



OpenTouch[®] Conversation for PC

Conversation user

Connection user

User manual

R2.2.1

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1 Introduction

OpenTouch Conversation enhances collaboration and communication within the enterprise. Users benefit from multimedia conversations with high-quality voice and video, instant messaging, presence, seamless session shifts, and embedded collaborative sessions. OpenTouch Conversation allows employees to find the right people, see if they are available and on what device, and collaborate using their preferred method.

OpenTouch Conversation is available on Microsoft Windows and Apple Mac OS X platforms.

This document describes all features of the OpenTouch Conversation for PC on Windows and Mac OS X platforms and its add-ins for Microsoft and IBM applications on Windows.

The labels and icons presented in this document are not contractually binding and may be modified without prior warning. The pictures are not contractually binding and are not localized.

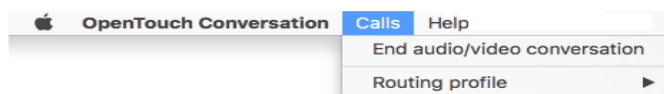
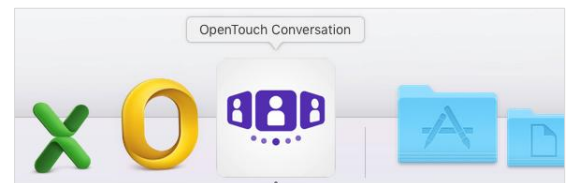
1.1 Note about Windows Installation

During installing, you have to select how you would like to install the OpenTouch Conversation application:

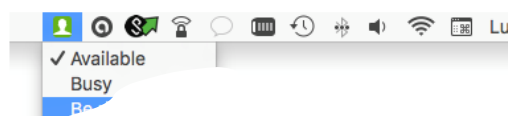
- All features (conversations, instant messages, contacts, meetings, presence) are managed by the OpenTouch Conversation: install the application as a standalone application. This installation integrates add-ins for Microsoft Outlook, Microsoft Office 365, IBM Notes.
- If you want to use Microsoft Lync or Skype for Business with OpenTouch Conversation features: install the application integrated with Microsoft.
- If you want to use IBM Sametime with OpenTouch Conversation features: install the application integrated with IBM Sametime.

1.2 Note about Mac OS X

On Mac OS X, all features (conversations, instant messages, contacts, meetings, presence) are managed by the OpenTouch Conversation.



You can access some features from the standard Mac menu: end the active audio conversation, select a predefined routing profile, display the version of the application and copyright information (About), exit the application



Menu bar also displays your presence status. You can see or change your status even if your application is not the foreground application.

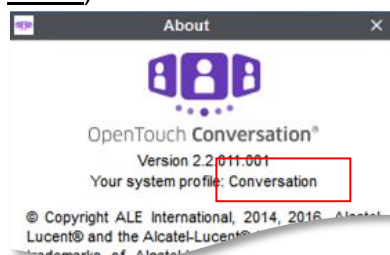
1.3 Mac OS X restrictions

OpenTouch Conversation is only available as a standalone application. Microsoft, IBM and Google integrations are not available. Video call and desktop sharing are not supported on Mac OS X.

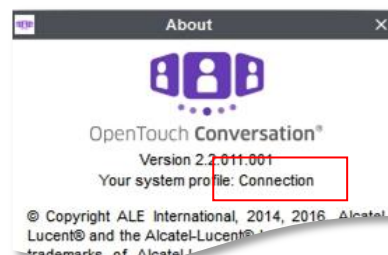
1.4 User profile

Features depend on the system and the user profile : Conversation User or Connection User. An unavailable function appears grayed or is not displayed. The user profile is indicated for a specific feature.

If you need to check which user profile you are connected, please open the 'About' section in the application (see [About](#)):



Conversation user



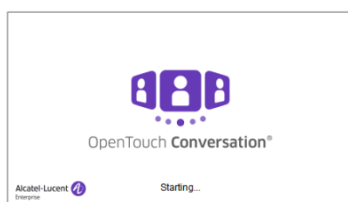
Connection user

Contact your administrator for more information.

2 OpenTouch Conversation for PC

This section describes all features of OpenTouch Conversation for PC installed as a standalone application. All pictures come from OpenTouch Conversation running on Windows. All features are available on Windows and Mac OS X platforms, except video call and desktop sharing which are not supported on Mac OS X.

2.1 Start OpenTouch Conversation



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

Run the OpenTouch Conversation from your Desktop or from the applications menu.

	Enter the address of the OpenTouch server.
	Enter your username.
	Enter your password.
"Remember password"	Validate the checkbox to store the password for the next connections.
"Show remote access"	If you are outside the company, enter your remote access credentials and the public address of your OpenTouch system.

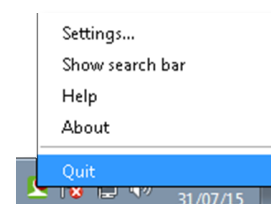


The OpenTouch Conversation icon is displayed in the Windows notification area.

You can automatically sign in every time you start the application by selecting this option in settings of the application.

2.2 Exit the application

Closing the main window will no more exit the application. Right-click the OpenTouch Conversation icon from the Windows notification area or click on the Mac OS X menu of the application and then quit the application by selecting the corresponding menu item.



2.3 Homepage

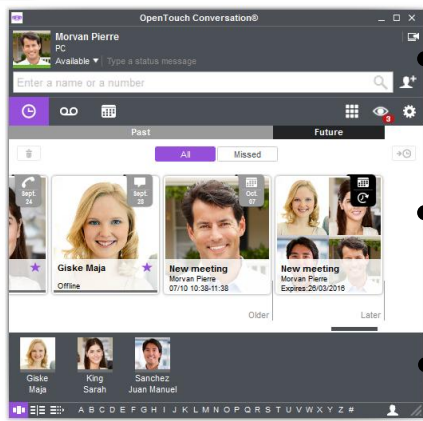
Note that some functions can be disabled depending on the context or options that are not available (e.g. voicemail, conferencing).



OpenTouch Conversation for PC allows choosing the display type by clicking on the corresponding button (left bottom of the window).



Display horizontally the favorite contacts and the conversation history.



Top banner:

- User area
- Search area
- Tabs

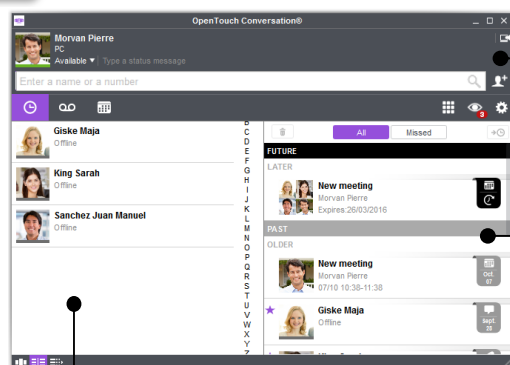
Conversation Wall:

- Past events
- Conversation in progress
- Future events

Favorite contacts (bottom banner displays your favorite contacts)



Display vertically the favorite contacts and the conversation history.



Top banner:

- User area
- Search area
- Tabs

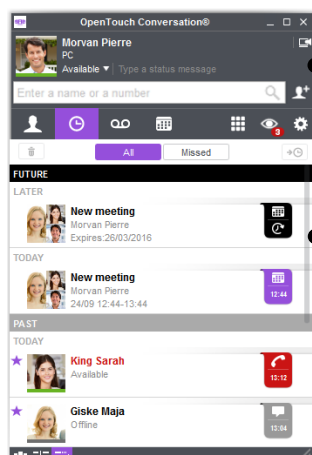
Conversation Wall:

- Past events
- Conversation in progress
- Future events

Favorite contacts



Display information vertically using tabs.





Top banner:

- User area
- Search area
- Tabs
- Open Favorite contacts (bottom banner)








Conversation Wall:

- Past events
- Conversation in progress
- Future events











Top banner

- Setting the routing profile and presence information.
- Changing the photo/avatar.
- Searching for contacts .
- Creating a contact .
- Seeing the audio device (mic, speakers) used with your computer.

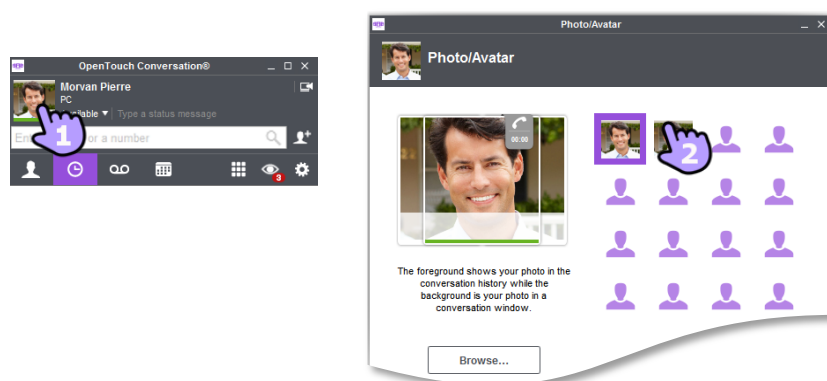
Tabs

	Favorites: quick access to your preferred contacts.
	Conversation Wall: past conversations, active conversation and future meetings. Click on the icon or on the corresponding button to display only missed calls or all conversations.
	Visual Voice Mail.
	Meetings: manage your meetings (consult, create, modify, share documents).
	Keypad.
	Settings
	Supervision (optional)

Status icons

	Microphone and speakers of the computer are used for audio call.		Call from your deskphone.
	Headset of the computer is used for audio call		Call from your professional mobile.
	Your personal computer will not ring when you receive an incoming call.		Call from your tablet.
	Microphone and speakers from two different devices are used for audio call.		Dual ringing is enable.
	Microphone or speakers cannot be detected.		
	Manager/assistant activated (optional)		

2.4 Change your photo or avatar



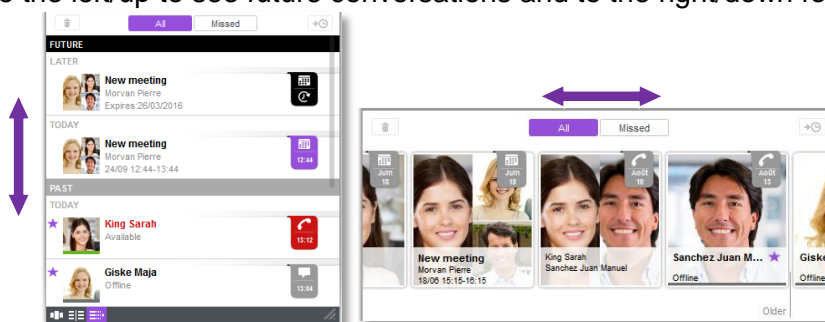
	Click on your Photo/Avatar.
	Select a photo in the list and apply. Close the window when you have finished.
<i>"Browse..."</i>	To add a new photo in the list (max 16 pictures), browse your computer to find a new photo. The photo is automatically resized if too large.
<i>"Delete"</i>	To delete a photo in the list, select the photo and delete it.

2.5 Conversation Wall

The Conversation Wall is more than a conversation history: it also displays your active conversations and your future meetings.

All conversations for a given contact are grouped into a single card. A card is displayed for each conversation with multiple participants (ad-hoc or scheduled conversations).

Move the Wall to the left/up to see future conversations and to the right/down for past conversations.





















The Wall is divided into 3 parts:

- Past conversations and meetings.
- Current conversations and meetings.
- Future meetings.

The badge associated to a card refers to the latest media used or latest event received (depends on your system and can be audio call event, callback request, video call, instant message, meeting or voice mail).

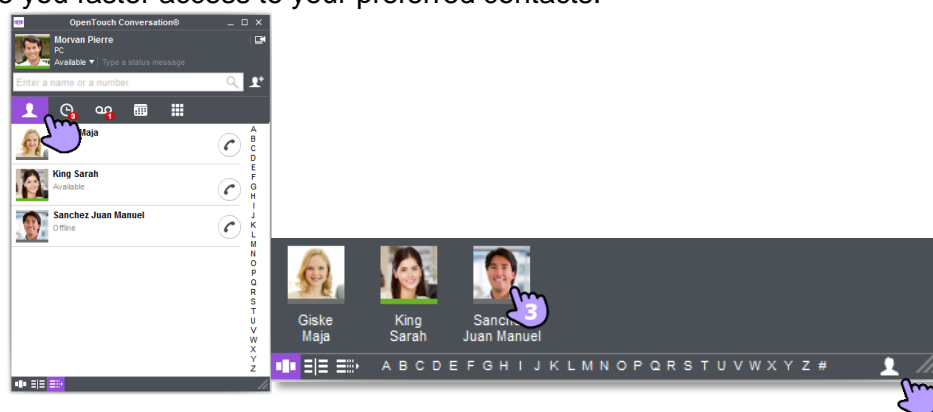
	Red badge: missed or new events.
	Purple badge: ongoing conversation.
	Grey badge: past event.
	Black badge: future meeting (depending on your system).




