Alcatel·Lucent Enterprise

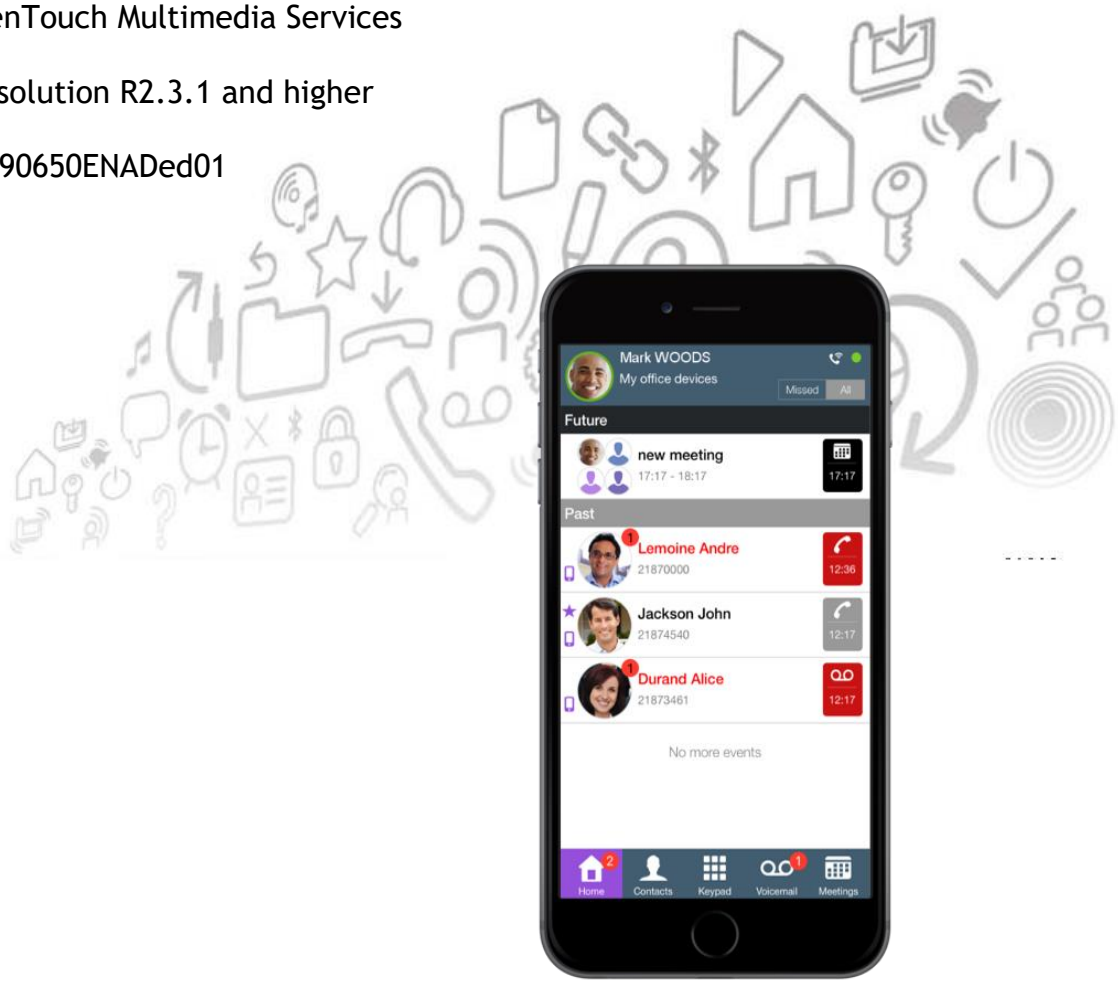
# OpenTouch® Conversation+ For iPhone

## User Manual

OpenTouch Multimedia Services

OT solution R2.3.1 and higher

8AL90650ENADed01




Direct link to the Apple Store

## OpenTouch Conversation Application Provisioning

This document describes the services offered by the OpenTouch Conversation application for iPhone.

This application requires OpenTouch solution R2.3.1 and higher.

## OpenTouch Conversation Application Provisioning

### Restricted access

The OpenTouch Conversation application requires access to some of your phone's features such as your contacts, the microphone or the camera for QR Code processing. When you use the application for the first time, you are prompted to allow the application to have access to these features.
This setting can be changed in the privacy menu of the iPhone settings.

### Certificates

At the first connection, you could be prompted to accept certificates, to ensure security of the data transfer when the application communicates with the Call Server of your company.
If the certificate has changed due to, for example, expiration or domain modification, you will be informed immediately and you will have to accept the new certificate.

### Guideline

The following guidelines are intended to help you get the most out of your device:

- Local contacts should be enriched with useful details: photo, job title, company, phone numbers, email, IM, address, etc (for example, a photo & caller identification will be used in the Wall).
- Keep your local contacts synchronized across all your devices. For example, you can use Exchange Active Sync or Google Contacts. The idea is to add a new contact on one device only and it is automatically synchronized on the other devices via sync over the air. All OpenTouch clients (Android smartphone and iPhone) will benefit from this sync.
- When you can, use a Bluetooth® handset so that you can take full advantage of your display whatever the situation.
- Use Corporate WLAN or Wi-Fi when available for less network latency.

Remember: any actions that cause you to be distracted while driving are potentially dangerous and should be avoided. Some jurisdictions have made it illegal to use a phone while driving.

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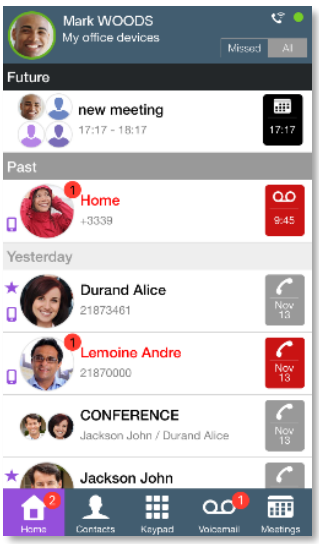
# 1 Start OpenTouch® Conversation

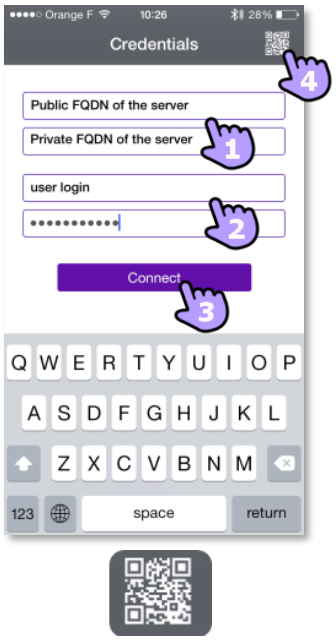
## 2 Start the application

Select the OpenTouch Conversation Icon.




## 2.1 Sign in

When you connect for the first time, if you have not configured the connection parameters (OpenTouch settings), a login configuration window is displayed to enter the OpenTouch credentials and OpenTouch server address.




1- Set your connection parameters.
2- Enter your user name (login) / Password (OpenTouch user password).
3- Sign in.
4- In the initial login screen you can see 'Scan QR Code' button (when necessary, hide the input keyboard). Press this button when you want to scan the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy). Note that the QR code can be retrieved from the OpenTouch Conversation for PC application.

If access to your business is secured by a Reverse Proxy, you could be prompted to enter the Reverse Proxy credentials when you are outside the business.

## 2.2 Voice-over-IP mode

OpenTouch Conversation integrates voice over IP (VoIP) capability allowing the user to place and receive business calls on the mobile through Wi-Fi or cellular data network.
Unless you do not wish to use VoIP (via a dedicated setting), VoIP capability will be provided automatically as soon as your IT Manager sets it and the cell phone has a data network coverage (Wi-Fi or cellular through a dedicated setting) and has successfully registered to the call server.
A VoIP icon on your mobile shows the VoIP status:

- : VoIP capability is activated and operational.
- : VoIP capability is deactivated via a dedicated setting.
- No icon displayed: cellular mode only or loss of VoIP connection (VoIP capability is temporarily unavailable).

OpenTouch Conversation supports Voice over IP outside corporate wireless LAN (including home, hotspot Wi-Fi network) and mobile data network 3G/4G/4G+.

The system administrator can inform you if there are any known restriction(s).

## 2.3 Native call integration

With the native call integration, OpenTouch Conversation is integrated into the native iPhone user interface. In this case, you can manage VoIP incoming calls easier. You can directly answer a VoIP incoming call when your mobile is locked or answer a second call during VoIP conversation.
With the native call integration, OpenTouch Conversation calls are listed in the native call history of your iPhone (and of course in the history of the OpenTouch Conversation).

You can also trigger some outgoing calls from your native contacts or native call history.

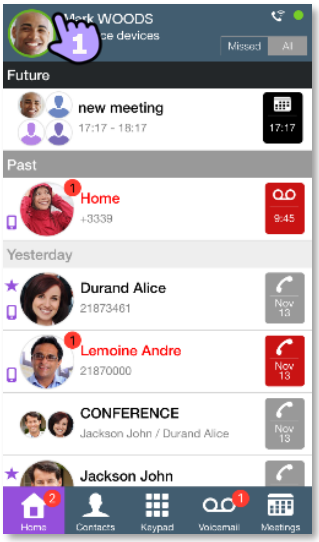
## 2.4 Using a Bluetooth® audio device connected to your phone

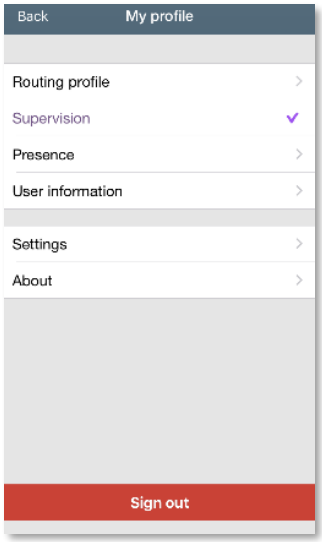
For cellular calls, use your Bluetooth® headset as you usually do.
For VoIP calls, we recommend to control the OpenTouch Conversation application directly from your smartphone.

# 3 Settings

## 3.1 My profile

1- Open your OpenTouch profile (the display depends on the system configuration):
   - Call Routing.
   - Manager/Assistant filtering (optional).
   - Activating / deactivating the hunting group feature (optional).
   - Activate / deactivate supervision feature (optional).
   - Change your presence status.
   - Display your user information.
   - Access to settings.
   - Software version (About).
   - Sign out.



