson-LG IP phones can send and receive text messages with other iPECS system users. (Fixed Line SMS may not be available as it is carrier/country dependent).



### To send a text message:

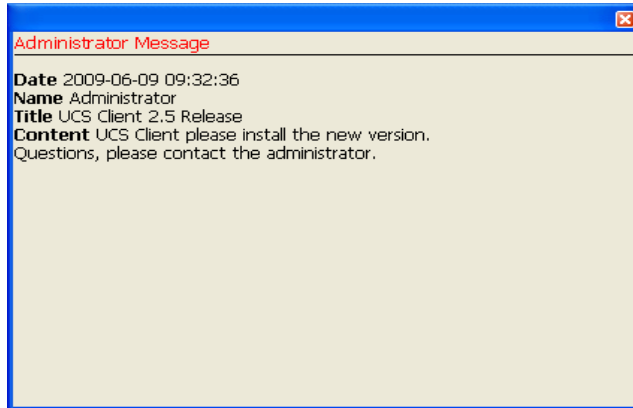
1. Select **SMS** from the main, video or other windows or popup menus, the SMS window displays
  2. Select the **Internal** radial button to send to other iPECS users.
- OR
3. Select the **Fixed Line** radial button to send an external SMS.
  4. Click the **Add** icon.
  5. From the Select Member window, select desired members and click **OK**.
  6. Enter the message in the Message to Send area.
  7. Press the **Send** button, the Result popup confirms transmission.

### To receive a text message:

1. Click the **SMS** icon located in the Message and Status bar at the top of the UCS Client window.

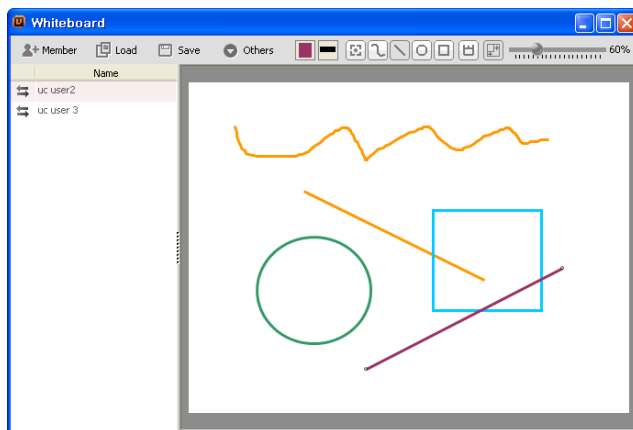
## 11.7 Administrative Messages

The UCS Administrator can send administrative messages to all iPECS UCS Clients. While online or at login, the UCS Client displays the administrative message.



## 11.8 Whiteboard – (P)










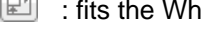
UCS Clients can efficiently collaborate with other clients participating in a meeting using Whiteboard to share drawings and free-form text. The drawing function of the Whiteboard uses lines, ellipses and rectangles to create pictures on the Whiteboard window; pictures can be deleted and moved. ⓘ This function is supported in **UCP/eMG Premium** license.



At the top left of the Whiteboard are the tools icons to add members and manage the file. To the right are the drawing tools discussed below.

### To initiate a Whiteboard collaboration session:

1. Select **Whiteboard** from the main, video or other windows or popup menus, the Whiteboard window will display.
2. Click the **Member** icon.
3. From the Select Member window, select desired members and click **OK**. Each selected party will receive a Whiteboard invite message popup, which they can accept, deny or ignore. The inviting party will receive an invite status message.

4. If the invitation is accepted, click on **Send** in the invite status message to transmit the Whiteboard.
5. To add additional parties, repeat steps 2 through 6.
  -  : sets the color
  -  : sets line width
  -  : select the picture drawn
  -  : drawing free-form line
  -  : drawing straight line
  -  : drawing ellipse
  -  : drawing rectangle
  -  : clear all
  -  : fits the Whiteboard size to the drawing area, or zoom (hold the button down).
  -  60% : zoom setting

## 11.9 Desktop Sharing – (P)

The UCS Client users can share their desktop screen with another user. When on a call, the user can give control of their desktop to another party on the call for drawing pictures, etc. using the Whiteboard. ⓘ This function is supported in **UCP/eMG Premium** license.




---

### NOTE

Screen capture resolution can be adjusted to improve transmission speed during Desktop Sharing. The lower the screen resolution selected the higher operating speed.

---

#### To adjust the Screen Resolution:

1. From the main menu, select File>Setting>Functions>Sharing>Desktop Sharing > Capture Resolution (10-100%)










#### To initiate Desktop Sharing:

1. From the main screen, click **Desktop Sharing**, and the Select Member window will appear.  
OR
2. Click **Desktop Sharing** from the presence popup menu; the Desktop Sharing window will display.
3. From the Select Member window, select the desired member and click on **OK**.



- Each selected party will receive a desktop sharing invite message popup, while the inviting party will receive an invite status message. The invitation can be accepted, denied or ignored.
- Click on the **Send** button from in the invite status message to transmit desktop sharing.

#### **To initiate the drawing mode:**

- Click on **Drawing Mode** from the desktop sharing popup menu; the drawing tools window will display.
  -  : sets color
  -  : sets line width
  -  : selects a picture
  -  : free-form line
  -  : straight line
  -  : ellipse
  -  : rectangle
  -  : clear all
  -  : exit

#### **To change the controlling user from the session initiator:**

- Select **Handover Control/Takeover Control** from the desktop sharing popup menu.

# Supplementary Features

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The UCS Client supports other supplementary features for the user's convenience.

## 12.1 Call from Outlook Contacts

UCS Client users can dial the phone numbers from Microsoft Outlook contact databases easily through UCS Client. UCS incorporates a TSP (Telephony Service Provider) for Microsoft Outlook to dial phone numbers from the Contacts through telephone systems. Users download the TSP for UCS Client from UCS Server and install it.

---

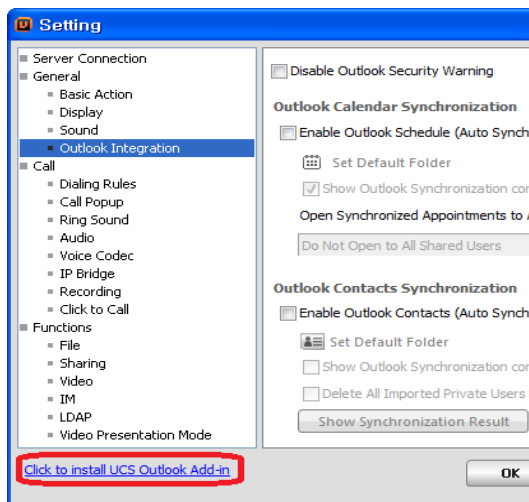
### NOTE

The dialing feature via outlook does not support 64 bit MS Outlook.

---

#### To install the TSP for UCS Client:

1. After login, from the main menu, select **File > Setting > General > Outlook Integration**.
2. Click the link at the left bottom of the window, which will download the TSP installation file from the UCS Server.



3. Download and run the TSP installation file.

---

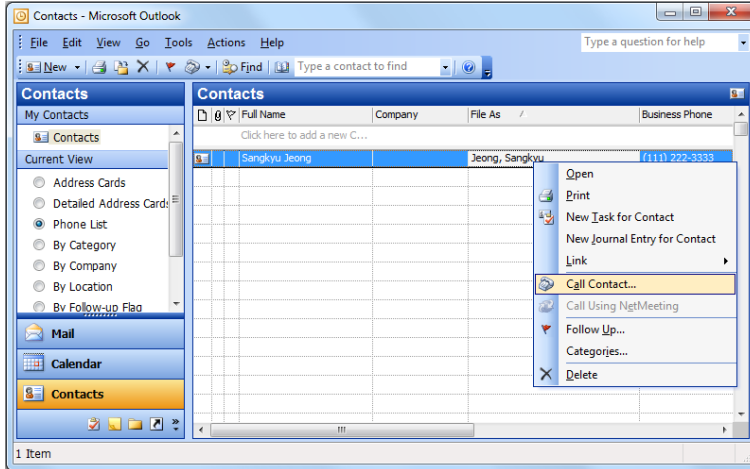
### NOTE

The link does not display if you already have the TSP installed.

---

### To show Microsoft Outlook dialer:

1. Run Microsoft Outlook and go to Contacts.
2. Right-click on a contact and select Call Contact, which displays the Microsoft Outlook dialer.



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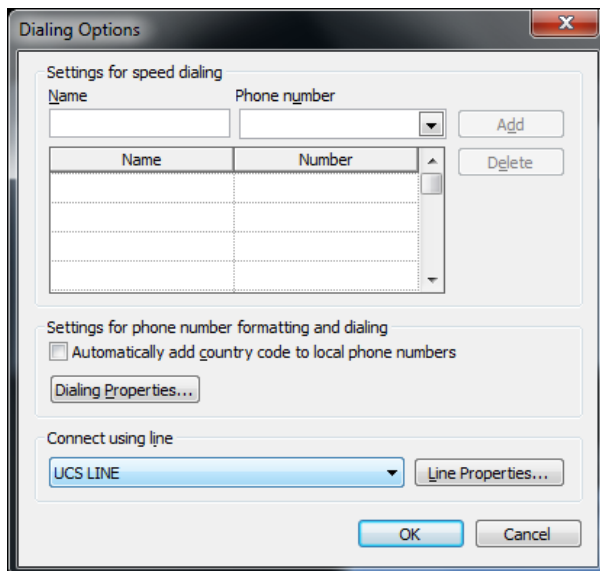
### NOTE

If you cannot find the Call Contact item in the popup menu, follow this link <http://support.microsoft.com/kb/959625/> to correct the popup.