<ul style="list-style-type: none"> Select an item from the Wall to open the corresponding card or conversation. 	
<ul style="list-style-type: none"> Start directly an audio call with the contact. 	
<ul style="list-style-type: none"> Open a contextual menu by right clicking on an item from the conversation Wall. The contextual menu displays all actions available with the selected conversation or meeting. <ul style="list-style-type: none">  Start an audio call with the contact.  Start a video call with the contact.  Start an instant message with the contact.  Share documents, an application window or desktop with the contact.  Send an email to the contact.  Create or modify a meeting.  Add/remove a contact to/from your favorite list.  Delete the selected conversation or meeting of the conversation Wall.  Join the meeting.  Join the meeting in audio with another device than the current defined in call routing. 	

<ul style="list-style-type: none"> Come back to the most recent conversation. 	
<ul style="list-style-type: none"> Delete the conversation history. 	
<ul style="list-style-type: none"> Delete a callback request by right clicking on the callback request card (depends on your system) and selecting delete option. 	  









2.6 Favorites

Favorites give you faster access to your preferred contacts.



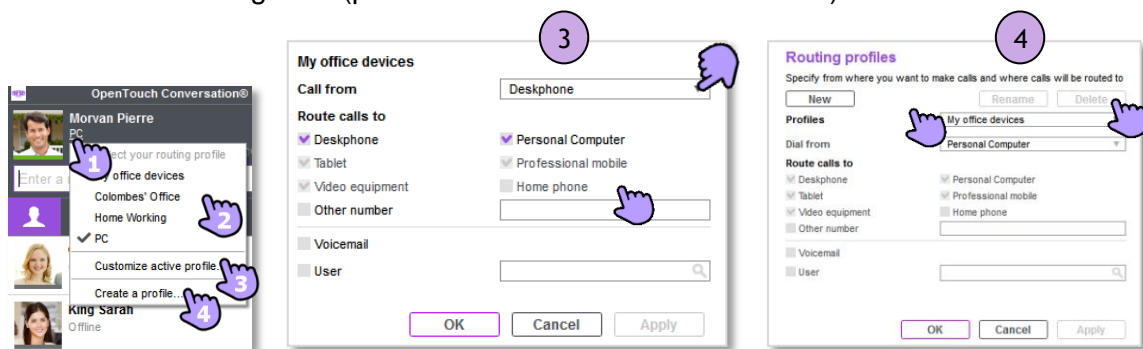
Close or open the favorite list.	
The presence of your contact is displayed under the picture.	
Use the alphabetical list to find quickly your preferred contact.	ABC
Click the contact you want to reach by opening the corresponding contact card.	
Start directly an audio call with the contact.	

Open a contextual menu by right clicking on an item from the conversation Wall. The contextual menu displays all actions available with the selected conversation or meeting.

-  Start an audio call with the contact.
-  Start a video call with the contact.
-  Start an instant message with the contact.
-  Share documents, an application window or desktop with the contact.
-  Send an email to the contact.
-  Create or modify a meeting.
-  Add/remove a contact to/from your favorite list.
-  Delete the selected conversation or meeting of the conversation Wall.






2.7 Call Routing for Conversation user

Call routing lets you to choose which devices will ring when you receive an incoming call and which device is used for making calls (predefined devices or other numbers).



- Click your current call routing profile in the user area.
- Select a predefined profile, customize an existing profile or create a new profile.
- "Customize active profile..."**
Customize your current profile (a temporally customized profile is created until you select another profile).
 - "Dial from"**: Define the device used for making calls.
 - "Route calls to"**: Select which devices will ring when receiving an incoming call.
- "Create a profile..."**
Create a new profile, modify or delete an existing profile.

The selected routing profile and information about this profile are displayed in the user area:

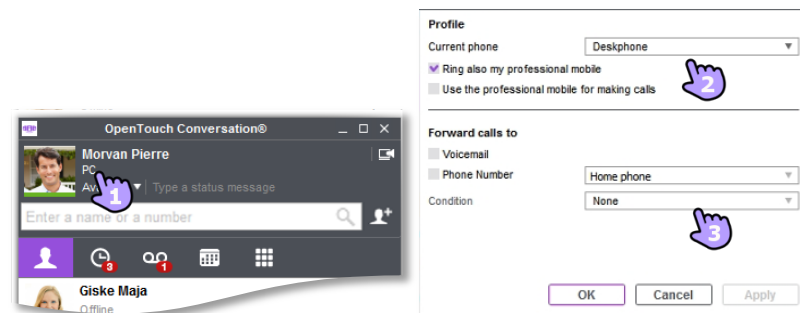
	This icon is displayed in the user area if your personal computer will not ring.
	Your deskphone is used to initiate the call.
	Your personal computer is used to initiate the call.
	Your professional mobile is used to initiate the call.
	Your tablet is used to initiate the call.
Voicemail	All your incoming calls are redirected to your voicemail and/or another user if you select voicemail and/or user option. In this case no devices will ring except the one specified for the user.
User	



You can also set a predefined profile by right clicking the OpenTouch Conversation icon from the Windows notification area.

2.8 Call Routing for Connection user

Call routing lets you to choose which devices will ring when you receive an incoming call and which device is used for making calls (predefined devices).



1. Click your current call routing profile in the user area.
2. *"Profile"*
Select the current phone to make incoming calls and which devices will ring.
3. *"Forward calls to"*
Decide to forward all incoming calls to voicemail or any other phone number following conditions (no condition, if busy, if no reply, if busy or no reply ...).

The selected routing profile and information about this profile are displayed in the user area:

	This icon is displayed in the user area if your personal computer will not ring.
	Your deskphone is used to initiate the call.
	Your personal computer is used to initiate the call.



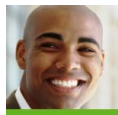
You can also set a predefined profile by right clicking the OpenTouch Conversation icon from the Windows notification area.

2.9 Presence

The OpenTouch Conversation presence shows the real-time availability of corporate colleagues (OpenTouch). It reduces the time you will spend "blind-calling" colleagues, only to get no answer, or to get forwarded to a voicemail service.

The presence status depends on the user profile of your contact.

The colored bar under a picture shows the contact's presence status.



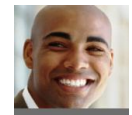
Available



Busy



Be right back

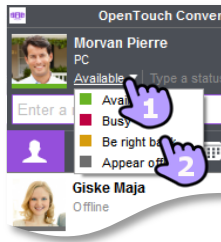


Appear Offline

The OpenTouch Conversation presence status of your contact can be augmented with the Outlook calendar presence (Exchange – depending on the system).

The calendar presence, information about meetings and appointments scheduled of your contact for the current day, is displayed in favorites list, conversation Wall or in the contact card when she/he is in an Exchange meeting with status Free (only in the contact card), Working Elsewhere or Tentative so that I know if I can call her/him.

Change your OpenTouch Conversation presence:



1. To change your presence, click on your current presence.
2. Select your new presence status: "Available", "Busy", "Be right back", "Appear Offline".

A custom message (beside the presence label) other users will see can be defined.

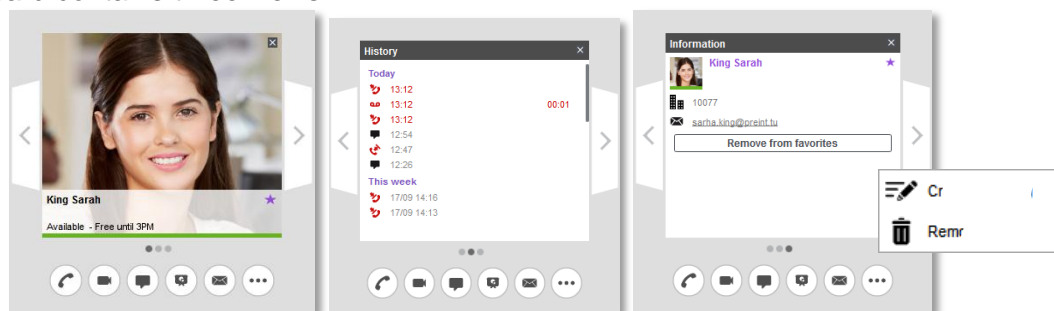


You can also set your presence status by right clicking the OpenTouch Conversation icon from the Windows notification area.


2.10 Contact card

The Contact card is a great way to initiate a conversation with a contact. In addition to the presence and custom message, it also displays organization information (company, job title, phone numbers, etc.) and the conversations you had with that contact.

Open a contact card by selecting a contact in the conversation Wall, from your favorite list or search result. Such card contains three views:



The first view displays main information about your contact: picture, name, presence (if available) and the favorite icon (if the contact is a favorite). The OpenTouch Conversation presence status of your contact can be augmented with the Outlook calendar presence (Exchange – depending on the system). The calendar presence of your contact is displayed in the contact card when she/he is in an Exchange meeting with status Free, Working Elsewhere or Tentative so that I know if I can call her/him.

-  Select the right arrow to access the next view.
- The second view is your conversation history with this contact. If the history is empty, this view is not displayed. Unread events are in red. Clicking a contact card will automatically display the History view if there are unread events (voicemail, missed call, or missed instant message). From this view, you can call back the contact or start reading an instant message.



Voice message. Click the item to listen to the voice message.






Read/Unread chat. Click the item to review exchanged messages.



Outgoing call (answered or cancelled). Click the item to call back.



Callback request. Click the item to call back.

-  Select the right arrow to access the next view.
- This page contains more information about your contact: company name, job title, phone numbers, email, postal address, etc.
-  The picture of a federated contact (such as a Lync contact) is marked with a specific icon. In this case, the presence is displayed only if the contact has accepted to publish presence information.
-  Close the card.

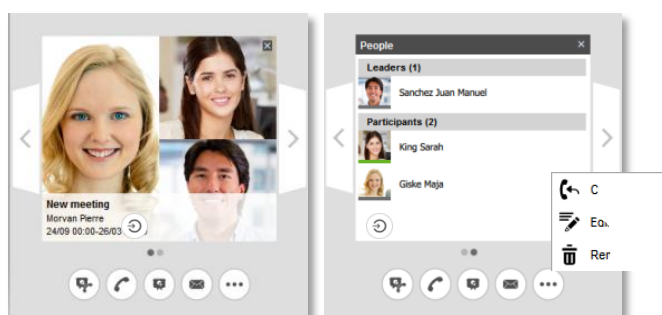
From a contact card, you can:

<ul style="list-style-type: none"> Start an audio or video call with the contact. If there are several numbers for the same contact, select the desired number by clicking on the down arrow. 	
<ul style="list-style-type: none"> Start an instant message with the contact. 	
<ul style="list-style-type: none"> Share documents, an application window or desktop with the contact. 	
<ul style="list-style-type: none"> Send an email to the contact. 	
<ul style="list-style-type: none"> Create a meeting with the contact. 	
<ul style="list-style-type: none"> Remove the card from the Wall. Confirmation is requested if there are unread events with this contact. 	

2.11 Meeting card

A meeting card represents a group of persons.




Open a meeting card by selecting a meeting from the conversation wall. Such card contains at least two views:





- The first view can display up to four participants of the meeting.
- Select the right arrow to access the next view.
- The second view lists all participants of the meeting (click a participant to open the contact card).
- From the meeting card, you can: edit (for a future or active meeting), create (from a past meeting), or delete the meeting.
- Close the card.
- If instant messages were exchanged during a meeting, an additional view allows displaying these exchanges.

From a meeting card, you can:


<ul style="list-style-type: none"> Join the meeting with all media. 	
<ul style="list-style-type: none"> Join the meeting with audio only. 	
<ul style="list-style-type: none"> Join the meeting without audio. 	
<ul style="list-style-type: none"> Send an email to all participants. 	

<ul style="list-style-type: none"> Modify the meeting. 	
<ul style="list-style-type: none"> Remove the card from the Wall. 	
<ul style="list-style-type: none"> Join the meeting in audio with another device than the current defined in call routing. Enter a new number you would like to use for the meeting or select one in the 9 last entered number (if necessary you can select your current number in the list). 	

2.12 Add/remove a contact to/from your favorite list

	From a list of contacts, open the contextual menu by right clicking on the contact. Select the corresponding menu to add/remove a contact to/from your favorite list.
	From a contact card, select/unselect the star or click the corresponding button in the Information view to add/remove the contact from your favorite list (" <i>Add to favorites</i> ", " <i>Remove from favorites</i> ").