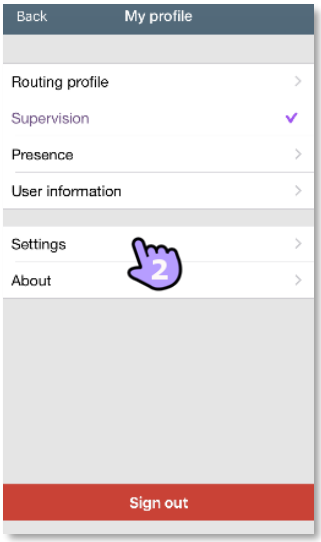



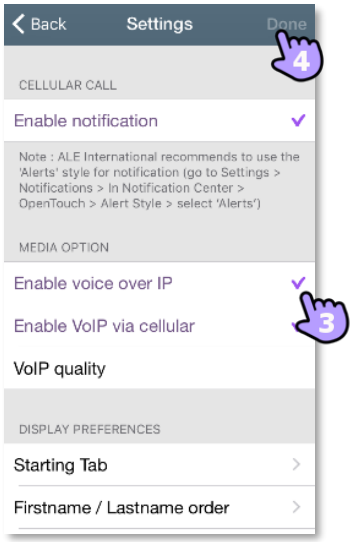

## 3.2 Activate / deactivate VoIP feature

1- Open your OpenTouch profile.
2- Access to settings.
3- Activate / deactivate VoIP feature. Activate/deactivate VoIP feature via cellular network.
4- Apply.

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

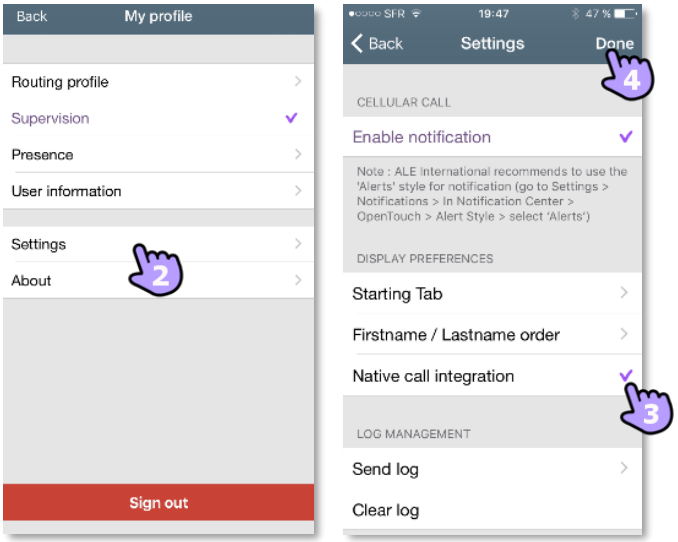
By default, the VoIP setting is activated.



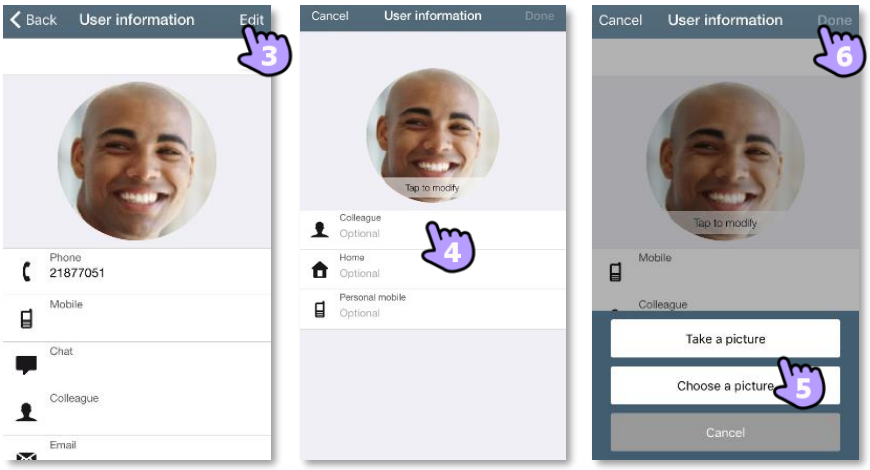
## 3.3 Activate / deactivate Native call integration (optional, depending on system configuration)

1- Open your OpenTouch profile.
2- Access to settings.
3- Activate / deactivate Native call integration.
4- Apply.



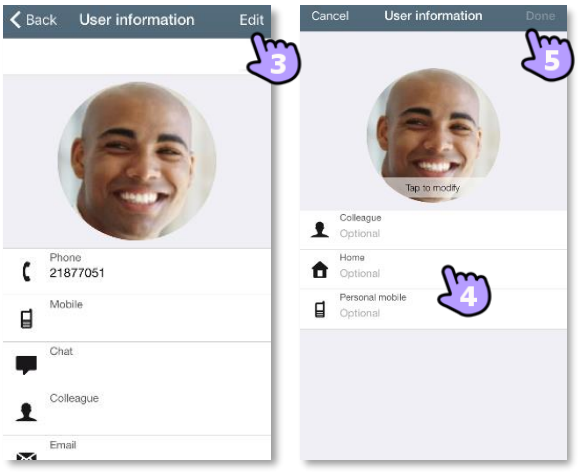

## 3.4 Change your photo / avatar

1- Open your OpenTouch profile.
2- Display your user information.
3- Select the edition mode.
4- Tap on your current photo/avatar to change it.
5- Select your new picture.
6- Apply.




## 3.5 Add personal numbers

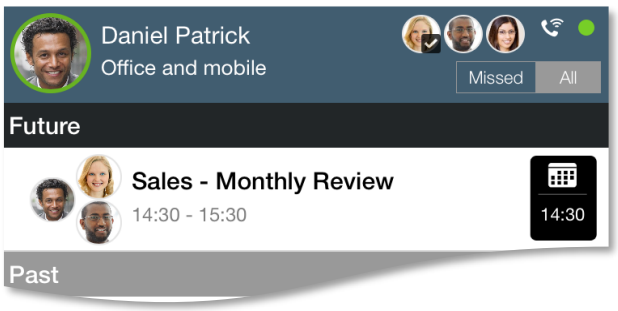
1- Open your OpenTouch profile.
2- Display your user information.
3- Select the edition mode.
4- Enter desired personal numbers (colleague, home, personal mobile).
5- Apply.

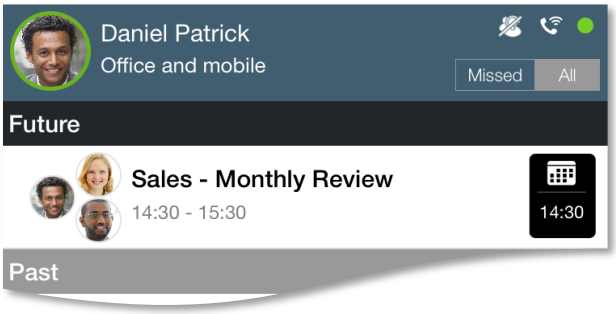


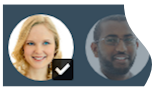
## 3.6 Manager/Assistant (optional, depending on system configuration)

This function is available for users in a management role. It allows a manager to delegate calls towards an assistant depending on the selected filter.

### 3.6.1 Presentation

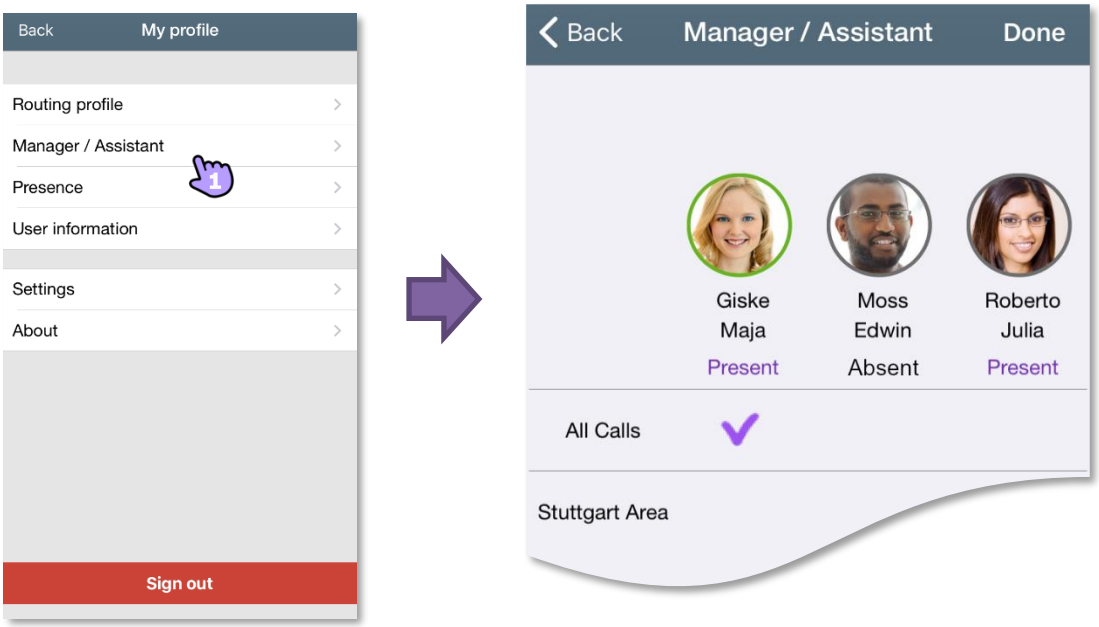



| | |
|---|---|
| • A manager can have several assistants.<br>• Photos/avatars of registered assistants are displayed in the 'Me Area'.<br>If the assistant is currently absent, the avatar is grayed (manager/assistant presence). The manager/assistant presence indicates if the assistant is available to assist you and is different than OpenTouch rich presence.<br>A tick on a photo/avatar indicates an active filtering rule with this assistant. |  |
| • This icon indicates that the list of assistants view is incomplete. Select the manager/assistant menu to open the complete view. | ••• |
| • This icon is displayed when no filtering rule is activated. | |

### 3.6.2 Complete view and filters

Select the manager/assistant menu in order to view or change the filtering rules as necessary.



- All assistants are listed including also their rich presence and absence information.
- All available filters are listed (One line per existing filter). Filters depend on the system configuration and are defined by the administrator.
- A filter can be assigned to one assistant only.

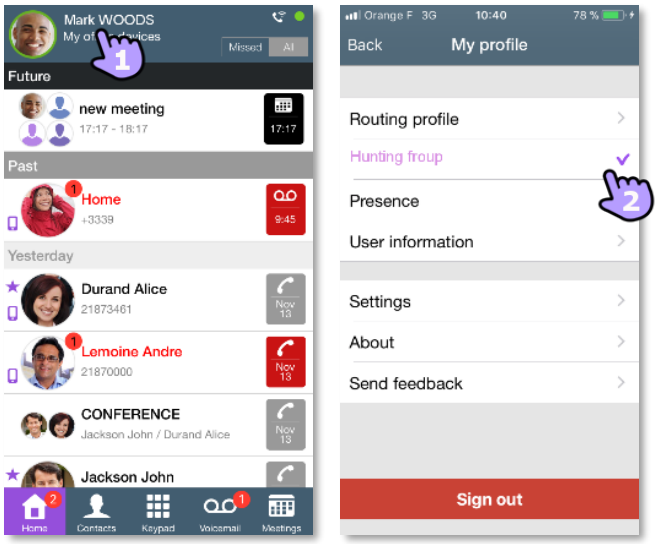
In the example, Maja and Julia are present. All incoming calls are filtered by Maja. It is possible to filter calls from the Stuttgart area via either Edwin (when back) or Julia. You can unselect all filters if needed.