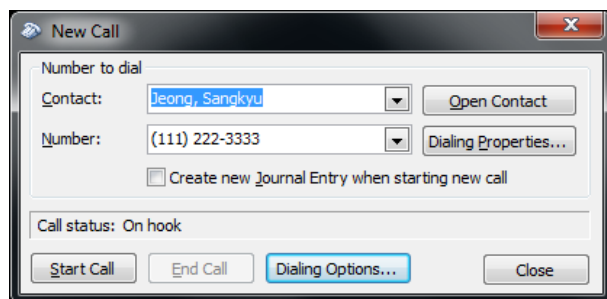
---

### To configure and dial the Outlook Contact numbers:

1. Click the **Dialing Options** button to show the Dialing Options window.
2. Choose **UCS Line** from the Connect using line box.



3. Click **OK**, and in the New Call window, click **Start Call**. The UCS Client will place a call to the Contact number through the iPECS system.



---

#### NOTE

You can check the dialed digits from LCD in UCS Client's Phone tab. You may need to configure Dialing Rules for proper operation, refer to Section 3.2.3.3.

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## 12.2 CRM Integration – (UCP/eMG)

UCS Client supports CRM integration with well known CRMs such as Salesforce.com or Microsoft Dynamics CRM. CRM Integration enables contact popping and caller preview when a call is made or received. ⓘ This function is supported in **UCP/eMG Premium and Standard** license.

### NOTE

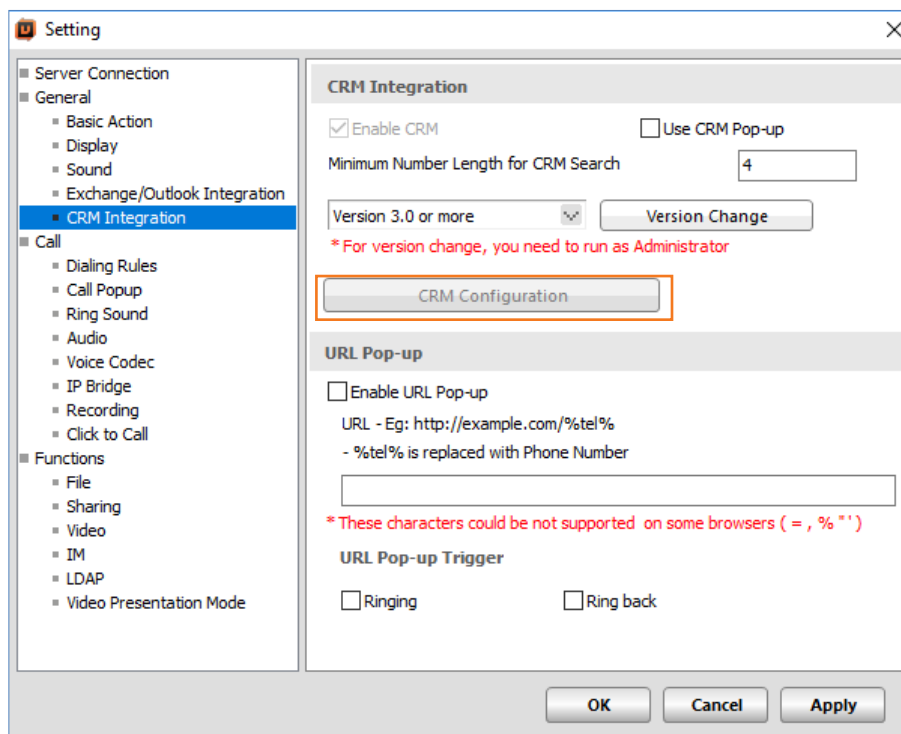
The following setting is required to use CRM Integration for UCS user:

- 1) In case of UCS Standard License, '**UCS CRM USE**' option should be set to '**ON**'. You can find '**UCS CRM USE**' option in Unified Web Admin – PGM112.
- 2) In case of UCS Premium License, '**Allow CRM Integration**' option should be checked. You can find '**Allow CRM Integration**' option in UCS Server Web Admin – Use Feature Permission.
- 3) CRM 2.6 license user needs to change CRM version to '**version 2.6 or less**' on setting menu.

### 12.2.1 Installing UCS CRM Integration

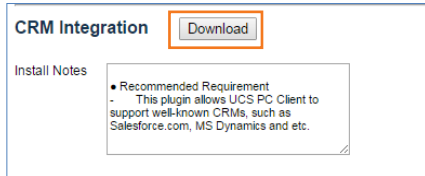
Select **File > Setting**, then click CRM Integration menu. If CRM Integration is not installed in local PC, follow the procedure described below to download and install the '**UCS CRM Add-in**' depending on the License you have.

- **Premium License:** Go to UCS '**Web Admin login page**' > '**Installing UCS Client Program**'.
- **Standard License:** Please contact UCS administrator to install UCS CRM Add-in.

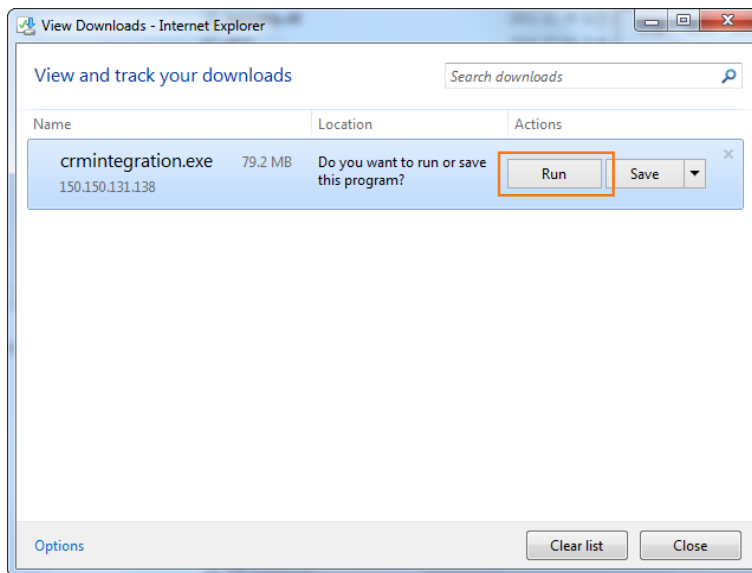


## Installing UCS CRM Integration:

1. Start installation by clicking **[CRM Integration]** button. On the Setting page.
2. Click **[Download]** button.



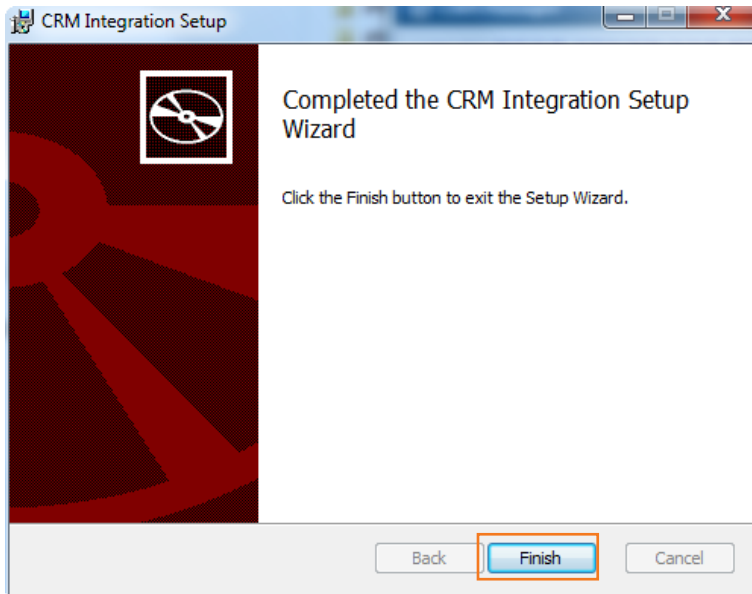
3. Click **[Run]** run to start installation.