2.13 Create a contact in your favorite list

-  Click to open the form to create your favorite contact.
- Enter the firstname, lastname and the number of your contact.
- Validate.
The contact is displayed in your favorite list.


2.14 Manager/Assistant (optional)

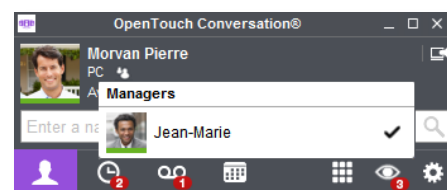
This function is available to users having a Manager role or an Assistant role. It allows a Manager to delegate all calls towards the Assistant, except calls filtered through a white list (this white list is created by the manager from the deskphone and corresponding calls are processed according to the manager's active call routing profile).

Manager can activate or deactivate the call delegation towards assistants.

A specific icon is displayed on the home page if the function is activated.



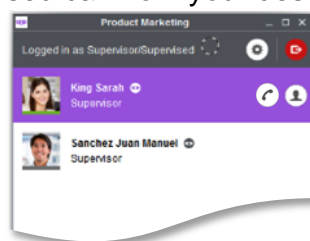
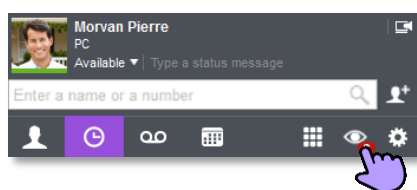
Assistant can see managers that have activated the call delegation by clicking the Manager/Assistant icon (). Assistant cannot deactivate the call delegation from the application.



2.15 Group Supervision (optional)

Your business phone number can be supervised and your incoming calls can be picked up by a supervisor when you are part of a supervision group.

If you are supervisor, you receive a beep on a supervised incoming call. The calling party is displayed on the top banner. You can pick up a supervised call from your deskphone.



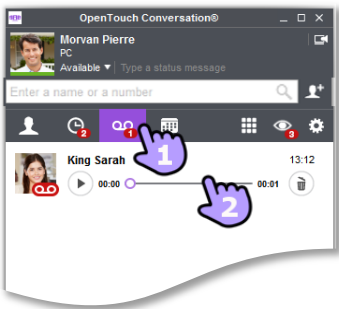
A specific icon is displayed on your home page if the function is activated. The number of connected supervisor(s) is indicated with a red badge.


Your business phone number is supervised (you are connected in a supervision group).	
Your business phone number is not supervised (you are not connected in a supervision group).	





<ul style="list-style-type: none"> Click the Group Supervision icon to see details about all members of this group who are logged in: presence status, supervisor members. 	
<ul style="list-style-type: none"> Log in the group. 	
<ul style="list-style-type: none"> Exit from the group. 	
<ul style="list-style-type: none"> Open the contact card of a group member for initiating for example a conversation with that member. 	
<ul style="list-style-type: none"> Start directly an audio call with the contact. 	
<ul style="list-style-type: none"> Define options : <ul style="list-style-type: none"> Display only members logged in (filter). Display desktop alerts. Play a sound when a member is called. 	

Your call log will display the name of the supervisor who has picked up your call (in the conversation history page of the contact card).

2.16 Visual Voice Mail










- 1.  You have new voice messages (number of new messages is displayed with a red badge). Click on the icon to open your visual voicemail. All read and unread messages are displayed.
- 2. Select the message you want to listen to.

<ul style="list-style-type: none">Listen to the message / Resume playing the message.	
<ul style="list-style-type: none">Pause the message.	
<ul style="list-style-type: none">Delete the message.	
<ul style="list-style-type: none">Call your voice mailbox to configure or activate for example your greetings.	 "Voicemail"
<ul style="list-style-type: none">Delete all voice messages.	"Delete all"

2.17 Start a conversation




Video is not supported on Mac OS X.



You can start a conversation from :

-  The Conversation Wall (history).
-  The Favorite list.
-  The visual voice mail.
-  The list of participants of a meeting.
-  A directory lookup.
-  The list of members of a supervision group.
-  The keypad

From a list of contact




When a list of contacts is displayed, and according to the selected contact capabilities, you can:

<ul style="list-style-type: none">Start directly an audio call from a list of contacts	
<ul style="list-style-type: none">Open a contextual menu by right clicking on an item in a list of contact. The contextual menu displays all actions available with the selected conversation or meeting.	
 Start an audio call with the contact.	

- | | | |
|---|--|--|
|  | Start an video call with the contact. | |
|  | Start an instant message with the contact. | |




From a contact card

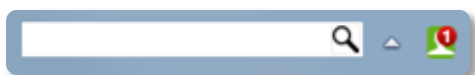
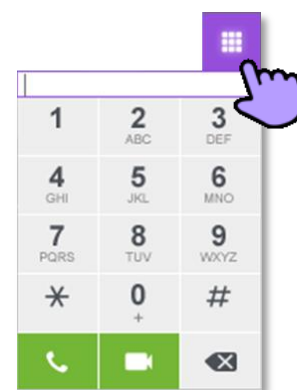
When the contact card is opened, and according to the contact capabilities, you can:

<ul style="list-style-type: none"> Start an audio call. If there are several numbers for the same contact, select the desired number by clicking on the down arrow. 	
<ul style="list-style-type: none"> Start a video call. 	
<ul style="list-style-type: none"> Send an instant message. 	

By dialing a phone number

You can also dial a phone number:

- By entering a number in the search/dial area.
- By using the keypad:
 -  Click to open the keypad.
 - Enter the caller's number.
 -  Start an audio call /  video call.



You can also enter a name or a number in the search/dial area from the Windows notification area (show or hide the search/dial area by right clicking the OpenTouch Conversation icon from the Windows notification area).

Phone number format

- Short number for an internal contact.
- Canonical number : +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.
- Contact number without country code for a contact in the same country.

2.17.1 Activate/deactivate the secret identity (CLIR) (Conversation user only)

Your external caller will not see your phone number. Select this option in the general settings (see: [General](#)).

When the secret identity is activated, the secret avatar is displayed instead of your photo or avatar in the top banner of the wall as a reminder.

This feature depends on your system.

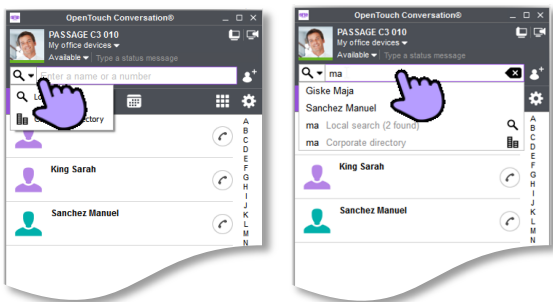


2.17.2 Callback request

Depending on your system, you can send a callback request when your contact doesn't answer or is busy.

2.18 Search for a contact

Searching for contacts in OpenTouch Conversation is simple. The search is performed through your local and corporate directories. The predictive search assists you to find quickly your contact.



	Select the directories in which you want to start your search.
	The search is performed first through the local directories. If necessary the result can be completed by a search through the corporate directories.
	The search is performed through the corporate directories.
	Cancel the search.

- From the search/dial area, enter the name of your caller. You can specify initials or some characters from the firstname/lastname for searching contacts.
- Local directory is selected: a lookup is immediately performed on “local” contacts (Microsoft Outlook contacts, IBM Notes, favorites, contacts logged in the Wall).
 - Up to 4 names are suggested among the local contacts matching with the search: the last called and the three most called.
 - Select this option in the suggested list to display all local contacts.
 - Select this option in the suggested list to perform the search in the corporate directories



You can also enter the name of your contact in the search/dial area from the Windows notification area (show or hide the search/dial area by right clicking the OpenTouch Conversation icon from the Windows notification area).

2.19 Answer a conversation

A Desktop alert is displayed when someone wants to start a conversation with you (example below with a Call toast):

• Accept the audio conversation.	
• Accept the video conversation.	
• Divert the incoming audio/video call to the voicemail.	
• Reply with an instant message or move the incoming call to a predefined number.	
• Accept the instant message conversation.	
• Decline the chat.	
• Start an audio or video call.	

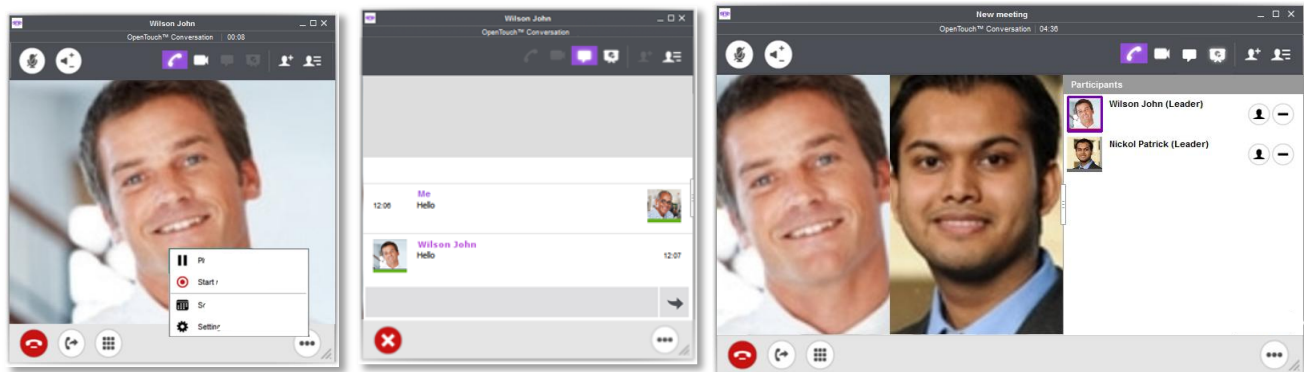
2.20 During a conversation

Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed or is not displayed.







2.20.1 Screen description

Actions are available according to the type of conversation:






- Audio or video call.
- Conference.
- Meeting.
- Instant messaging.










Main audio/video controls (top bar, left side)

• Mute/unmute the conversation (line is muted when the microphone is red).	 
• Set the volume of your speakers.	
• Mute/unmute the video call.	
• Hide/Show the 'picture in picture' during a video call.	 


Media controls/Participants (top bar, right side)

• Add video to the conversation.	
• Add instant messaging to the conversation.	
• Share documents, an application or your desktop during the conversation (see section : Content sharing).	
• Add a new participant to the conversation.	
• Display the list of participants.	

Conversation functions (bottom bar, left side)

<ul style="list-style-type: none"> Hang up the audio/video conversation. End the conversation. 	
<ul style="list-style-type: none"> Put the call on hold. 	
<ul style="list-style-type: none"> Retrieve the call on hold. If you are in conversation with another contact, the current conversation is put on hold. 	
<ul style="list-style-type: none"> Divert the conversation to a predefined device (e.g. mobile, deskphone), another number or contact. 	
<ul style="list-style-type: none"> Switch the conversation from main device to twinset (DECT, mobile). 	
<ul style="list-style-type: none"> Switch the conversation from twinset to main device (defined for making calls in routing profile). 	
<ul style="list-style-type: none"> Send DTMF. 	

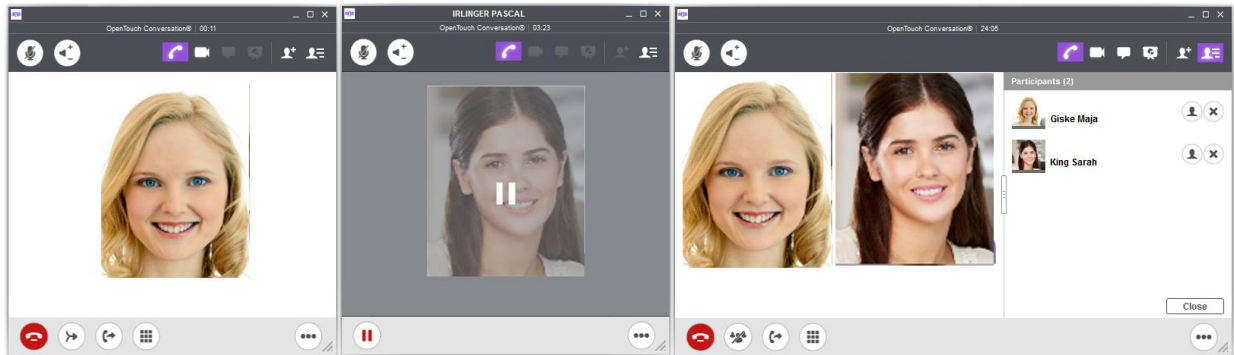
Other functions (bottom bar, right side)

<ul style="list-style-type: none"> Open more actions. 	
<ul style="list-style-type: none"> Put the call on hold. 	
<ul style="list-style-type: none"> Record/Stop recording the conversation.  This icon is displayed when recording. 	
<ul style="list-style-type: none"> Create a meeting with your correspondent(s). 	
<ul style="list-style-type: none"> Access to the settings. 	

