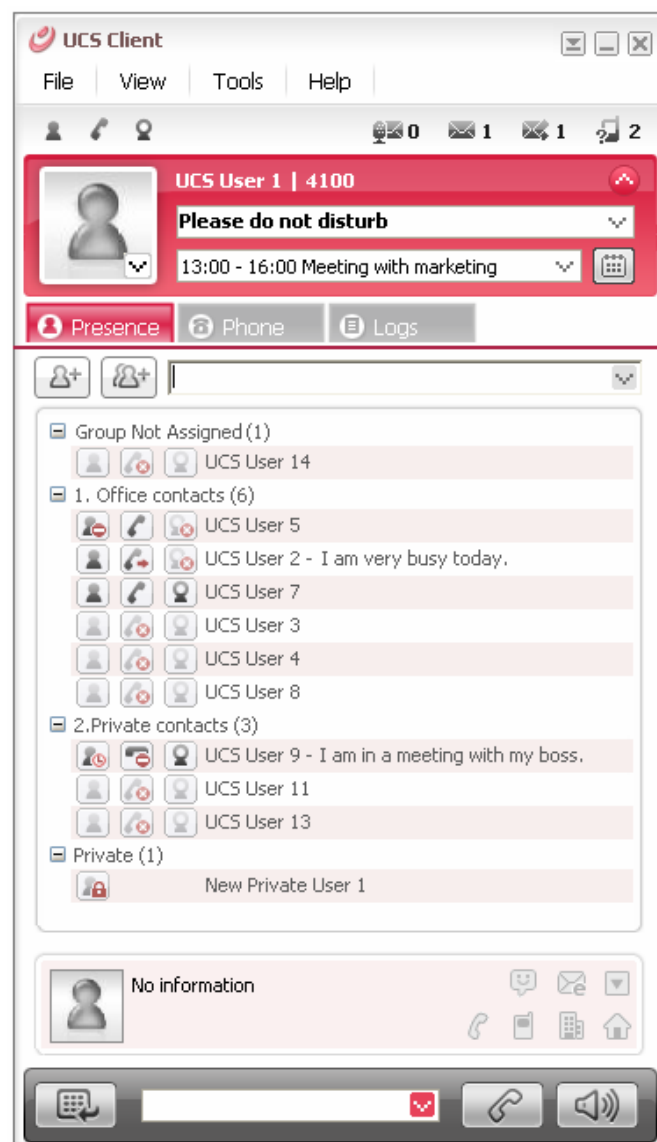




## *UCS Client*

(Unified Communication Solution)

### Installer & User Guide



**Revision History**

Issue 1	2007.01	First release
Issue 2	2008.10	Modified for new GUI and features
Issue 2.5	2009.07	Modified for new features
	2009.11	Added a special dialing rule for non-standard format of phone number
Issue 2.5	2009.07	Modified for new features
Issue 2.6	2010.02	Automatic Activation of Flex Button Window
Issue 2.7	2010.03	Import recurring appointments from outlook

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## Table of Contents

1	Introduction .....	1
2	Install and Setup .....	2
2.1	PC Hardware and OS Requirement .....	2
2.2	License and Lock Key .....	3
2.3	iPECS UCS Client Installation .....	3
2.4	Initial Set-up & Login.....	8
3	General Description.....	10
4	Main Application Menu.....	11
4.1	File Menu Selection.....	11
4.1.1	Set My Presence .....	11
4.1.2	Set My Phone Status .....	11
4.1.2.1	Clear All .....	12
4.1.2.2	Set Do Not Disturb (DND).....	12
4.1.2.3	Set Simple Call Forwarding .....	13
4.1.2.4	Set Remote Call Forwarding .....	13
4.1.2.5	Set ICR (Individual Call Routing).....	14
4.1.3	Setting.....	14
4.1.3.1	Server Connection.....	14
4.1.3.2	General.....	16
4.1.3.3	Call.....	18
4.1.3.4	Functions.....	24
4.2	View Menu Selection.....	26
4.2.1	View Contact Detail.....	27
4.2.2	Call Assistance.....	27
4.3	Tools Menu Selection .....	28
4.4	Help Menu Selection .....	29
4.5	Tray Menu .....	29
5	Message & Status Bar .....	30
5.1	Message Icons.....	30
5.1.1	Voice Mail.....	30
5.1.2	SMS .....	30
5.1.3	Notes .....	31

5.1.4	Missed Calls .....	31
5.2	Status Icons .....	31
6	My Detail Information.....	32
6.1	Setting My Picture .....	32
6.2	My Information and Password .....	32
6.3	User Defined Message.....	33
6.4	Today's Appointments .....	33
7	Main Window Views .....	34
7.1	Presence Window Introduction.....	34
7.1.1	Managing the Presence Window.....	38
7.1.1.1	<i>Adding and Deleting Contacts .....</i>	<i>38</i>
7.1.1.2	<i>Organizing Contacts by Group.....</i>	<i>40</i>
7.1.1.3	<i>Searching the Presence Window.....</i>	<i>41</i>
7.1.1.4	<i>Managing the Private User Directory.....</i>	<i>43</i>
7.2	Phone Window View .....	46
7.3	Logs Window.....	47
7.4	Active Call Window .....	48
7.4.1	Icon Tools Menu .....	49
7.4.2	Call and Status .....	50
7.4.3	Audio Controls .....	50
7.5	Selected Contact Window.....	51
7.6	Organization Window .....	51
7.6.1	Setting.....	51
7.6.2	Screen and Associated Features.....	52
7.6.2.1	<i>Organization Top/User Bottom.....</i>	<i>53</i>
7.6.2.2	<i>Organization Left/User Right.....</i>	<i>53</i>
7.6.2.3	<i>Organization Bottom/User Top.....</i>	<i>54</i>
7.6.2.4	<i>Organization Right/User Left.....</i>	<i>54</i>
7.6.2.5	<i>Customize Column View.....</i>	<i>55</i>
7.6.2.6	<i>Sort.....</i>	<i>55</i>
8	Quick Call Control Bar.....	57
8.1	Placing a call.....	57
8.2	Receiving a Call.....	58
9	Tools Menu Call Features.....	59
9.1	Group Call .....	59
9.2	Conference Room .....	60

9.3	Scheduled Dial.....	61
9.4	Recorded Call Playback.....	62
9.5	Auto Call Recording.....	62
9.6	Flex Buttons.....	63
9.7	Voice Mail Server Selection .....	63
9.8	Favorite Contacts.....	64
9.9	Step Call.....	64
9.10	Call Memo .....	66
10	Scheduling Appointments.....	69
10.1	Managing Appointments.....	69
10.2	Folder List Display .....	72
10.3	Importing and Exporting the Calendar .....	72
10.4	View Other UCS Client User Schedules .....	74
11	ICR (Individual Call Routing) Window Introduction .....	75
11.1	ICR User List.....	75
11.2	Scenario & Summary Screen.....	76
11.3	ICR Icon Tools.....	77
11.4	ICR Wizard .....	77
11.4.1	Entering a Scenario Name .....	78
11.4.2	Defining the Scenario Caller ID .....	78
11.4.3	Setting the Scenario Timing.....	79
11.4.4	Assigning a Scenario Destination.....	80
11.5	Activating ICR Call Forward .....	81
11.6	Using My Agent Control .....	82
11.7	Scenario Menu.....	82
12	Collaborative Session Tools .....	83
12.1	Instant Messaging Introduction .....	83
12.1.1	Initiating an Ad-hoc IM Session .....	83
12.1.2	Creating a Chat Room IM Session .....	84
12.1.3	IM Window Introduction .....	85
12.1.3.1	IM Application Menu.....	85
12.1.3.2	IM Participant List.....	86
12.1.3.3	IM Icon Tools.....	86
12.1.4	Sending IM Messages.....	86
12.1.4.1	IM Text Message.....	87
12.1.4.2	IM Drawing Messages .....	88

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12.1.5	IM Log.....	88
12.2	File Send Introduction .....	89
12.2.1	File Send Window.....	89
12.2.1.1	<i>Sending Files</i> .....	89
12.2.1.2	<i>Adding Member Recipients</i> .....	90
12.2.1.3	<i>Adding Files to Send</i> .....	90
12.2.2	Recipient Authorization.....	91
12.2.3	Opening Received File .....	91
12.3	Application Sharing.....	91
12.3.1	Application Sharing Window .....	92
12.3.1.1	<i>Starting an Application Sharing Session</i> .....	92
12.3.1.2	<i>Adding Application Sharing Session Participants</i> .....	93
12.3.1.3	<i>Adding Files to Share</i> .....	93
12.3.2	Application Sharing Participant Window .....	94
12.3.2.1	<i>Other Participant Tools</i> .....	94
12.3.2.2	<i>Drawing in Program Sharing mode</i> .....	95
12.4	Web Push .....	95
12.5	Video – Conferencing.....	96
12.5.1	Video – Conferencing (Normal Mode).....	96
12.5.2	Video – Conferencing (Presentation Mode) .....	97
12.5.3	Video – Remote Monitoring .....	99
12.6	Short Message Service (SMS).....	100
12.7	Administrative Messages.....	101
12.8	Whiteboard .....	101
12.9	Desktop Sharing .....	102

## **1 Introduction**

---

The **iPECS UCS** (Unified Communications Solution) **Client** is a PC based application, which operates in conjunction with the **iPECS UCS Server**, expanding and enhancing the communication services of **iPECS** to dramatically improve business productivity and customer responsiveness. In addition to the rich voice services available with the **iPECS** system, users of **iPECS UCS Client** are provided access to a wide range of video, text and graphic collaborative and messaging services. Services available include Presence, Video Conferencing, Instant Messaging, Sharing (Application Sharing, Desktop Sharing, Whiteboard), Individual Call Routing (ICR) and more. Employing a simple intuitive graphical user interface, the **UCS Client** has access to both private and shared scheduling and directory database applications which are fully integrated with the various services available. Further, the **UCS Client** database applications can interoperate and synchronize with major personal information management applications and databases such as Outlook, ACT!, Goldmine, Excel and LDAP. The **UCS Client** user interface is highly flexible and can be customized to address the needs of the individual user. As an Internet Protocol (IP) solution, the **UCS Client** overcomes geographical limitations allowing access to services and databases while in the office or on the road.

The following describes installation and details for use and operation of the **iPECS UCS Client**.

## **2 Install and Setup**

---

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

1. Install the *iPECS UCS Client* application on the user's PC.
2. Adjust *UCS Client* login settings.
3. Login to complete registration of the *iPECS UCS Client* application to the *iPECS* system and *UCS Server*.

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

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

### **2.1 PC Hardware and OS Requirement**

---

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

Hardware:

Pentium IV (Core2 Duo 3 or higher, required for VGA)  
2.3 GHz clock  
256 M Bytes of DRAM (2GB required for VGA usage)  
200 M Bytes of HDD storage  
Monitor, 17" recommended, with a resolution of 1024 x 768  
10/100 Base T NIC (Network Interface Card)  
CD ROM drive  
Standard Keyboard  
Standard Mouse  
Web Cam, optional for Video Conference  
Sound card and Microphone installed  
USB headset (recommended)  
**NOTE:** Voice quality depends on the headset manufacturer and type.

Operating System:

Microsoft Windows 2000  
Windows XP  
Vista



---

## 2.2 License and Lock Key

---

Prior to registration of *iPECS UCS Clients* with the host *iPECS* system and *UCS Server*, the host *iPECS* system will require installation of a *UCS Client* software license. *iPECS UCS* employs a concurrent-user (floating) license scheme. In this scheme, the maximum number of active (logged in) *UCS Clients* is set by the number of clients allowed by the installed lock-key. The lock-key installation is permitted only by an authorized agent of LG-Nortel. For information on Lock-keys, contact the local LG-Nortel distributor.

---

## 2.3 iPECS UCS Client Installation

---

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

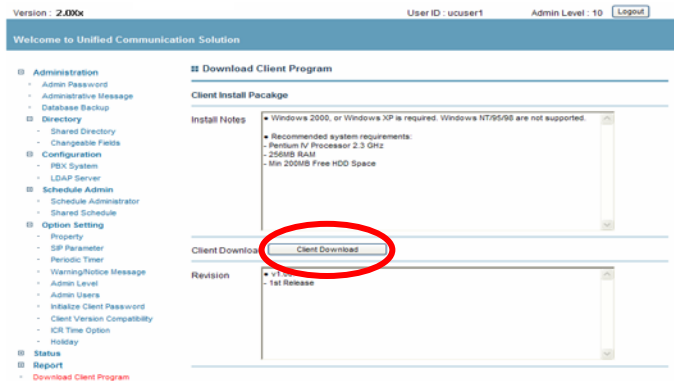
1. Open a browser on the PC.
2. Point the browser to <http://ip address of UCS Web Admin/UCS>, the *UCS* Administrator should have the IP address.



**NOTE:** Java Runtime Environment (JRE) must be installed on the PC for proper login operation. If you are experiencing difficulty with login, click on the JRE link, lower right, to download. If the Java 2 Platform icon shows in the Windows tray on your PC, JRE does not need to be downloaded.

3. Login to the *UCS Web Admin*; enter the User ID and Password given by the *UCS* Administrator and click on OK.

4. Select Download Client Program in the left Navigation pane
5. Select Client Download from the Download Client Program window.

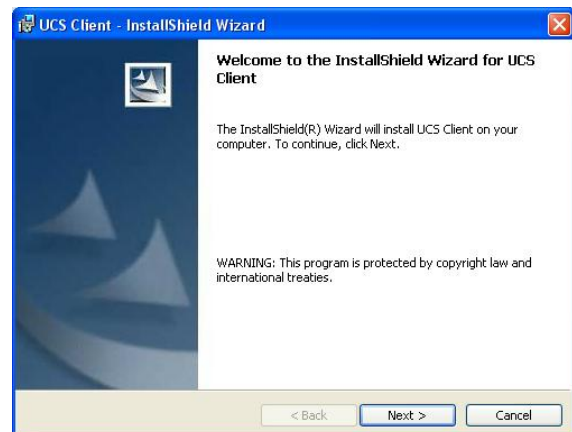


6. Select Save to save **UCS Client** application in the designated directory  
OR
7. Select Run to install **UCS client** directly on the PC.

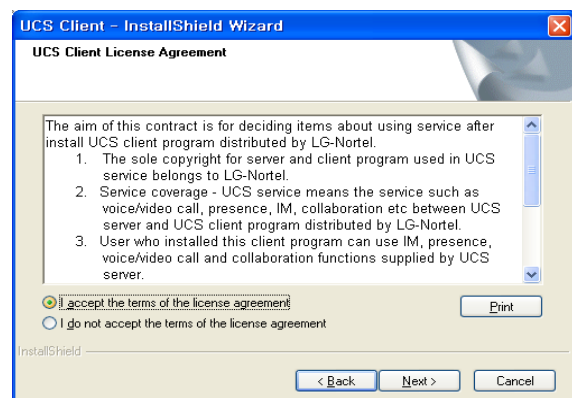


To install the **UCS Client** application:

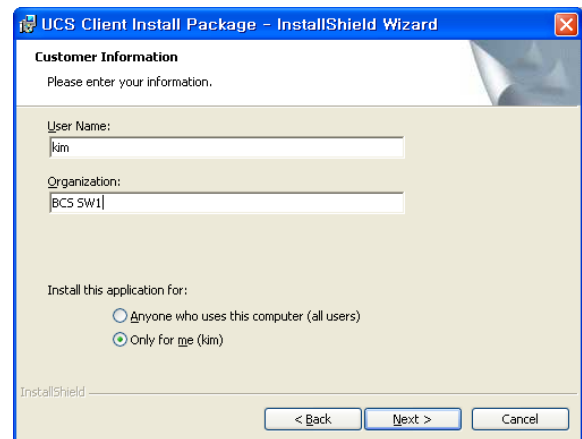
1. If Run was selected in 6 above, the **UCS Client** Install Wizard appears. If Save was selected;
2. Find and run the UCSCClient.exe file received during download.
3. The **UCS Client** Install Wizard should appear.
4. In the Install Wizard screen, and click Next.



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



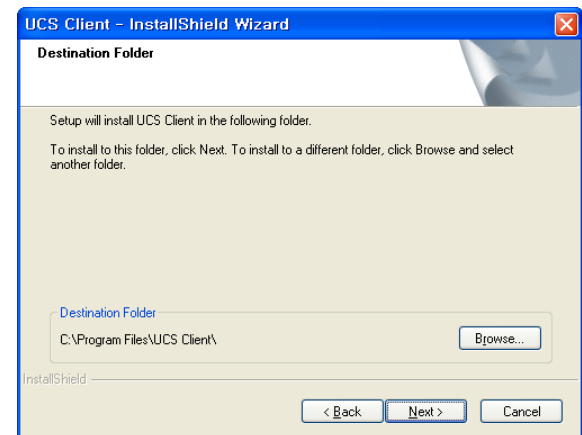
6. In the Customer Information window, enter a User Name and Organization; select the radio button for all users or Only for me, and then click Next.



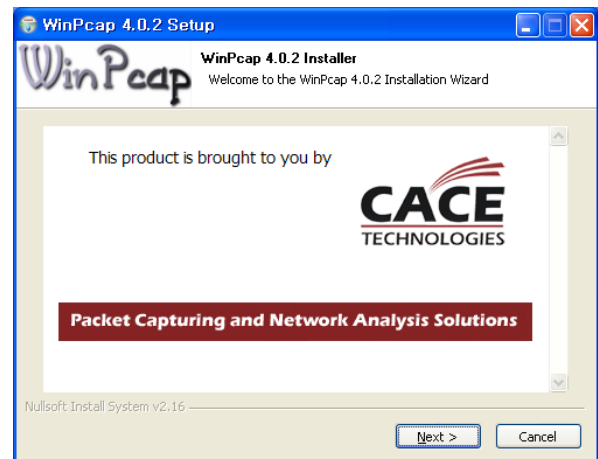
7. In the Destination Folder window, you may either accept the default destination (C:\Program Files\UCS Client), which is recommended

OR

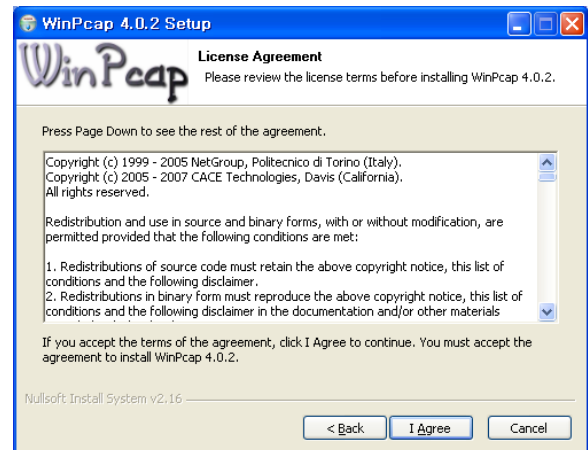
8. Select Browse to locate a different directory or specify a directory. If you specify the directory, do not include spaces or special characters.