4. Continue installation by clicking **Install** button.



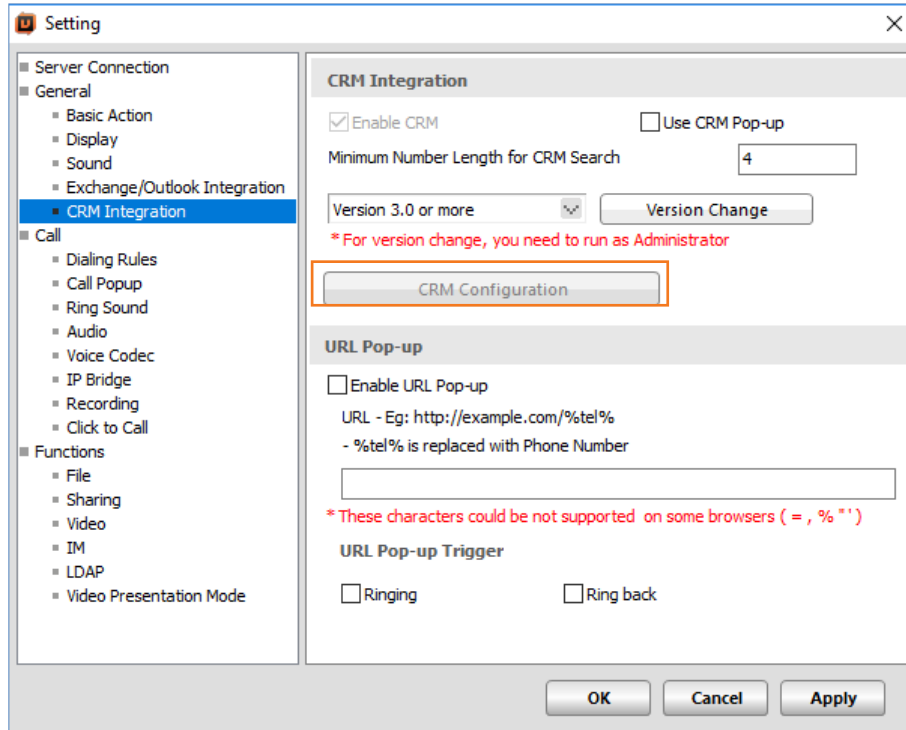
5. Complete by clicking **Finish** button.



6. If CRM Integration is installed, UCS CRM Integration download link will be disappeared.

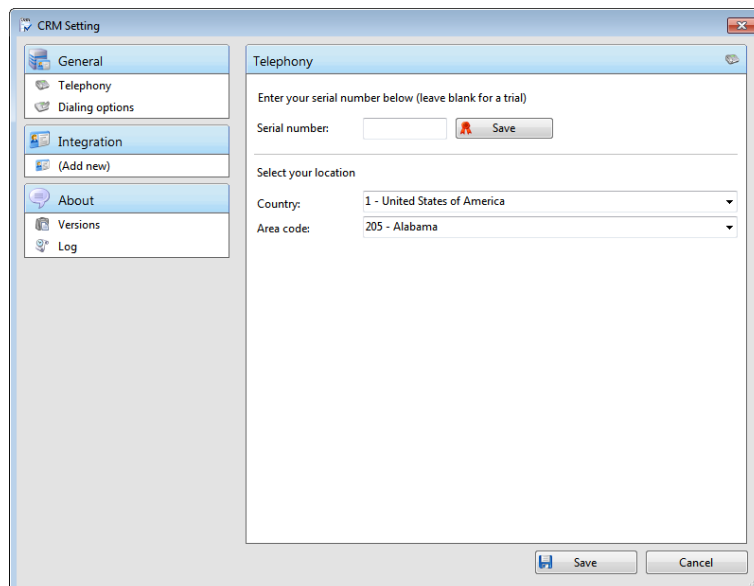
## 12.2.2 CRM Configuration

When 'Enable CRM' option is checked, CRM search is enabled. In case CRM search result is single, when 'Enable CRM' and 'Use CRM Pop-up' options are checked, CRM Pop-up is displayed automatically without clicking **show contacts** button.



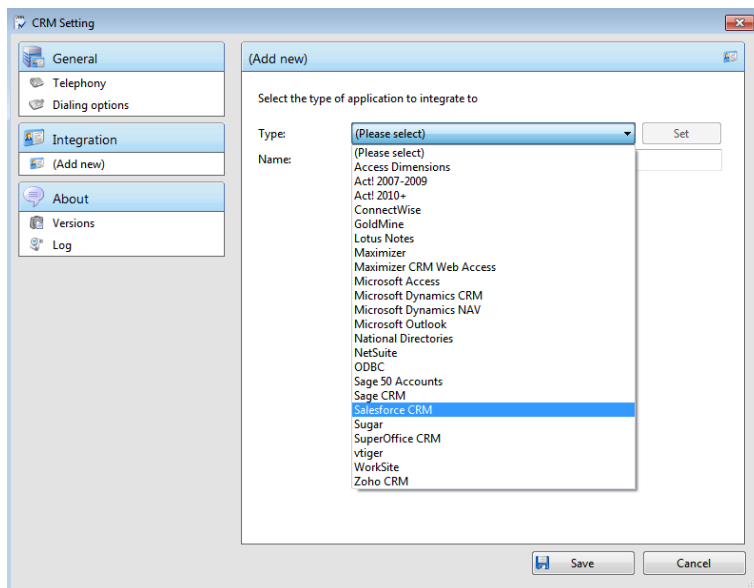
### CRM Configuration:

1. Click [**CRM Configuration**] button on Setting > CRM Integration menu, then CRM Setting window is activated.

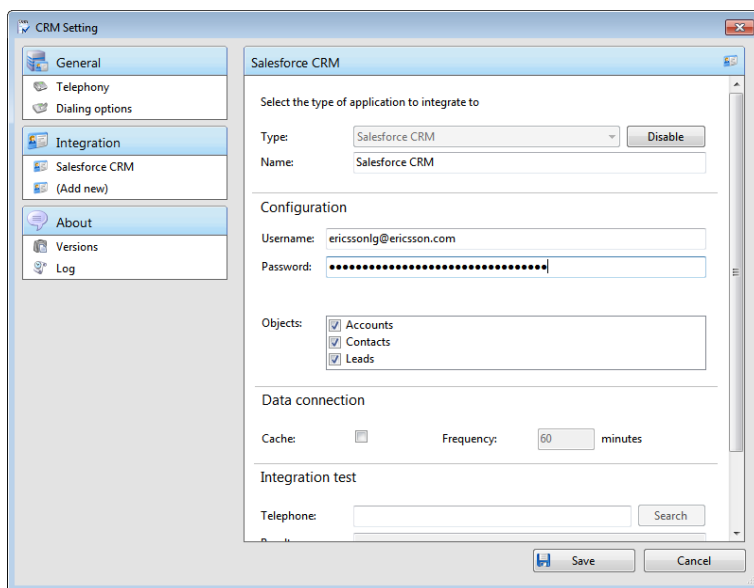




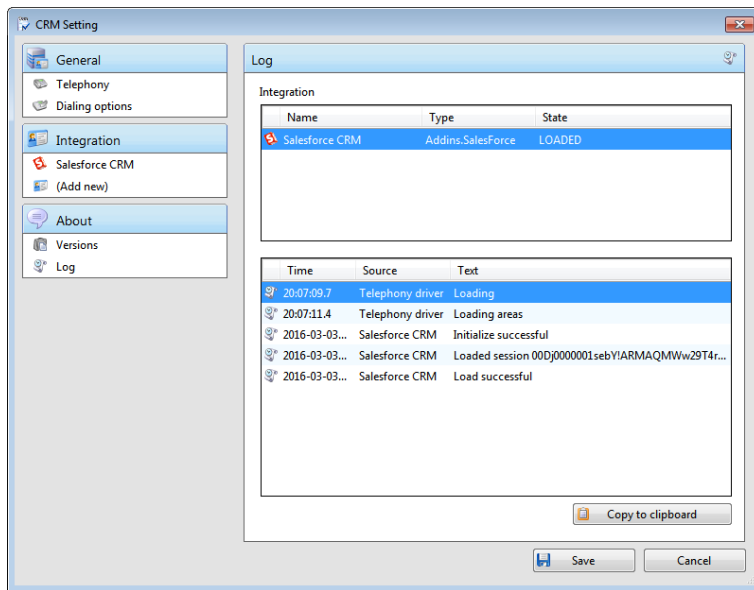
2. Click Integration - [Add new] button and select [type] button, then CRM list is displayed.



3. Select a CRM from CRM list, then specific menu of selected CRM is displayed (ex, Salesforce.com)



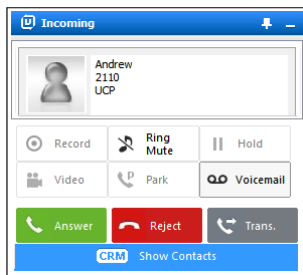
4. After CRM is added, make sure that CRM is successfully loaded on CRM Integration. You can check CRM Integration state on Log Menu. If Integration State is a [LOADED], it means that UCS can search and pop-up contacts information through this added CRM.