In a scheduled meeting, the name of the active talker is displayed in the bottom bar (avatar of active talker is also highlighted in the participants view).
Conversation window can be retrieved from the Wall when closed.

2.20.2 Make another conversation, N-party conference

You can manage several audio (and video) communications at a time (maximum 10, depending on your system configuration).



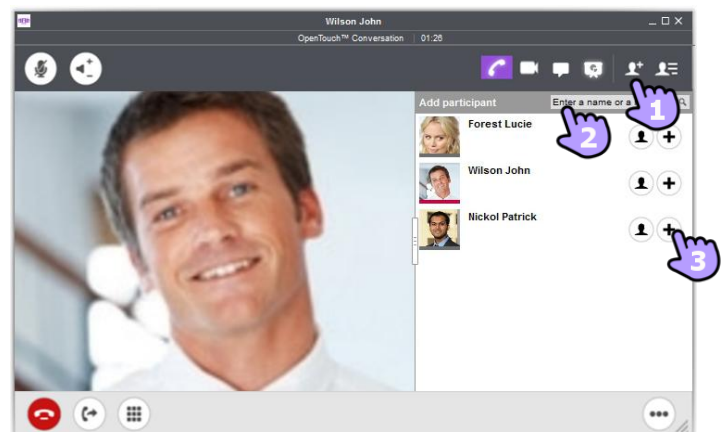
A new conversation window is opened when you receive a second call or when you start a new conversation (from the contact card, the search result, the dial box ...).

<ul style="list-style-type: none"> • Hang up the audio/video conversation. • End the conversation. 	
<ul style="list-style-type: none"> • Put the call on hold. 	
<ul style="list-style-type: none"> • Switching between calls (broker call): when you retrieve a call, the current conversation is put on hold. 	
<ul style="list-style-type: none"> • Transfer the conversation to a predefined device (e.g. mobile, deskphone), another number or contact. 	
<ul style="list-style-type: none"> • Merge all conversations to conference. 	
<ul style="list-style-type: none"> • End the conference. 	

2.20.3 Add participants to a conversation

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

1. Click to add a new participant in your conversation (your favorites are displayed by default).
2. You can also enter a name or a number in the text field for adding a new participant. The search is performed in the local directories. Press Enter key to perform the search in the corporate directories.
3. Add the participant to the conversation.



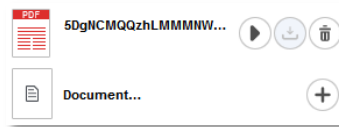
2.21 Content sharing

2.21.1 Share documents during a conversation

- Open the sharing tool.



Management panel:



- Add a new document.
- Share the document.
- Download the document to your personal computer.
- Delete the document.










Controls (top bar of the conversation window):



- Stop the document sharing
- Go to the previous or next page of the document.
- Go to the first or last page of the document.
- Select a page in the document.
- Use thumbnails to display the pages of the document.
- Use the full screen mode.
- Fit the document to the window or display the actual size.



Annotation tools

- Use a pen  (to draw freehand), a highlighter  (to highlight a specific area) or shapes   (to draw lines and rectangles) to annotate the document.
- Use the eraser  to remove annotations or remove all annotations  from current page.
- Use the laser  to point on the document.



- Change the color of the annotations or laser pointer.



- Change the size of the annotations or laser pointer.



2.21.2 Share your desktop during a conversation

Desktop sharing is not supported on Mac OS X.

- Open the sharing tool.



Management panel: all monitors are displayed.



- Share a monitor with the other participants (monitors you are connected to, are automatically displayed).
- Stop the sharing.



Use the mouse wheel to zoom/unzoom the presentation.

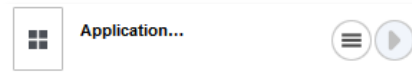
2.21.3 Share an application during a conversation

Application sharing is not supported on Mac OS X.

- Open the sharing tool.



Management panel:

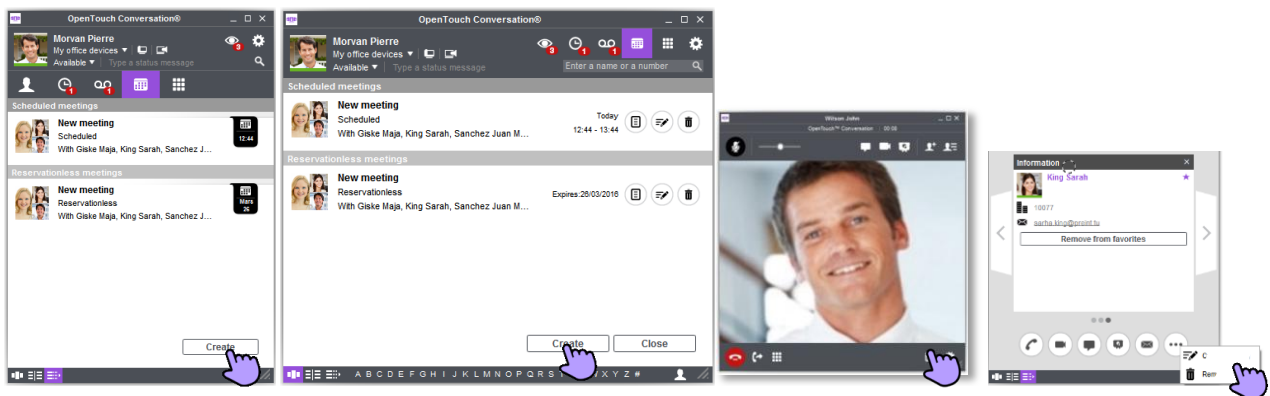


- Select the application to share among all applications running in your computer.
- Share the selected application with the other participants.
- Stop the sharing.



2.22 Meeting

2.22.1 Create a meeting

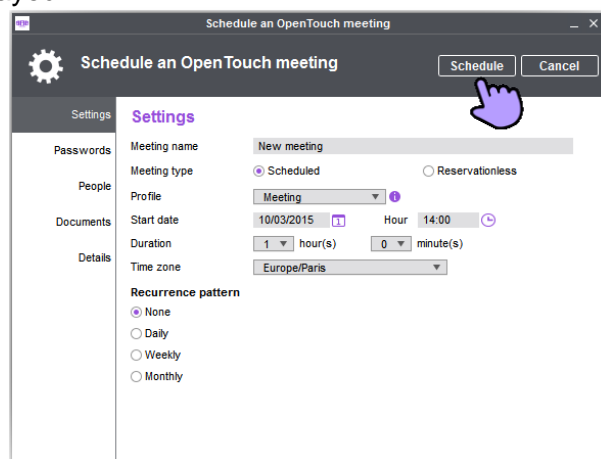


Create a meeting:

- Via the corresponding icon in the homepage.
- Via the corresponding icon in the conversation window (this will automatically add the participants of the conversation to the meeting).
- From a contact card or past meeting card - select the Create meeting menu item (this will automatically add the participant(s) of the card to the meeting).



Following window is displayed:



- Enter the name of the meeting ("*Meeting name*")
- Choose the meeting type ("*Meeting type*") : scheduled or reservationless meeting. A reservationless meeting is useful to initiate an impromptu meeting without having to schedule the meeting in advanced.
- Choose a predefined profile for the meeting ("*Profile*"):
 - "*Meeting*": use for interactive business meetings. All licensed features are available.
 - "*Webinar*": use for a Web presentation (large events). Participants only listen and see the Web presentation of leaders.
 - "*Training*": use for teacher-student scenario. All licensed features are available. Session ends when the teacher hangs up (leader).
 - "*Conference call*": use for a voice only conference.
- Enter the different parameters and schedule the meeting ("*Start date*", "*Duration*", "*Time zone*", "*Recurrence pattern*").
- Schedule the meeting ("*Schedule*") or cancel the creation ("*Cancel*").

You can complete the meeting by selecting the other tab when you create the meeting or later by editing the meeting:

- “*Password*”: secure the access to the meeting.
- “*People*”: add or remove a participant from an upcoming meeting and define leaders.
- “*Documents*”: upload a document to a meeting.

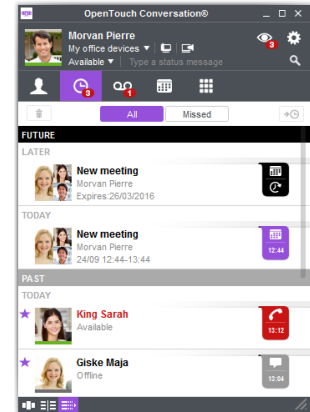
When created, the new meeting appears in the conversation wall (future events):



Scheduled meeting.

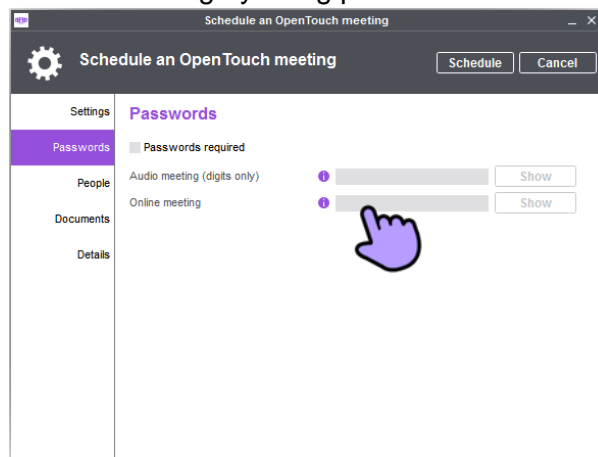


Reservationless meeting.
Expiration date is displayed.




2.22.2 Secure the access to the meeting

You can protect the access to the meeting by using passwords.



- Select the “*Passwords*” tab.
- “*Passwords required*”: validate the checkbox if you require a password to join the meeting.
- “*Audio meeting*”: you can define a password for audio meeting (digits only). In this case, an external user has to enter the password to join the audio meeting.
- “*Online meeting*”: you can define a password for online meeting. In this case, an external user has to enter the password to join the web meeting.
- “*Create*” or “*Schedule*”: create the new meeting or update an existing meeting.

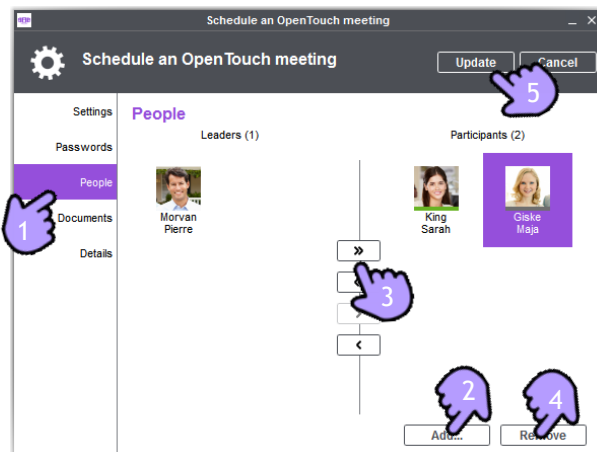
Depending on your system configuration, you may need to follow a password policy.

-  Display the password policy.

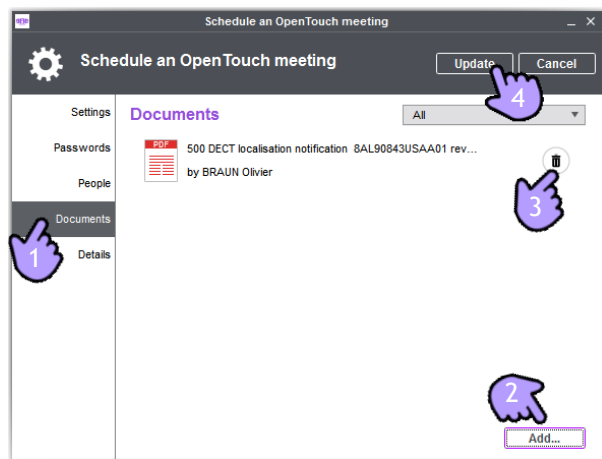
2.22.3 Add or remove a participant from an upcoming meeting and define leaders

The leader role (according the licensed features):

- Add or remove participants.
- Mute or unmute a participant.
- Share documents.
- Annotate documents.
- Share desktop.
- Allow participants to use some roles.