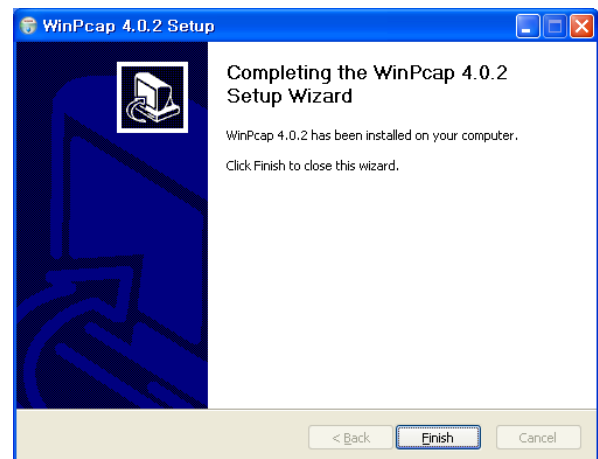
9. Click Next to install WinPcap. WinPcap is a standard tool for link-layer network access in the Windows environment. The WinPcap Installer is imbedded in the *UCS Client* Installer, and will open automatically.



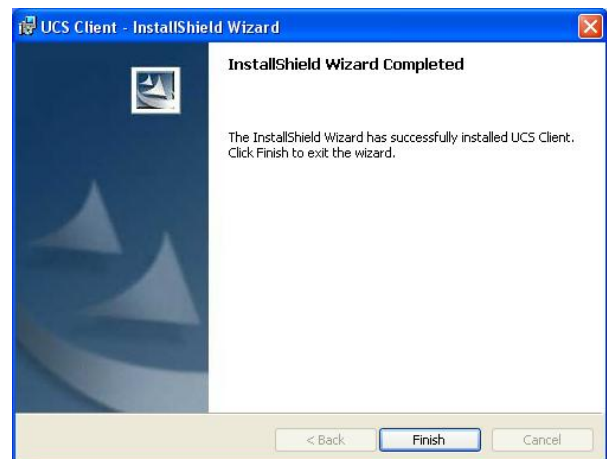
10. The WinPcap software License Agreement window appears. Read and click I Agree to continue the installation. The WinPcap installer begins copying files onto your hard disk.



11. After successful installation of WinPcap, click Finish to complete WinPcap installation.

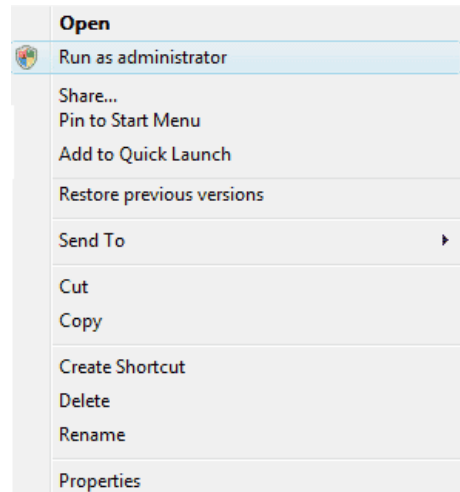


12. When all files have been downloaded, the Installation Completed window is shown, click the Finish button.

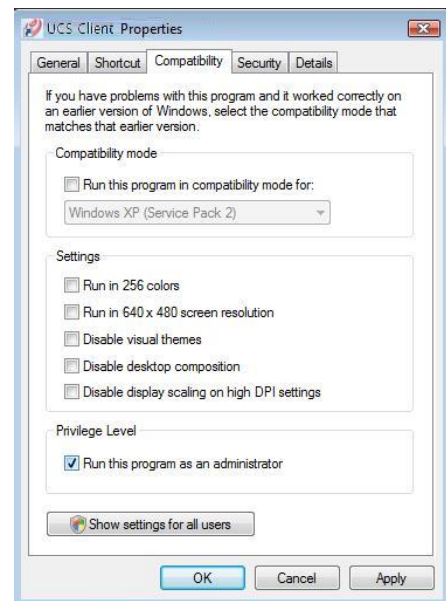


To install when running the Vista operating system:

1. Install as in previous instructions; in the Destination Folder window, you may either accept the default destination (C:\Program Files\UCS Client), which is recommended.  
OR
2. Select **Browse** to locate a different directory or specify a directory. If you specify the directory, do not include spaces or special characters.
3. Run the UCS Client using the “Run as administrator” option.



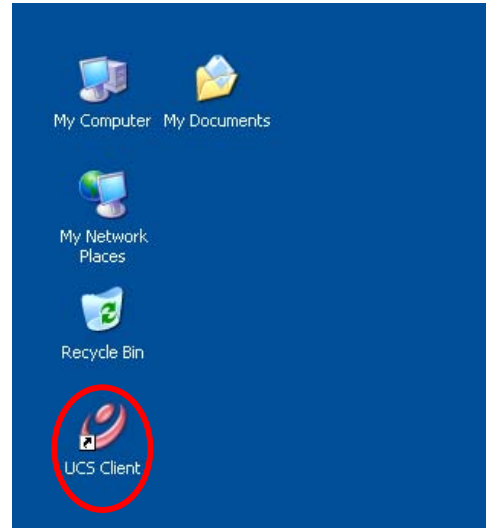
4. Programs can be set to always run as if under administrator control; right-click the program icon and go to 'Properties', then click the 'Compatibility' tab. Under 'Privilege Level', select 'Run this program as administrator' and click 'OK'.



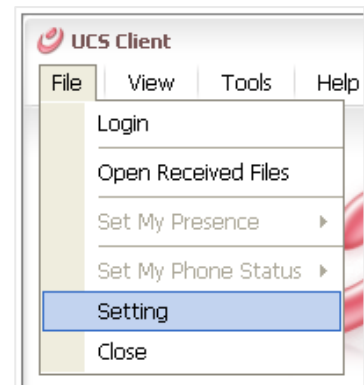
## 2.4 Initial Set-up & Login

To set-up the *UCS Client* application, perform the following steps:

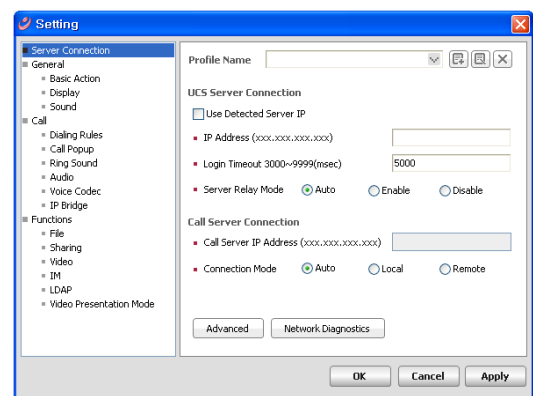
1. Following installation, click on *UCS Client* from the Programs listing in the Windows start menu or click on the desktop shortcut icon created during the software installation.



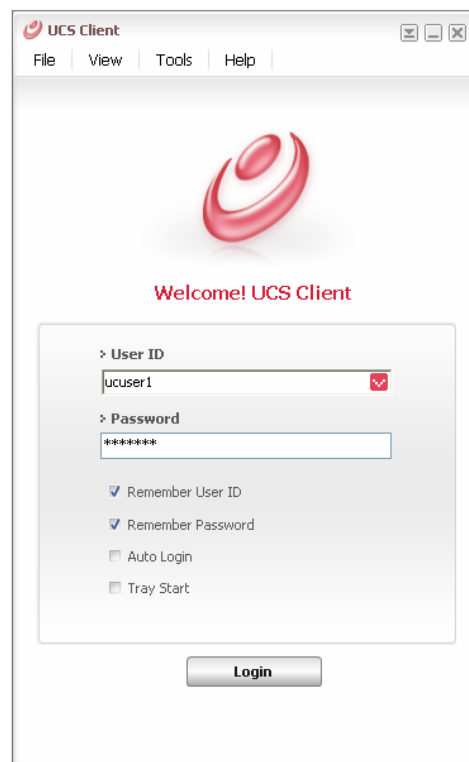
2. Once launched, the *iPECS UCS Client* Login screen will appear. For the initial installation you must define the IP address and other basic parameters for the *iPECS* system, *UCS Server* and client in the General Setting window.
3. Select Setting from the File menu, the Server Connection window displays, refer to Section 4.1.3.1.



4. Under UCS Server Connection, enter the IP Address of the *UCS Server* provided by your *UCS* Administrator, or if already shown, check Use Detected Server IP.
5. Select OK to save the new values.

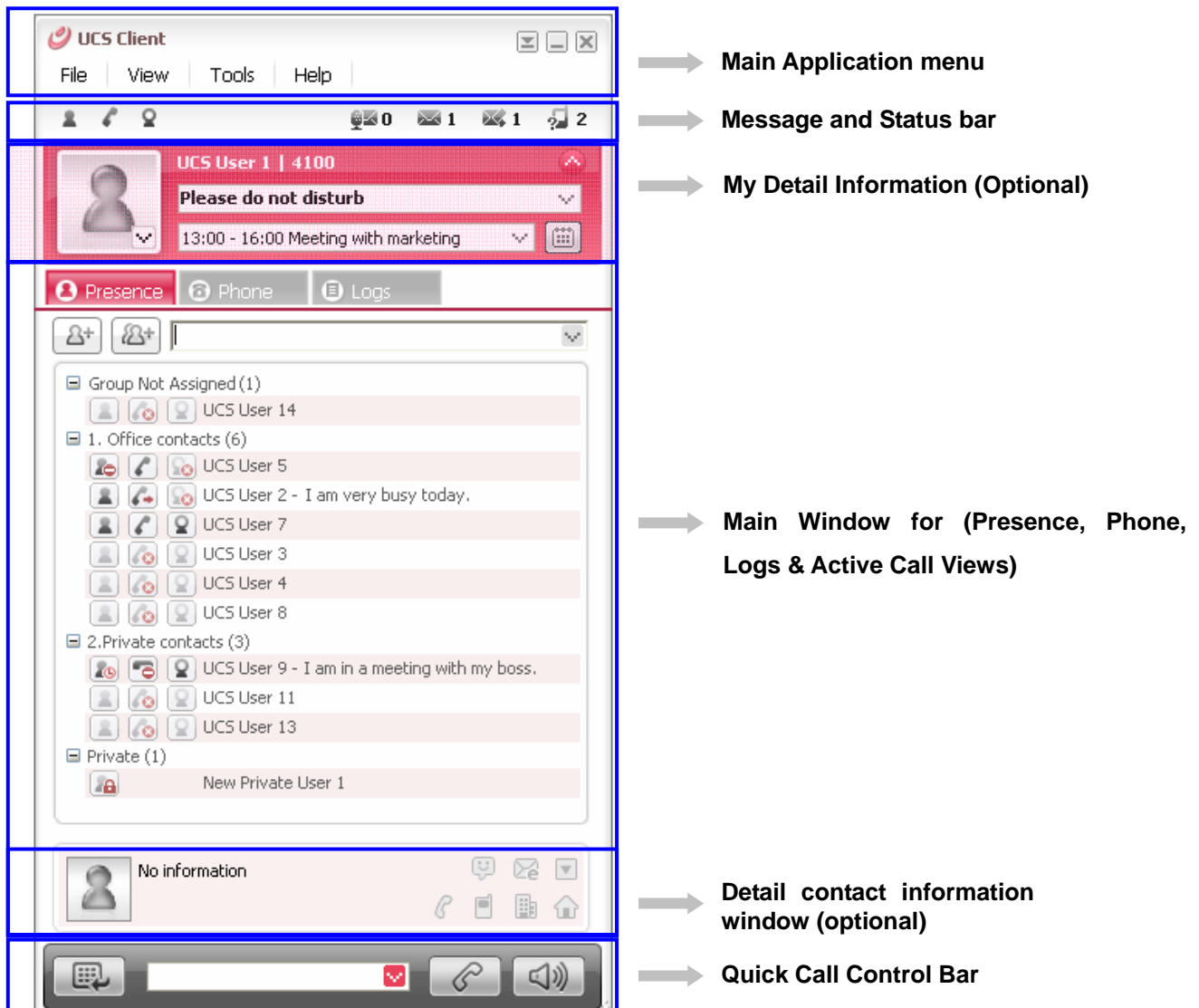


6. When finished inputting the settings, login by entering your User ID and Password. Remember, the ID and Password is case sensitive.
  - The User ID may be 2-12 alpha-numeric characters
  - A Password can be 1 to 12 alpha-numeric characters.
7. In a single user environment, use the Auto Login, Remember User ID and Password checkboxes, to automate login to the *iPECS* system and *UCS Server* every time the *UCS Client* application is launched.
8. Click Login to initiate the *iPECS UCS Server* and system login; the *UCS Client Console* should display.



### 3 General Description

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

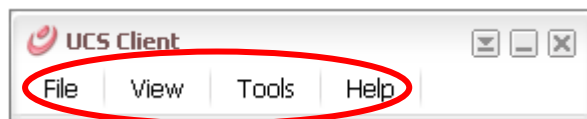


- The Main application menu is discussed in [Section 4](#).
- The Message and Status bar is discussed in [Section 5](#).
- The My Detail Information is discussed in [Section 6](#).
- The Main Window for Presence, Phone, Logs and active Call views is discussed in [Section 7](#).
- The Quick Call Control bar is discussed in [Section 8](#).



## 4 Main Application Menu

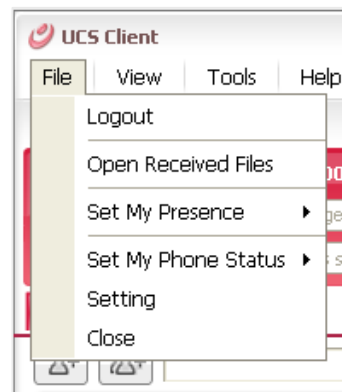
The Main Application menu at the top of the console includes menu selections for File, View, Tools and Help.



### 4.1 File Menu Selection

Click on File to show the following selections:

- Login/Logout – initiates the login or logout process with the *iPECS UCS Server* and system, see section 2.4.
- Open Received Files – opens the folder where files received from other *UCS Client* users are stored, see section 12.2.3.
- Set My Presence – defines your IM presence state.
- Set My Phone Status – sets the phone status.
- Setting – displays the Setting window, where you set up and customize the *iPECS UCS Client*.
- Close – minimizes the *iPECS UCS Client* application to the Windows notification tray.

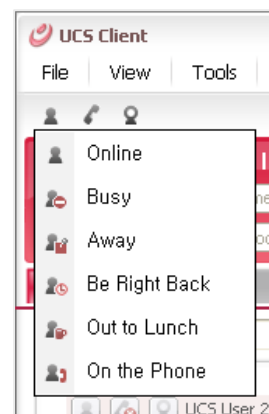


#### 4.1.1 Set My Presence

Presence establishes your availability to be part of an Instant Messaging session. *iPECS UCS Server* monitors and automatically updates your Presence as Online, Offline, Busy or On the Phone. The presence of other users is also provided in the Presence window (refer to [Section 7.1](#)). Your status is displayed by the IM Status icon, which is located on the left above your picture. You may change the status with the Set My Presence selection in the File menu, or by clicking the IM Status icon.

To change the *UCS Client* IM status:

1. Select Set My Presence from the File menu.
2. Select the IM status (presence) desired from the status window



#### 4.1.2 Set My Phone Status

Using Set My Phone Status, the *UCS Client* can be placed in a Do-Not-Disturb state or calls to the *UCS Client* may be re-routed (forward) to another destination. When in DND, internal callers will

receive a fast-busy tone and outside callers are re-routed based on **iPECS** system admin settings. Simple Call Forward is activated from the phone allowing the user to define the type of Call Forward (all calls, busy, and no-answer) and destination for the calls. Remote Call Forward or Follow-me forward is activated from a different phone allowing the user to define the type of calls to forward and the destination for the calls. For Follow-me forward, the user must also enter the station number and the password (Authentication code) to activate Remote Call Forward. Call Forward ICR accesses the Individual Call Routing feature where the user can define various Call routing scenarios as discussed in Section 11.

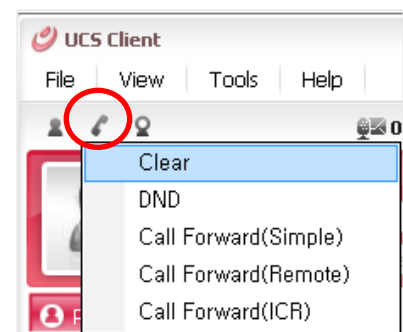
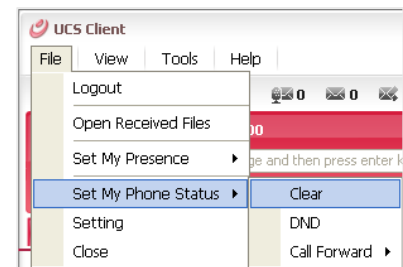
**NOTE:** When DND or Call Forward is activated, a confirmation window will display at next login, DND or Call Forward can be deactivated in the confirmation window.

#### 4.1.2.1 Clear All

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

To deactivate Call Forward or DND:

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

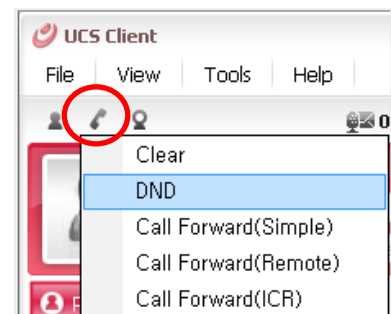


#### 4.1.2.2 Set Do Not Disturb (DND)

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

To activate DND:

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

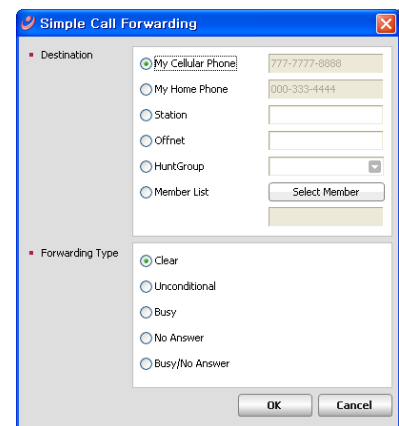
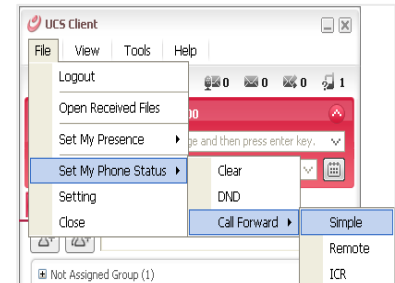


#### 4.1.2.3 Set Simple Call Forwarding

You may select to re-route incoming calls to other stations, station groups, the system Voice Mail, or over CO/IP resources.

To activate Call Forward:

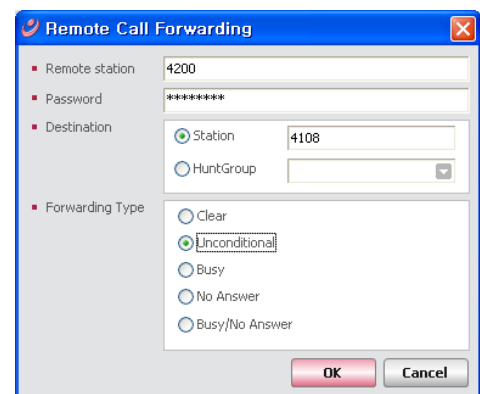
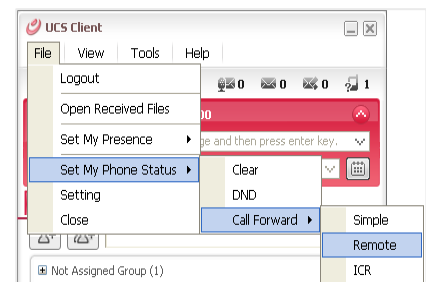
1. Select Set My Phone Status from the File menu or the Phone status icon.
2. Select Call Forward.
3. Select Simple; the Simple Call Forwarding window will display.
4. In this window click on and enter the Destination information (as needed).
5. Select the Forwarding Type.
6. Click OK to activate Call Forward.