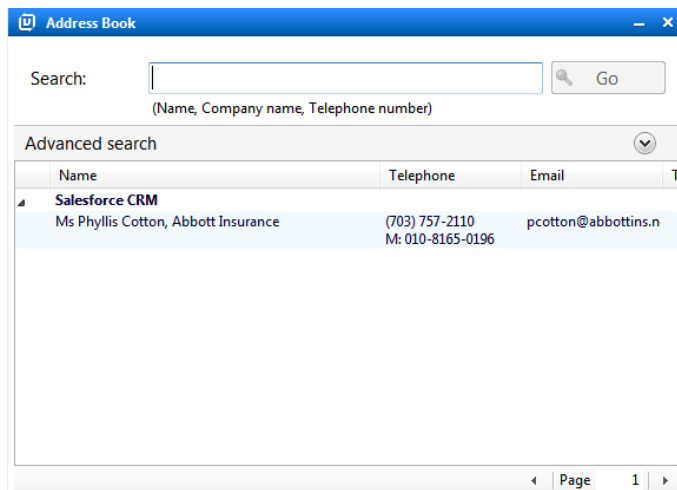
## 12.2.3 CRM Search and Contact pop-up

### CRM search and Contact pop-up using CID when a call is made or received

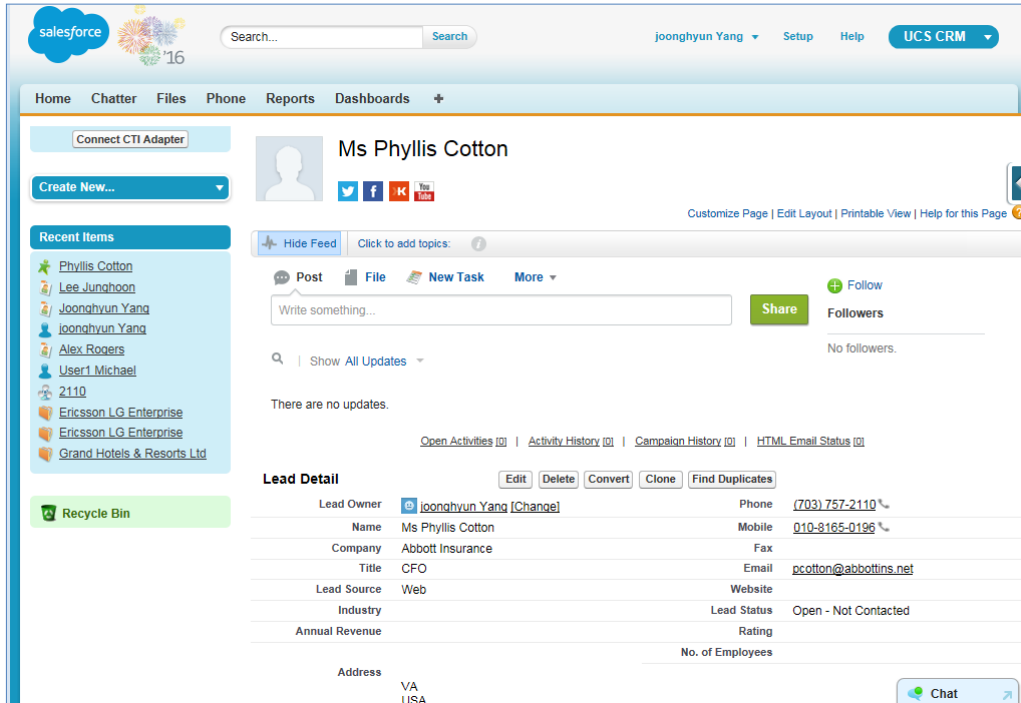
1. If CRM is added correctly, **[CRM – Show Contacts]** button will be shown on Call View window when caller's CID is searched in registered CRM.



2. Click **[CRM – Show Contacts]** button, then searched user list will be shown.



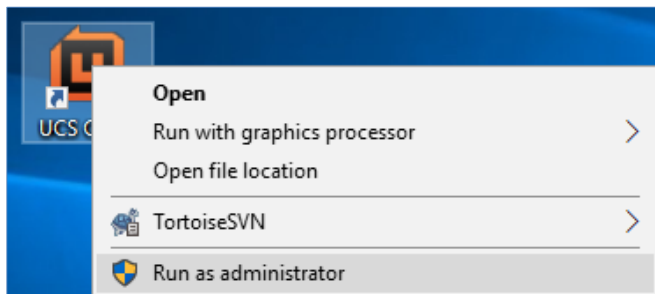
3. Click Name field of searched user list, then detailed information of CRM will be shown.



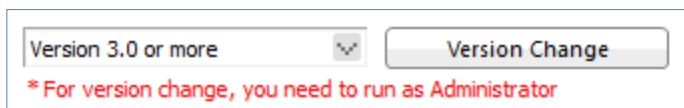
## 12.2.4 CRM Version Change

You might need to change CRM version when CRM version is changed.

1. For CRM version change, UCS Client should be run as administrator.



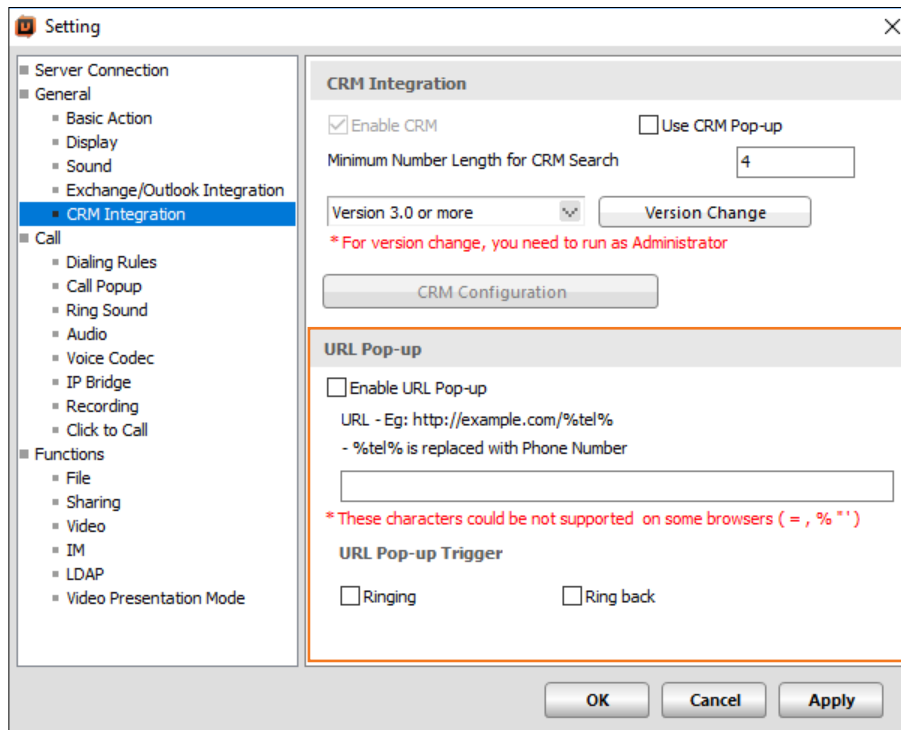
2. Click **[CRM – Version Change]** button, then UCS Client would be exited for version change.



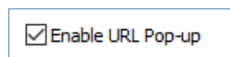
## 12.3 URL Pop-up – (UCP/eMG)

URL Pop-up function is for popping-up web page with URL when user makes a call or receives a call. %tel% of URL is replaced with Phone Number. ⓘ This function is supported in **UCP/eMG Premium and Standard** license.

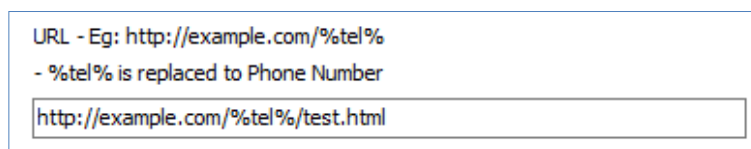
### 12.3.1 UCS Pop-up configuration



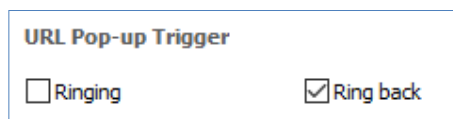
1. Select **File > Setting** then click CRM Integration menu.



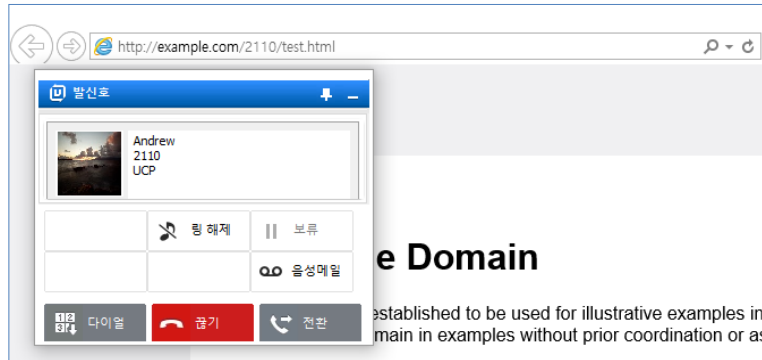
2. When [**Enable URL Pop-up**] option is checked, URL Pop-up function is enabled.