## 3.7 Hunting groups (optional, depending on system configuration)

The hunting group enables calls to be distributed from from a single number to a group of several phone numbers. If your phone number is part of a hunting group, it can be reached via the hunting group number. You can take a call from all your compatible devices (mobile, desk phone or personal computer if available). You can activate or deactivate this feature from your compatible devices. When you are in the hunting group, a specific icon is displayed on your homepage. Belonging to a group does not affect the management of direct calls. A specific telephone within a group can always be called by using its own number.

To enter into or to leave your hunting group from your mobile, activate or deactivate the feature

1- Open your OpenTouch profile.
2- Activating / deactivating the hunting group feature.
3- A specific icon is displayed on your home page if the feature is activated.

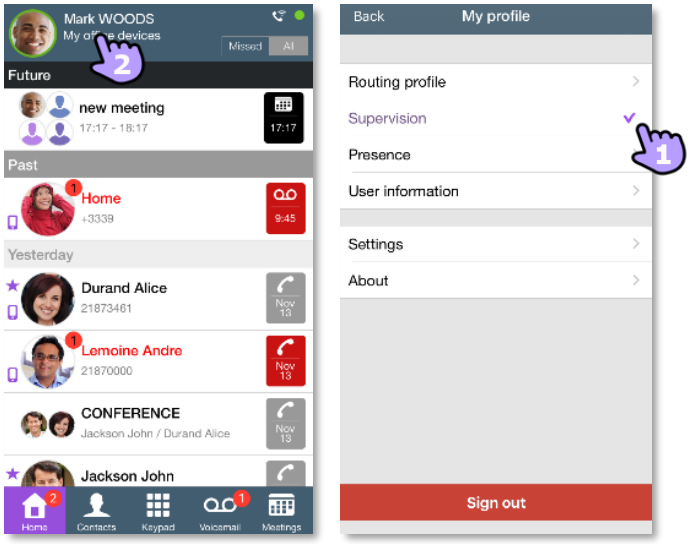


## 3.8 Supervision (optional, depending on system configuration)

Your business phone number can be supervised. This means that your incoming calls can be picked up by a supervisor when you are absent, busy or off-site.

1- Open your OpenTouch profile.
2- Activate / deactivate supervision feature.
3- A specific icon is displayed on your home page if the feature is activated.

If your phone is supervised, the call log displays the name of the supervisor who has picked up your call.



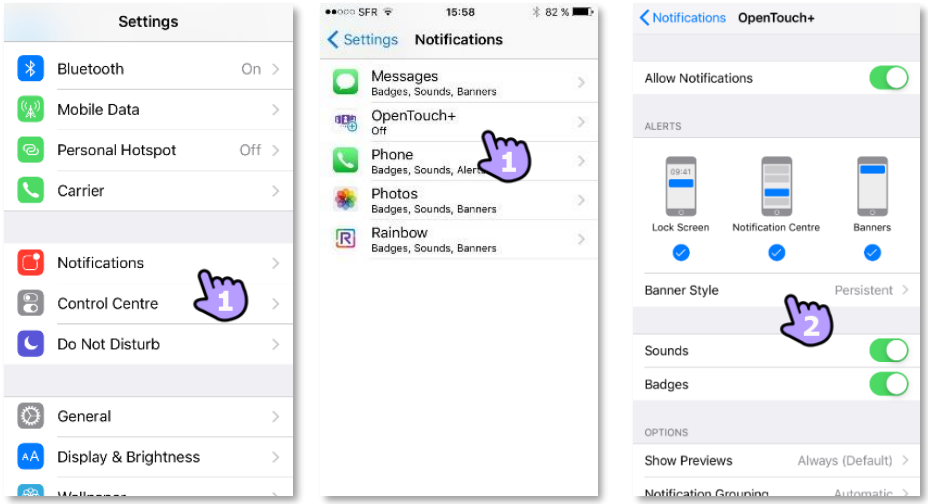

## 3.9 Settings

| | |
|---|---|
| Enable notifications | When the OpenTouch Conversation application receives an event such as a missed call or a new voicemail message, you can be alerted by a notification, sound or vibration. The sound and vibration depend on the audio configuration of your cell phone. |
| Voice over IP | Activate / deactivate VoIP feature. |
| VoIP via cellular network | Activate / deactivate VoIP via cellular network |
| VoIP quality | Display network quality for voice over IP calls. |
| Display Firstname / Lastname | Define how the name of your contact is displayed. |
| Starting Tab | Define which tab is open at start-up. |
| Send log | Send saved logs by email for support. |
| Clear log | Delete log. |

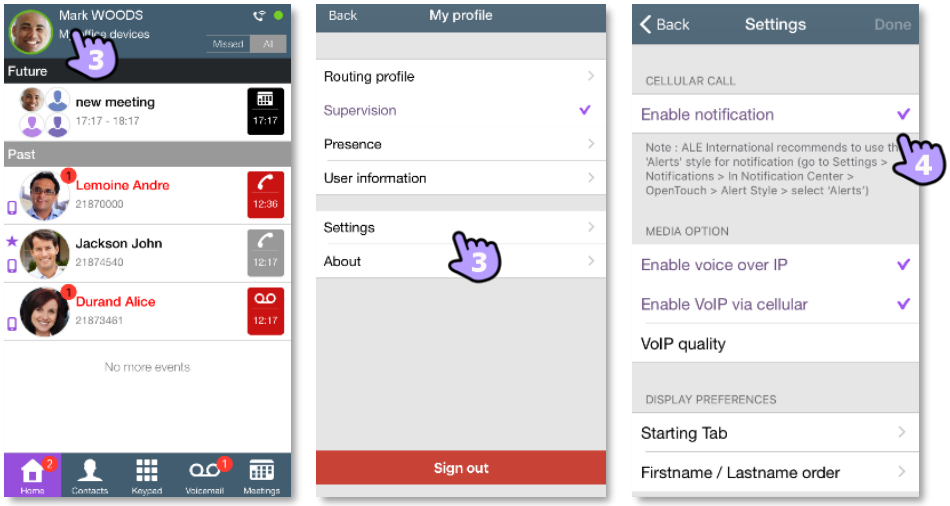
## 3.10 Notifications

**We recommend configuring notifications as follows.**

1- Open iPhone notification settings for OpenTouch Conversation.
2- We recommend using 'Persistent' banner style for OpenTouch notifications.

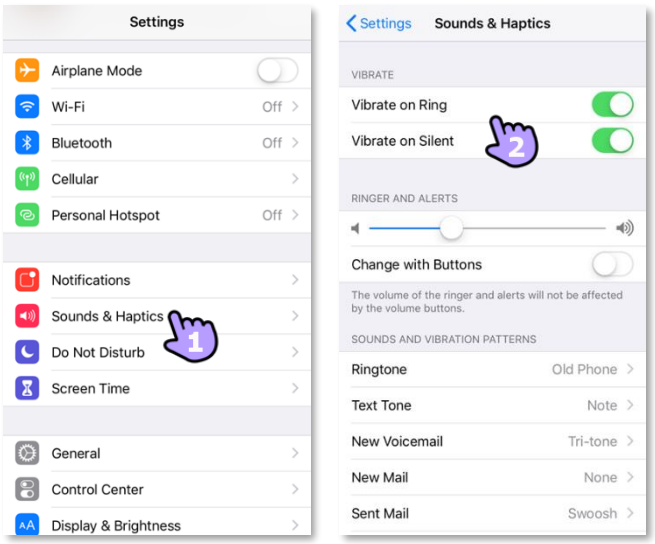


3- Open the OpenTouch® Conversation settings.
4- Ensure that enable notification is checked.




## 3.11 Vibration settings for incoming calls

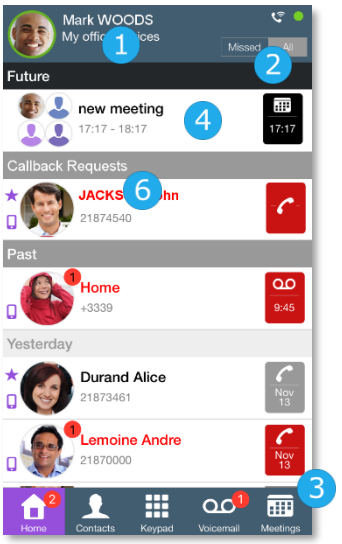
To configure your mobile to vibrate while ringing and/or on silent when receiving an incoming call (VoIP or cellular mode), you have to activate this feature in the iPhone settings.




1. Open the iPhone sounds settings.
2. Select vibrate on ring and/or vibrate on silent.

# 4 Homepage

## 4.1 Homepage description



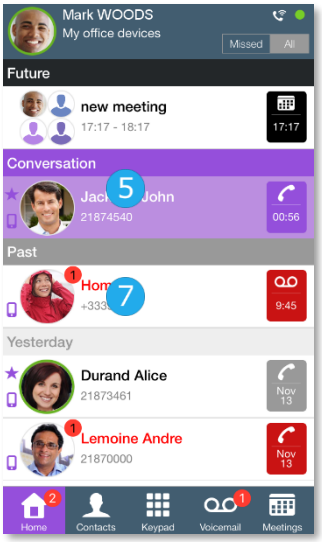

1 My profile: settings and information about the user.

2 Display of all conversation logs. Display of missed conversations. Display of callback requests.

3 Tab

- Conversation wall. The number of new events is displayed.
- Contacts and favorites. Depending on the system configuration, you can manage who can see your presence.
- Dialer.
- Voicemail access.
  You have unread voice messages (the number of unread messages is displayed).
- Meeting.

## 4.2 Conversation wall (History)




Conversation Wall contains the history of all your conversations.
The Wall is divided into 4 parts:

4 Future meeting if managed by your system.

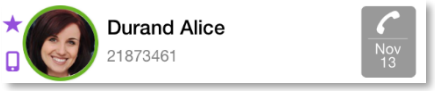
5 Conversation in progress.

6 Callback requests.

7 Past conversations.
All conversations are sorted by date: today, yesterday, this week, last week and before.

How to understand the conversation wall:
Each item represents a conversation log by user, by time slot and by the corresponding number of unread events.

- Red badge: missed or new events.
- Purple badge: ongoing conversation.
- Grey badge: past event.
- Black badge: future event (meeting).
- Conversation.
- Visual Voice Mail.
- Instant messages.
- Meeting.




: This icon indicates a contact from the local directory of the mobile.