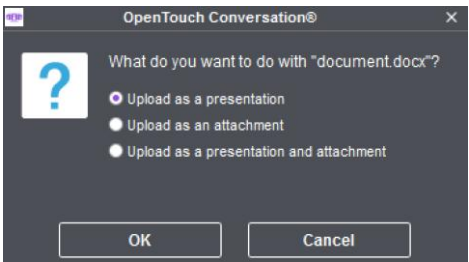
1. Select the “People” tab.
2. “Add...”: add a participant (select a favorite, or enter a name or an email address).
3. Move one or several participants to the Leader list if needed (select and drag and drop participants or use the move buttons).
4. “Remove”: Remove a selected participant.
5. “Create” or “Schedule”: create the new meeting or update an existing meeting.


2.22.4 Upload a document to a meeting

1. Select the “Documents” tab.
2. “Add...”: Add a new document by selecting the file on your computer. You can add the document by drag and drop it in the application .

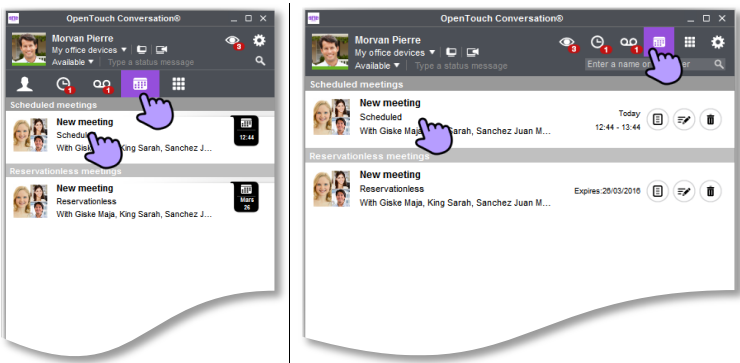
Select how to share the document :

- “*Upload as a presentation*”: all participants can only view the document.
- “*Upload as an attachment*”: all participants can only download the document.
- “*Upload as a presentation and attachment*”: all participants can view and download the document.






- 
3. Remove a document from the list.
4. “*Create*” or “*Schedule*”: create the new meeting or update an existing meeting.

2.22.5 Consult the meeting list

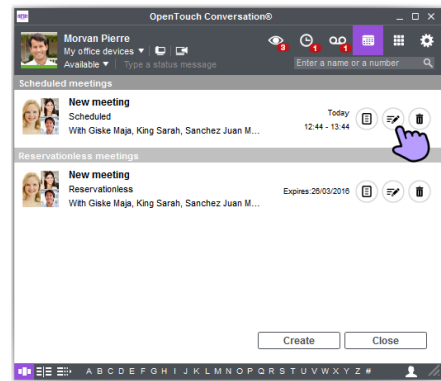
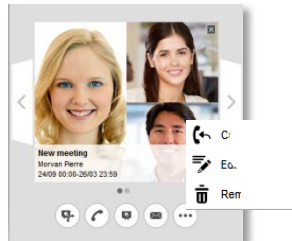


Use the Meeting icon or tab to display the meetings you have created (scheduled and reservationless) and invitations you have received. Scheduled meetings and reservationless meetings are sorted by date in two separated sections.

• Display the details of the meeting.	
• Edit the meeting (double click the meeting or use the edit icon).	
• Delete the meeting.	

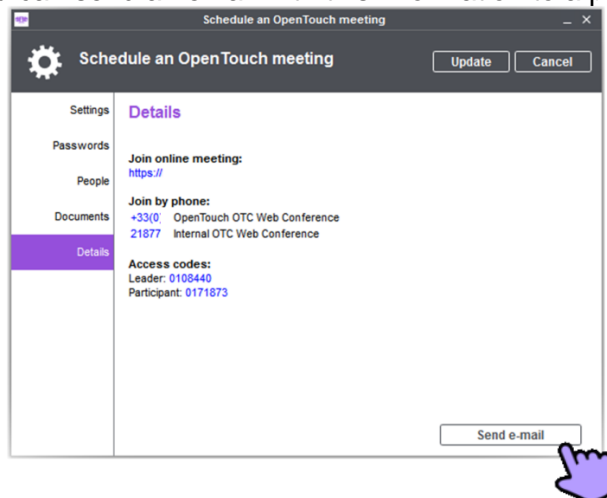
2.22.6 Modify an upcoming meeting

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

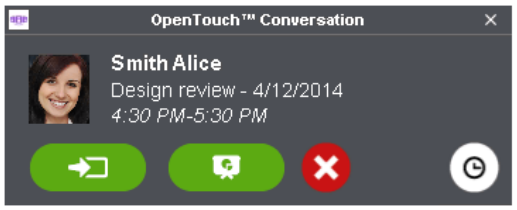


- Select the tab to complete:
 - "Password"**: secure the access to the meeting.
 - "People"**: add or remove a participant from an upcoming meeting and define leaders.
 - "Documents"**: upload a document to a meeting.
- Validate the change by clicking the **"Update"** button.





The **"Details"** tab contains the URL, the phone numbers and the access codes for joining the meeting. From this tab, you can send an email with this information to a participant (**"Send e-mail"**).









2.22.7 Join a meeting



A Desktop alert is displayed 15 minutes before a meeting starts.

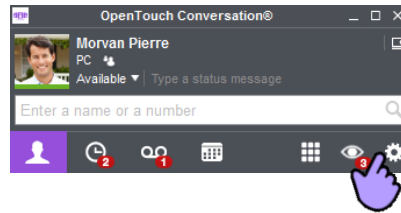
<ul style="list-style-type: none">Join the meeting	
<ul style="list-style-type: none">Join the meeting without audio	
<ul style="list-style-type: none">Repeat the notification in 5 minutes.	
<ul style="list-style-type: none">Dismiss the notification.	

You can also join the meeting from the conversation wall by opening the meeting card.

<ul style="list-style-type: none">Join the meeting with all media.	
<ul style="list-style-type: none">Join the meeting with audio only.	
<ul style="list-style-type: none">Join the meeting without audio.	
<ul style="list-style-type: none">Send an email to all participants.	
<ul style="list-style-type: none">Join the meeting in audio with another device than the current defined in call routing. Enter a new number you would like to use for the meeting or select one in the 9 last entered number (if necessary you can select your current number in the list).	 

2.23 Settings

Settings depend on user profile (Conversation User, Connection User). Only available settings are displayed.

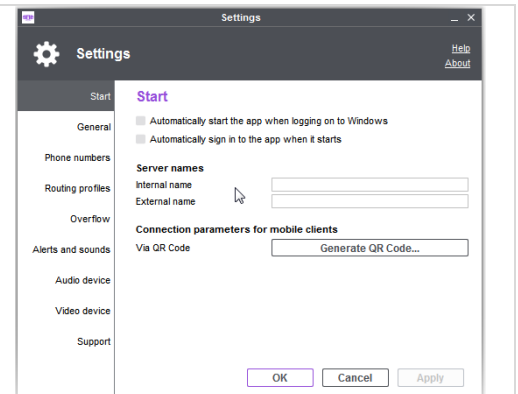


Open the settings window.

2.23.1 “Start”

Define how you want to start your OpenTouch Conversation application:

- Automatically start the application when logging on to Windows.
- Automatically sign in to the application when it starts. The “Remember password” checkbox has to be validate in the login window (see [Start OpenTouch Conversation](#)).
- “OK”: validate.

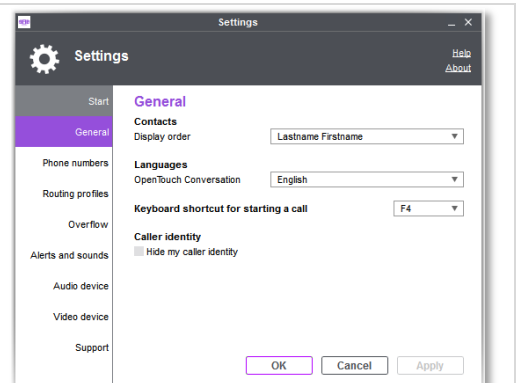


From this page, you can generate a QR code (“Generate QR code...”). The QR code lets you to easily configure connection settings for another client like OpenTouch Conversation for Android or iPhone.



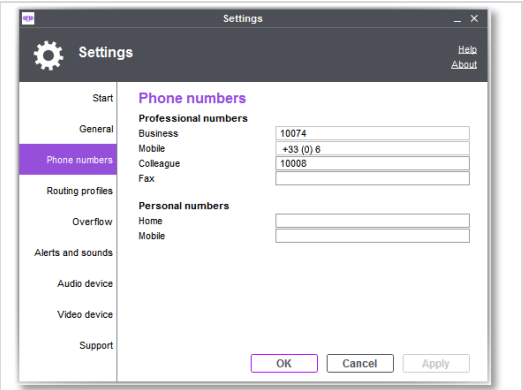
2.23.2 “General”

- “*Display order*”: define how to display contacts (lastname first or firstname first).
- “*Languages*”: Define the display language.
- Define a keyboard shortcut for starting a call.
- “*Caller identity*”: activate/deactivate the secret identity (CLIR). Your external caller will not see your phone number. This feature depends on your system and is displayed if available (Conversation User only).
- “OK”: validate.



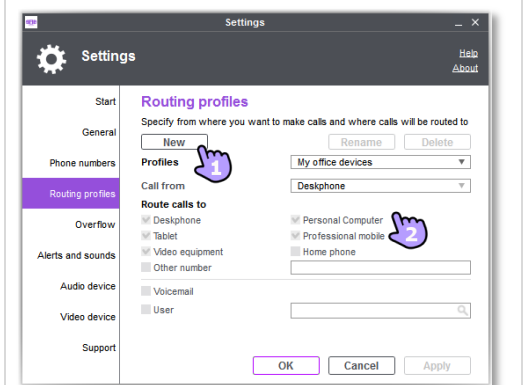
2.23.3 “Phone numbers”

- “Professional numbers”, “Personal numbers”: define professional and personal phone numbers (use these numbers for diverting/transferring calls or in call routing profiles). The phone number you entered is automatically formatted as a canonical number when you apply: +Country/RegionCode (AreaCode) Number.
- “OK”: validate.



2.23.4 “Routing profiles” (Conversation User only)

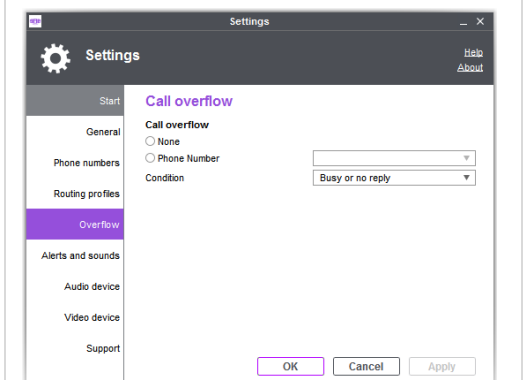
1. “New”, “Rename”, “Delete”: Create, rename or suppress a routing profile.
2. “Profiles”: define the device for making calls. “Route calls to”: define the devices that will simultaneously ring when you receive a new call. If you route your calls to another number, the phone number you entered is automatically formatted as a canonical number when you apply: +Country/RegionCode (AreaCode) Number.
3. “OK”: validate.




2.23.5 “Call overflow”

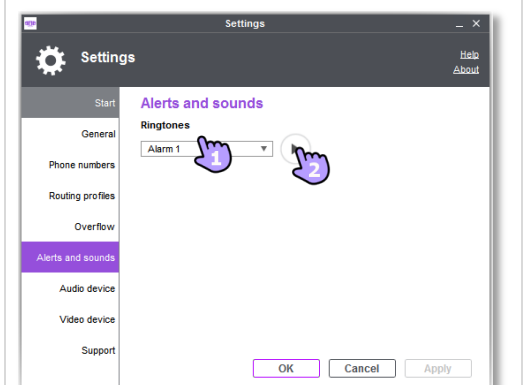
“Call overflow”: define how to manage a call when you do not reply or when you are busy. All incoming calls can be diverted to voicemail or predefined phone number when you are absent and/or busy.

- Select the destination of the diversion: No diversion (“None”) or predefined phone number (“Phone number”).
- “Display order”: select the condition of the diversion (busy, no reply, busy or no reply).
- “OK”: validate.



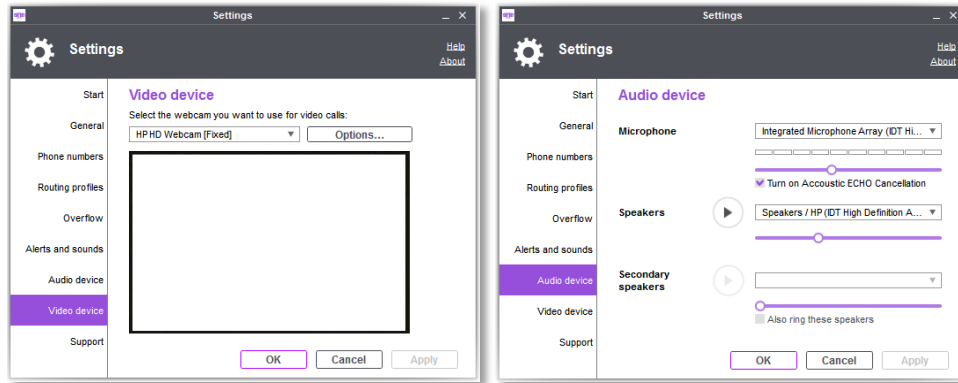
2.23.6 “Alerts and sounds” (Conversation User or Connection User in Softphone mode)

- “Ringtones”: define the ringtone when receiving an incoming call on your computer.
-  Check the ringtone.
- “OK”: validate.