3. When user make a call or receives a call, web browser pops-up inserted URL. %tel% is replaced with Phone Number.



- You can configure URL Pop-up by call status. For popping-up URL during ringing or ring back, you need to check [Ringing] or [Ring back] option



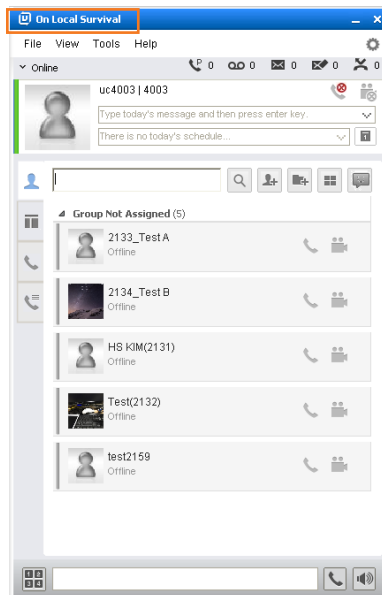
## 12.4 System Failover

In case UCP/eMG system is under the T-Net, when Call Service is unavailable due to Active CCM and Standby CCM are disconnected by some reasons, UCS Client can access to LCM which is involved in and use Call Service.

① This function is supported in **UCP/eMG Premium** license.

### 12.4.1 On Local Survival

When Active/ Standby CCM is disconnected in T-Net, UCS Client can access to LCM which is involved in and use Call Service. It displays [On Local Survival] to let user to know that UCS Client service is restricted except call.




---

#### NOTE

For UCS Client to connect with LCM, please check below

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- 
- 1) To connect with LCM, UCS Client should register same user information as Premium license which is registered in CCM to LCM as standard license.
  - 2) UCS Client which is connected in LCM is available to use call service.
-

## Chapter 13

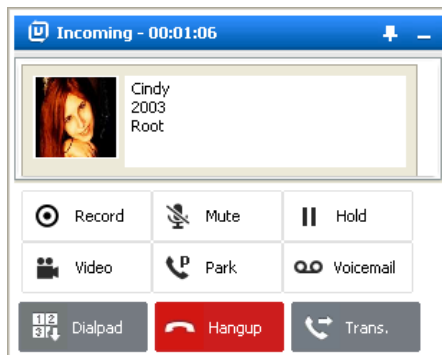
# Call View & Call Function

---

When call is received or placed, the active Call View screen displays with various user call function buttons to manage the call.

## 13.1 Active Call

The active Call View displays the Caller id with picture and various call function buttons including the list below.

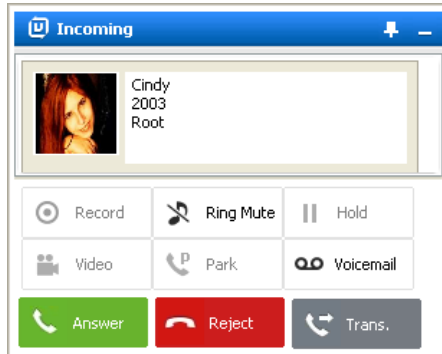


- Reject/Answer/Mute Ring (incoming call pop-up)
- Dial Pad access button
- Video Call start/accept/stop
- Ringing Call transfer
- Active Call transfer
- Call hold
- Hang-up
- Call park
- Record Call
- Mute

## 13.2 Call Functions

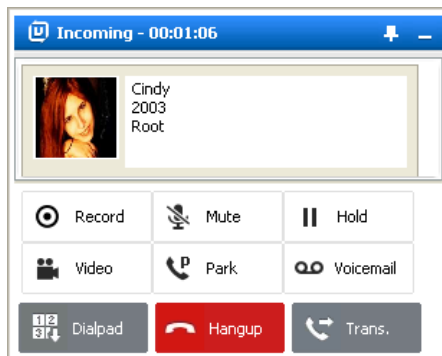
### 13.2.1 Call Answer/Reject

When receiving a call from others, the inbound Call View displays. You may answer the call - press the Answer button, or reject the call - press the Reject button. If desired, the Ring signal may be muted. You can send the call to your voicemail - press the Voicemail button. The call can be transferred to another user or user's voicemail or your voicemail while the call is ringing without answering the call.



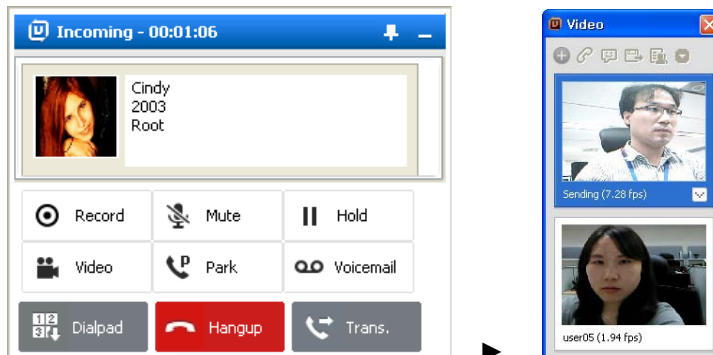
### 13.2.2 End a Call

From the active Call view, selecting the **Hangup** button terminates the active call.



### 13.2.3 Video Call

You can start a video call while on the phone by pressing Video button.






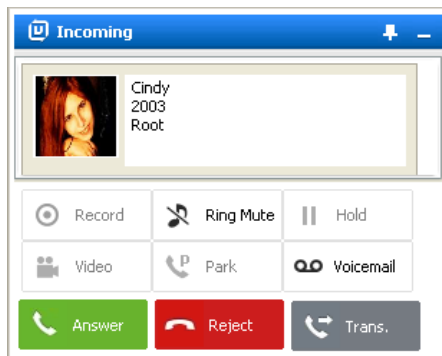
## 13.2.4 Call transfer while receiving ring tone

You can transfer call while receiving ring tone as the below.

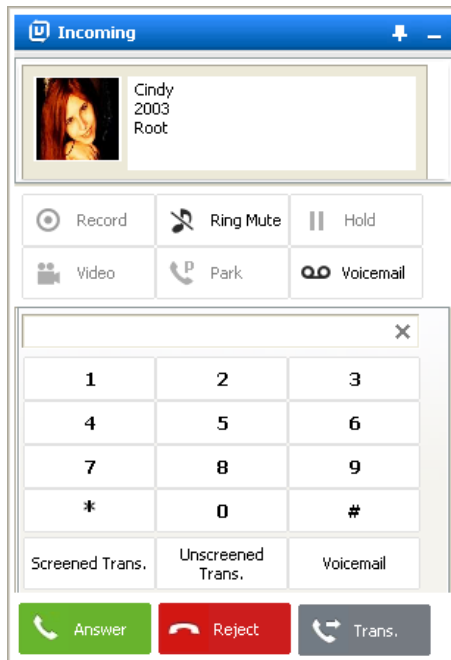
- Call transfer
- Call transfer with Voicemail
- Call transfer with user's voice mail
- Call transfer by drag and drop

### To transfer the call

1. Clicking call transfer button (  ) in the call view while receiving ring tone as below.

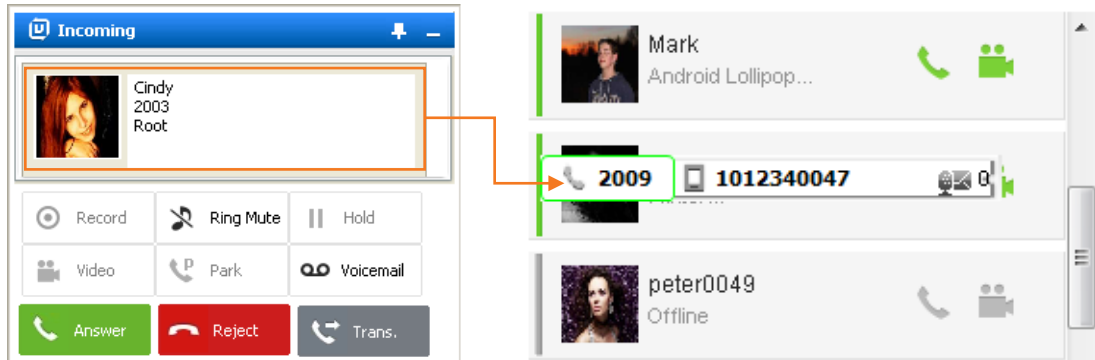


2. The dial pad displays, dial the station number to receive the call.



3. Select the type of transfer,  
**Screened Trans:** await answer to announce the call  
**Unscreened Trans:** hang up after selection  
**Voicemail:** send the call to the station user's voicemail

## To transfer the call by Drag and Drop




1. When dragging picture area of CallView window into Presence Tab, Phone Number will be displayed.
2. Drop into displayed number, call will then be an unscreened transfer.