#### 4.1.2.4 Set Remote Call Forwarding

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

1. Select Set My Phone Status from the File menu or select the Phone status icon.
2. Select Call Forward.
3. Select Remote; the Remote Call Forwarding window will display.
4. Input your Remote Station number.
5. Input your Station Authorization Code (Password)
6. Input the Station or Station Group to receive calls.
7. Select the desired Forwarding Type.
8. Click OK to activate Call Forward.

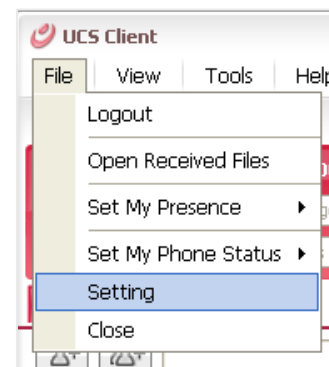


#### 4.1.2.5 Set ICR (Individual Call Routing)

Setting Individual Call Routing (ICR) is discussed in Section 11.

### 4.1.3 Setting

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



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

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

#### 4.1.3.1 Server Connection

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

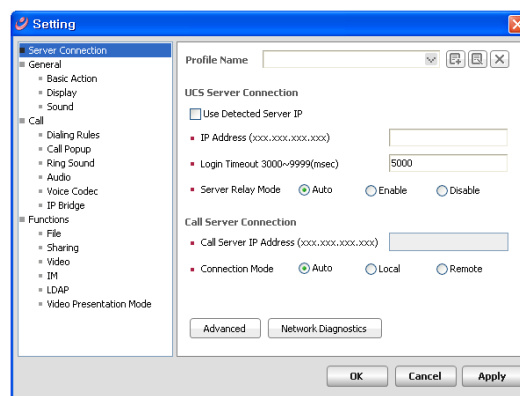
To modify any of the Server Connection settings:

1. Select Setting from the File menu, the Server Connection window displays.
2. Change the desired item(s).
3. Click Apply or OK to exit.

In the Server Connection screen, the selections are:

##### UCS Server Connection

- Use detected server IP – when the *UCS Client* application is launched, it attempts to locate a local *UCS Server* (if found and this item is checked, the *UCS Client*



will use the located *UCS Server* for services).

- IP Address – input box for the IP Address or domain name of the *UCS Server*.
- Server Relay Mode – relay mode between the *UCS Clients*; Auto is recommended.
  - Auto – Session connection is determined by the *UCS Client* automatically.
  - Enable – Implements the server relay function so that the *UCS Client* can establish a connection to others when separated by a firewall. In this case, the *UCS Server* acts as a relay to distribute session (IM, File Send and Sharing) packets to other users. This mode connects separated by a firewall.
  - Disable – Implements a peer to peer connection for the session.

### Call Server Connection

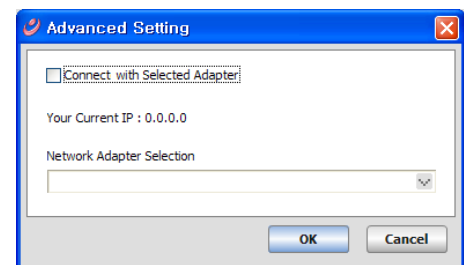
- PBX IP Address – IP address of the iPECS host system serving the iPECS UCS Client.
- Connection Mode – connection mode between the UCS Client and the iPECS; Auto Connection mode is recommended.
  - Auto – selects either Local or Remote automatically.
  - Local – connection is employed when the iPECS system and UCS Client are on the same LAN.
  - Remote – supports packet relay.

### Advanced Settings

- Connect with Selected Adapter – enables selection of a specific network adapter.
- Your Current IP – displays current IP

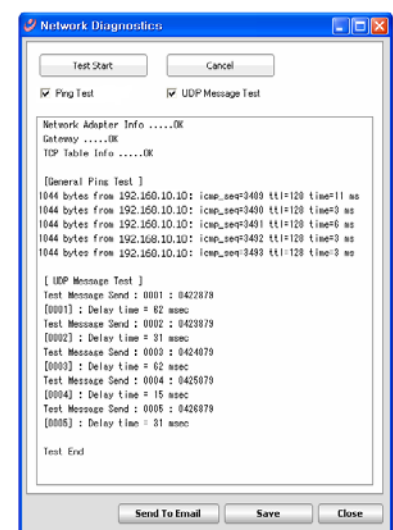
Address.

- Network Adapter Selection – displays network adapter list; select the desired network adapter



### Network Diagnostics

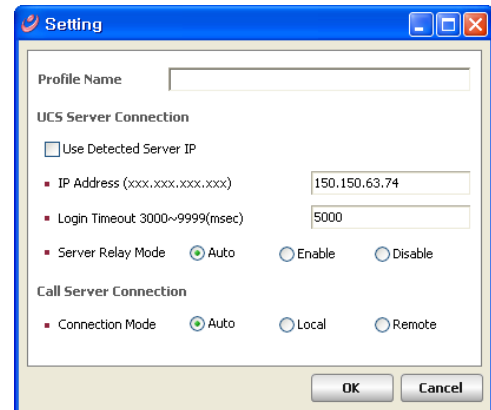
- Test Start – start network diagnostics
- Cancel – cancel network diagnostics
- Ping Test – ping test option between a *UCS Client* and a server.
- UDP Message Test – application message test option between a *UCS Client* and a server.
- Send To Email – sends the test results as an e-mail attachment.



- Save – saves the test result to a file.
- Close – exit network diagnostics.

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

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

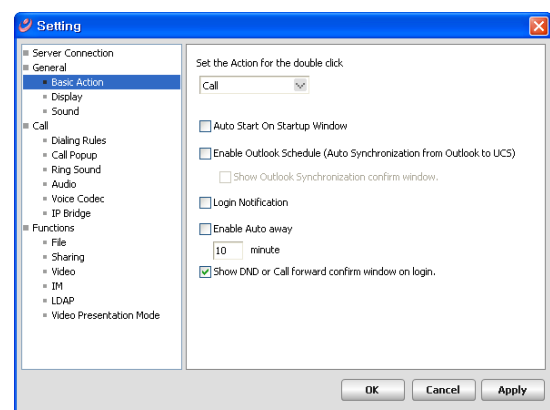


#### 4.1.3.2 General

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

To modify any of the General category settings:

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



##### 1) Basic Action page

The Basic Action page includes the following items:

- Set the action for double-clicking – when double clicking on a user record in the Presence window, UCS Client will take the action selected from the drop-down list (Call, IM, Detail Information, No Action).
- Auto-Start on Startup Window – when enabled, UCS Client opens following Windows opening.
- Enable Outlook Schedule (Auto Synchronization from outlook to UCS) – enables synchronization between iPECS UCS user's Private schedules and Outlook (when enabled, you will receive a schedule synchronization confirmation request after

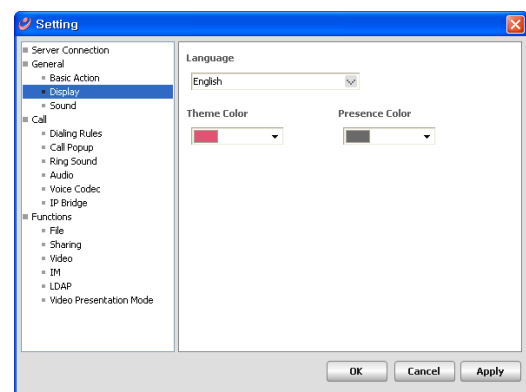
login). If you don't want to see the outlook security window when importing contacts or schedules, you can install 'Express' Click Yes.'

When you set 'Enable Outlook Schedule' in the Setting Window, new schedule in Outlook is automatically synchronized to the UCS Client Schedule. Also, the changed schedule is automatically synchronized in Outlook. This feature is applied only for schedules within the period of two months (current month and next month). For example, a schedule at current month and next month will be synchronized. But, a schedule occurring the month before current month or a schedule occurring the month after next month will not be synchronized.

- Show Outlook Synchronization Confirm window – If enabled, at login the synchronization confirm window is displayed.
- Login Notification – If enabled, at login the login notification message is displayed.
- Enable Auto away – If enabled, auto sets you to away when there is no activity occurring on your computer. You can set auto away time (minute).
- Show DND or Call forward Confirm window on login – if enabled, the DND or Call Forward confirm window is displayed at login.

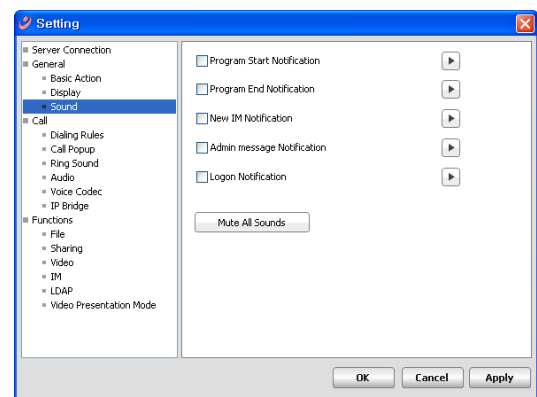
## 2) Display

- Language – selects the display language (English or Local).
- Themes Color – selects a theme color for UCS client windows. Ten colors are available.
- Presence Color – selects a color for the Presence screen. Ten colors are available



## 3) Sound

- Program Start Notification – when enabled, play the Program Start alert.
- Program End Notification – when enabled, play the Program End alert.
- New IM Notification – when enabled and invited, play the IM message sound.



- Administrative message Notification – when enabled and a message is received from UCS administrator, play the notify message Sound.
- Logon Notification – when enabled and the user logs in, play the logon notification sound.
- Mute All Sounds – click to deactivate all sounds.

#### 4.1.3.3 Call

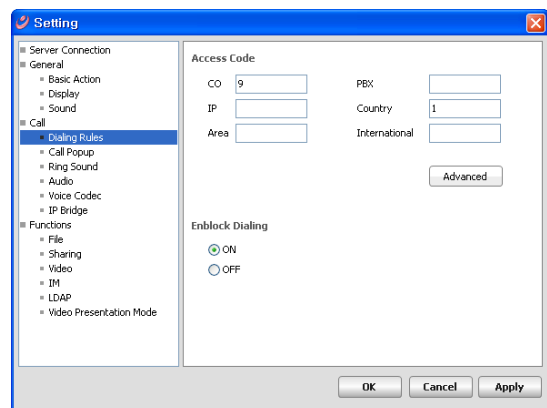
The Call category includes settings for Dialing rules, call pop-up boxes and several audio settings as discussed below.

To modify any of the Call category settings:

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

##### 1) Dialing Rules

When placing an outside call from any of the *UCS Client* windows (e.g. Presence, Logs, etc.), certain digits may need to be included or removed to assure proper dialing through the *iPECS* System. When a number is selected from a window, the *UCS Client* will compare the number to the dialing rules. The dialing rules country and area codes are compared to the number, and if matched, are deleted from the number. If not matched, the appropriate Area (LD) or International codes will be inserted, preceded by the PBX, CO or IP line access codes.



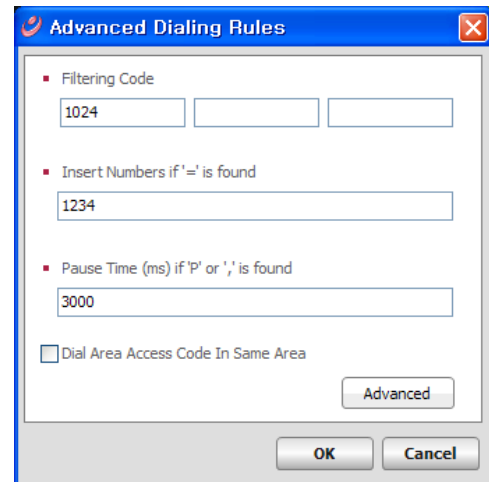
- Access Codes – entered in the Dialing Rules window, along with local codes for comparison.
- Enblock Dialing – is a dialing scheme that sends to the system all digits required to complete a call; if 'ON' is set, Enblock Dialing is used (recommended when using an IP Bridge), and if 'OFF' is selected, the UCS client will send each digit one-by-one to the system using DTMF tones.

**NOTE:** For proper operation, Phonebook entries should follow normal conventions (ex., +country code (area code) number [ex., +41 (041) 4904636])



### Advanced Dialing Rules

- Filtering Code – code is used for special cases to search contact directories. To add this code, please ask your system administrator.
- Insert Numbers if '=' is found – replace '=' with assigned number. This is useful to dial a long number.
- Pause Time (ms) if 'P' or ',' is found – if a number includes the pause code, 'P' or ',', dialing will pause for the timer value in milli-seconds set here. If the area code is required for local dialing, this option must be checked.



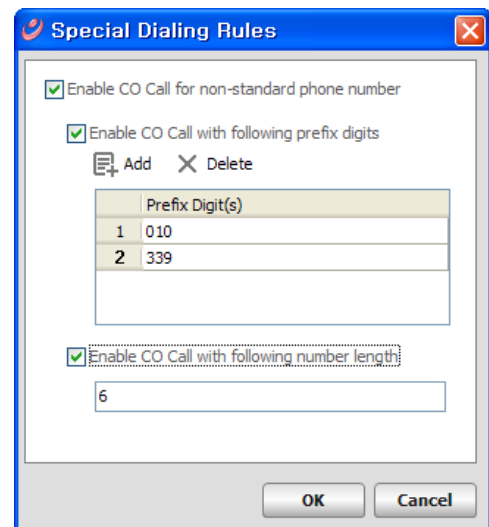
The 'Advanced Dialing Rules' dialog box contains the following settings:

- Filtering Code:** A text box containing '1024'.
- Insert Numbers if '=' is found:** A text box containing '1234'.
- Pause Time (ms) if 'P' or ',' is found:** A text box containing '3000'.
- Dial Area Access Code In Same Area:** An unchecked checkbox.
- Buttons:** 'Advanced', 'OK', and 'Cancel'.

### Special Dialing Rules

These rules help a user who wants to place an outside CO call without CO Phone number format recommended above. Without enabling these rules, any phone number which does not have a national code or an area code will be dialed only as an internal call. After enabling these rules, an internal call (no nation code or no area code) can also be CO call if some conditions are matched.

- Prefix Digits – If Phone number is started with 'Prefix Digits(s), Co access code will be added automatically.
- Length – If a length of phone number is longer than the input length, Co access code will be added automatically.



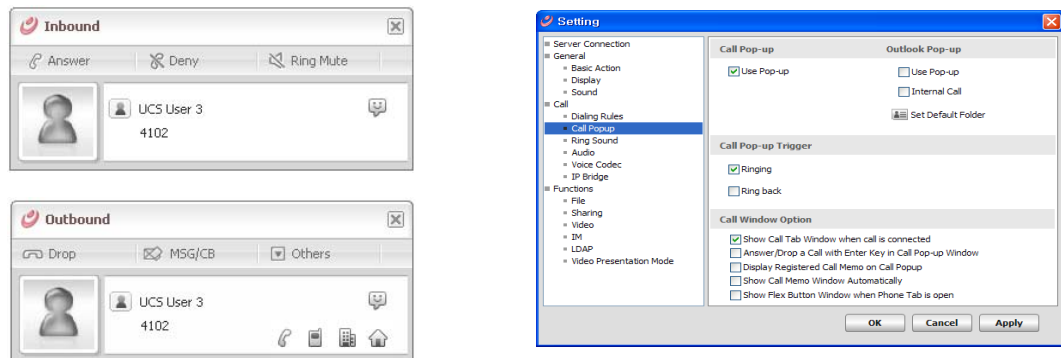
The 'Special Dialing Rules' dialog box contains the following settings:

- Enable CO Call for non-standard phone number:** Checked checkbox.
- Enable CO Call with following prefix digits:** Checked checkbox. Below it are 'Add' and 'Delete' icons.
- Prefix Digit(s) Table:**

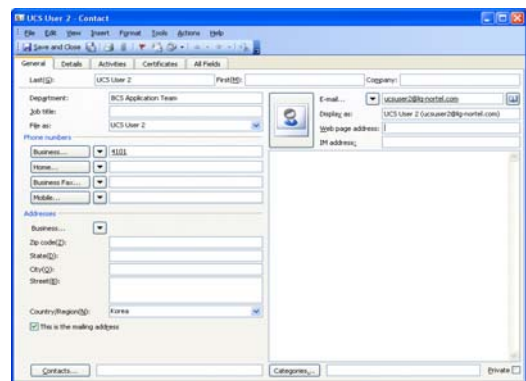
	Prefix Digit(s)
1	010
2	339
- Enable CO Call with following number length:** Checked checkbox. Below it is a text box containing '6'.
- Buttons:** 'OK' and 'Cancel'.

## 2) Call Popup

- Call Pop-up – check to enable Call Pop-up.

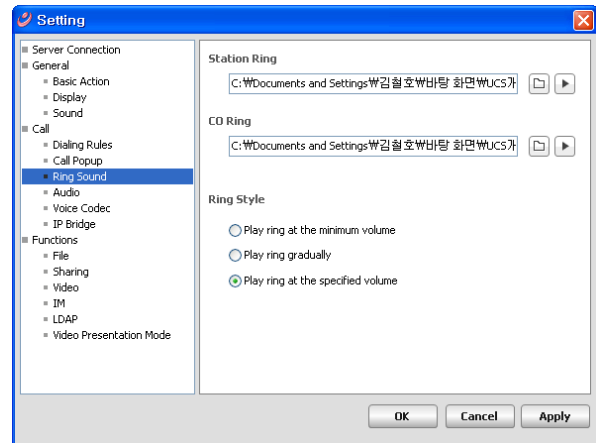


- Outlook Pop-up – when Call popups are enabled, the client will display either the UCS popup shown above or the Outlook popup, to the left. Check to enable Outlook Popup in place of the UCS popup. If you check Internal Call the Outlook popup will also be displayed for internal calls. Also, set the default folder where new Outlook contacts are defined.
- Call Popup Trigger – defines the event that will cause display of the selected popup, both incoming calls and outgoing calls may trigger the call popup.
- Call Window Option – the Call tab in the main window can be displayed when a call is connected or when a call is answered or dropped with Enter in the popup window. When you set 'Display Registered Call Memo on Call Pop-up' in the Setting Window, incoming and outgoing calls are displayed in the Call Memo window. Also, if you want to activate the Call Memo window automatically while a call is being placed to a UCS client, select the 'Show Call Memo Window Automatically' option. For more information about the Call Memo window, refer to Section 9.10. Select the 'Show Flex Button Window when Phone Tab is open' to see the Flex Button Window automatically.