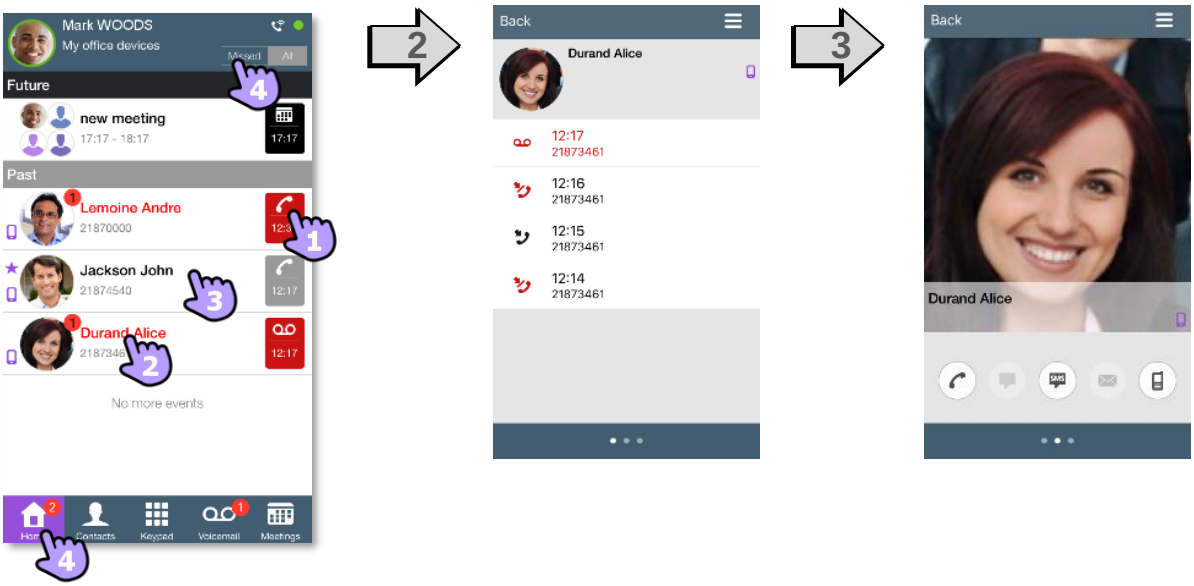
: This icon indicates a favorite contact.

The colored circle around the avatar shows the contact's present status.

| | |
|---|---|
| Selected routing profile with the mobile has no ringing on incoming calls. | |

The action on a contact depends on how you select it.

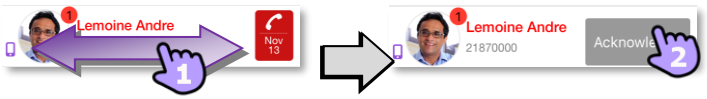
1- Select the badge to direct call the displayed number.
2- If you select an unread event, you open the history card directly.
3- If you select a read event, you put your contact on the stage.
4- To display new missed calls only, select the appropriate filter or tap on the conversation wall icon ( ).




### 4.2.1 To acknowledge a missed call

If an item is marked as a missed event, you can acknowledge the event.
A conversation log is acknowledged if all events for that item are acknowledged.

1- Swipe right on the item.
2- Acknowledge the event.




A single event is automaticaly acknowleged when consulting.

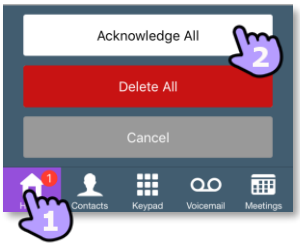
### 4.2.2 To delete one conversation log

You can delete a conversation log if it is acknowledged.

1- Swipe right or left on the item.
2- Delete the conversation log.

### 4.2.3 To acknowledge all missed calls

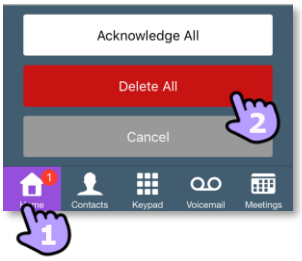
1- Press the home page icon.
2- Acknowledge all missed calls.
Confirm the acknowledgement of all missed calls.




### 4.2.4 To delete all conversations in the wall

You can delete all conversations if all events are acknowledged.

1- Press the home page icon.
2- Delete all conversations.
3- Confirm the deletion.




## 4.3 Status icons

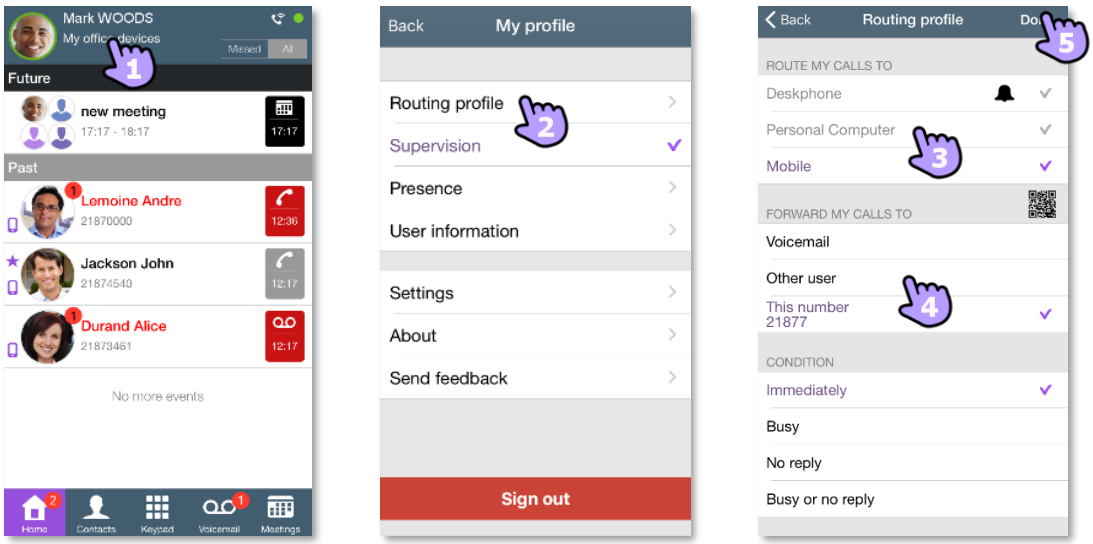
| | |
|---|---|
| Application is connected and fully available. | |
| Application is disconnected. The application does not display any new event. You cannot access any of the services. | |
| Application is connected but some services are not accessible. | |

| | |
|---|---|
| Supervision activated (your business phone is supervised). | |
| Activating Hunting group. | |
| Voice over IP activated. | |
| Voice over IP deactivated. | |
| Selected routing profile with no mobile ringing on incoming calls. | |

# 5 Call Routing

## 5.1 Select your routing profile

The call routing profiles displayed depend on your configuration and installation (main phone and other registered devices).

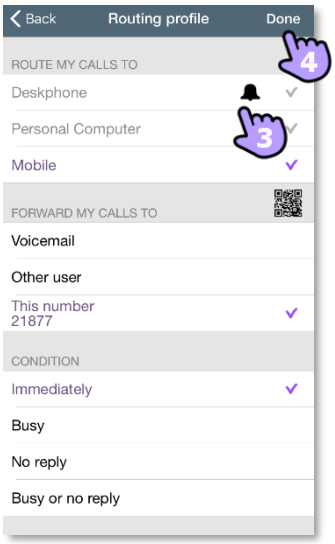



1- Open your OpenTouch profile.
2- Open the routing profile management.
3- Route my calls to
   Select which devices will ring when you receive an incoming call. All available devices which you can use to make a call, are listed. The list of devices depends on the system configuration. If you are using a multi-device feature, the main device and all secondary devices (up to 4 devices) are displayed. Some devices are mandatory and cannot be unchecked. For other numbers, you can choose which devices can receive them.
   For example, select a profile between:
   - Desk phone.
   - Personal Computer.
   - Mobile.
   - DECT.
   - Home phone.
   - Other number.
4- Forward my call to
   Forward all incoming calls to:
   - Voicemail.
   - Other user: to a defined user.
   - This number: to a defined number.

   With the following condition:
   - Immediately (no condition).
   - If busy.
   - If no reply.
   - If busy or no reply.
5- Apply.
   The active routing profile is displayed in the user banner.

If you selected a routing profile with mobile not ringing, a specific status icon is displayed.

## 5.2 Mute or unmute the ringing of your DeskPhone

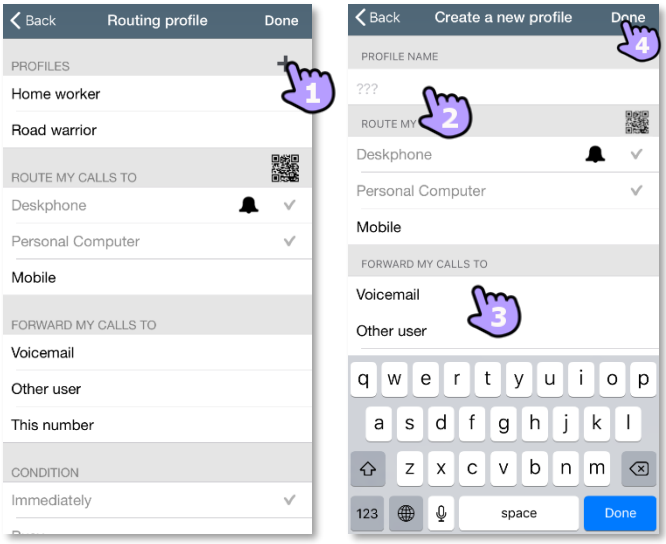



1. Open your OpenTouch profile.
1. Open the routing profile management.
2.
   Mute or unmute the ringing of your Deskphone by selecting the icon. This can be useful if you do not want to disturb the people around you. You can also mute the ringtone of your desk phone when you are away from your office.
3. Apply.

## 5.3 Define and save routing profiles

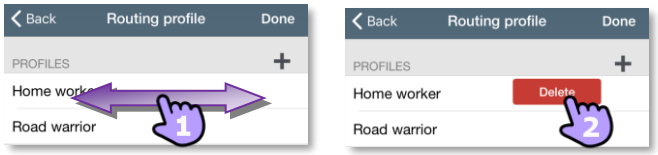
This feature depends on the system configuration (user profile) and is controlled by the IT manager.
The routing profile is enhanced by the capability to define and save personal profiles.

### 5.3.1.1 Create a new profile



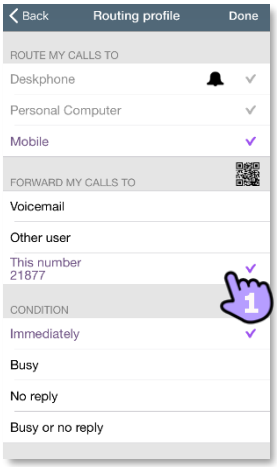

1- Edit the new routing profile.
2- Enter name of the new profile.
3- Define your routing profile by selecting available options.
4- Create the new profile.
   The new profile is displayed on the list of routing profiles.

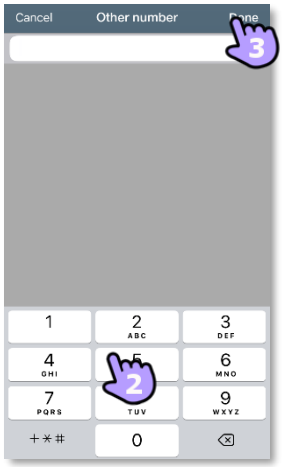
### 5.3.1.2 Delete a profile




1- Swipe right or left on the item.
2- Delete the profile.

## 5.4 Define numbers (This number)

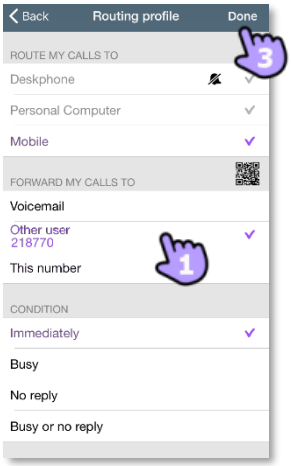


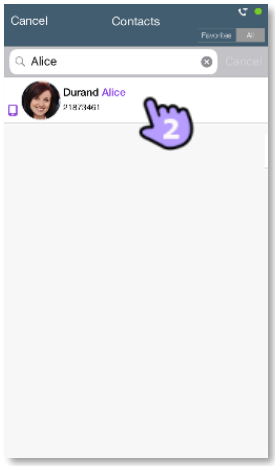




1- This number.
2- Enter a phone number then apply.
3- Apply.