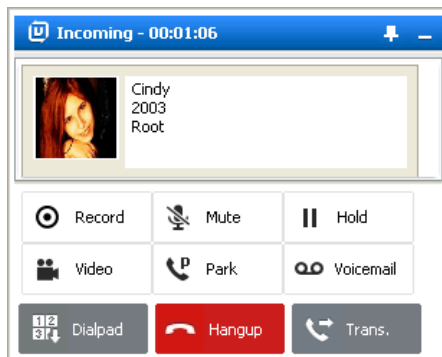
## 13.2.5 Call transfer while call connection

You can transfer call while receiving ring tone as below:

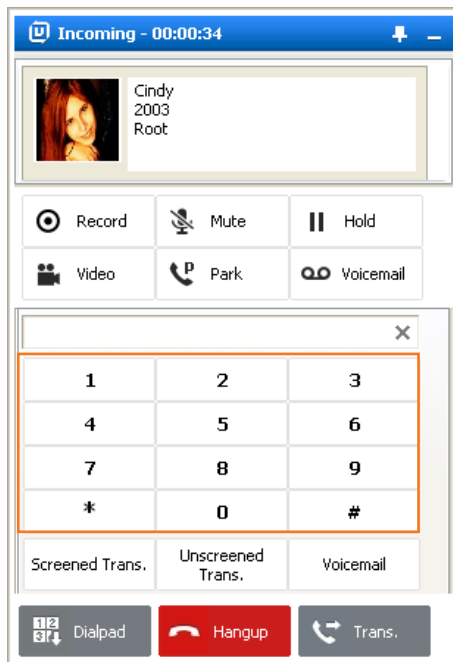
- Call transfer
- Call transfer with Voicemail
- Call transfer with user's voice mail
- Call transfer by drag and drop

### To transfer the call

1. Clicking call transfer button (  ) in call view while receiving ring tone such as below.

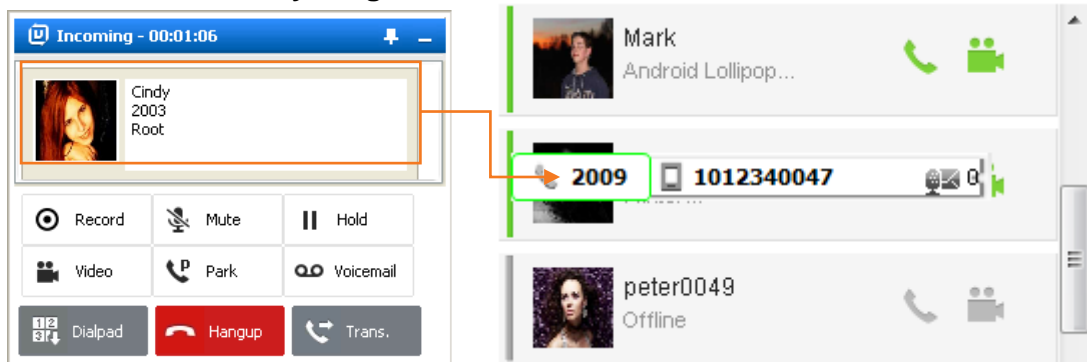


2. The dial pad displays, dial the station number to receive the call.



3. Select the type of transfer,
  - **Screened Trans:** await answer to announce the call
  - **Unscreened Trans:** hang up after selection
  - **Voicemail:** send the call to the station user's voicemail

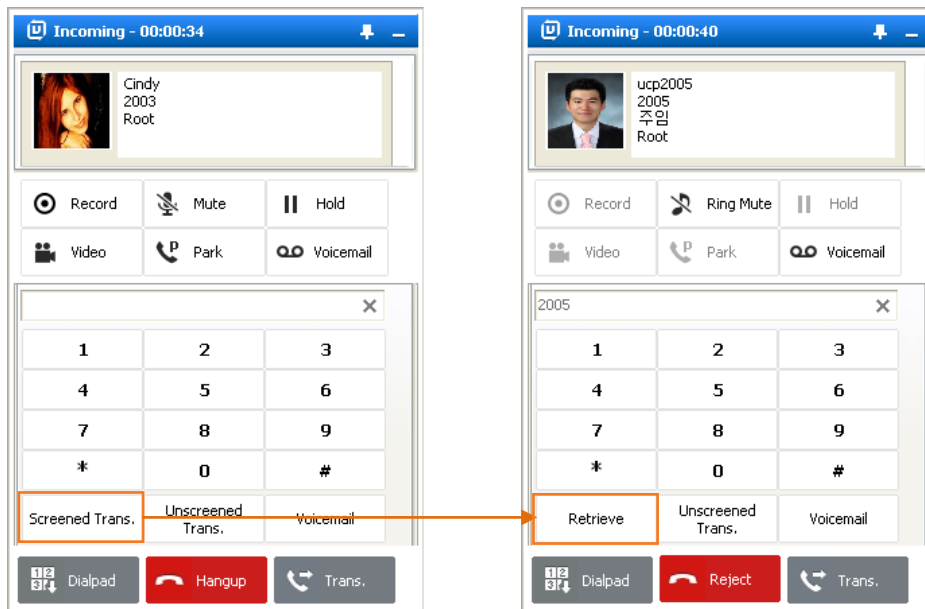
### To transfer the call by Drag and Drop



1. When dragging picture area of CallView window into Presence Tab, Phone Number will be displayed.
2. Drop into displayed number, the call will then be an unscreened transfer.

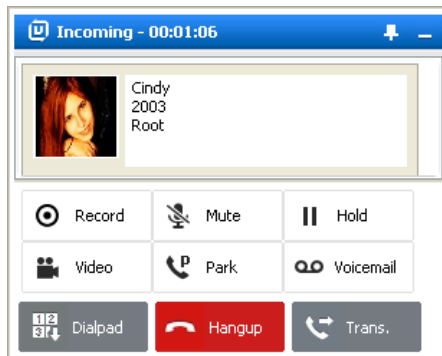
### To retrieve screened transferred call

1. When call is screened transferred, screened trans. Button will be changed into Retrieve Button.
2. When unscreened transferred call is ringing, that call can be retrieved by clicking Retrieve Button.



## 13.2.6 Call Hold

You can place the call on hold, press the Hold button, to perform another task or place a call. While on hold, the party receives music from the iPECS system. The call may recall if held too long. You reconnect to the call by pressing the Hold button again.



## 13.2.7 Call Park – (P-UCP/eMG, S)

You can place the call in a 'Parking Orbit', where others can easily access the call. The call is parked by pressing the Park button. You may then inform the desired party to access the Parking Orbit. This feature is often used with internal paging to page the desired user.

When you park calls, the parked call message icon indicates the number of calls you have parked. Selecting the icon displays the Parked call list, where you may reconnect to a parked call by selecting the call. ⓘ This function is supported in **UCP/eMG Premium** license.



## 13.2.8 Call Recording

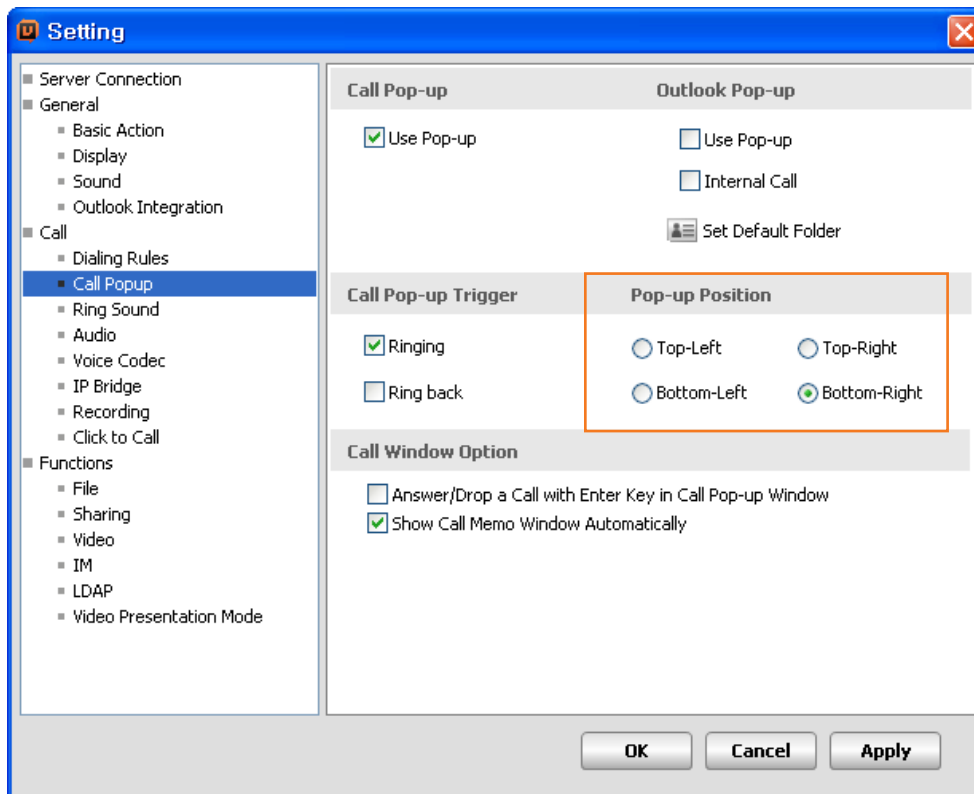
Selecting the Record button records the call to the UCS Client directory. Note the recording includes audio starting from when the button is selected. You can stop the recording using the same record button.

## 13.2.9 Muting Your Audio

You can mute the active microphone so the connected party will not be able to hear audio from your microphone by pressing the Microphone button.