### 3) Ring Sound

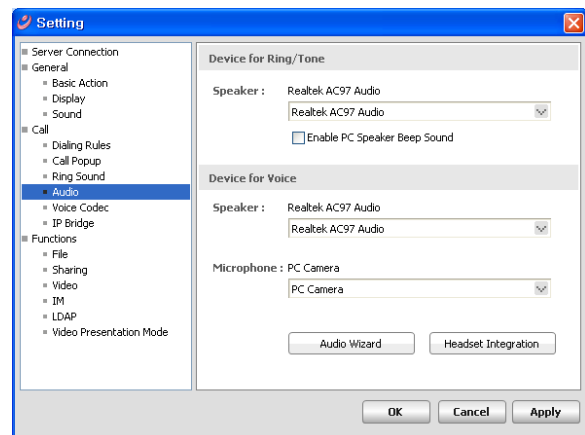
iPECS UCS Client can provide one of 4 ring signals with separate assignments for internal and external calls. Each of the 4 ring signals is contained in a \*.wav file. You may select one of the four \*.wav files (ring1.wav, ring2.wav, ring3.wav and ring4.wav) or replace any of these files with a desired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



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

### 4) Audio

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

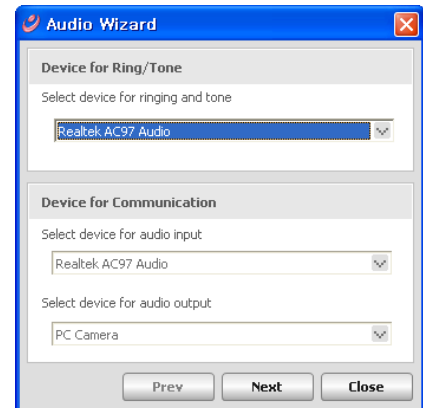


### Audio Wizard

- Device for Ring/Tone – defines the devices for ring and tones. PC Speaker Beep tone will sound for incoming calls if this option is enabled.
- Device for Voice – defines the devices, speaker and microphone, for voice communication.
- Audio Tuning Wizard – assists in adjusting the volumes for the Speaker/Microphone, see Section 4.1.3.3.

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

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



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

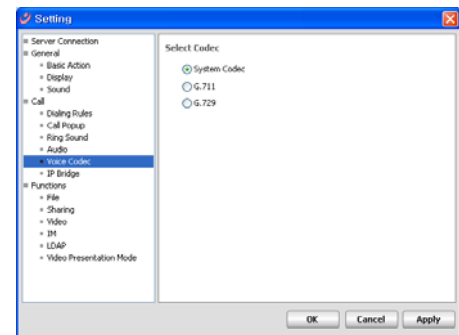


- Headset Integration – when headset integration is enabled, operation of the headset hook-switch function for answering or dropping a call is recognized using one of several headsets. The supported headsets with the hook-switch function include:
  - Audio 910 Headset
  - CS 50/60 USB Headset, Press volume up or down button for more than 3 seconds to dial the assigned numbers.
  - GN8120 Headset

**NOTE:** Headsets have different remote hook-switch operation, to use one of the listed headsets with *UCS Client*, refer to the manual packaged with the headset.

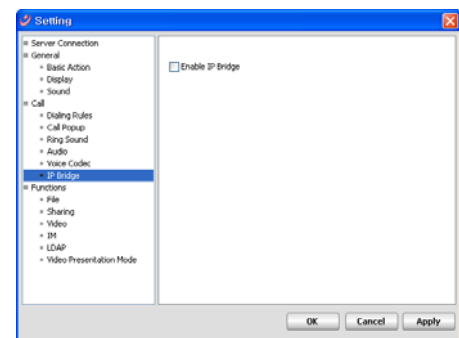
## 5) Voice Codec

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



## 6) IP Bridge

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



#### 4.1.3.4 Functions

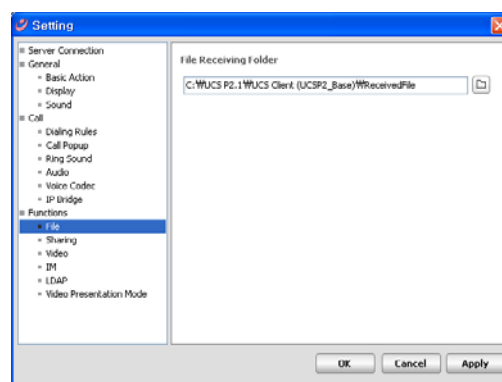
Under functions, settings are available for Sharing, video, IM logging and database characteristics as discussed in detail below.

To modify any of the Function category settings:

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

##### 1) File

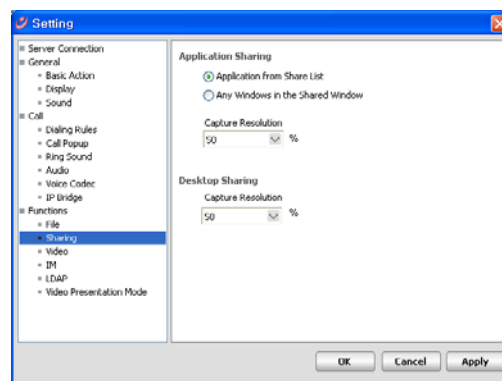
- File Receiving Folder – defines the folder for where files received from other UCS Clients are stored



##### 2) Sharing

###### Application Sharing

- Application from Share List – only shares files from the Shared List during a sharing session (refer to Section 12.3.1.3)
- Any windows in the Shared Window – shares all windows that are moved or displayed in the Sharing window including files in the Shared List, refer to Section 12.3.1.3. Certain types of files such as Internet browsers may not be recognized by the sharing module as applicable to sharing. In this case, selecting Any Windows in the Shared window allows a window to be drag to the Sharing window for display to participants.
- Capture Resolution – sets the capture resolution (10, 20, 50, 80, and 100%). Higher resolution improves quality but can significantly increase LAN traffic.

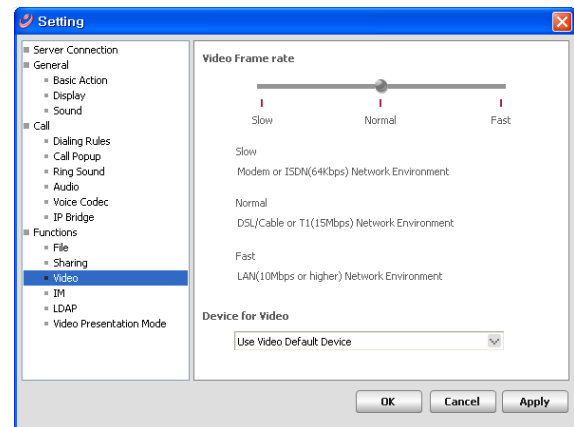


### Desktop Sharing

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

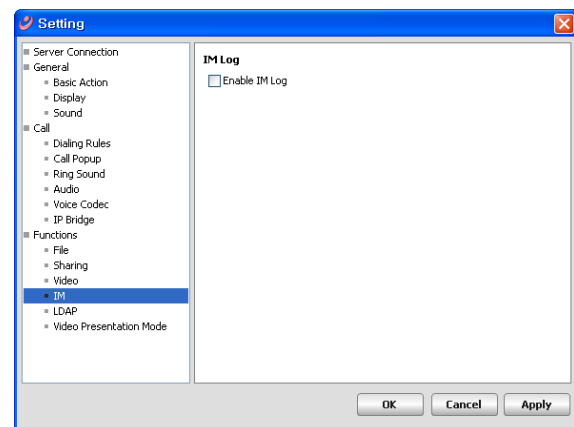
### 3) Video

- Video Frame rate – sets the video frame rate (Slow, Normal, and Fast). Because added processing time is required, faster frame rates may impact quality
- Device for Video – sets the device for video. If there are more than two devices, user can select one of the devices from list.



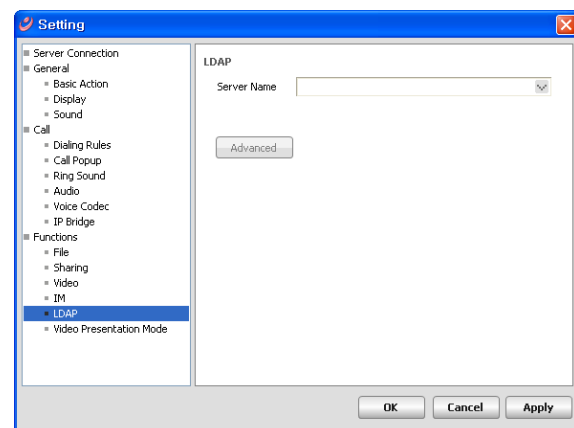
### 4) IM

- Enable IM Log – enables the IM Log, all IM sessions are stored until erased, refer to Section 7.3.

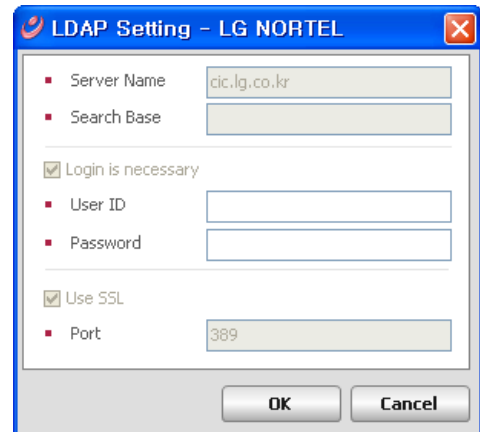


### 5) LDAP

- Server Name – identifies the LDAP Server. A LDAP server defines the server where UCS Server databases reside.

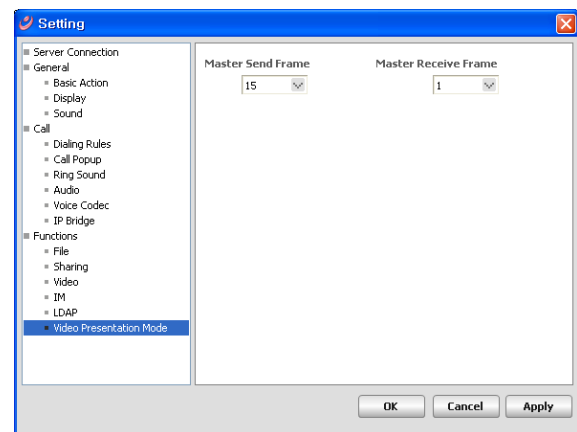


- Advanced – view to advanced LDAP Setting window.



## 6) Video Presentation Mode

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

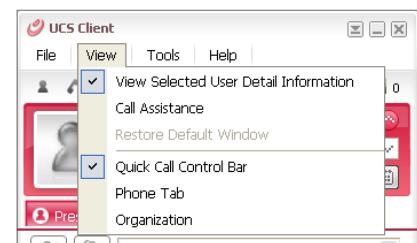


**NOTE:** The organizer PC in presentation mode should have considerable CPU power to process video frames receiving from up to 32 users. Also, if using a higher video format, it will require more CPU power to process the video frames.

## 4.2 View Menu Selection

Selecting View shows the following selections:

- View Selected User Detail Information – displays detail information window for selected user in the Presence or Log window.
- Call Assistance – displays the Call Assistance window.
- Restore Default Window – returns all UCS Client windows to the default appearance (only available before logging-in).
- Quick Call Control Bar – determines if Quick Call Control Bar will be hidden or shown.
- Phone Tab – determines if Phone Tab will be hidden or shown.

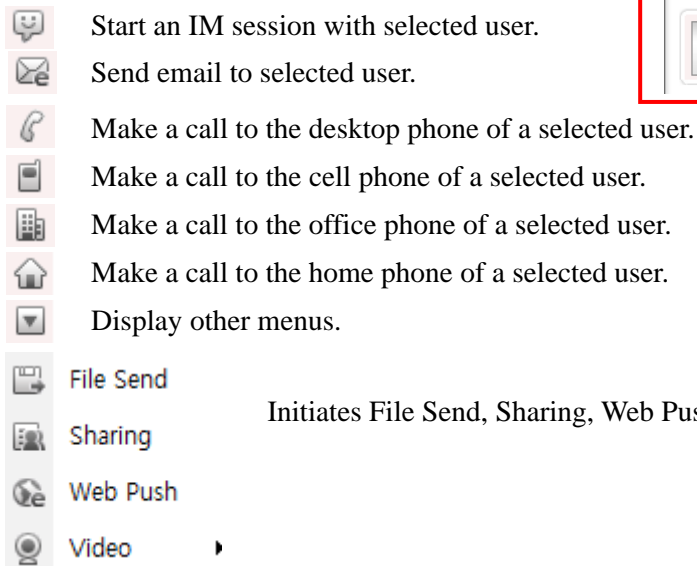




- Organization – determines if Organization Tab will be hidden or shown (options set by Server Admin.).

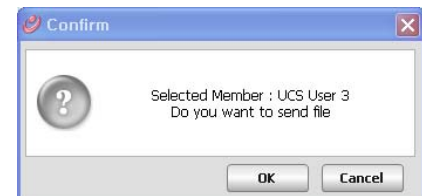
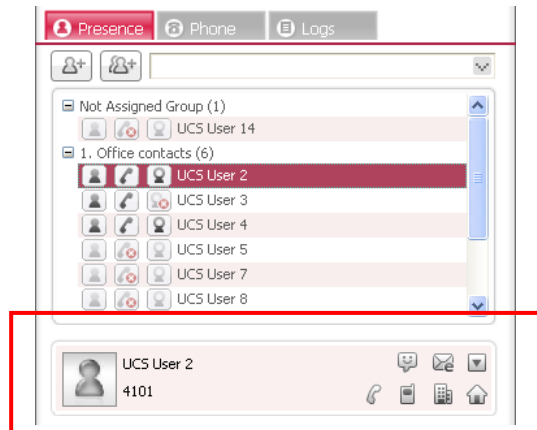
#### 4.2.1 View Contact Detail

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



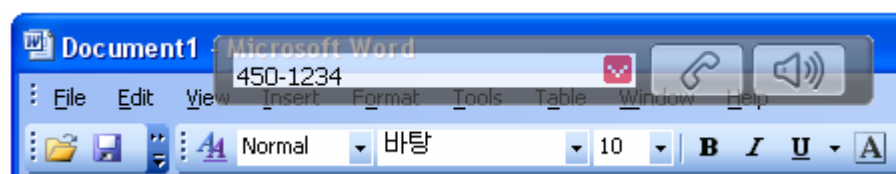
Initiates File Send, Sharing, Web Push or Video call with the selected user.

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

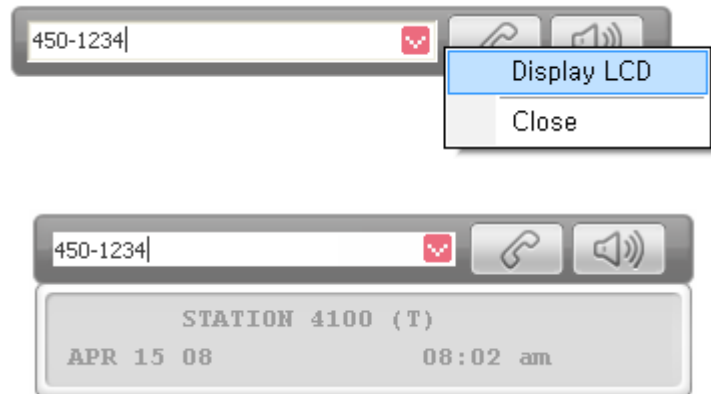


#### 4.2.2 Call Assistance

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



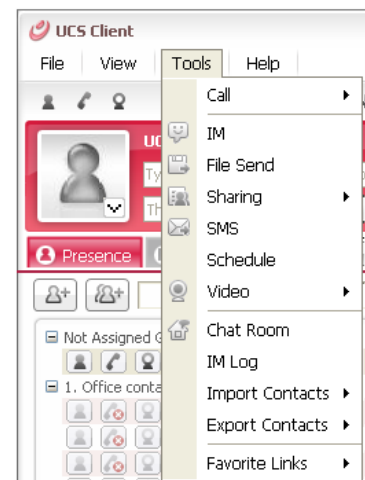
Additionally, you may activate display of the Station LCD; right click on the Call Assistant and select Display LCD to view the Station LCD display.



### 4.3 Tools Menu Selection

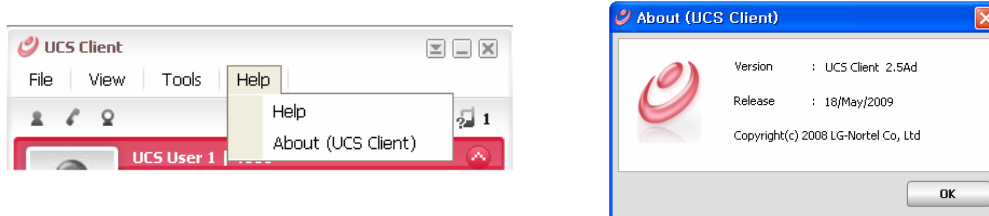
The Tools menu provides direct access to *UCS Client* collaboration, database and communication services. Each of the Tools menu items can be accessed from other menus and may be discussed further in other sections of this guide as noted below.

- Call – displays the Call menu, refer to Section 0.
- IM – displays the IM window, refer to Section 12.1.
- File Send – displays the File Send window, refer to Section 12.2.
- Sharing – contains the selections for Application Sharing, Desktop Sharing, Whiteboard, Web Push, and SMS; refer to Section 12.3.
- Schedule – displays the Schedule window, refer to Section 10.
- Video – contains selections for Video (Normal Mode), and Video (Presentation Mode), refer to Section 12.5.
- Chat Room – displays the Chat Room window, refer to Section 12.1.2.
- IM Log – displays the IM Log window, refer to Section 7.3.
- Import Contacts – import the contents from other contact database tools, refer to Section 7.1.1.4.
- Export Contacts – export the contents of the user's contacts to other database tools, refer to Section 7.1.1.4.
- Favorite Links – displays the Program & Web Link window.



## 4.4 Help Menu Selection

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

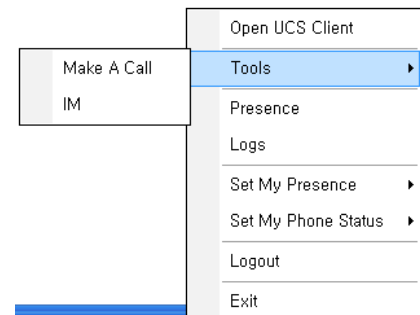


## 4.5 Tray Menu

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

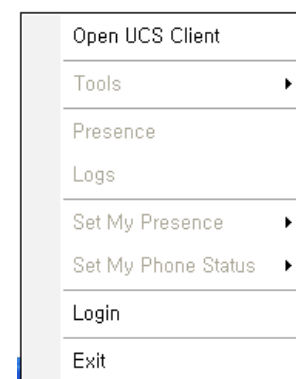
After Login

- Open UCS Client – opens the UCS Client with the last displayed main window.
- Tools – opens the selected member window to either Make a call or IM.
- Presence – opens the UCS Client with presence in the main window.
- Logs – opens the UCS Client with the logs window.
- Set My Presence – change my presence, refer to Section 4.1.1.
- Set My Phone Status – change my phone status, refer to Section 4.1.2.
- Logout – log out of the UCS Client.
- Exit – closes and exits the UCS Client.