## 5.5 Define user (Other user)

Select or define a user to forward your calls on to.

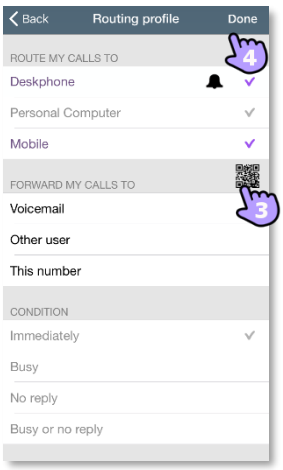



1- Other user.
2- Select a user in the search result (this user must be an OpenTouch user, registered on the same system).
3- Apply.

## 5.6 Change routing profile via QR code

You can modify your current ringing call routing profile with any internal desk phone which is prepared with QRcode. One hour after the routing change, the application will prompt the user to keep this configuration or get back to the initial routing state.




You are facing a QR code of the internal desk phone.

1- Open your OpenTouch profile.
2- Open the routing profile management.
3- Define the new internal number by scanning the QR code.
4- Apply.
Your incoming calls will ring on this new desk phone.

# 6 Presence

The colored circle around the avatar shows the contact's present status.

Available

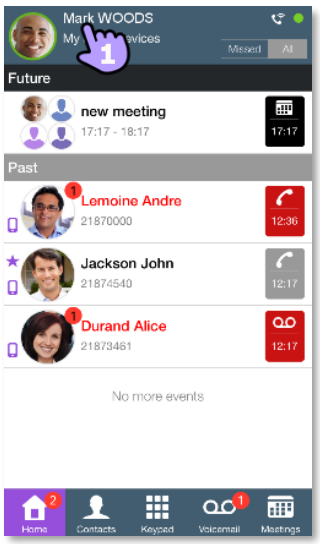
Busy

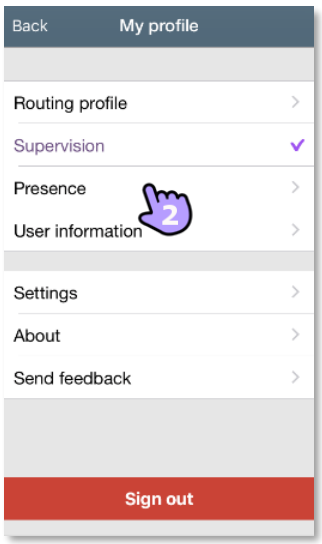
Be right back

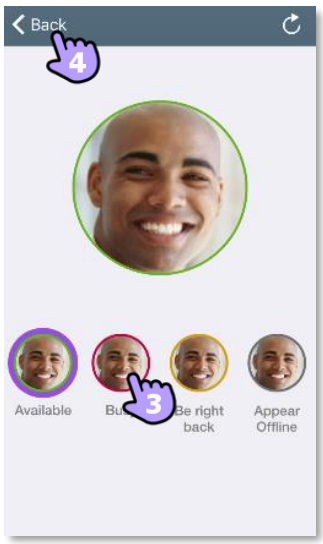
Appear Offline

To get the last status presence, remember to refresh the conversation history tab or the contact tab.
Depending on the system configuration, you can manage who can see your presence (see: Manage your favorites, followers or blacklist).

## 6.1 Change your presence status



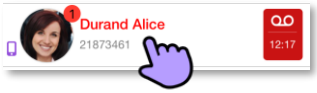




1- Open your OpenTouch profile.
2- Access to the presence feature.
3- Change your presence status.
4- Apply.

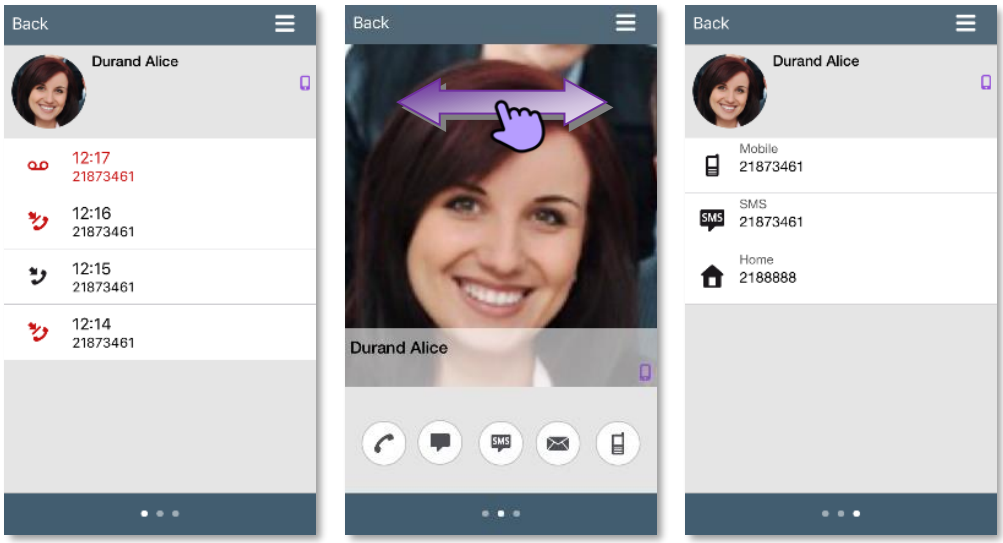
# 7 Contact card

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




A card contains 3 pages

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.
  The color bar under the photo shows your contact's presence status (Available, Be right back, Busy, Appear Offline).
  Make a call with the default business number.
  Send instant message.
  Send SMS.
  Send e-mail.
  Make a call with the mobile number.
  Icon is inactive (grayed out) when the corresponding contact detail is not provided.
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.



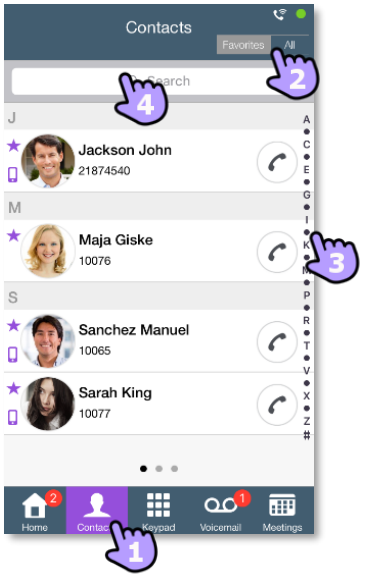

**From the conversation history page:**
When you select an event in the conversation history page, all available actions are displayed. The actions you can perform depend on the event and configuration:

- You can play a voicemail or call the originator of the voicemail.
- You can acknowledge or delete an event.
- You can call the contact back from your cell or other pre-defined phone.
- You can call the contact back in a private call.

# 8 Contacts and favorites

Favorites give you faster access to your preferred contacts. A favorite contact is a typically a corporate colleague whose real-time presence you can see.

1- Open your contact tab.
Your favorite contacts are displayed.
Favorites give you faster access to your preferred contacts.
A favorite contact is indicated by an asterisk ★.
2- To display all your contacts or just your favorites, select the corresponding filter.
3- Contacts are sorted alphabetically. Select a letter to display contacts whose name starts with the selected letter.
4- Search for a contact in your local contacts or in a corporate look-up by using the search interface (see “Search a contact”).

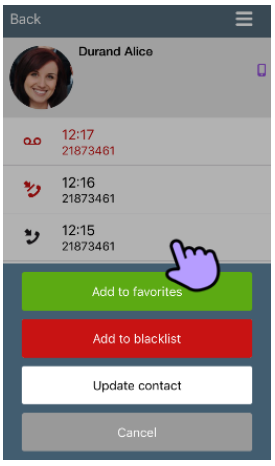



The contact tab also includes some temporary entries (corporate look-ups, incoming or outgoing calls) thanks to a local cache mechanism. This cache mechanism is cleared when you exit the application.

## 8.1 Add a favorite contact

The contextual menu displays the feature available on your system.

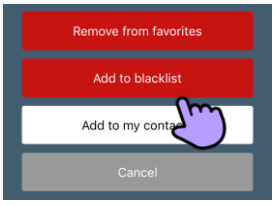
- Open a contact's card.
- Open the contextual menu.
- Add the contact to your favorites list.




Use the same procedure to remove a contact from your favorites. The contact is not deleted.

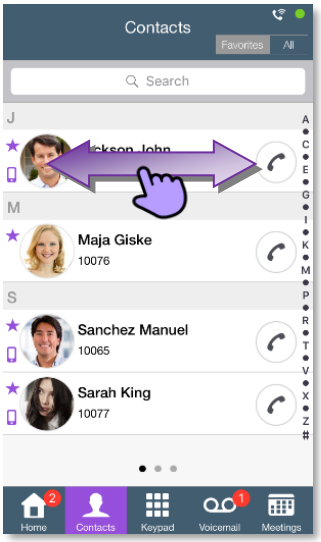
## 8.2 Add a contact to your local directory

- Open a contact's card.
- Open the contextual menu.
- If the contact is not in your local directory, you can add it.



## 8.3 Manage your favorites, followers or blacklist

The visibility of this feature depends on the system configuration managed by your administrator
If the 'Privacy' option is enabled in your system, you can manage favorite contacts who can see your presence and can start a collaboration session as instant message.




Open your contact tab. Select the favorites filter. The favorites tab contains 3 pages: “*Contacts*”, “*Followers*”, “*Blacklist*”. Swipe right and left to navigate between the 3 pages.

- A contact is a favorite. All favorite contacts are listed in the tab: “*Contacts*”. If your favorite is a corporate colleague, you can see his or her real-time presence. You can start a collaboration session as an instant message.
- A follower is a corporate colleague who has added you as favorite and can see your real-time presence. He or she can start a collaboration session as an instant message. All followers are listed in the tab: “*Followers*”. At any time, you can discard a follower.
- A blacklisted contact is a corporate colleague who has added you as favorite but he or she cannot see your real-time presence because you don't accept him or her as a follower. A blacklisted contact sees your presence as offline and cannot start any collaboration session with you. An instant message will be sent as an offline message. All blacklisted contacts are listed in the tab: “*Blacklist*”.

Contact your administrator for more information.

### 8.3.1 Favorite contacts

When you add a contact as a favorite, he or she is added to the list of your favorites and a follower notification is sent to the contact (To add a contact as a favorite, see section: 8.1). He or she is added to the list of your favorites. You can see his or her real-time presence unless he or she decides to add you to the blocked contact list.

### 8.3.2 Accept or reject a new follower request

Swipe right or left until you reach the page: “*Followers*”. A contact wants to add you to his or her list of favorites. You receive his or her notification as a 'follower' request. Each new 'Follower' request is displayed at the top of the tab: “*Followers*” (in the section: “*New followers*”).

| | |
|---|---|
| | Block the contact. The contact is placed in the 'Blacklist' list, sees your presence as offline and cannot start any collaboration session with you. |
| Accept new followers | When you exit the 'Folowers' tab, you accept all new followers to see your real-time presence. A warning is displayed before acceptance. Contacts are added to your list of followers. |

You can block the contact by opening the contact card:

- Open a contact's card.
- Open the contextual menu.
- Add the contact to the blacklist.