## 13.2.10 CallView Pop-up Position Setting

Pop-up Position of CallView can be configured as below. When UCS Main Window is not shown, CallView is located in selected Pop-up Position



## Chapter 14

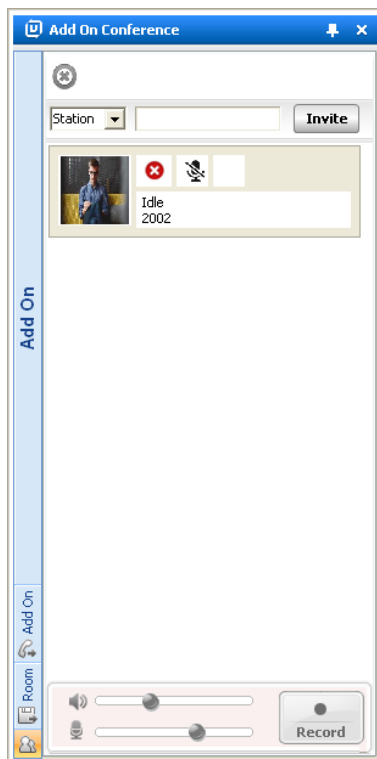
# Audio Conference Manager

---

The Audio Conference Manager permits the UCS client user to manage both Add-on and Room Conference calls. MCU (ex,MCIM) must be installed for Audio Conference.

## 14.1 Add on Conference

Add-on Conference allows you to establish a conference and add members on an Add-on basis. In addition, you may control audio from other conference members and delete members of the conference as discussed below.



- Invite/Remove a member
- Mute a member
- End the conference

## 14.1.1 Inviting/Removing a member

As the master, you can invite and remove conference members.

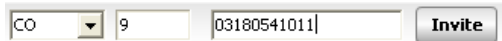
### Inviting a member

- ▶ Input station number or external telephone number, then press invite button.

- In case of station number



- In case of external telephone number




### Removing a member

- ▶ Press remove button (  )

## 14.1.2 Muting a Member – (UCP)


A master can mute a member (eMG system does not supported this function). ⓘ This function is supported in **UCP** system.

### Muting a member

- ▶ To mute a member, press mute button (  ).
- ▶ To cancel the mute, press mute button again.

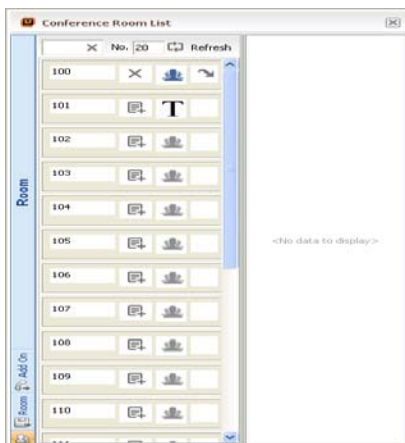
## 14.1.3 Ending the conference – (UCP/eMG)

A master can end the conference. ⓘ This function is supported in **UCP/eMG** system.

- ▶ To end the conference, press end button (  ).

## 14.2 Room Conference

With the UCS Client, you can establish a Conference Room, which others can join by entering the Room. Functions available in a Conference Room are similar to those of an Add-on Conference as discussed below.



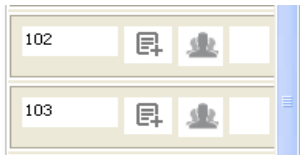
- Reserve / Release a room
- Entering / Exiting a room
- Inviting / Removing a member (master only)
- Muting a member (master only)
- Changing the master (master only)
- Ending the conference (master only)

## 14.2.1 Reserving/Release a Room

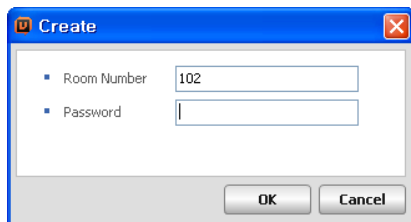
You can reserve / release a room from the conference call list.


### Reserving a Room

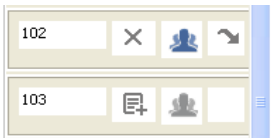
1. Select the Reservation button (  ).




2. The Create room window appears allowing you to assign a password for the room. Input a five-digit string in Password attributes, then press OK button. If a password is not required just press OK button. In case of template room, input the pre-programmed password.



3. If a room is reserved, then the create button does not appear. Instead the enter room button (  ) appears and, if selected, you will enter the room.



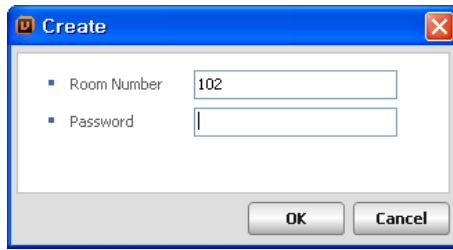
### Releasing a room

1. Press release button (  ).

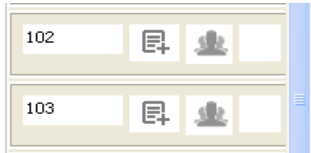


2. If the room has password, input the password, then press OK button. If no password, then just press OK button.





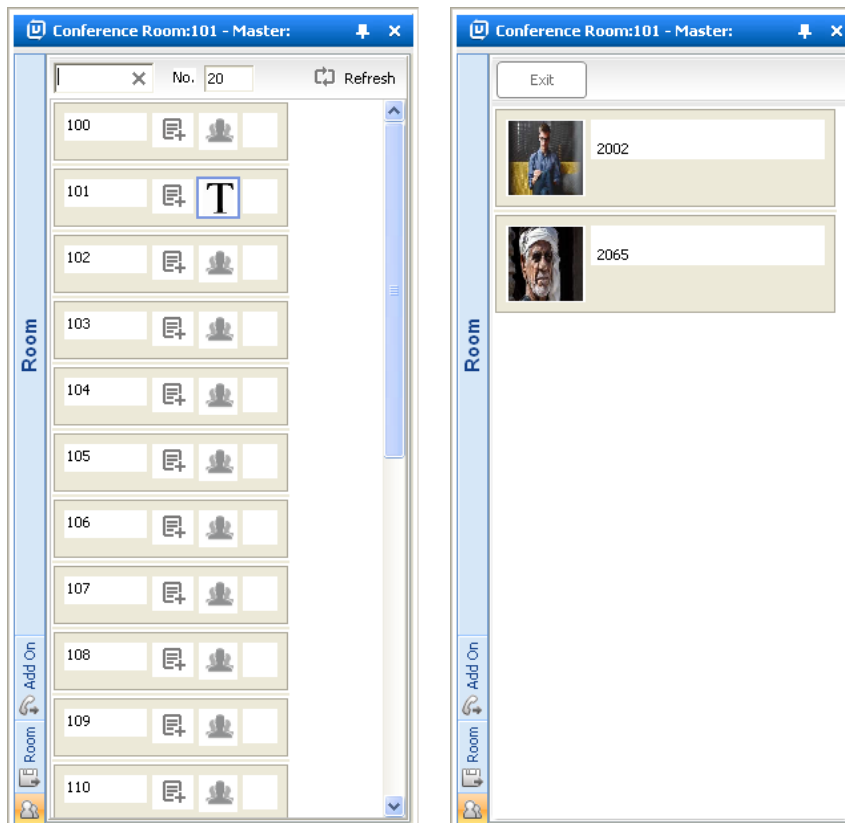
3. If a room is released, others may now reserve the room.



## 14.2.2 Checking Members of a Template Room – (UCP/eMG)


You can check the members associated with a template room. ⓘ This function is supported in **UCP/eMG Premium** system.

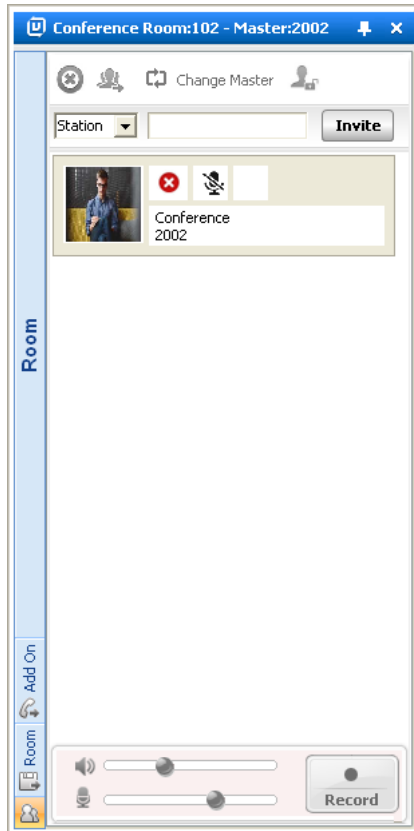
- ▶ Press template room check button, then the information of members is displayed.



## 14.2.3 Entering/Exiting a room

### Entering a room

- ▶ If a room is reserved, the room enter button is displayed. Press the room enter button (  ). The display after entering a room is as below.



### Exiting a room

- ▶ Press the room exit button.

## 14.2.4 Inviting a Member

A master can invite and remove conference members.