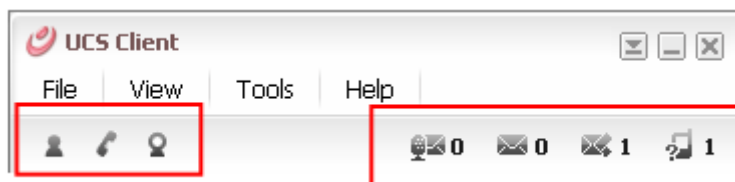
Before Login

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



## 5 Message & Status Bar

The icons for Presence, Phone and Video status are shown above the main window on the left. These icons indicate the user's current Presence, Phone and Web Cam status. The Message icons for Voice Mail, SMS, Notes and Missed calls are shown at the right above the main window. These icons indicate the number of unheard or unread messages and give access to Voice Mail and message log windows.



### 5.1 Message Icons

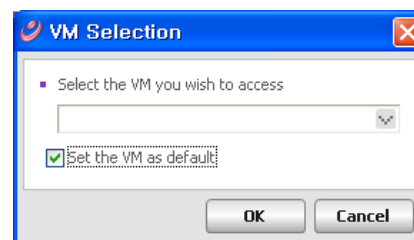
Message icons display the number of unheard or unread messages and missed calls. Selecting an icon accesses Voice Mail or the Logs window directly. To check messages:

1. Press the desired message icon.
  - Voice mail, refer to Section 5.1.1.
  - SMS, refer to Section 5.1.2.
  - Notes, refer to Section 5.1.3.
  - Missed Calls, refer to Section 5.1.4.



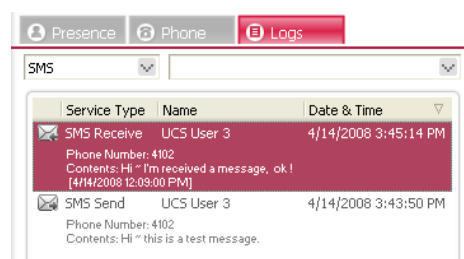
#### 5.1.1 Voice Mail

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



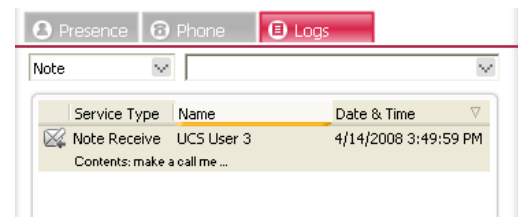
#### 5.1.2 SMS

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



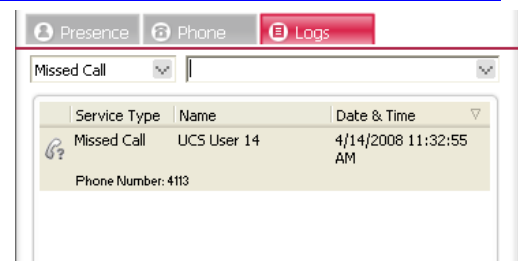
### 5.1.3 Notes

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

















### 5.1.4 Missed Calls

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



## 5.2 Status Icons

*UCS Server* monitors and displays your IM Presence, Phone and Video status icons, updating the icons automatically as your status changes. In addition, the Presence and Phone icons can be used to modify your status as outline in Sections 4.1.1 and 4.1.2. The Presence and Phone status can also be changed manually under the File selection of the Main application menu. Icons and the represented status are shown below.

IM PRESENCE ICONS	PHONE STATUS ICONS	VIDEO STATUS ICONS
 – Online	 – Idle	 – Idle
 – Busy	 – Busy	 – Busy
 – Away	 – Unavailable	 – Unavailable
 – Be Right Back	 – Call Forward	
 – Out to Lunch	 – DND	
 – On the Phone		

## 6 My Detail Information

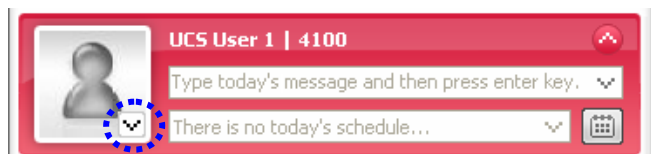
Users can view and modify the information in the My Detail Information window including today's message, 'My picture' and the day's appointments. In addition the user's detailed information and password can be modified using the My Detail Information window.

### 6.1 Setting My Picture

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

To change the picture:

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



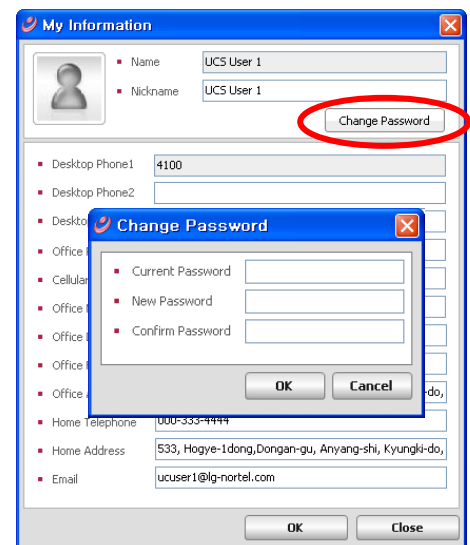
### 6.2 My Information and Password

The *UCS Client* sends the User ID and Password to the *iPECS* system and *UCS Server* during login to authenticate the client. The password can be changed from the My Detail window or from the *UCS Server Web Admin*. To change your password in the My Detail window:

1. Double click on the Picture ID to display your detailed information.
2. Select Change Password; the Change Password dialog window displays.
3. Enter the current password.
4. Enter and retype the desired password in the New Password and Confirm Password boxes.
5. Select OK to save the change.

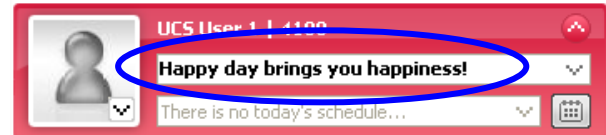
To change My Information:

1. Double click on the Picture ID to display your detailed information.
2. Edit contents of any editable field. Editable fields are set by *UCS Administrator*.
3. Press OK to save the changes.



### 6.3 User Defined Message

Users can write a message to display to other *UCS clients*.

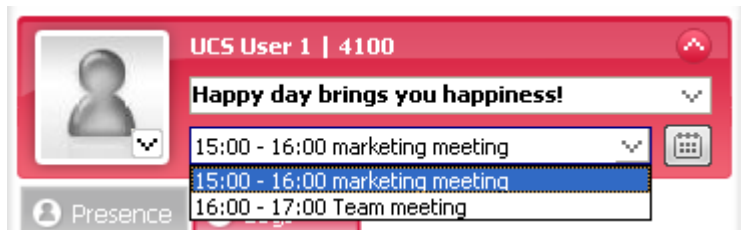


To post your message:

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

### 6.4 Today's Appointments

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





## 7 Main Window Views

The main window has four views (Presence, Phone, Logs and Call) selectable with the tabs at the top of the window. The Phone tab can be eliminated, see section 4.1.3.2. The Call tab only appears during an active call and the Call window can be assigned to automatically display when a call is placed or received, refer to Section 4.1.3.3.




### 7.1 Presence Window Introduction

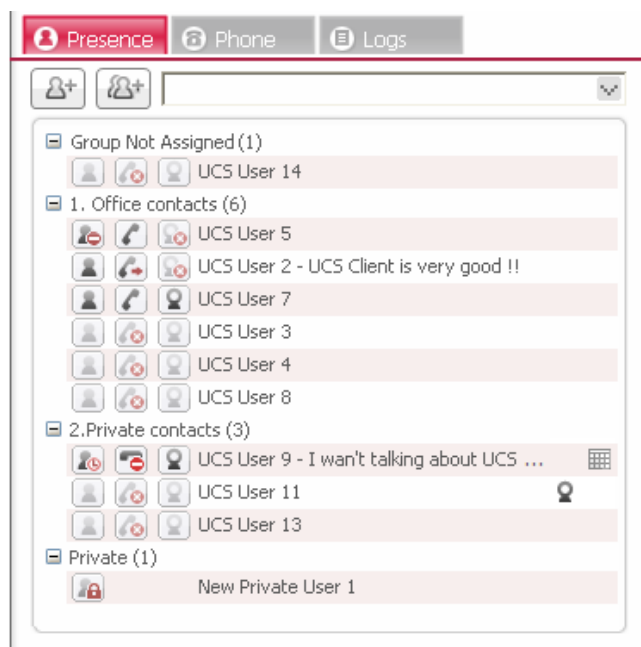
The Presence window displays the status of contacts you select from one of two directories available with *UCS*. The contacts in the Shared directory, which is managed by the *UCS* Administrator, are available to all users. Users also have access to contacts in a second directory called the Private User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

The tool icons are:

-  Add Contact
-  Add Group

The Presence icons are:

-  Offline
-  Online
-  Busy
-  Away
-  Be Right Back
-  Out to Lunch
-  On the Phone
-  Blocked
-  Non-UCS Contact
-  Private Contact










The *iPECS Phone* status icons are:

-  - Idle


The Webcam status icons are:

-  - Idle



- |  |   |
|--|---|
|  - Busy         |  - Busy  |
|  - Unavailable  |  - Unavailable, Webcam not connected at contact's PC.  |
|  - DND          |  - Offline, contact's PC or UCS <i>Client</i> offline. |
|  - Call Forward |   |

The Schedule status icon is:

-  - Today's schedule exist

**NOTE:** if selected contact have today's schedule, the schedule status icon is displayed.























The Remote Monitoring status icon is:

-  - Remote monitoring is allowed

**NOTE:** if selected contacts allowed you to use remote monitoring, the remote monitoring status icon is displayed.

When a contact is selected, the contact's information displays in the **Selected Contact** window just below the **Presence** window, refer to Section 7.5. In addition, icons are available in the window for each available communication mode.

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

ONLINE POP-UP	OFFLINE POP-UP	NON-UCS POP-UP	PRIVATE USER POP-UP
 Make A Call ▶  Scheduled Dial  Start a Video Call ▶  IM  File Send  Sharing ▶  Video ▶  SMS  Email Block Detail Information Schedule Info Move Selected User to ▶ Delete User Delete All Private Users View ▶ Sort ▶	 Make A Call ▶  Scheduled Dial  SMS  Email  Leave A Note Block Detail Information Schedule Info Move Selected User to ▶ Delete User Delete All Private Users View ▶ Sort ▶	 Make A Call ▶  Scheduled Dial  SMS  Email Detail Information Move Selected User to ▶ Delete User Delete All Private Users View ▶ Sort ▶	 Make A Call ▶  Scheduled Dial  SMS  Email Detail Information Move Selected User to ▶ Delete User Delete All Private Users Edit User View ▶ Sort ▶

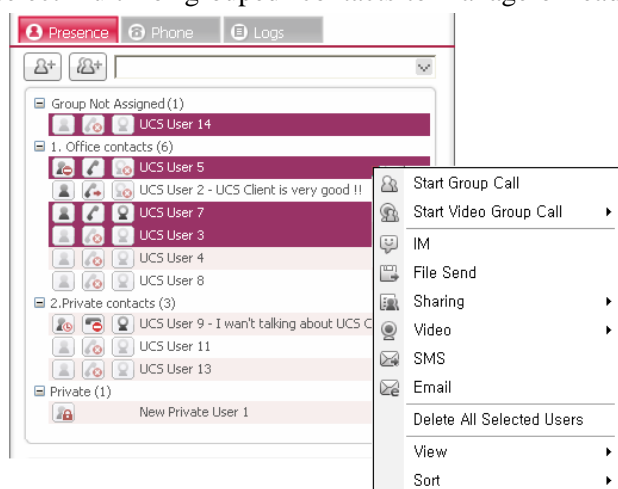
From these menus you may select **Make a Call** to place a voice call to the selected contact; initiate a collaborative session (IM, File Send, Sharing, Web Push, etc, see section 0), block the selected user from receiving your presence and status information (select **Block**), remove the selected contact from your Presence window (**Delete User**), or view detail contact information (**Detail Information**). In addition, for offline contacts, you may **Leave A Note**. The following describes menu items:

- **Make a Call** – places a call to the selected contact
- **Scheduled Dial** – registers a Schedule Dial to the selected contact
- **Start a Video Call** – Video with call (Normal/Presentation Mode)
- **IM** – starts IM to the selected contact
- **File Send** – starts File Send to the selected contact
- **Sharing** – Initiates a sharing session with the selected contact (Application Sharing/Desktop Sharing/Whiteboard/Web Push)
- **Clicking popup item** – starts one click sharing session with the selected contact and include selected item.
- **Video** – starts a Video call to the selected contact
- **SMS** – sends an SMS to the selected contact
- **Email** – sends an Email to the selected contact
- **Leave a Note** – leaves a note to the selected offline contact
- **Block** – blocks the selected user from receiving your presence
- **Detail Information** – opens the selected user's detail information box
- **Today's Schedule Info** – displays the selected user's today's schedule information
- **Move Selected User to** – moves the selected user to another group
- **Delete User** – deletes the selected user from the Presence window
- **Delete All Private Users** – deletes all private users from the Presence window

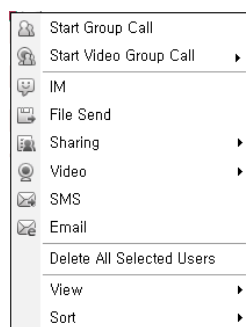
In addition to selecting a single contact, you can select multi- or grouped- contacts to manage or lead functions. To select multi contacts:

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

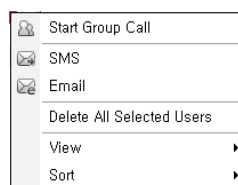
**NOTE:** If selected contacts have more than 5 online users, the offline popup menu is displayed.



### MULTI SELECT ONLINE POP-UP



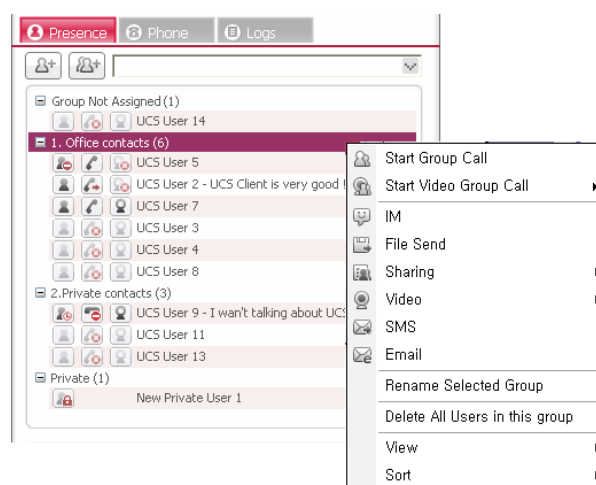
### MULTI SELECT OFFLINE POP-UP



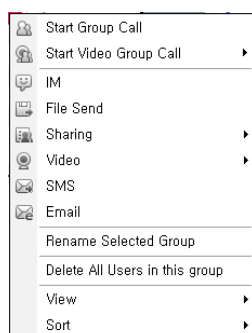
To select contacts in a group:

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

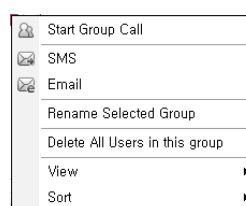
**NOTE:** If selected contacts have more than 5 online users, the offline popup menu is displayed.



### GROUP SELECT ONLINE POP-UP



### GROUP SELECT OFFLINE POP-UP



The following is a brief description of menu items available.

Start Group Call – places a group call to the selected contacts

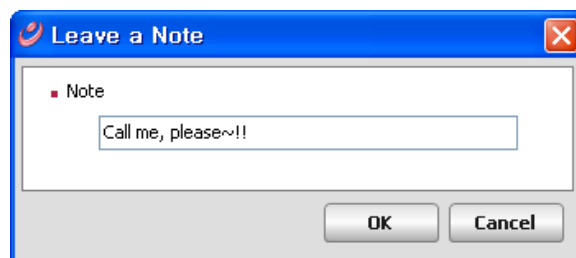
Start Video Group Call – places a video and group call to the selected contacts

Delete All Selected Users – deletes the selected users from the Presence window

Delete All Users in this group – deletes all users in the selected group from the Presence window.

To Leave a Note to an offline contact:

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



Users can customize the Presence window appearance with the View selection.

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

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

- IM – sort by IM status
- Phone – sort by Phone status
- Name – sort by contact's name

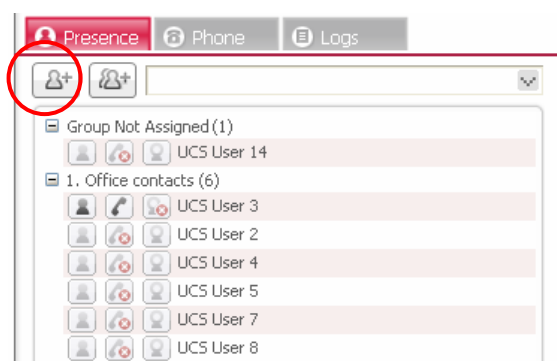
### 7.1.1 Managing the Presence Window

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

#### 7.1.1.1 Adding and Deleting Contacts

A contact may be added to or deleted from the Presence window from the Shared contacts directory. The Presence window also displays the Private directory and contacts may be added or deleted. The Shared contacts directory is stored in the *UCS Server* and is managed by the *UCS Administrator*. You manage the Private directory, which includes the following information for each contact:

- Name and Nickname
- Cellular Phone
- Office Phone, Name, Department, FAX and Office Address

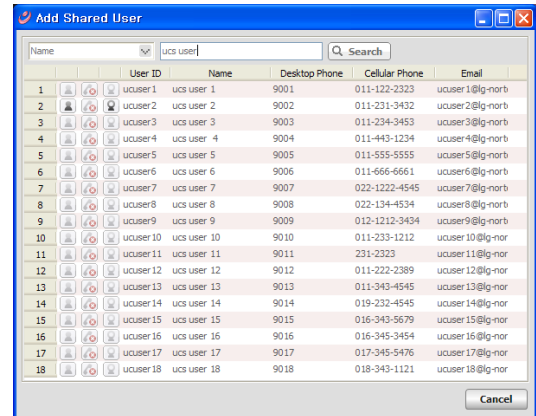


- Home Telephone, Address and Email.

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

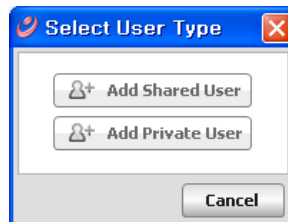
To add a contact from the Shared directory:

1. Select the Add Contact icon in the upper left side of the window.
2. In the Select User Type window, select Add Shared User.
3. In the Add Shared User window, select the field to search using the drop-down menu.
4. Enter the appropriate text to search within the field.
5. Click Search to display matching records.
6. Select the user to add and click Add; the contact record is displayed in the Not Assigned Group in the Presence window.



To add a new Private User:

1. Select the Add Contact icon in the upper left side of the window.
2. In the Select User Type window, select Add Private User.
3. In the Add Private User window enter the contact information (Name and Office Phone are the required fields).
4. Click OK to store and display the contact record. The new contact is shown under the Private group and stored in the Private User directory.