### 8.3.3 Unblock a contact

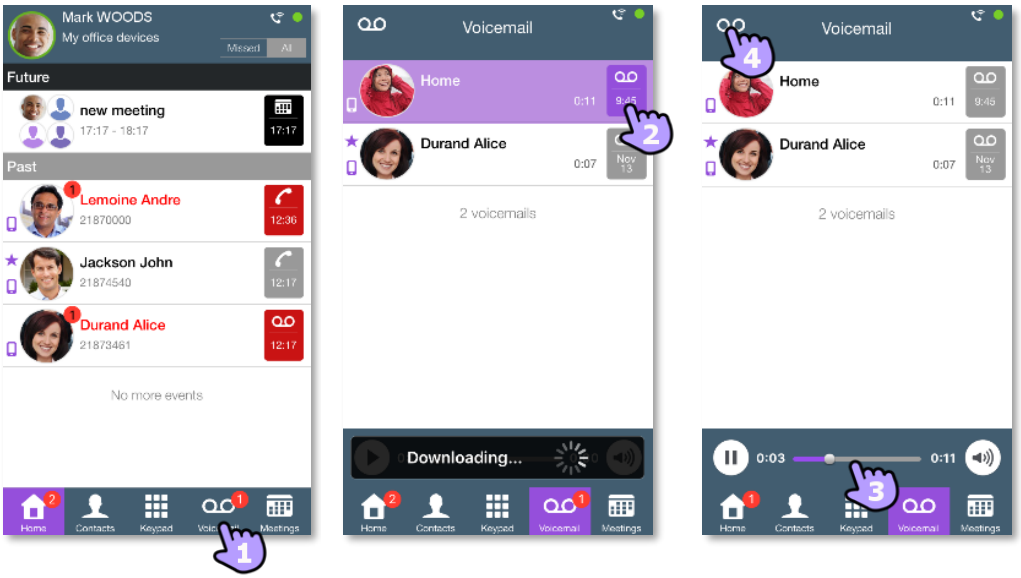
Swipe right or left until you reach the page: "*Blacklist*".
All blocked contacts are listed in the tab: "*Blacklist*".

| | |
|---|---|
| ✓ | Unblock the corresponding contact. The contact is placed in the 'Followers' list and sees your real-time pressence. |

You can unblock the contact by opening the contact card:

- Open a contact's card.
- Open the contextual menu.
- Remove the contact from the blacklist. The contact is placed in the 'Followers' list and sees your real-time pressence.

## 9 Visual Voice Mail



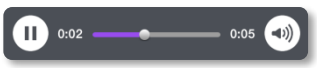

1- You have unread voice messages (the number of unread messages is displayed). Open your visual voicemail. All read and unread messages are displayed.

> If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application.

2- Select the message to listen to.

3- From the selected message you can:

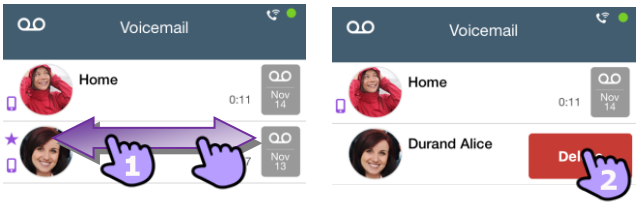
- Move the cursor along the play bar to go forward or backward in the message.
- Pause or resume the message.
- Activate/deactivate loudspeaker.




4- Customize your voice mail.

**To delete a message**

1- Swipe right or left on the item.
2- Delete the message.
You cannot delete an unread message.



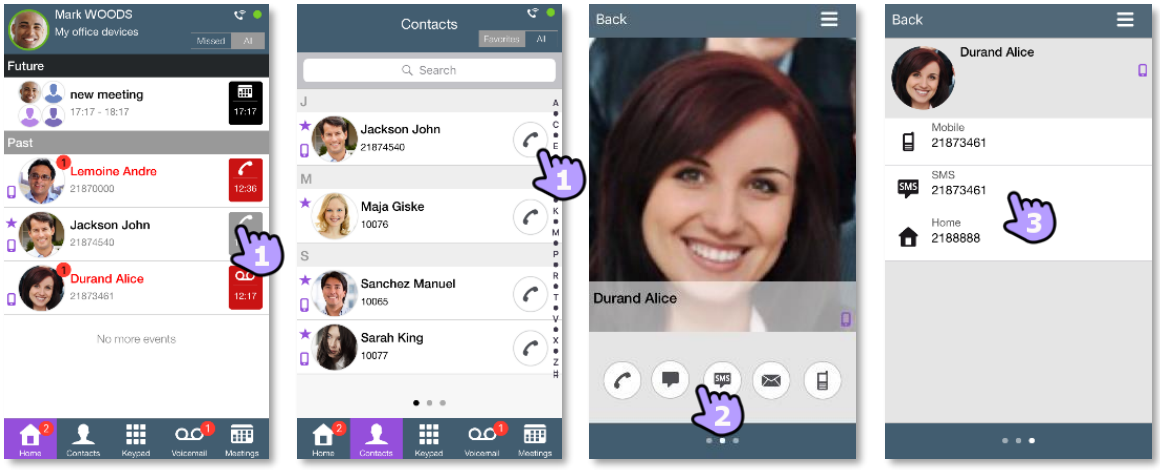

The Voicemail tab is not visible when a voicemail box has not been created for the end-user.

## 10 Conversation

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

### 10.1 Set up a conversation with a contact

- You can make a call from the conversation wall, visual voicemail tab, instant messaging tab or a scheduled meeting, if available on your system.
- You can make a call from a search on your local contacts or from a corporate look-up.
- You can make a call from the contact card (details or history).

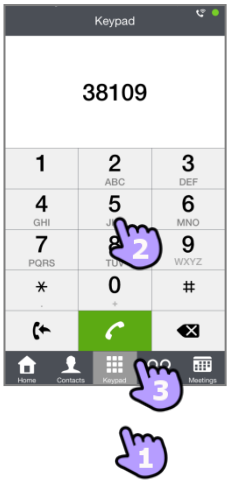



How to set up a conversation with a contact

1- Call directly using the displayed phone number.
2- Set up different types of conversation (if available).
3- Call using a specific phone number from the contact card.

## 10.2 Make a conversation by entering a number

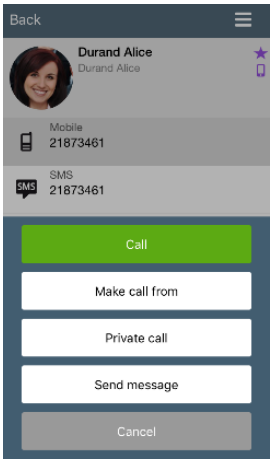
1- Open the keypad.
2- Enter your contact's number.
3- Make the call.




## 10.3 Make a private call

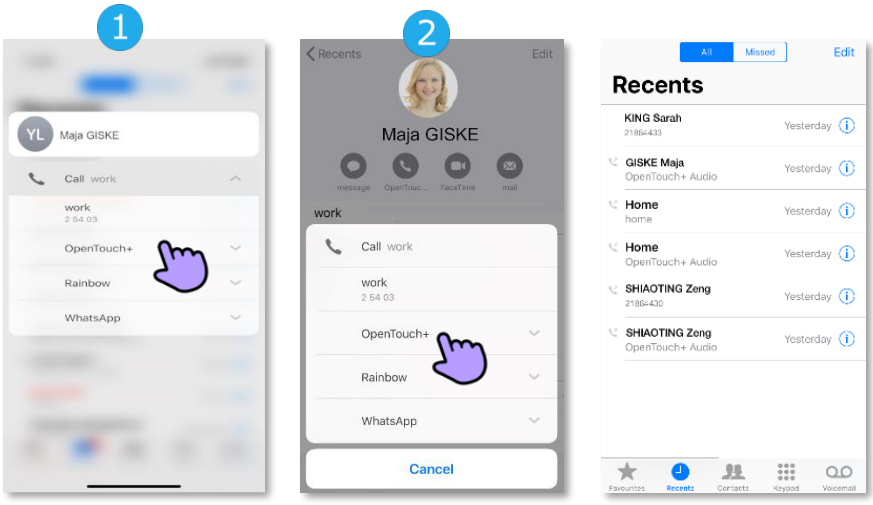
By default, you make business call with the OpenTouch Conversation. But you can make private call. In this case, you call your contact without going through your company telephone system.

Pressing the phone number (from contact card details) allows you to make a private call.




## 10.4 Call from native call log or contacts (native call integration)

You can make a call with OpenTouch Conversation from the iPhone call log or contacts.




1- From the call log (from iPhone 7 and higher):
   - Long press on your contact to display all applications available for the communication.
   - To make the call, select OpenTouch on the displayed pop-up.
   - Select the number to call with OpenTouch Conversation. The selected number will be associated to an OpenTouch Conversation.

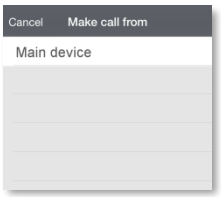
2- From the contact card:

- Long press on the call icon to display all applications available for the call.
- Select OpenTouch on the displayed pop-up.
- Select the number to call with OpenTouch Conversation. The selected number will be associated to an OpenTouch Conversation.

Each call made must be individually associated to OpenTouch.
The application associated to the number used to make the call is stored. The name of the default application is displayed under the name/number of the contact in the native call log, and under the call icon in the native contact card (for example, OpenTouch).
If you want to call back your contact in the same way, just select your contact in the iPhone call log or press the call icon in the iPhone contact card.
Follow the same procedure to change the current application, by selecting another application in the pop-up.

## 10.5 Dial from another device (one-shot)

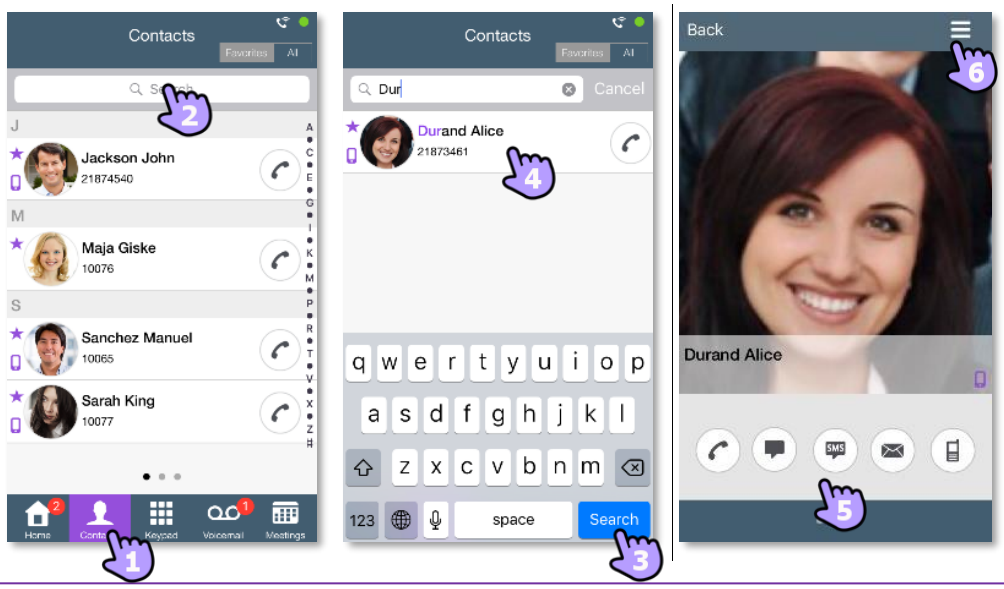
This feature provides the capability to launch a single call from your main device. When the conversation is ended, the routing profile automatically returns to its previous state.