### Inviting members

- ▶ Input station number or external telephone number, then press Invite.
  - In case of station number

Station


- In case of external telephone number

CO

## 14.2.5 Muting a member – (UCP)

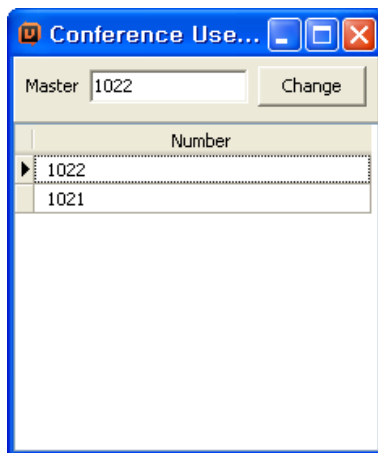
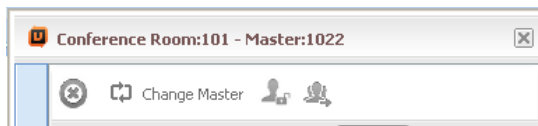
As the master, you can mute the audio from other members (eMG system does not support this function). ⓘ This function is supported in **UCP** system.

### Muting a member

- ▶ To mute a member, press mute button (  ).
- ▶ To cancel the mute, press mute button again.


## 14.2.6 Changing the master – (UCP/eMG)

As the master, you can pass control of the conference to another member. ⓘ This function is supported in **UCP/eMG** system.



## 14.2.7 Ending the conference – (UCP/eMG)

As the master, you can end the conference. ⓘ This function is supported in **UCP/eMG** system.

- ▶ To end the conference, press end button (  ).

## Visual Voicemail – (UCP/eMG)

---

Visual Voicemail provides the user with a graphical representation of their voice mailbox messages, permitting simple management and interaction with (play, pause, stop, delete and call to sender) the voicemail. ⓘ This function is supported in **UCP/eMG** system.

### 15.1 Usage for Visual Voicemail

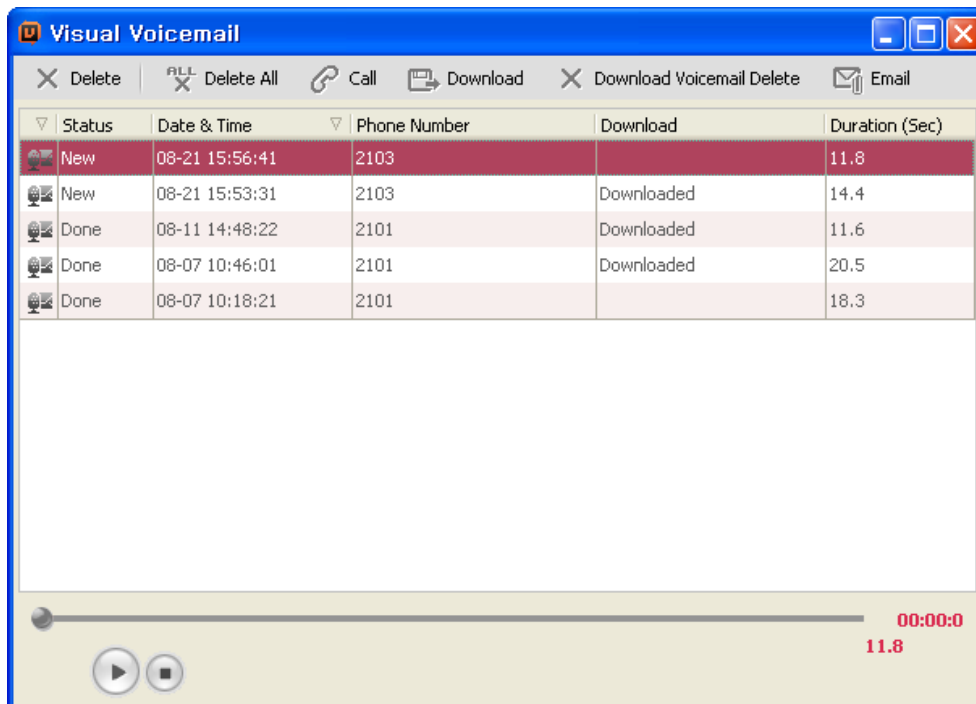
The Voice Mail status button in the Message and Status bar indicates your new message status as shown in the figure below. Selecting the button will display the Visual Voice Mail window. In the window, you may access the various controls as listed below.



- Play / pause / stop Voicemail
- Delete Voicemail
- Save Voicemail
- Call to sender of Voicemail
- Send downloaded Voicemail by outlook email
- Offline Voicemail

#### 15.1.1 Play/ Pause /Stop Voicemail

You can play/ pause/ stop voicemails in the Visual Voicemail window.



### Play voicemail

- ▶ To play voicemail, click the play button (▶).

### Pause voicemail

- ▶ To pause voicemail, click the pause button (⏸).

### Stop voicemail

- ▶ To stop voicemail, click the stop button (⏹).

## 15.1.2 Delete Voicemail

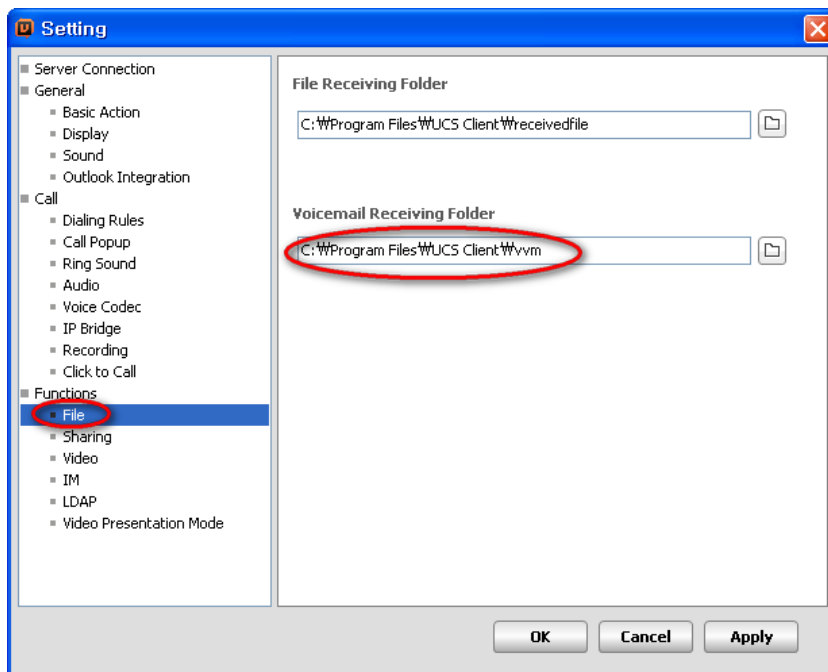
You can delete voicemail from the Visual Voicemail list.

### Delete voicemail

- ▶ To delete voicemail, click the delete button (✕) after selecting voicemail in the Visual Voicemail list.

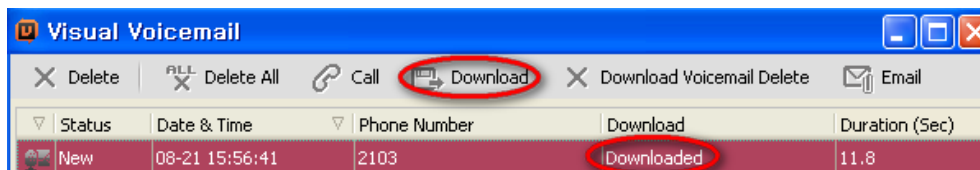
## 15.1.3 Save Voicemail

You can save voicemails to your PC hard drive. User can change the voicemail Receiving Folder in Setting -> Functions -> File menu.



### Save voicemail

- ▶ To save voicemail, click the save button (  ) after selecting voicemail in the Visual Voicemail list.



## 15.1.4 Call to Sender of Voicemail


You can return a call to the sender of the voicemail.

### Call to sender

- ▶ To call the sender, click the Call button (  ) after selecting voicemail in the Visual Voicemail list.

## 15.1.5 Send downloaded Voicemail by Outlook email

### Send downloaded voicemail by Outlook email

- ▶ To send downloaded voicemail by outlook email, click the Email button (  ) after selecting voicemail in the Visual Voicemail list.

## 15.1.6 Offline Voicemail

You can listen to the downloaded voicemails in offline status without login.

## Appendix A:

# Useful Information

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This chapter discusses the open source software used in the UCS Client.

## A.1 Open Source Software Notice

Open Source Software used in this product are listed as below. You can obtain a copy of the Open Source Software License from Ericsson-LG Enterprise Web site, <http://www.ericssonlg-enterprise.com>. Ericsson-LG Enterprise reserves the right to make changes at any time without notice.

Open Source	License
appweb	LGPL
bash	
bluez	
busybox 1.8.1	
dbus	
dhcpcd	
glibc	
iproute2	
wpa	
linux 2.6.35.7	
lzo	
ntpclient	
openlldp	
openssl	OpenSSL Combined License
openvpn	
sqlite	
tcpdump	
tslib	
supplicant	
FFmpeg	LGPL v2.1 or later
MS Server 2003 Platform SDK Samples	MS Server 2003 SP1 SDK License for sample code

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org.apache.commons.net.ftp.FTP	Apache
org.apache.commons.net.ftp.ftfp	Apache

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