The 'Add Private User' dialog box has a blue title bar. It contains several input fields: Name (New Private User 1), Nickname (New Private User 1), Office Phone (4200), Cellular Phone (000-999-0000), Office Name, Office Department, Office FAX, Office Address, Home Telephone, Home Address (Hogye-1dong,Dongan-gu, Anyang-shi, Kyungki-do), and Email. 'OK' and 'Cancel' buttons are at the bottom right.

To delete a contact from the Presence window:

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

**NOTE:** Deleting a Private contact from the Presence window also deletes the record from the

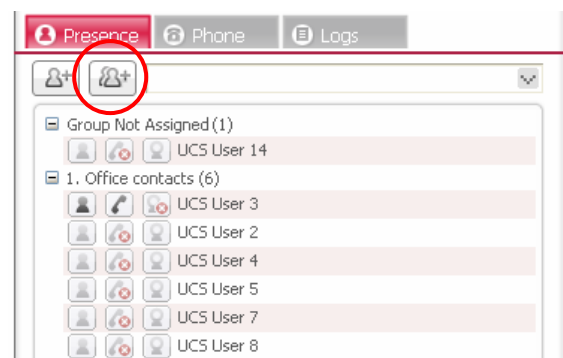
Private User directory. Deleting a Shared contact only removes the record from your Presence window.

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

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

#### 7.1.1.2 Organizing Contacts by Group

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



To add a group:

1. Select the Add Group icon.
2. Type the new group name desired.
3. Click OK to add the new group.

To rename group name:

1. Right-click on the desired group, the pop-up menu will display.
2. Select Rename Selected Group.
3. Enter the new group name and click OK button.

To delete group:

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

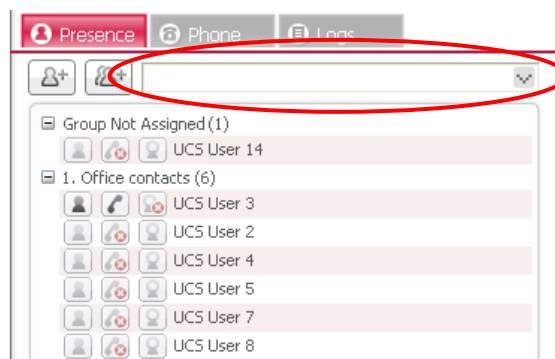
**NOTE:** All contacts must be removed from the group before it can be deleted. Also, the predefined Not Assigned Group cannot be deleted.

To move a user to another group:

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

### 7.1.1.3 Searching the Presence Window

You may query the Presence window to locate a contact quickly. The *UCS Client* will search the contacts listed in the window. Text entered in the search box is compared to the Name, Today's message and Desktop Phone 1 fields in each record. If no matching records are found, you can extend the search to all records in the Shared directory or, if enabled in Section 4.1.3.4, the LDAP database.

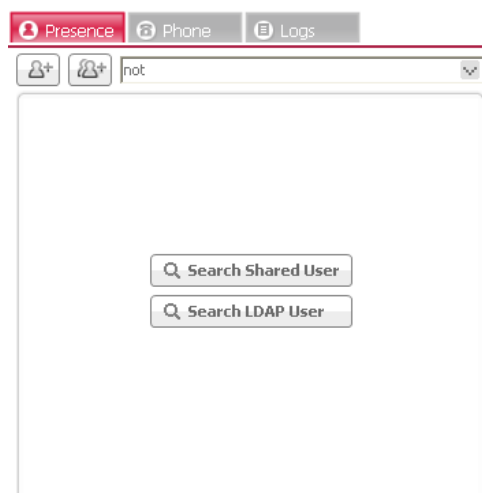


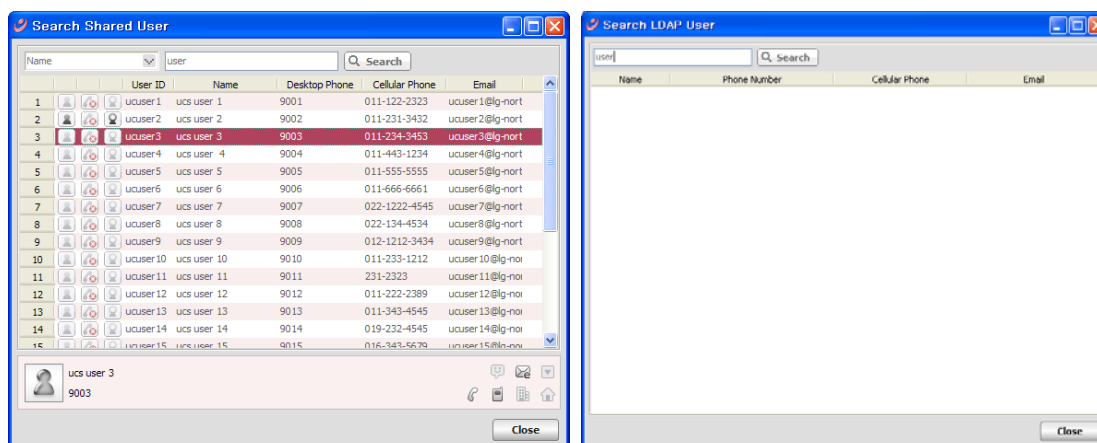
To search users in the Presence window:

1. Enter the appropriate text to search.

If no matching records are found, extend the search to the Shared or LDAP database:

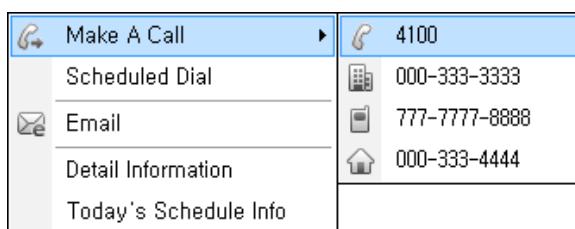
1. Select Search Shared User or Search LDAP User.
2. The search results window displays.



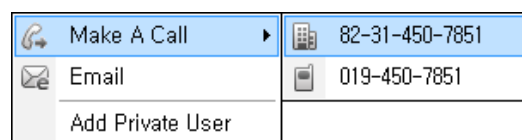


3. From the results window, right click to display the actions popup menu as shown below.

#### SHARED USER POP-UP

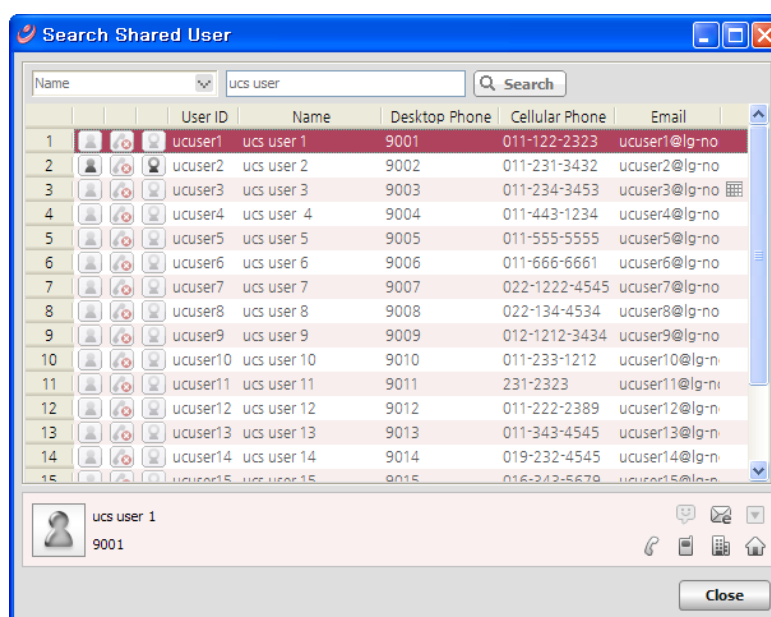


#### LDAP POP-UP



### Search Shared User

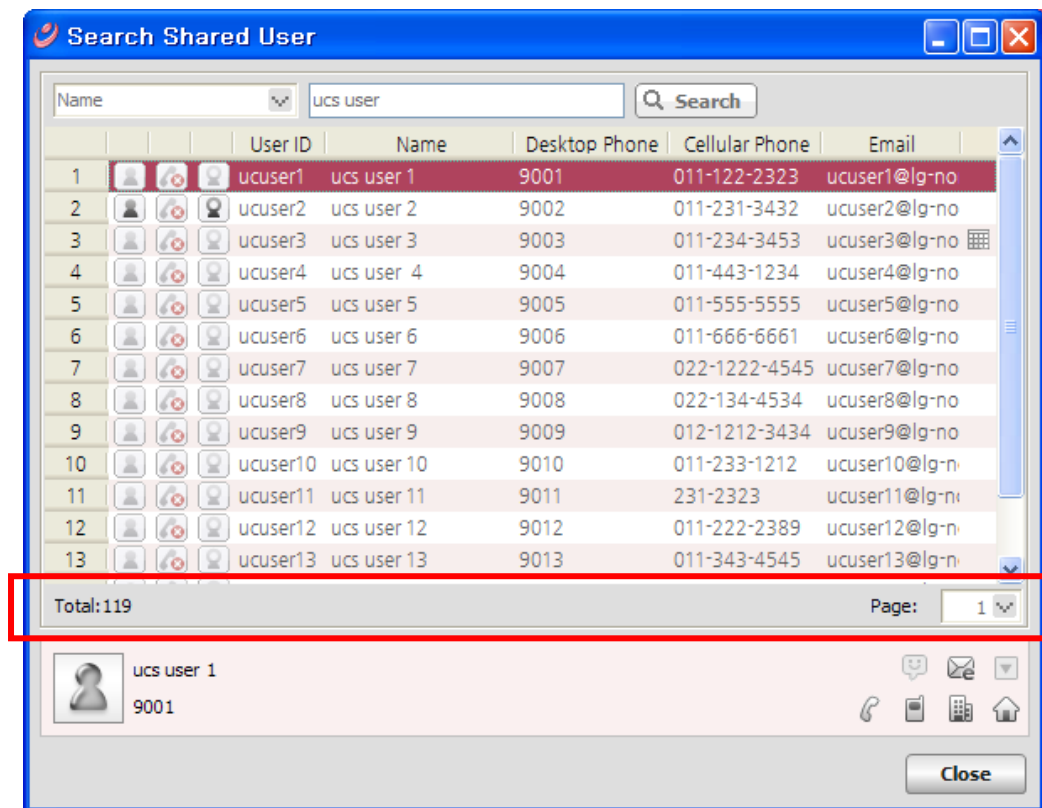
The Search Shared User window shows IM status, phone status, Webcam status, User ID, Name, Desktop Phone, Cellular Phone, Email and schedule status like a Presence window. The user can use some features available in a Presence window.



**NOTE:** Presence status information does not automatically update and instead shows the current status at the time the user queried the data.



If the number of queried users exceeds 100, the first 100 results will be shown, and any other results will be shown on subsequent pages as shown below. For example, if all queried users total 117, only 100 users are displayed on the first screen, the other 17 results will be shown on a second page.

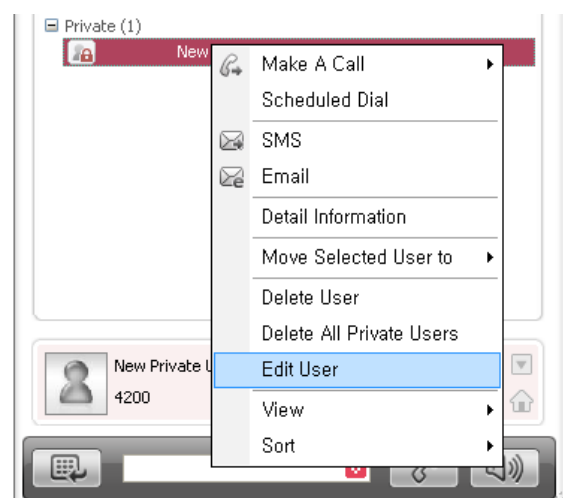


#### 7.1.1.4 Managing the Private User Directory

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

To edit a record:

1. Right-click on a record; the pop-up menu will display.



2. Select Edit User from the popup menu.
3. Modify the user's information
4. Click OK to save.

To delete all the Private User contact records:

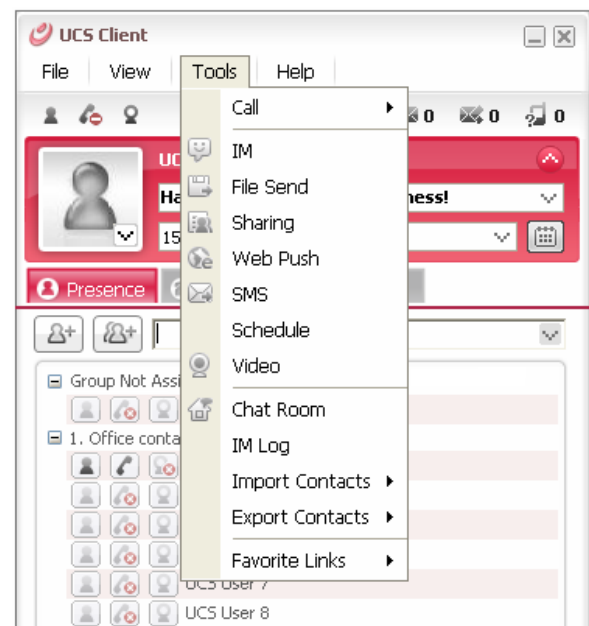
1. Right click on any contact or group.
2. Select Delete All Private Users from the popup menu.
3. Click Yes to confirm.

### Importing and Exporting Contacts

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

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

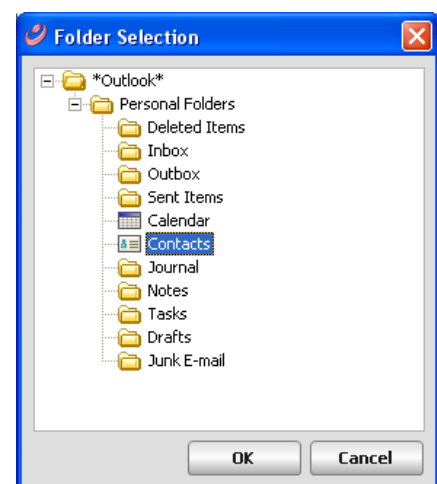
1. Select Import Contacts from the Tools menu.
2. Select database type.
3. After importing the Import Result window displays and the imported contacts are displayed in the Private group.



To import contacts from Outlook:

1. Select Import Contacts from the Tools menu.
2. Select Outlook
3. Select Outlook contact folder, the Outlook access popup displays.
4. Check Allow access for, select time and click Yes.
5. The Import Result window displays and the imported contacts are displayed in the Private group.

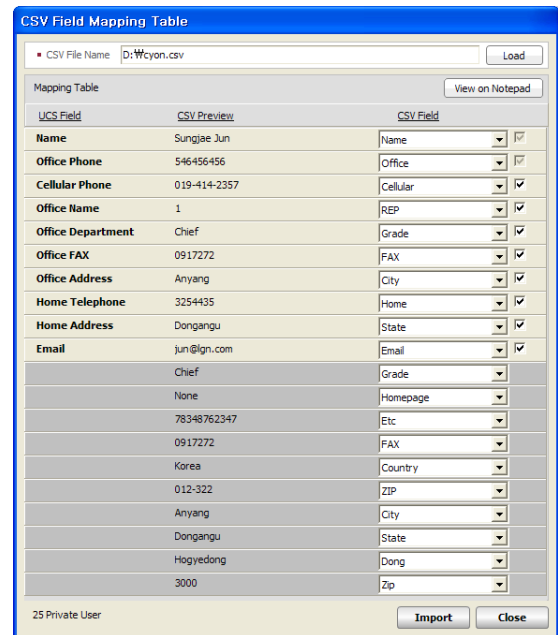
**NOTE:** If No is selected in the Outlook access popup window, the import will fail and you will receive an unknown error notification (shown next page).





To import contacts from a CSV file:

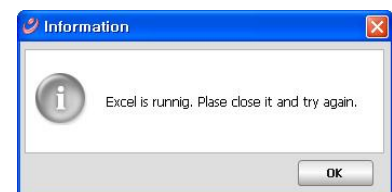
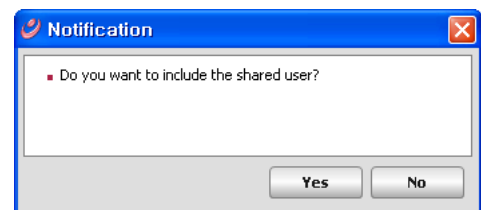
1. Select Import Contacts from the Tools menu.
2. Select CSV.
3. Select the CSV file to import.
4. The CSV Field Mapping Table window is shown.
5. Arrange the CSV Fields.
6. Uncheck fields not to import.
7. Click on the Import button.



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

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

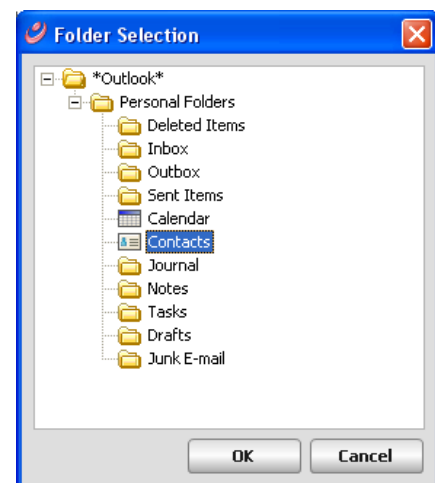
**NOTE:** When using Excel reporting, the Excel program must be closed before starting to export data. If the program is not closed, the user will receive a popup message requesting Excel to be closed.



To export contacts to Outlook:

1. Select Export Contacts from the Tools menu.
2. In the popup Notification window, select Yes to include Shared User contacts or No to export Private User contacts only.

3. Select Outlook for the database type.
4. Select the desired Outlook contact folder, Outlook access popup displays.
5. Check Allow access for, select time, and click Yes. The export process starts; a notification window displays when completed.



## 7.2 Phone Window View

With the Phone mode enabled, refer to Section 4.1.3.2, you have access to all of the *iPECS* system features as well as the features available to traditional *iPECS IP Phones*, with the few exceptions based on the differences discussed below. The fixed feature keys operate in the same manner as in the *iPECS IP Phones* except the mouse is used to select dial pad and feature buttons. For operation of the features, refer to the *iPECS IP Phone* User Guide.

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



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

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

### 7.3 Logs Window

The Logs window is the log of *UCS* services used by the *UCS Client*. The log identifies the service type, name of connected party and time the service was employed. These logs are stored on the *UCS Client* PC and can be searched or archived as a backup file in the *UCS Client* folder. In addition, by right clicking on a record, the popup menu similar to the Presence popup, see Section 7.1, is displayed.