- Press the phone number to call.
- *Make call from*
- Select the device in the list.

## 10.6 Search a contact

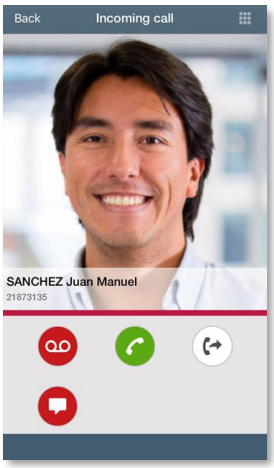
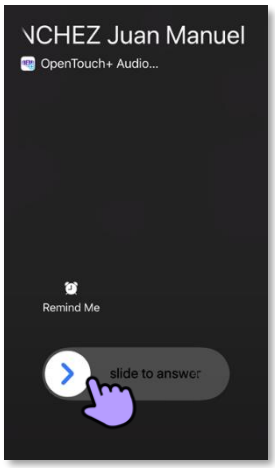
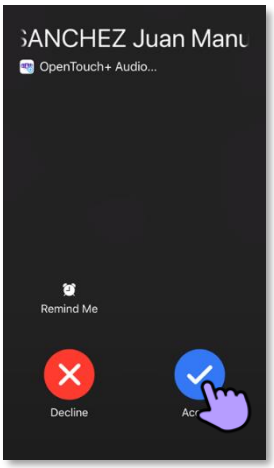
1- Open your contact tab.
2- Enter the name of your contact.
Search is immediately done on local contacts (predictive search). You can base your search on 2 strings for better results.
3- To perform a corporate look-up, select the specific search button.
4- From the search result, select the contact you are searching for.
5- Call your caller.
6- If the contact is not in your local directory, you can save them as a new local contact.



## 10.7 Receiving a conversation

The application behaves differently if the application is in foreground or background or if the phone is locked. Depending on your connection mode (VoIP or Cellular), you can answer a call in the following ways.

### 10.7.1 VoIP mode

| IN THE FOREGROUND | LOCKED | IN THE BACKGROUND |
|---|---|---|
|  |  |  |
| Call is presented directly in the OpenTouch Conversation application (i.e. not the native dialer). | Slide to take the call with the OpenTouch Conversation. | Tap the 'Accept' button to take the call with the OpenTouch Conversation, or decline the call. |

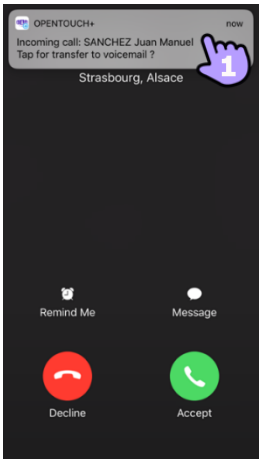
When the call is established in OpenTouch Conversation:

| | |
|---|---|
| | Answer the call. |
| | Forward an incoming call to business voice mail. |
| | Decline the call with an instant message (available with a caller registered on the same system). |
| | Divert call to a colleague (defined in user information). |
| | Mute the ringing by pressing the on/off button of your mobile. Your phone no longer rings but the call is still presented. You can still answer the call after you have ignored it. |

### 10.7.2 Cellular mode

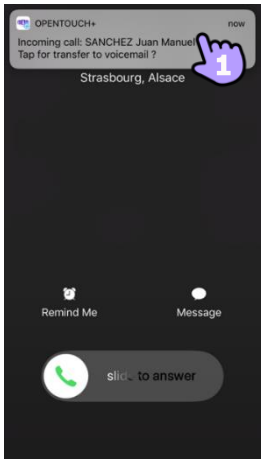
The application behaves differently if the application is in foreground or background or if the phone is locked.

IN THE FOREGROUND OR BACKGROUND

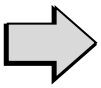


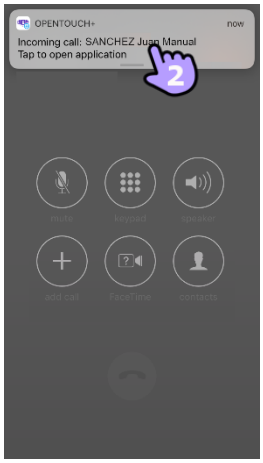

A pop-up is displayed with information on the incoming call. Take or decline the call or forward the call to your business voice mail.

LOCKED




A pop-up is displayed with information on the incoming call. Take the call or forward the call to your business voice mail.






After taking the call in the native interface, a pop-up notification will let you switch the call to the OpenTouch Conversation.

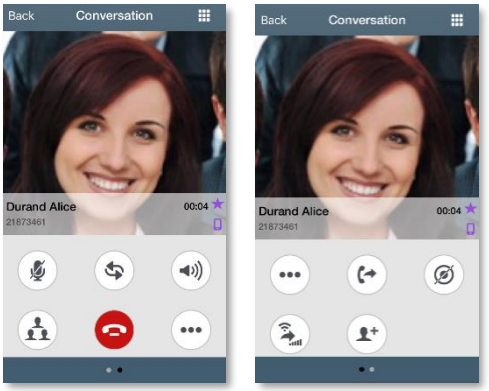
| | |
|---|---|
| | Answer the call by tapping the call icon. Call is presented in the native dialer (Apple constraint). |
| | Answer the call by sliding the call icon. Call is presented in the native dialer (Apple constraint). |
| | Tap on the pop-up to forward the incoming call to your business voice mail. |
| | Tap on the pop-up to take the call with the OpenTouch Conversation. In cellular mode, the call is first presented in the native dialer. Switch to the OpenTouch Conversation by tapping the notification. |
| | Decline the call. |

# 11 During conversation

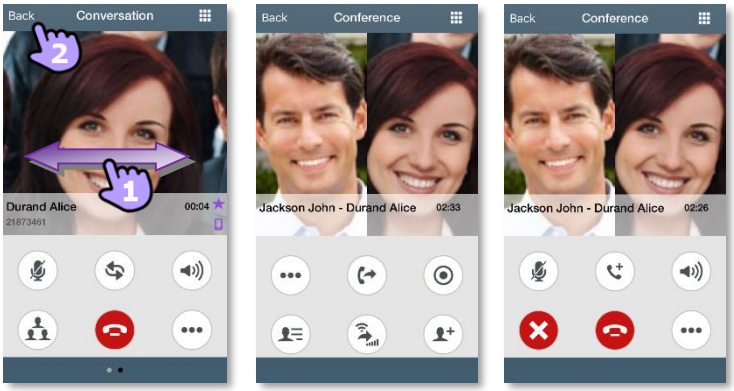
The actions you can perform during a conversation depend on the connection mode (VoIP or Cellular) and the type of conversation.

## 11.1 Screen description

You are in conversation with one contact.




You are in a call with two contacts (hold or conference).




## 11.2 Make a second call / Switching between two calls / Transfer call to your contact on hold / Three-party conference / Send DTMF

| | |
|---|---|
| Navigates between action pages when there are more than six available actions. | |
| End the active call.<br>Leave the conference (the call is still active with the other participants). | |
| Add a participant to the conversation. | |
| Put the distant on hold. | |
| Recover the call on hold. | |
| Transfer your call to another device or to an internal number via QR code. If you are using the multi-device feature, you can transfer your call to all available devices (main device, personal computer or other phone number). | |
| Display active or on-hold calls by swiping right or left. | |
| Switching between two calls. | |
| Transfer call to your contact on hold. | |
| Setting up a conference (three-party conference). | |
| List of conference participants or meeting details. | |

| | |
|---|---|
| End all conversations. | |
| During the conversation, you can check information by consulting the Conversation Wall.<br>Select the current conversation in the Conversation Wall to go back to the conversation screen. | |
| Send DTMF. | |
| Record/Stop recording the conversation.<br> This icon is displayed when recording (the recording is stored in your voicemail box). | |

## 11.3 Receiving a second business call - VoIP mode (according system configuration)

During a conversation, another person is trying to call you ›› Name or no. of the caller displayed for 3 seconds.

You are alerted by a notify ringtone (native notify ringtone defined in iPhone settings).

| | |
|---|---|
| Answer the call. The first call is on hold. | |

## 11.4 Receiving a private call during a VoIP business call

You are in a business conversation via the OpenTouch Conversation in VoIP mode. You receive a new incoming private call (not managed by the OpenTouch system) ›› The new incoming call is displayed.

| | |
|---|---|
| Accept the new incoming call and end the current business call. | |
| Accept the new incoming call and put the current business call on hold. | |
| Decline the new incoming call and transfer it to voicemail. | |

## 11.5 Audio media switch from your iPhone to any desk phone via QR code

When you are in conversation, you can switch the active audio media from your iPhone to any internal desk phone prepared with QRcode. You can find a QR code in a meeting room for example. You can use this feature to isolate you in a meeting room. When the conversation is ended, the routing profile automatically returns to its previous state.

- Select the 'Divert incoming call' icon, then scan the QR code.

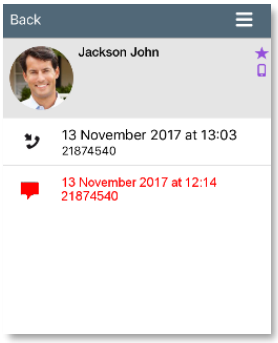
# 12 Instant messages

## 12.1 Start an instant message

An instant message is a type of conversation which offers real-time text transmission with your contact.

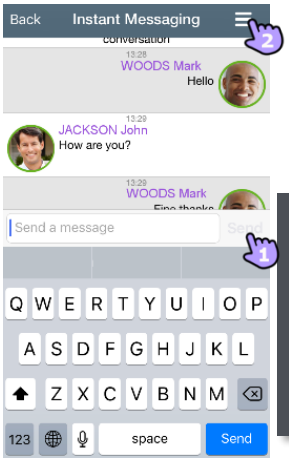
You start an instant message like other conversation from a contact card.

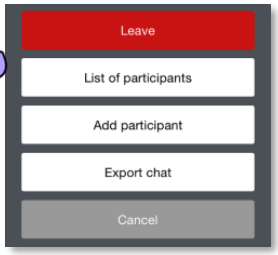
## 12.2 Receive an instant message

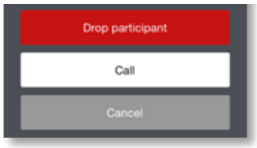



- If you are online, you receive instant messages on the Wall.
- If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.