2.23.7 “Audio device”, “Video device”

Select the webcam, microphone and speakers you want to use for video and audio calls.

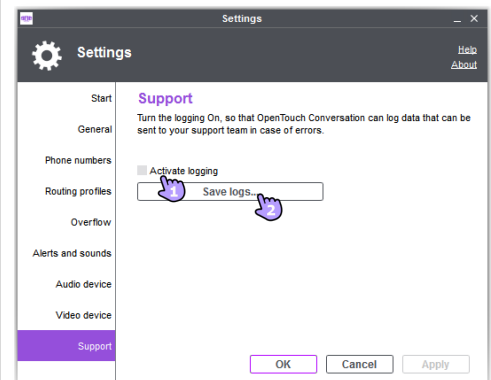


Depending on the audio device selected, a specific icon is displayed in the user area:

-  : Microphone and speakers of the computer.
-  : Headset.

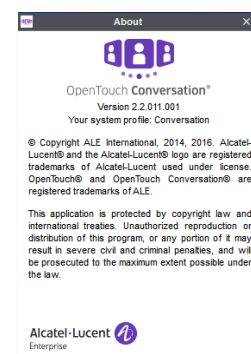
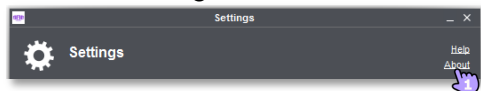
2.23.8 “Support”

- “*Activate logging*”: Select this option to activate logging for the current session.
- Click “*Save logs...*” button to put the collected data into a zip archive that can be sent to the support team.
- Uncheck the option or stop the application to deactivate logging.
- “*OK*”: validate.



2.23.9 “About”

Open “about” information to know the software version and the user configuration.



3 OpenTouch Conversation for Microsoft® Outlook™

The OpenTouch Conversation provides a high level of service when associated to Microsoft Outlook.

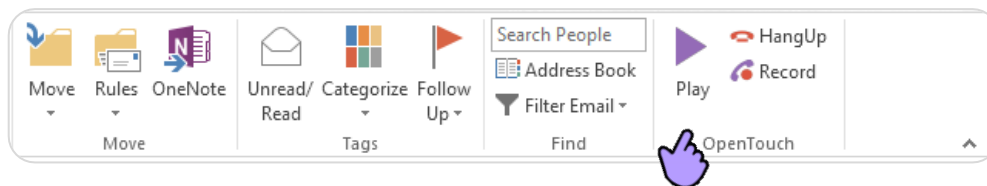
3.1 Supported versions

- Outlook 2010 – 32 or 64 bits
- Outlook 2013 – 32 or 64 bits
- Outlook 2016 – 32 or 64 bits
- Outlook 365

The screenshots are examples, provided from Outlook 2013.

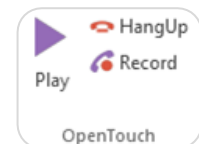
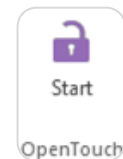
3.2 OpenTouch Conversation services

OpenTouch communication services integration is performed through the native Microsoft user interface: telephony and messaging services and personal contact search capabilities.



3.2.1 Start OpenTouch Conversation integration

1. Check that OpenTouch Conversation for PC is started.
2. Click the lock icon in Outlook ribbon (homepage) to start the Telephony & Messaging add-in.
3. Once logged in, buttons are displayed according to user's permissions.



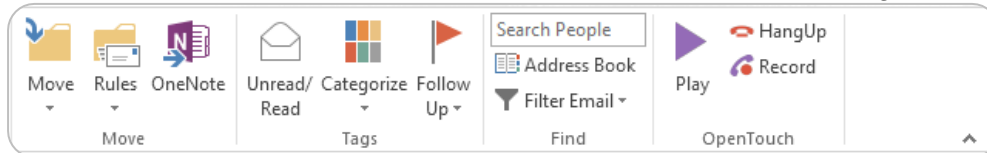
3.2.2 OpenTouch communication services

OpenTouch communication services depend on user's permission and context. The corresponding button is displayed only if the associated action is currently possible.

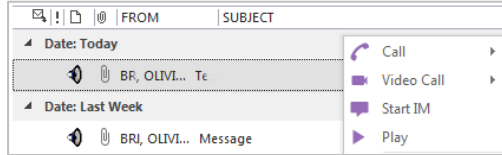
• Make an audio call.	
• Make a video call.	
• Send an instant message.	
• Play/replay a voice message (received or recorded).	
• End the active conversation.	
• Record a voice message to send by email.	
• Reply with an instant message.	

OpenTouch Conversation is integrated to Outlook interface:

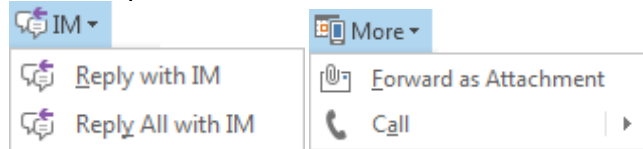
- In the Outlook ribbon of the home tab, the contact tab or the message window.



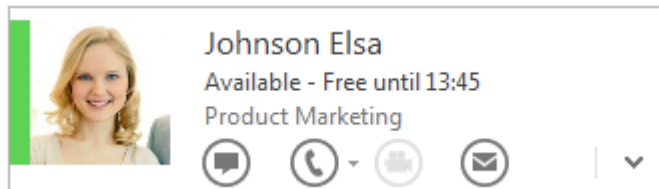
- In the contextual menu by right clicking on email, contact,



- In the respond menu of Outlook.



- In contact card.



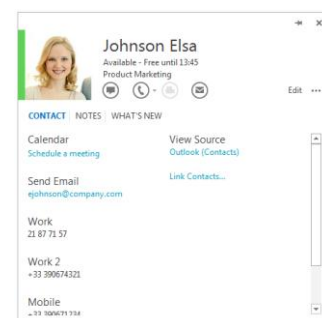
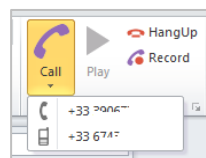
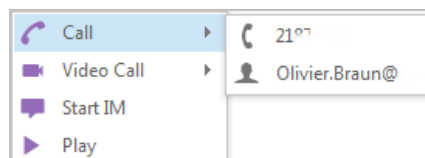
Note that OpenTouch Conversation uses the native UI of Microsoft Office applications. Communication services can be displayed in other Office application as SharePoint, Excel, and Word.

3.2.3 Make a conversation

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

You can make a conversation from:

- An email with the sender or any recipients.
- A contact card.





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


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







3.2.4 Listen to a voice message

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

3.2.5 Recording a message

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

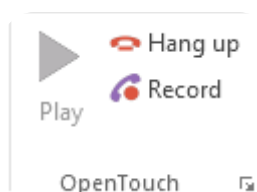
• To attach the latest recorded message	
• To record a new message (the previous one will be lost if not attached)	
• To play the recorded message.	
• To cancel the record operation.	


3.2.6 Presence information

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

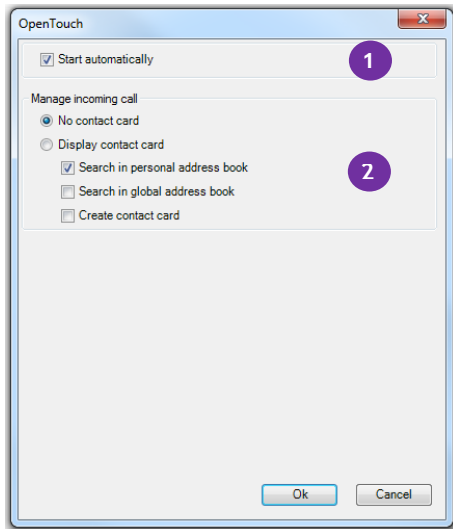
	Available		Be right back
	Busy/In conversation		Offline

3.2.7 User options



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

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

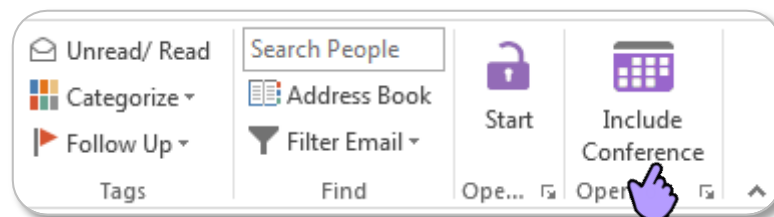


1 If this option is selected, the add-in is automatically started when you start Outlook

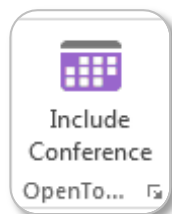
2 When receiving an incoming call, an Outlook contact card can be displayed if the calling party can be identified from Outlook Personal Folders or the Exchange Global Address List. Contact cards can be created for calling parties that are not recognized.

3.3 OpenTouch conference

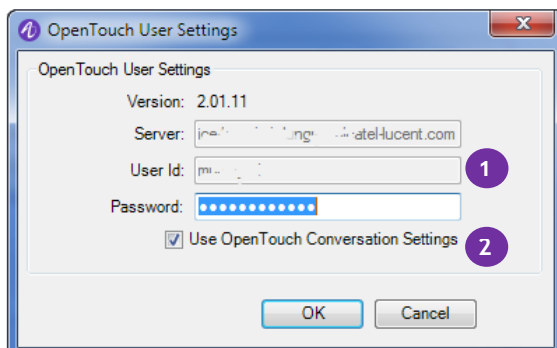
OpenTouch conference integration is performed through an “add-in” client. Use Microsoft Outlook to schedule OpenTouch conferences.



3.3.1 Settings



Click the bottom right corner of the OpenTouch conference application (↗).



Enter the OpenTouch server name and the credentials (1) or use OpenTouch Conversation settings for starting the conferencing add-in (2). For remote worker users, the server is the conference server name and the option 2 is not available.

3.3.2 Create a meeting



- Select the OpenTouch conference icon to create a new meeting.
 - From the Mail view, create directly a new meeting in the Calendar with current date and hour.
 - From a new created appointment.
- Complete the appointment.
- Send the email invitation including the meeting URL, dial-in numbers and the access code.

Meetings created in Microsoft Outlook are displayed in OpenTouch Conversation application.

3.3.3 Cancel the meeting



From the appointment view, cancel the conference from the appointment.

3.3.4 View details of the meeting



From the appointment view, show all information and options about the OpenTouch Conversation meeting.

In meeting options, set Leader and Participant (default) roles when scheduling the conference (the leader access code shall be sent separately to the invitees that have been promoted).

3.3.5 Join a meeting

An Outlook reminder pops up to notify you of the meeting 15 minutes before it starts.



Join the meeting via the OpenTouch Conversation Web interface.

4 Microsoft® Office 365

Microsoft® Office 365 is a cloud solution for Microsoft Office. In this case, your email and calendar can be managed in the Microsoft cloud.

Depending on the configuration of your system, OpenTouch Conversation supports Office 365:

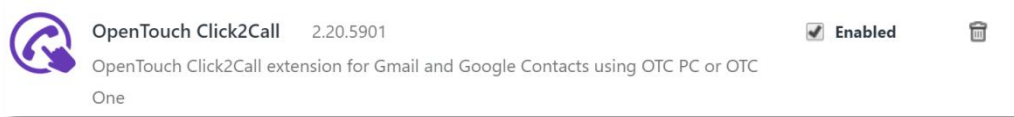
- Your voicemails are accessible from Outlook or Outlook Web Access (OWA)
- OpenTouch Conversation meetings are synchronized with Office 365 calendar.
- OpenTouch Conversation and conference add-in for Microsoft Outlook are available.
- Communication services can be displayed in other Office application as SharePoint, Excel, and Word.

5 OpenTouch Click2Call extension for Gmail and Google Contacts

OpenTouch Click2Call is a free extension for OpenTouch Conversation for PC, that allows making call from any Gmail and Google contacts-

5.1 Installation

OpenTouch Click2Call is a Chrome extension.
Install OpenTouch Click2Call via the Chrome Web Store.