Services logged are:

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

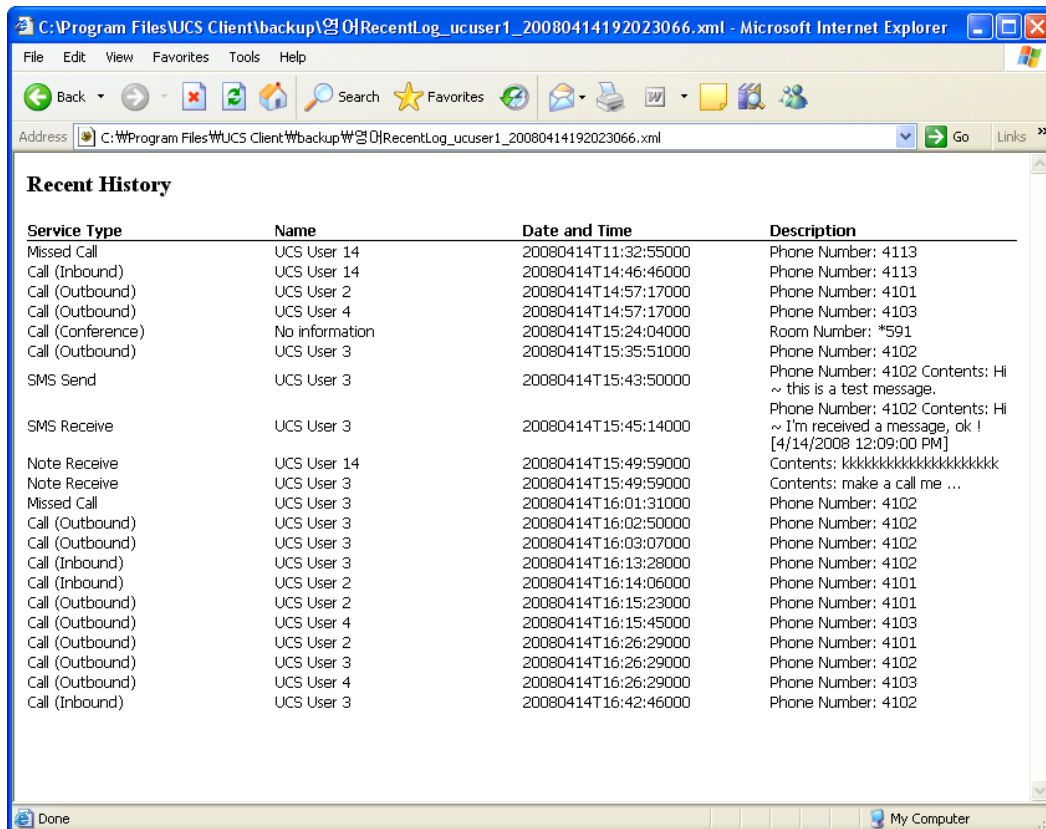
Service Type	Name	Date & Time
Missed Call	UCS User 3 Phone Number: 4102	4/14/2008 4:01:31 PM
Note Receive	UCS User 3 Contents: make a call me ...	4/14/2008 3:49:59 PM
SMS Receive	UCS User 3 Phone Number: 4102 Contents: Hi ~ I'm received a message, ok ! [4/14/2008 12:09:00 PM]	4/14/2008 3:45:14 PM
SMS Send	UCS User 3 Phone Number: 4102 Contents: Hi ~ this is a test message.	4/14/2008 3:43:50 PM
Call (Outbound)	UCS User 3 Phone Number: 4102	4/14/2008 3:35:51 PM
Call (Conference)	No information Room Number: *591	4/14/2008 3:24:04 PM
Call (Outbound)	UCS User 2 Phone Number: 4101	4/14/2008 2:57:17 PM

To search the Logs window:

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

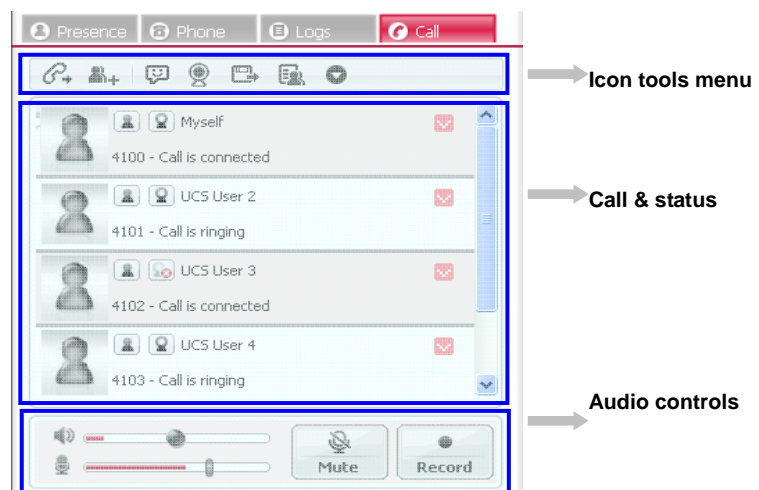
**NOTE:** If more than 2000 records are stored when you login, a Backup window will display indicating the logs window should be archived. This is needed to minimize any affect of a large number of logs on performance of the *UCS Client* and other Windows applications. The archive file is named and saved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

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



## 7.4 Active Call Window

When you place or answer a call, the active Call tab will display and, if enabled, the Call window displays. The window includes call and status information, an icon menu and audio controls as shown in the Graphic.

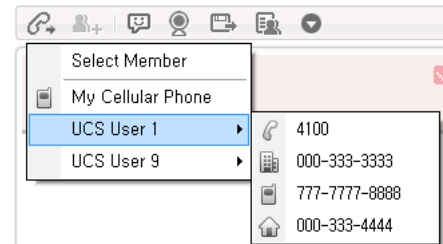


### 7.4.1 Icon Tools Menu

The Icon tools include the call transfer icon and icons to activate a collaborative session.

To transfer a call:

1. Select the Transfer icon.
2. Select a member from the Select Member window and then Click OK,  
OR
3. Select a member from the Popup menu of the user Favorite Contacts (refer to Section 9.8).



To add a new member to a Conference Group call:

1. Select the Add Member icon.
2. Select a member from the Select Member window.
3. Click OK.

**NOTE:** This function may require conference devices in call server.

The remaining icons establish collaborative sessions with other users. To use an icon:

1. Select the icons.
2. Select a member from the Select Member window.
3. Click OK to initiate the session.

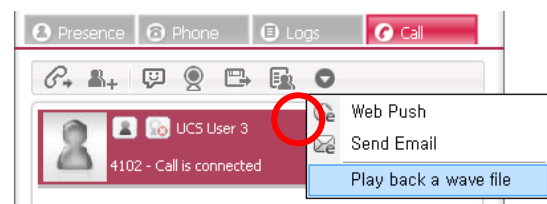
The *UCS Client* incorporates a tool to play recorded wave files during a conversation so that the connected parties can hear the recording. The wave file can be a recording of a previous conversation, see section 7.4.3 or any wave file with the following format.

Wave file format:

- PCM - u-law or A-law format
- Bits per sample – 8/16 bits per sample
- Sampling rate – 8, 11, 16, 22, 32, 44 or 48 KHz
- Mono or stereo

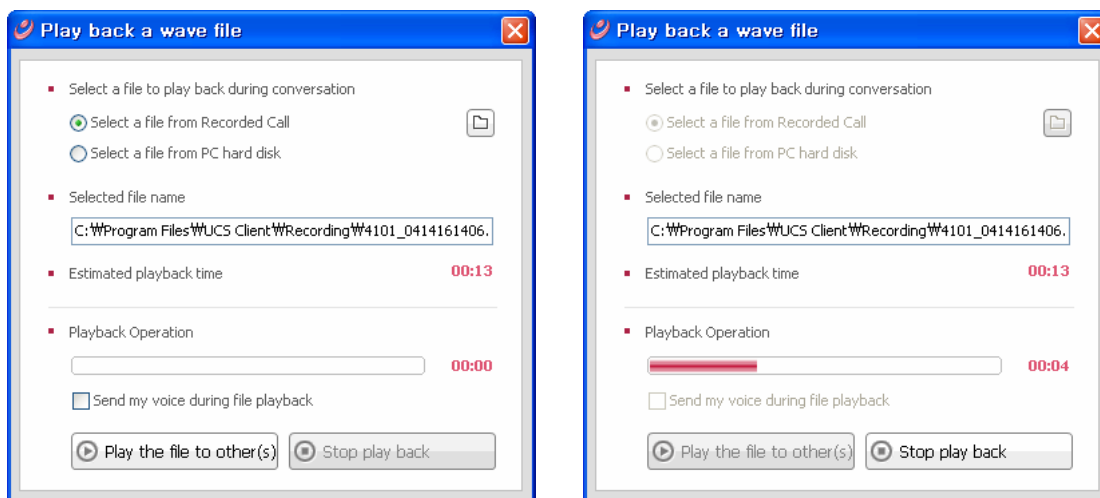
To playback a wave file:

1. To play a recorded wave formatted file.
2. Select Play back a wave file.
3. In the popup window, select the file type,




file name and select Play the file to other(s).

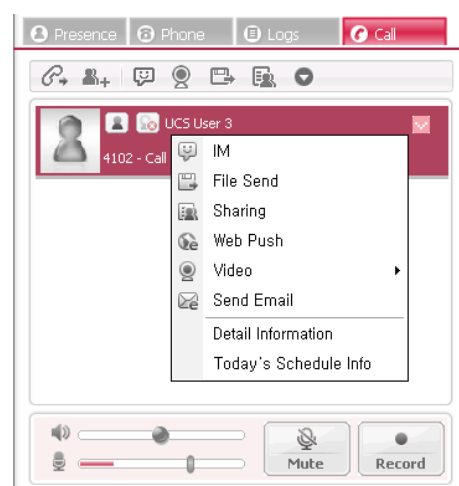
4. Select Stop Playback to stop the playback at any time.



## 7.4.2 Call and Status

Call and Status shows call status as well as the connected party's picture, presence and video status. The left click popup menu offers tools for collaborative sessions, directory information on the contact and the contacts schedule for the day.

**NOTE:**  indicates a non-registered user.



## 7.4.3 Audio Controls

The Call and status window includes audio controls to adjust the speaker and microphone volumes and mute, turn off, the microphone. In addition, a control is provided to record the current conversation. Caution, recording may not be legal in some locations and other parties should be notified of your intent to record a conversation.

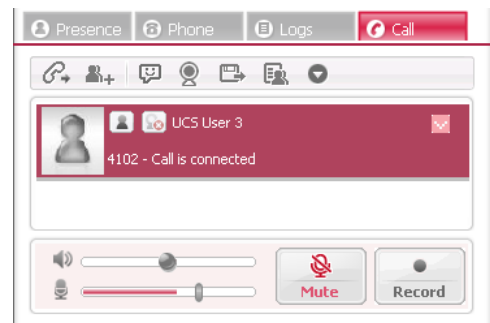
To adjust the volume:

1. Click and slide the volume knob for the microphone or speaker; left is down right is up.
2. When AGC is on (Section 4.1.3.3), the microphone volume is adjusted automatically by the *UCS Client*. In this case, you cannot adjust the microphone volume.



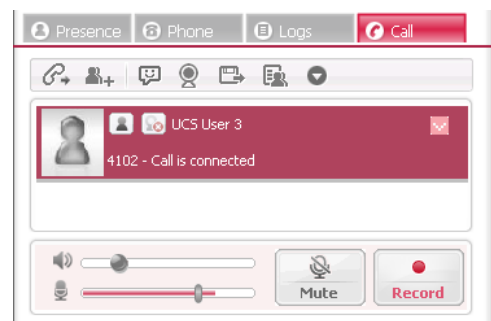
To Mute the microphone:

1. Click Mute; the button will light when muted.
2. Click Mute again to activate the microphone.



To record an active conversation:

1. Click Record; the button will light.
2. Click Record again to stop recording; the *UCS Client* sends a single “record-start” tone when recording is started.



## 7.5 Selected Contact Window.

The Selected Contact window displays immediately below the main window and provides basic information about the highlighted contact. The window includes icons to establish a collaborative session with the contact using highlighted icons indicating the communication modes available to the contact. Selecting an icon initiates the communication. The Selected Contact window can be disabled if more space is desired in the main window, see section 4.2.1.

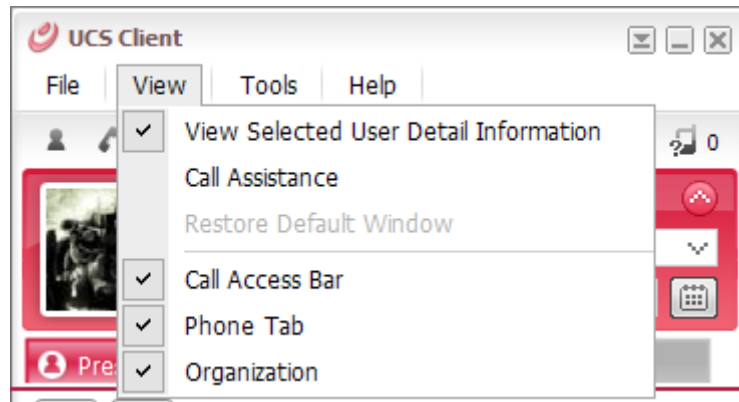


## 7.6 Organization Window

### 7.6.1 Setting

To use the Organization Window, the Web Admin Organization Chart Use Property setting must be enabled ‘Yes’ by administrator. Following Logging-in, to view the Organization Window:

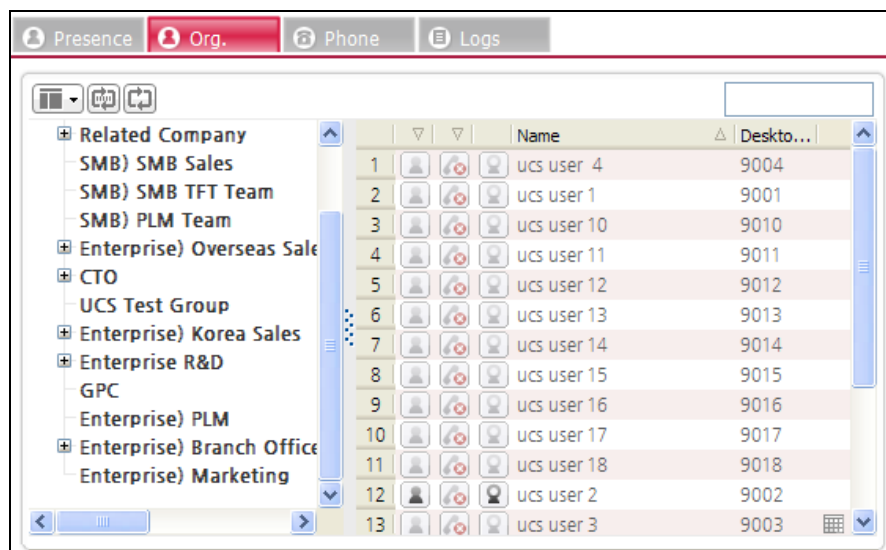
1. From the View menu, select Organization.



2. Log-out from UCS Client, and log back in; the Organization Window will be shown in UCS Client automatically.

### 7.6.2 Screen and Associated Features

The Organization Window shows the applicable Organization Chart well as table formatted information about users such as IM status, phone status, video status, desktop phone and schedule status similar to a Presence Window.



To view a particular user's information:








1. Select the department name to obtain information about users belonging to that selected department name.
  - User information table has the same features as a Presence Window except the capability of remote monitoring status and user customized group management (refer to Section 7.1).
2. Click on the tool buttons for screen customization (descriptions below),



OR

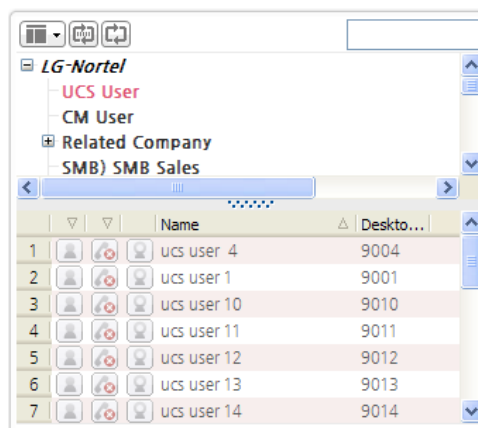
3. Enter data into the input box for searching.
4. The right-click popup menu offers tools for screen customizing (shown).

#### ORGANIZATION FORMAT BUTTON MENU DESCRIPTION

BUTTON	DESCRIPTION
	<div>  Organization Top/User Bottom              Organization Left/User Right              Organization Bottom/User Top              Organization Right/User Left             <hr/>  Customize Column View ▶              Sort ▶         </div>

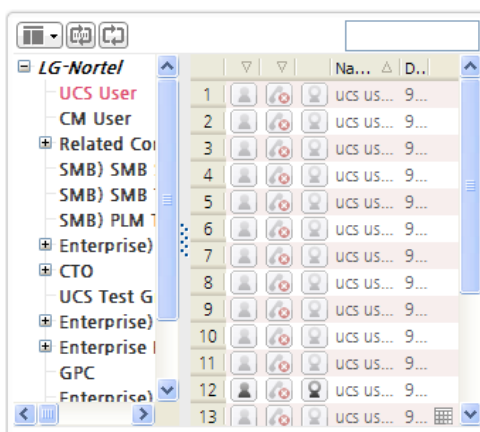
##### 7.6.2.1 Organization Top/User Bottom

The Organization Tree is located at top of the screen and the User information table is located at the bottom of the screen.



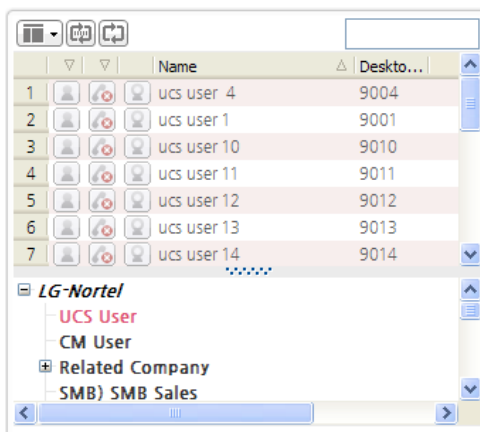
##### 7.6.2.2 Organization Left/User Right

The Organization Tree is located at left of the screen and the User information table is located at the right of the screen.



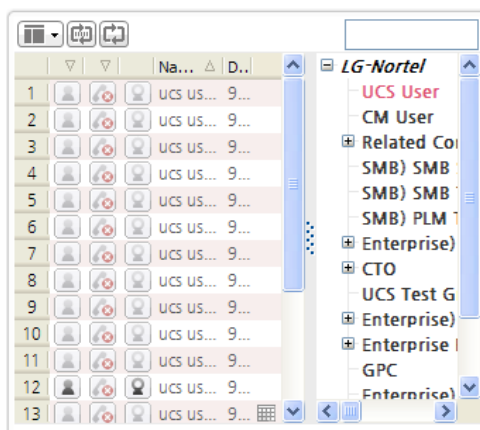
### 7.6.2.3 Organization Bottom/User Top

Organization Tree is located at the bottom of the screen and the User information table is located at the top portion of the screen.



### 7.6.2.4 Organization Right/User Left

Organization Tree is located at the right of the screen and the User information table is located at the left of the screen.



### 7.6.2.5 Customize Column View

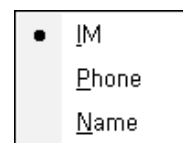
Users can customize the column view to view in the user information table. To customize columns:

1. Check the column name at the popup menu.






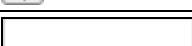
### 7.6.2.6 Sort

Users are capable of defining the sorting order of users listed in the Organization window. The screen customizing values of Column View and Sort are saved automatically and automatically restored when initiating the UCS Client.