## 12.3 During conversation




1- Send message.

2- Open the contextual menu

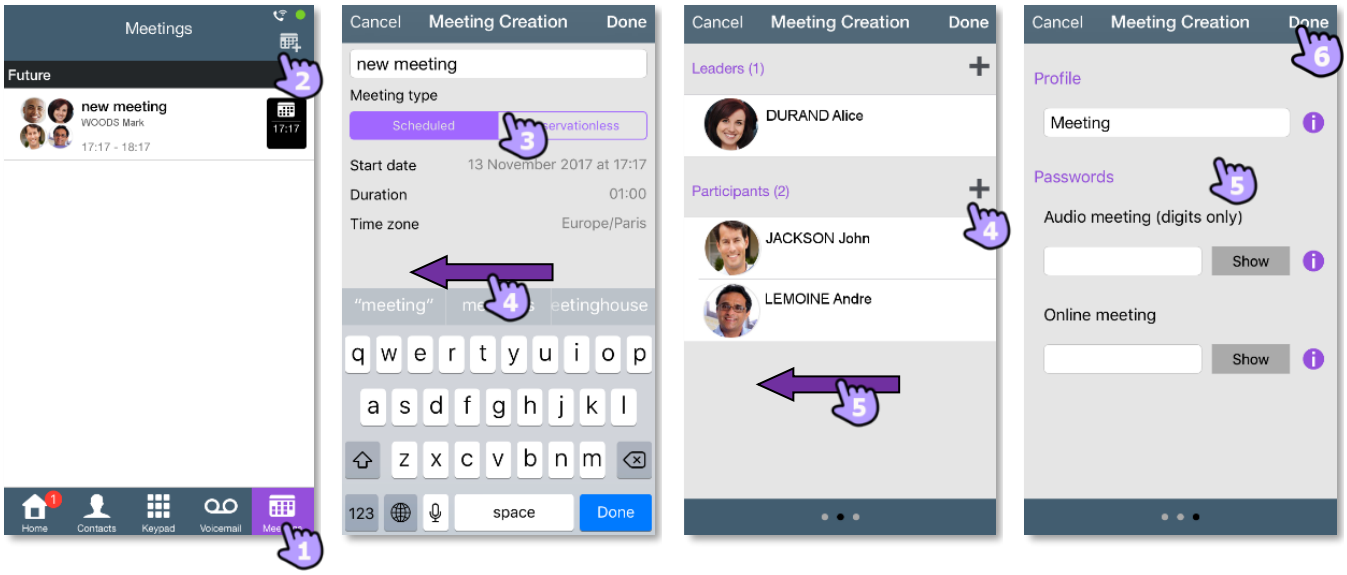
- Leave the conversation.
- Display the list of participants.
  From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
- Add a participant to the conversation.
- Export the text of the conversation.
  You can export the text of a conversation, to copy it into an email for example. The content of the conversation is copied into the clipboard. Paste the text into another application like email (long press on a text box).

From a group chat, if you want a private chat with one participant, you need to create a new IM session with only this participant.

Instant messaging feature can be deactivated by administrator if your system is using a third party instant messaging server.

# 13 Meeting

## 13.1 Create a meeting




1- Select the meeting tab.

2- Create a new meeting.

3- Select the type of meeting (scheduled or reservation less) and fill in the various appointment fields.

4- Swipe left to manage leaders and participants of the meeting.

- Add a new leader/participant *.
  A meeting leader can add or remove a participant, share a document, and cancel the meeting (depending on the OTC client).
- Remove a participant by selecting the contact in the list and pressing the corresponding menu: *Delete*.

* In the case of a local contact (phone's local contact), it's necessary to fill an IM mail address in order to add this contact to the meeting.

5- Swipe left to manage the profile and password for the meeting.

**Choose a predefined profile for the meeting:**

- Meeting: use for interactive business meetings. All licensed features are available.
- Webinar: use for a Web presentation (large events). Participants only hear and see the Web presentation of leaders.
- Training: use for a teacher-student scenario. All licensed features are available. The session ends when the teacher hangs up (leader).
- Conference call: use for a voice only conference.

**Secure access to the meeting**

- You can define a password for an audio meeting (digits only). In this case, an external user has to enter the password to join the audio meeting.
- You can define a password for an online meeting. In this case, an external user has to enter the password to join the web meeting.

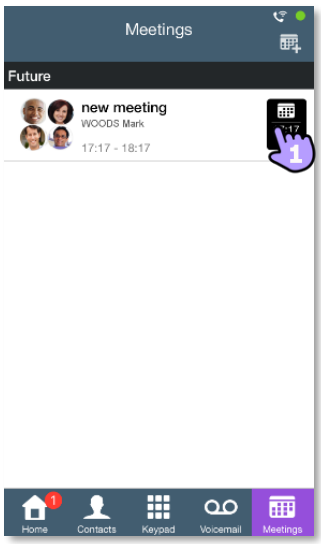
Depending on the system configuration, you may need to follow a password policy (Consult the password policy).

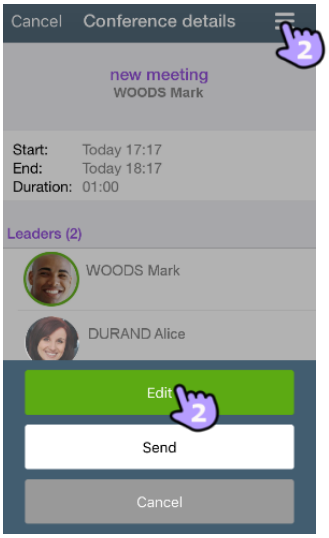
6- Confirm the meeting.

Scheduled meetings and non-reservation meetings are sorted by date in two separate sections.

## 13.2 Consult meeting list

Future scheduled meetings are displayed on the conversation wall.



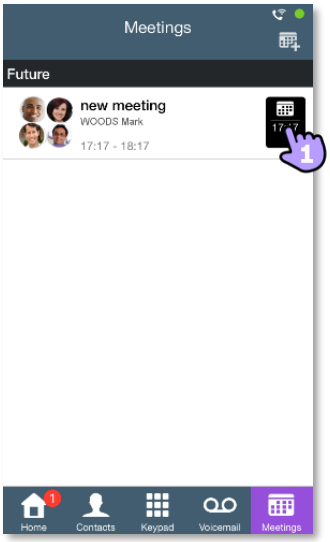

1- Open the meeting details from the conversation wall or the meeting tab.
Subject, start and end dates, duration, recurrence if any, owner, participants (with leader and participant information), calling number and SIP URI information, Access code and password (optional) are displayed in this page. The URI is the network identifier of your caller's telephone. Numbers and SIP URI can be used to join the meeting.

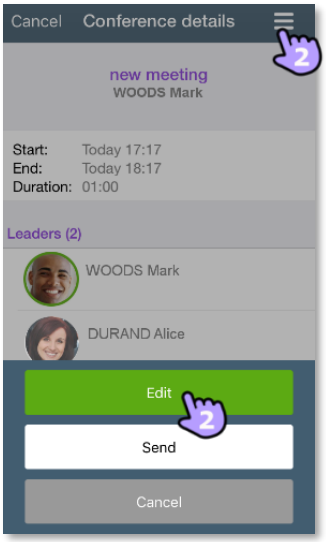
2- From this page, you can send an email containing all the information needed to join the meeting. A pop-up about leader-access-code security is displayed.

## 13.3 Modify a future meeting

1- Open the meeting details from the conversation wall or the meeting tab.

2- Edit the meeting to modify it.



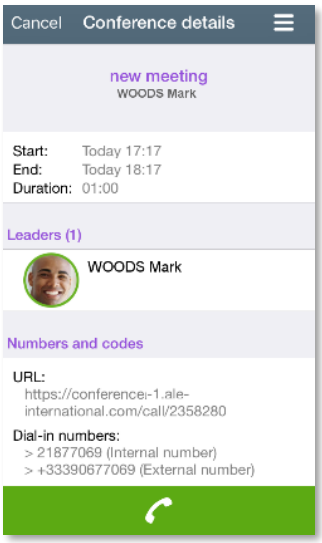




## 13.4 Start meeting

The badge becomes purple five minutes before the conference starts.
There are 3 ways to join a live conference:

- From the conversation wall, select the corresponding badge to join the conference.
- From the conference details, select the corresponding action at the bottom of the screen.

From another set, dial directly the number or the SIP URI to join the meeting. Enter access code and password if necessary. Follow instructions.




| | |
|---|---|
| Display the real-time list of participants during conference. | |

Note: sometimes, you could receive an email invitation with the OTC Web link only to join the conference from your smartphone. Open the OTC Web link in your native Safari browser and join with audio only.

## 13.5 Delete a future meeting

- Select the meeting tab.
- Swipe left or right.
- Delete the meeting.

## 14 Apple Watch

OpenTouch Conversation notifications are pushed on Apple Watch based on Apple native mechanism. By default, your Apple Watch notifications are set up to mirror your iPhone settings. If your iPhone is unlocked, you'll get notifications on your iPhone, instead of your Apple Watch. If your iPhone is locked or asleep, you'll get notifications on your Apple Watch, unless your Apple Watch is locked with your passcode.

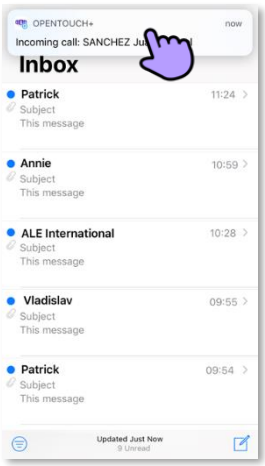
# 15 Annex– Native call integration setting is not activated (optional, depending on system configuration)

## 15.1 Receiving a VoIP business call

IN THE FOREGROUND

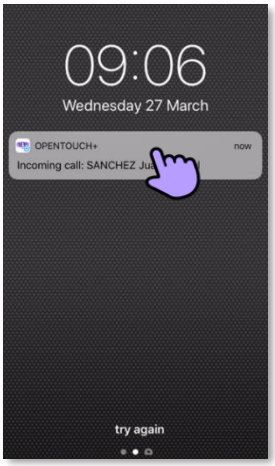
Call is presented directly in the OpenTouch Conversation application (i.e. not the native dialer).

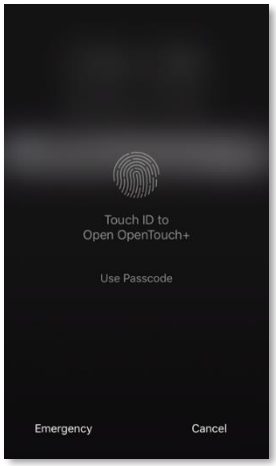
IN THE BACKGROUND




A pop-up is displayed to announce the incoming call. Tap on the pop-up to take the call with the OpenTouch Conversation.

LOCKED




A pop-up is displayed to announce the incoming call. Tap on the pop-up to take the call with the OpenTouch Conversation. Passcode or touch ID is required to unlock the iPhone.

## 15.2 Receiving a private call during a VoIP business call

You are in a business conversation via the OpenTouch Conversation in VoIP mode. You receive a new incoming private call (not managed by the OpenTouch system).
The new incoming call is automatically answered and the current business call is put on hold.

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