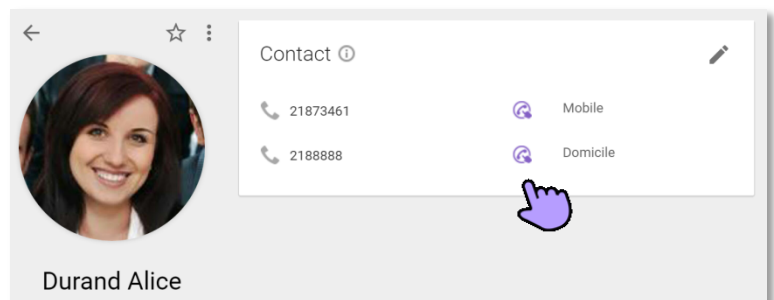
If necessary, check that the Chrome extension is enabled after installation (<chrome://extensions/>).
At the first start, you have to allow OpenTouch Click2Call to use information about your contact.

5.2 Make a call from a Gmail or Google contact



Select the Click2Call icon of your contact. The call is managed by the OpenTouch application.

If you select the Click2Call icon in Google list of contacts, the first number of your contact, defined in Google card, is used. If you want to use another number of your contact, open the Google card and select the Click2Call icon of the corresponding number.



6 OpenTouch Conversation for Skype for Business

The OpenTouch Conversation provides a high level of service when associated to Skype for Business. OpenTouch Conversation has to be installed with option : “Integrated with Microsoft Lync/Skype for Business”.

6.1 OpenTouch Conversation integration

OpenTouch communication services integration is performed through the native Skype for Business user interface: telephony and messaging services and personal contact search capabilities.

When you are connected, the OpenTouch Conversation ribbon is added to the Skype for Business window.



The ribbon displays the current routing profile, selected device for making a call and available actions.

Open the OpenTouch Conversation services by clicking on the corresponding button in the ribbon. Refer to the OpenTouch Conversation for PC sections for more information about the following features.

	Conversation Wall: past conversations, active conversation and future meetings. Click on the icon to open the conversation wall. The number of new events is displayed (missed call, callback request if available).
	Visual Voice Mail.
	Meetings: manage your meetings (consult, create, modify, share documents). All meetings are managed as described for OpenTouch Conversation application.
	Settings: open the OpenTouch Conversation settings
	List current active conversations. If only one conversation is active, the corresponding communication card is opened.
	Supervision (optional)
	Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.

Microphone and speakers of the computer are used for audio call.

Headset of the computer is used for audio call

Your personal computer will not ring when you receive an incoming call.

Call from your deskphone.

Call from your professional mobile.

Call from your tablet.

Manager Assistant (optional)

From the tools menu, you can choose to display or hide the OpenTouch Conversation add-in.

6.2 Presence information



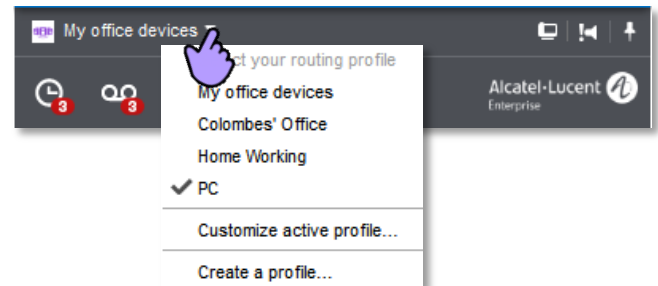
Pierre Morvan - In a call

OpenTouch phone presence is communicated to the Microsoft Skype for Business client, so that anyone else looking at the user status will see that this user is on the phone.

6.3 Routing profile

- Click on your current call routing profile in the OpenTouch Conversation ribbon.

Select the routing profile. The selected routing profile and information about this profile are displayed in the user area.



The routing profile depends on your user profile (Conversation User, Connection User). For more information, refer to the next OpenTouch Conversation for PC sections:

- 2.7 Call Routing for Conversation user
- 2.8 Call Routing for Connection user

6.4 Make a conversation

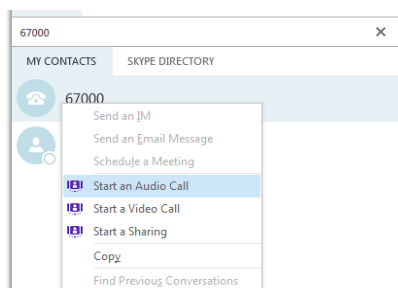
According to user permissions and Opentouch Conversation for PC configuration, you are able to start a video or audio conversation with Skype for Business contacts.

All conversations are managed by the OpenTouch Conversation for PC.

You can make a conversation:

<ul style="list-style-type: none"> From favorites, history or search result, by selecting the corresponding action in the contextual menu (right click). 	<ul style="list-style-type: none"> From an instant message session, by selecting the menu button.

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



You can also enter the number of your contact in the search/dial area. The number is displayed as a Skype for Business contact. You have just to start a conversation by right clicking on the number and selecting the corresponding menu.
Phone number format: canonical number : +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.

6.5 Search a contact

The OpenTouch Conversation integration fully relies on the Skype for Business capabilities for searching people.

6.6 Receiving an incoming call

Receive incoming call alerts from OpenTouch Conversation with the option to answer, divert (to the voicemail or a predefined number), or reply using chat.

6.7 Share a document

Like a conversation, you can share a document with a Skype for Business contact (history, favorites, search result, Instant message), by right clicking on the contact or using the menu button, and selecting the start sharing document menu.

For more information, refer to the next OpenTouch Conversation for PC sections:

- [2.21 Share documents during a conversation](#)
- [0 Share your desktop during a conversation](#)




7 OpenTouch Conversation for IBM Sametime

The OpenTouch Conversation provides a high level of service when associated to IBM Sametime. OpenTouch Conversation has to be installed with option : “Integrated with IBM Sametime”.

7.1 Sametime add-in

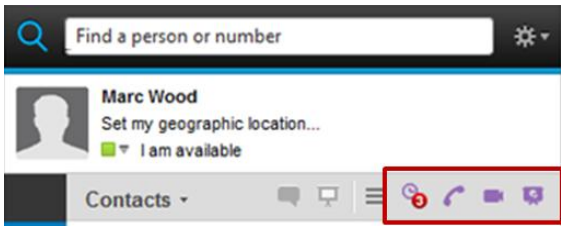
Before using your application, you have to authorize add-in installation in the Sametime server administration (Sametime default rules). Contact the administrator of the Sametime server if necessary. If the add-in is correctly installed, OpenTouch conversation is started automatically when you start Sametime. Enter the OpenTouch Conversation username and password. Validate the “Remember password” checkbox to store the password for the next connections. If you are outside the company, enter your remote access credentials and the public address of your OpenTouch server.

The OpenTouch Conversation icon is displayed in the top bar menu of Sametime.

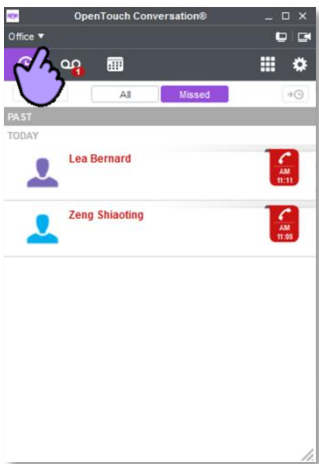
	The add-in is starting and you are connected to the OpenTouch server.
	Add-in can be started (OpenTouch Conversation is running).
	Add-in is not running (OpenTouch Conversation is not started or add-in cannot be executed)






7.2 OpenTouch Conversation integration


OpenTouch communication services integration is performed through the native Sametime user interface: telephony, messaging services and personal contact search capabilities.









You can also access all other features of the OpenTouch Conversation application. Refer to the OpenTouch Conversation for PC sections for more information about the following features.



	Conversation Wall: past conversations, active conversation and future meetings. Click on the icon or on the corresponding button to display only missed calls or all conversations.
	Visual Voice Mail.
	OpenTouch Conversation Meetings: manage your meeting (consult, create, modify, share documents).
	Keypad.
	OpenTouch Conversation settings

	Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.
---	--

Status icons

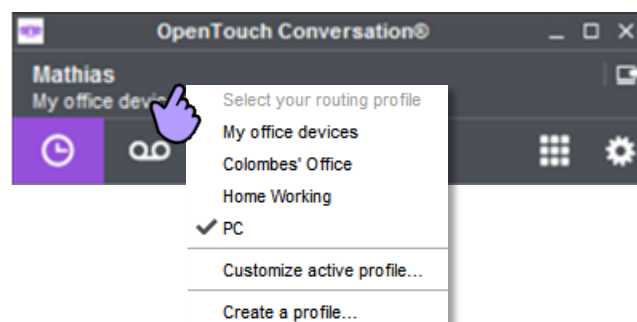
	Microphone and speakers of the computer are used for audio call.		Call from your deskphone.
	Headset of the computer is used for audio call		Call from your professional mobile.
	Your personal computer will not ring when you receive an incoming call.		Call from your tablet.

	Manager Assistant (optional)
---	------------------------------

The ribbon displays the current routing profile, selected device for making a call and available actions.

7.3 Routing profile

- Click on your current call routing profile in the OpenTouch Conversation ribbon.
- Select the routing profile. The selected routing profile and information about this profile are displayed in the user area.







The routing profile depends on your user profile (Conversation User, Connection User). For more information, refer to the next OpenTouch Conversation for PC sections:

- [2.7 Call Routing for Conversation user](#)
- [2.8 Call Routing for Connection user](#)

7.4 OpenTouch communication services in Sametime

OpenTouch communication services depend on user's permission and context. The corresponding button is active only if the associated action is currently possible.

• Open the Conversation Wall. The number of missed calls is displayed.	
• Make an audio call.	
• Make a video call.	
• Share a document.	

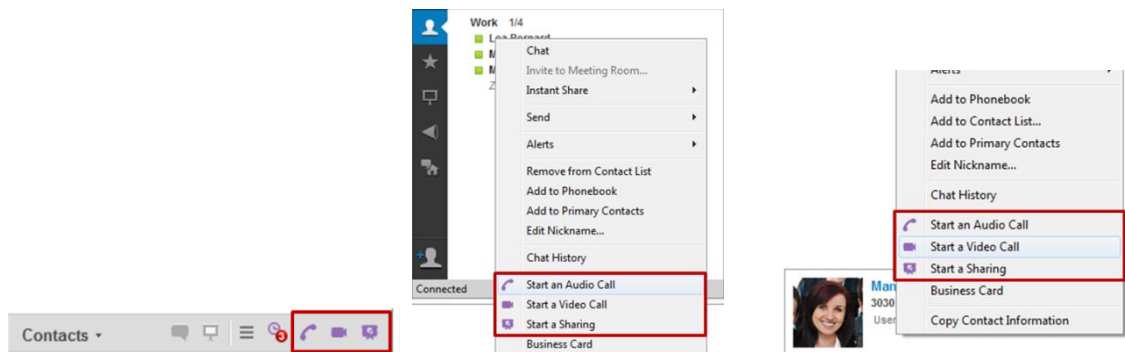
7.5 Make a conversation

According to user permissions and OpenTouch Conversation for PC configuration, you are able to start a video, audio or share a document with Sametime contacts.

All conversations are managed by the OpenTouch Conversation for PC.

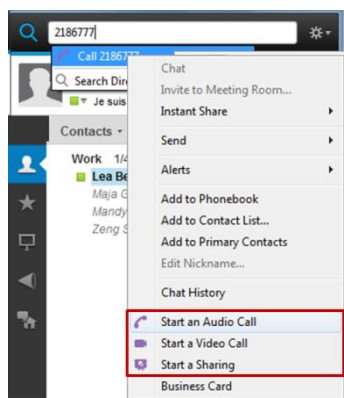
Access all available services:

- From the Sametime menu bar by selecting a Sametime contact.
- From the contextual menu by right clicking on a contact.
- From contextual menu by right clicking on the Sametime contact card.



A list of phone numbers is displayed if the contact owns several numbers (click the number to dial).

7.6 Dial a number



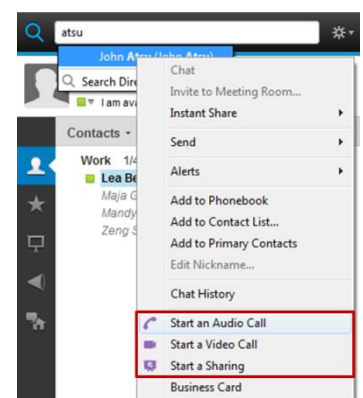
Enter the number of your contact in the search/dial area.

Right click to get the contextual menu with OpenTouch Conversation services.

Phone number format: canonical number : +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.

7.7 Search a contact

Search for anyone in your Sametime contacts and initiate a call with that person (if several contacts match the search criteria, a list of phone numbers is displayed for each contact. Right click to get the contextual menu with OpenTouch Conversation services.



7.8 Receiving an incoming call

Receive incoming call alerts from OpenTouch Conversation with the option to answer, divert (to the voicemail or a predefined number), or reply using chat.

7.9 Listen to a voice message

- Select the visual voicemail tab in the OpenTouch Conversation homepage.



7.10 Presence information

The presence of contacts is displayed with name (status color and text):

	Available		Be right back
	Busy/In conversation		Offline

The telephony presence of your contact is displayed:

Your contact is in conversation.



7.11 Share a document

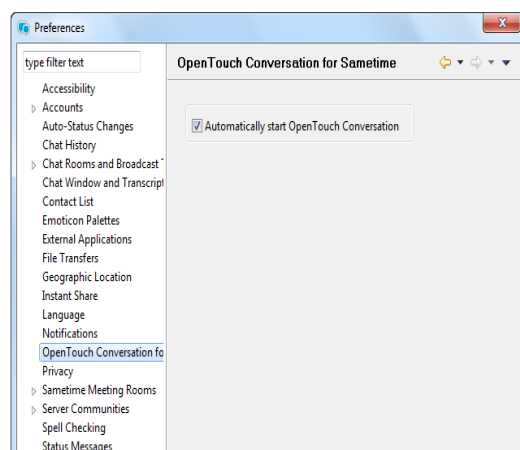
Like a conversation, you can share a document with a Notes contact, by right clicking on the contact, and selecting the start sharing document menu.

For more information, refer to the next OpenTouch Conversation for PC sections:

- 2.21 Share documents during a conversation
- 0 Share your desktop during a conversation



7.12 Settings



OpenTouch Conversation is automatically launched when Sametime is started. Uncheck if you don't want an auto-start.

8 OpenTouch Conversation for IBM Notes

The OpenTouch Conversation provides a high level of service when associated to IBM Notes. OpenTouch Conversation has to be installed with option : “Standalone”.




8.1 Notes add-in

Before using your application, the add-in has to be installed and configured on the Domino server and in your Notes application. The add-in is stored in the folder “Notes update site” of the OpenTouch Conversation installation. Add this folder location in Notes features updates. Refer to the Notes/Domino documentation or contact your installer. Mass provisioning deployment is possible.

To display the toolbar associated to the OpenTouch Conversation in the top bar menu of Notes, you have to unselect “show toolbars only when editing” option in “View” -> “Toolbar” menu.

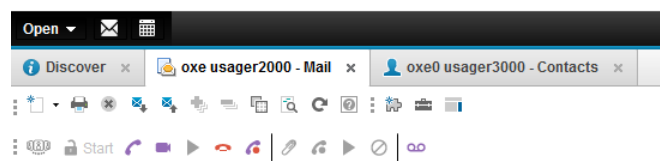
If the add-in is correctly installed, OpenTouch conversation is started automatically when you start Notes. Enter the OpenTouch Conversation username and password. Validate the “Remember password” checkbox to store the password for the next connections. If you are outside the company, enter your remote access credentials and the public address of your OpenTouch server.

The OpenTouch Conversation icon is displayed in the top bar menu of Notes.

	The add-in is correctly running and you are connected to the OpenTouch server.
	Add-in can be started (OpenTouch Conversation is running) – Automatic start option is unchecked.
	Add-in is not running (OpenTouch Conversation is not started or add-in cannot be executed)

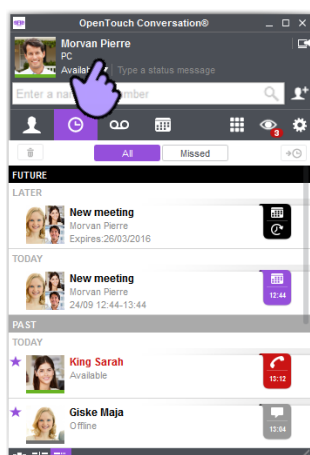
8.2 OpenTouch Conversation integration







OpenTouch communication services integration is performed through the native Notes user interface: telephony, messaging services and personal contact.



Click the lock icon in the top bar menu of Notes to start the OpenTouch Conversation add-in. Once started, buttons are displayed according to user's permissions in the Notes menu bar and the OpenTouch Conversation homepage is displayed in a separated window. The start icon is not displayed If automatic start option is checked in OpenTouch Conversation add-in settings (Notes settings).

You can also access all other features of the OpenTouch Conversation application. Refer to the OpenTouch Conversation for PC sections for more information about the following features.



	Favorites: quick access to your preferred contacts.
	Conversation Wall: past conversations, active conversation and future meetings. Click on the icon or on the corresponding button to display only missed calls or all conversations.
	Visual Voice Mail.
	OpenTouch Conversation Meetings: manage your meetings (consult, create, modify, share documents).
	Keypad.
	OpenTouch Conversation settings



Routing profile by clicking on your current call routing profile in the OpenTouch Conversation ribbon.

To search a contact, use the search feature in OpenTouch Conversation homepage or from the Windows notification area (show or hide the search/dial area by right clicking the OpenTouch Conversation icon from the Windows notification area).

Status icons

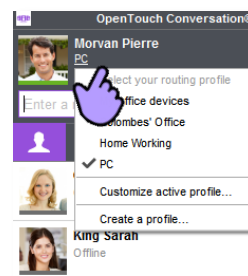
	Microphone and speakers of the computer are used for audio call.
	Headset of the computer is used for audio call
	Your personal computer will not ring when you receive an incoming call.
	Microphone and speakers from two different devices are used for audio call.
	Microphone or speakers cannot be detected.
	Manager/assistant activated (optional)

	Call from your deskphone.
	Call from your professional mobile.
	Call from your tablet.
	Dual ringing is enable.

The ribbon displays the current routing profile, selected device for making a call and available actions.

8.3 Routing profile

- Click on your current call routing profile in the OpenTouch Conversation ribbon.
- Select the routing profile. The selected routing profile and information about this profile are displayed in the user area.



The routing profile depends on your user profile (Conversation User, Connection User). For more information, refer to the next OpenTouch Conversation for PC sections:

- [2.7 Call Routing for Conversation user](#)
- [2.8 Call Routing for Connection user](#)

8.4 OpenTouch communication services in Notes

OpenTouch communication services depend on user's permission and context. The corresponding button is active only if the associated action is currently possible.

• Make an audio call.	
• Make a video call.	
• Send an instant message.	
• Play/replay a voice message (received or recorded).	
• End the active conversation.	
• Record a voice message to send by email.	

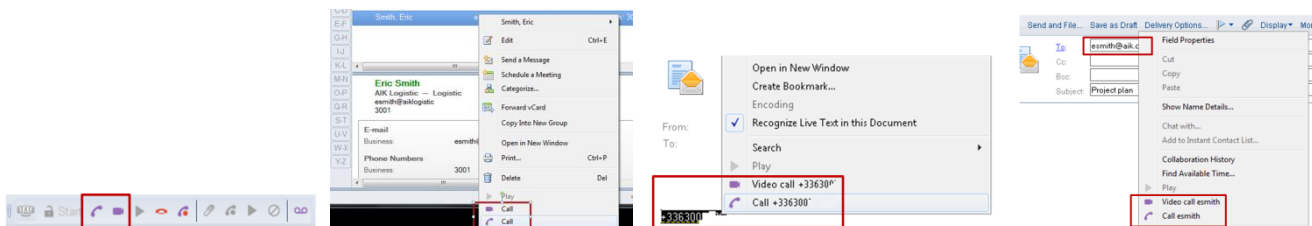
8.5 Make a conversation

According to user permissions and OpenTouch Conversation for PC configuration, you are able to start a video or audio conversation with Notes/Domino contacts.

All conversations are managed by the OpenTouch Conversation for PC.

Access all available services:

- From the Notes menu bar by selecting a Notes/Domino contact or message.
- From contextual menu by right clicking on a message of a contact.
- From contextual menu by right clicking on the Notes/Domino contact card.
- From contextual menu by right clicking on a phone number
- From contextual menu by right clicking on an email address or name



A list of phone numbers is displayed if the contact owns several numbers (click the number to dial).

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



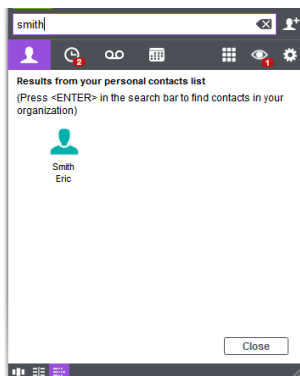
8.6 Dial a number

Enter the number of your contact in the Notes search/dial area.

Select the call option or right click to get the contextual menu with OpenTouch Conversation services.

Phone number format: canonical number : +Country/RegionCode (AreaCode) Number or +Country/RegionCode Number for internal or external contact.

8.7 Search a contact



Search for anyone in your Notes/Domino contacts and initiate a call with that person (if several contacts match the search criteria, a list of phone numbers is displayed for each contact).

From OpenTouch Conversation application, search for anyone in your Notes contacts and initiate a call with that person

You can also enter the name of your contact in the search/dial area from the Windows notification area (show or hide the search/dial area by right clicking the OpenTouch Conversation icon from the Windows notification area).

8.8 Receiving an incoming call


Receive incoming call alerts from OpenTouch Conversation with the option to answer, divert (to the voicemail or a predefined number), or reply using chat. A Notes contact card can be displayed if the calling party can be recognized (see add-in settings).





8.9 Listen to a voice message

- To consult your voice messages, select the corresponding icon in the Notes top bar or select the visual voicemail tab in the OpenTouch Conversation homepage.







8.10 Recording a message

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

<ul style="list-style-type: none"> To attach the latest recorded message 	
<ul style="list-style-type: none"> To record a new message (the previous one will be lost if not attached) 	
<ul style="list-style-type: none"> To play the recorded message. 	
<ul style="list-style-type: none"> To cancel the record operation. 	

8.11 Presence information

The presence of contacts is displayed with name (status color and text):

	Available		Be right back
	Busy/In conversation		Offline

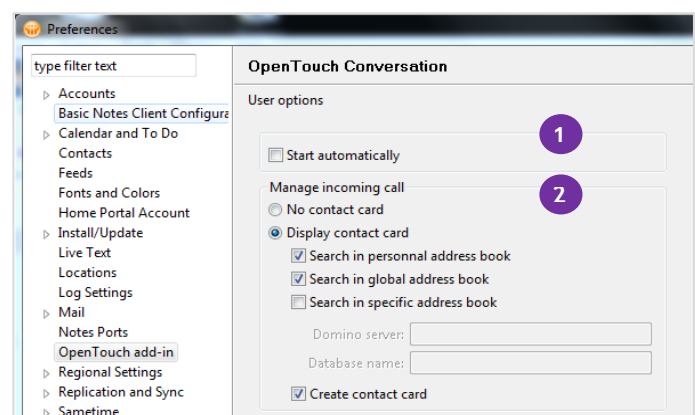
The telephony presence of your contact is displayed:

Your contact is in conversation.	
----------------------------------	---

8.12 Settings

Customize the OpenTouch Conversation add-in from the Notes preferences.

- If this option is selected, the add-in is automatically started when you start Notes.
- When receiving an incoming call, a Notes contact card can be displayed if the calling party can be identified from Notes/Domino Address List. Contact cards can be created for calling parties that are not recognized.



9 Communicate with organizations using Microsoft® Lync™ user

Federation with Lync 2013 XMPP Federation Gateway allows Presence and IM federation between OpenTouch Conversation users and Lync 2013 users.

This federation feature lets you communicate faster and more effectively with contacts outside your organization, such as partners, suppliers, customers, or vendors.

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




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

9.1 Supported version

- Microsoft® Lync™ Server 2013
- Microsoft® Lync™ 2013

9.2 Features available with a Lync contact

Use your application for initiating a conversation with a Microsoft Lync 2013 user, like any other contact.

	A federated contact is tagged with a specific icon.
	OpenTouch Conversation users can request to be notified of Microsoft Lync users' available or busy presence status. Same applies for Lync users.
	As an OpenTouch user, you are able to: <ul style="list-style-type: none"> • Exchange instant messages: when presence is federated between Conversation and Lync users, instant messages can be sent (note that Instant Messaging is limited to peer-to-peer sessions). • Place voice calls: open a contact card of a federated user and click to call. • Invite Lync users to join a scheduled OpenTouch conference: send an invitation with OpenTouch meeting details that Lync users can join from a web client and a phone. • Add a federated contact with audio only in a multimedia/multi-party conversation (instant messages cannot be exchanged with this contact in this context).

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