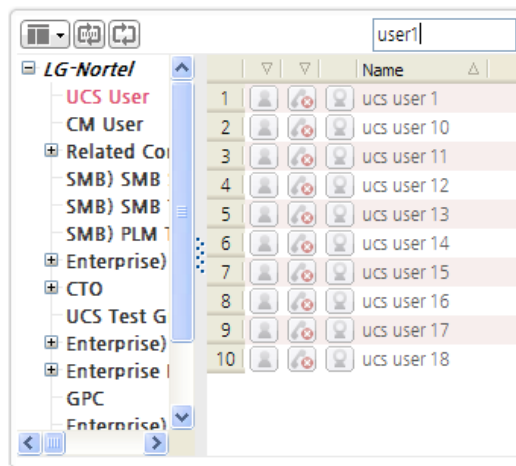
There is a splitter between the organization tree and user information. User can adjust the separation for these two areas. This value is also saved and restored automatically.

#### USER CUSTOMIZATION BUTTONS

BUTTON	DESCRIPTION
	Toggle button – if clicked, user information contained in the selected department is updated periodically, according to Web Admin configuration.
	
	Update button – click this button to update user information.
	Input box – search user information from the current displayed users or in the list of all users.

To search(filter) displayed users:

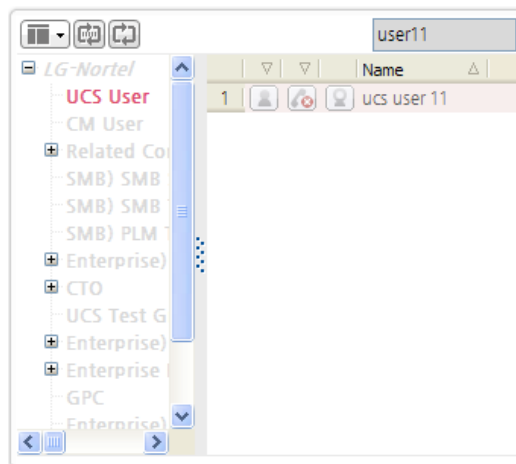
1. Input keyword to search.
2. User information containing input keyword match are displayed in the user information table.
3. When the search input box is cleared, the user information list will return to the previous state prior to inputting the keyword.



To search the list of all users:

1. Input keyword to search.
2. Press the enter key.
3. User information matching the input keyword is displayed; input box color is changed to gray, and the organization tree and update button will be disabled.
4. Change the input keyword to filter the list of user information further (do not press Enter).
5. When the search input box is cleared, the user information list will return to the previous state prior to inputting the keyword.

**NOTE:** When searching, user list will be retrieved from Name, Desktop Phone, User ID and Cellular Phone.



## 8 Quick Call Control Bar

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

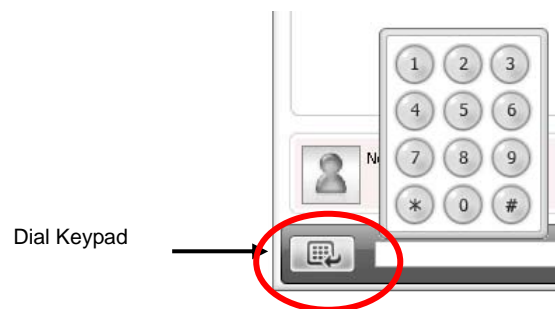


### 8.1 Placing a call

Placing a call from the Quick Call bar is quick and efficient. For your convenience, calling options are available using the control bar.

To place a call using the Simple Dial-pad popup:

1. Launch the simple dial-pad popup using the dial pad icon.
2. Click on digits to select the appropriate number, which will be displayed in the pre-dial box.
3. Press the Call button to place the call.



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

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



To end the call:

1. Click on the speaker button

Calls can be placed from other applications while the *UCS Client* is active or minimized. To place a call from another application:

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

## 8.2 Receiving a Call

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

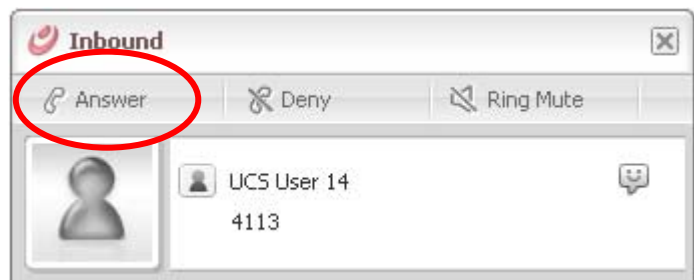
To answer a call with the *UCS Client* active:

1. Click on the speaker button.



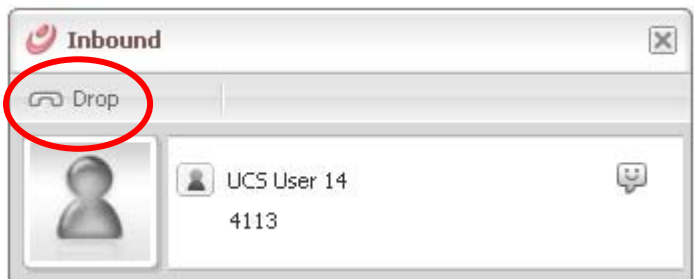
To answer the call with the *iPECS UCS Client* minimized from the Caller Id popup:

1. Click the Answer button.



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

1. Click the Drop button or activate the *UCS client*.
2. Click the speaker button.





## 9 Tools Menu Call Features

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

### 9.1 Group Call

With Group Call, a conference can be setup with a group with a single call. *iPECS* processes the group call request by notifying the group members, who can then respond by entering the call or rejecting the request. The *UCS Client* can add or delete members during the group call with up to 32 members in the group call. Note for proper operation, the *iPECS* must be equipped with the conferencing module.

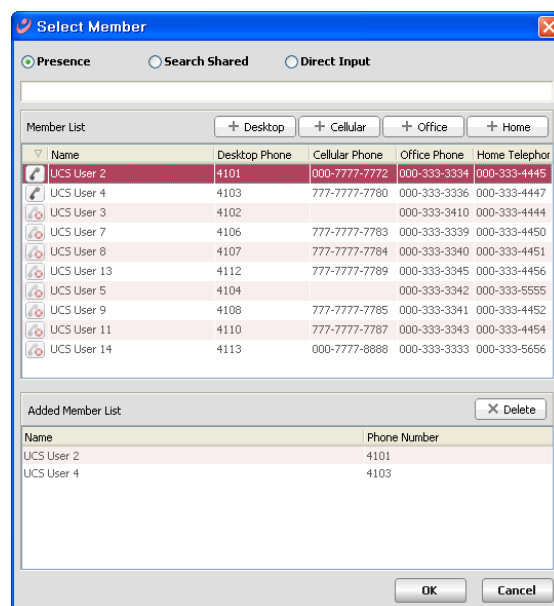
To initiate a group call:

1. From the Tools menu select Call
2. Select Start Group Call from the Call menu.
3. Add members from the Select Member window.

Members are added from the-

- Presence list
- Shared directory
- Manually entered telephone number

4. The selected or inputted numbers are displayed in the Added Member List at the bottom of the window.
5. Press OK; members of the group are notified of the request.

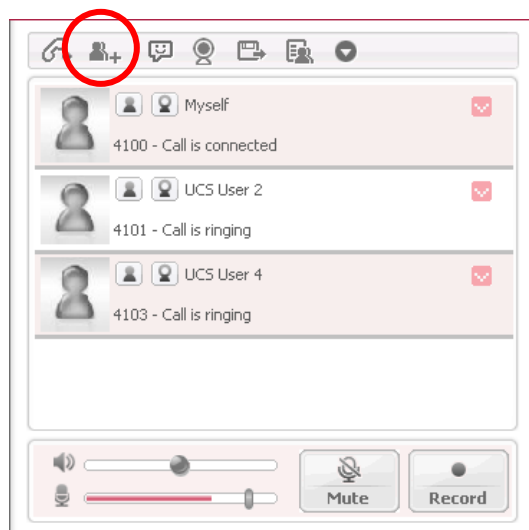


To join a group call:

1. When the Group Call .popup is received, click Yes.

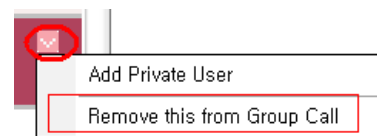
To add members to an active group call:

1. Click the Add User icon (shown right).
2. Select new members (up to 32), from the Select Member window.



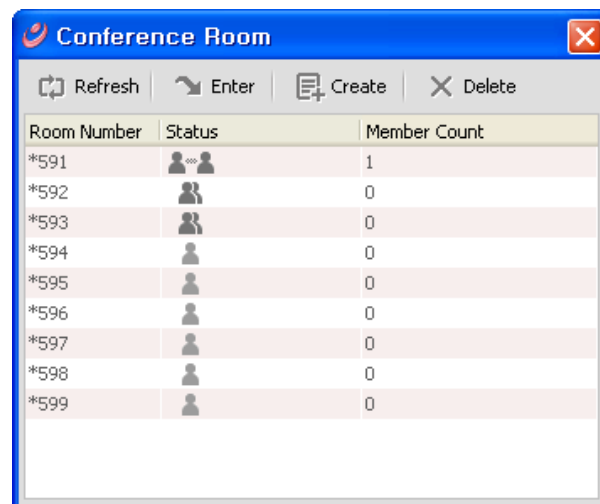
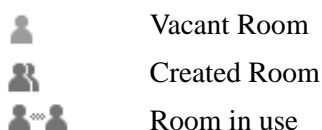
To delete member from an active group call:

1. Click the down arrow to the right of the record of the member to be deleted.
2. From the popup menu, select Remove this from Group Call.



## 9.2 Conference Room

*iPECS UCS Client* can use the *iPECS* Conference Room feature to set-up or join a scheduled conference. A Conference Room can support up to 32 parties with the *iPECS* conferencing module. When accessed, the Conference Room window displays controls to create and manage rooms and status of available rooms. The status is indicated with icons as below:



To access the Conference Room window:

1. From the Tools menu select Call.
2. From the Call menu select Conference Room, to display the window.

To update the status of rooms:

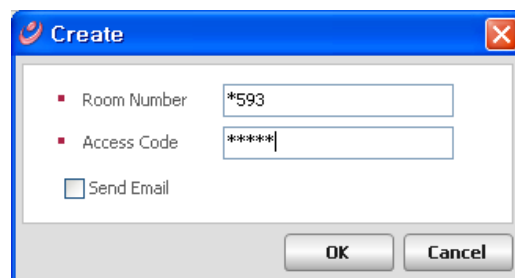
1. Click the Refresh button.

To enter a room:

1. Enter the room from the Conference Room window.
2. Enter the Access Code from the room creator.

To create a Conference Room:

1. Select a vacant room from the window.
2. Enter an Access Code, maximum 5 digits.
3. If desired, check Send Email to send an e-mail notification of the conference.



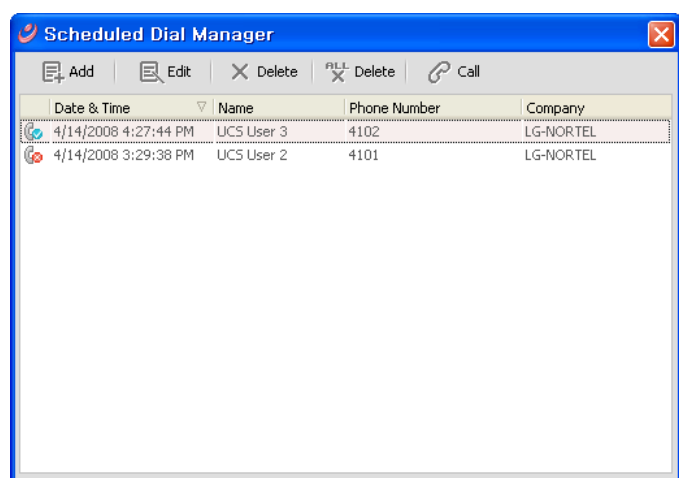
4. Click OK to create the Conference Room.

To delete a Conference Room:

1. Select the room from the window.
2. Click the Delete button.
3. Enter the Access Code.
4. Click OK to delete the room.

### 9.3 Scheduled Dial

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

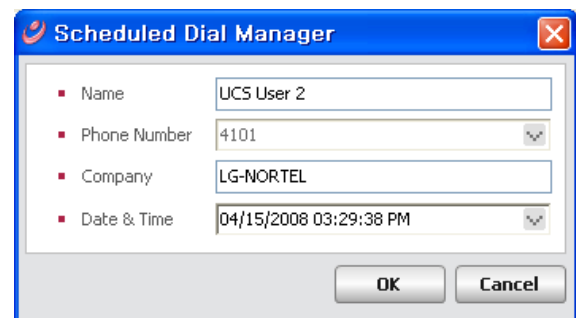


To access the Scheduled Dial window:

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

To add or edit a Schedule Dial:

1. Click the Add or Edit icon on the Schedule Dial window; the Schedule Dialing Manager popup appears.
2. Enter the Name and Company.
3. Enter or use the drop down menu and select a Phone number (required entry).
4. Use the pull-down to schedule a Date & Time.
5. Click OK to save.

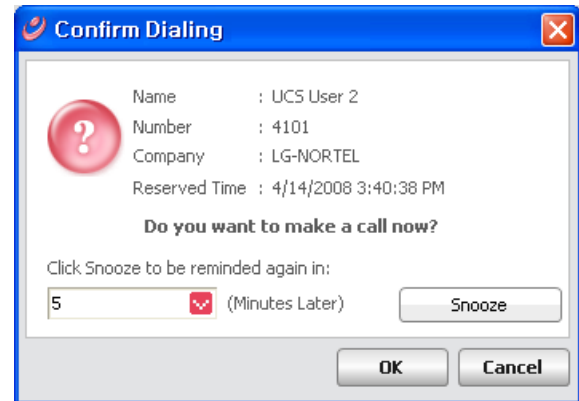


**NOTE:** Each Schedule Dial must have a unique scheduled time. Duplicate schedule times are not allowed.

To delete an entry from the Scheduled Dial window:

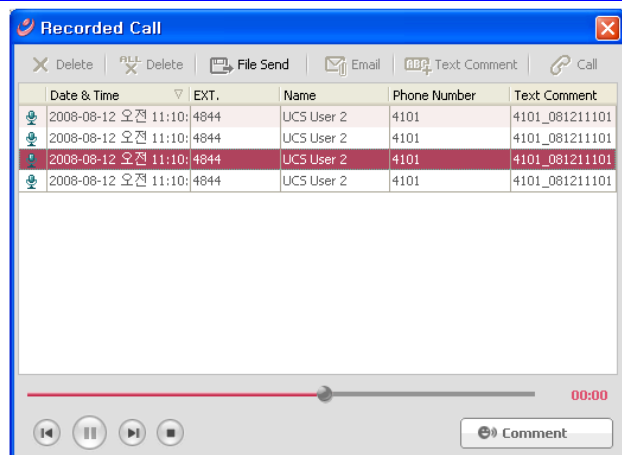
1. Select Delete or Delete All; confirm the record deletion.
2. Click OK.

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



## 9.4 Recorded Call Playback

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



Calls are recorded from the Call window, see section 7.4.3. To playback a recorded call:

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

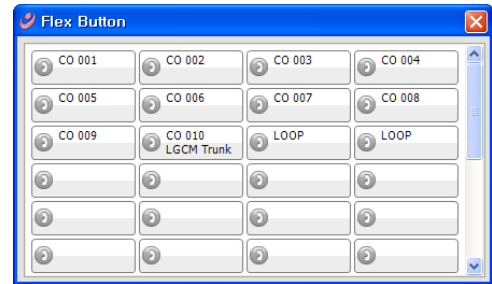
## 9.5 Auto Call Recording

When enabled in the *iPECS* system, conversations of the *UCS Client* and/or other 3<sup>rd</sup> party *iPECS* users are recorded to the hard drive of the *UCS Client* PC. Automatic recording is assigned under Program code 112 of the *iPECS* system. Other stations in the system may be assigned to record conversations to the *UCS Client*, “3<sup>rd</sup> party recording”. For proper 3<sup>rd</sup> party recording, the *iPECS UCS Client* must be idle.

Once recorded, the Recorded Call window (refer to Section 9.4) will indicate the date, time and station number(s) that was party to the conversation.

## 9.6 Flex Buttons

The Flex Button window provides access to 48 Flex buttons. Each button includes a status icon, which displays the status of the CO Line or station associated with the button. The button also displays a designation from the *iPECS* system database, such as CO 001, SPD 001, etc. You may assign an additional label to the button for display in the Flex Button window.



You can assign the function of Flex buttons that are not pre-assigned as a Line. Instructions for assigning a Flex button are provided in the *iPECS Phone* user guides.

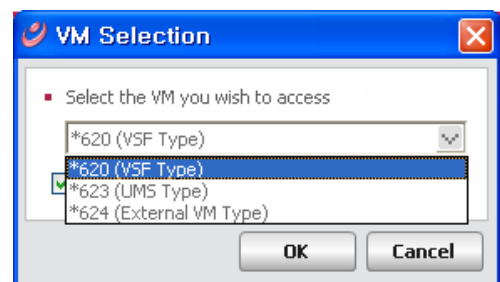
To add a label to an assigned button:

1. Right click on an assigned Flex button.
2. Click Add Description; the Label popup appears.
3. Enter a label for the selected Flex button.
4. Press Save to store the new label.

## 9.7 Voice Mail Server Selection

When multiple voice mail servers are associated with the *UCS Client*, the VM Selection window permits access to the various mail servers.

**NOTE:** a server can be selected as default, in which case this window is not shown when selecting the VM icon in the message and message icon toll bar.



To access the VM Selection window:

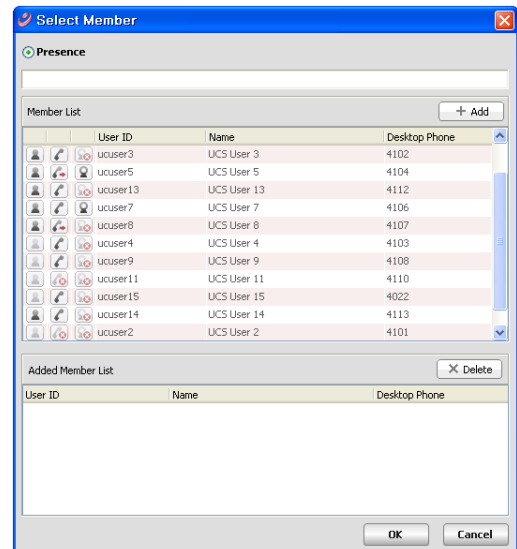
1. From the Tools menu select Call.
2. From the Call menu select VM Selection to display the VM Selection window.
3. Select the desired voice mail server from the drop down list.

## 9.8 Favorite Contacts

Favorite Contacts allows the user to transfer a call easily using the call tab window.

To add lists to Favorite Contacts:

1. From the Tool menu, select **Call>Favorite Contacts>Favorite Contact**; the Selected Member window will be shown.
2. Select the desired Member(s) and press the Add button.
3. The Members of Favorite Contacts will be added into the bottom of the Select Member Window.



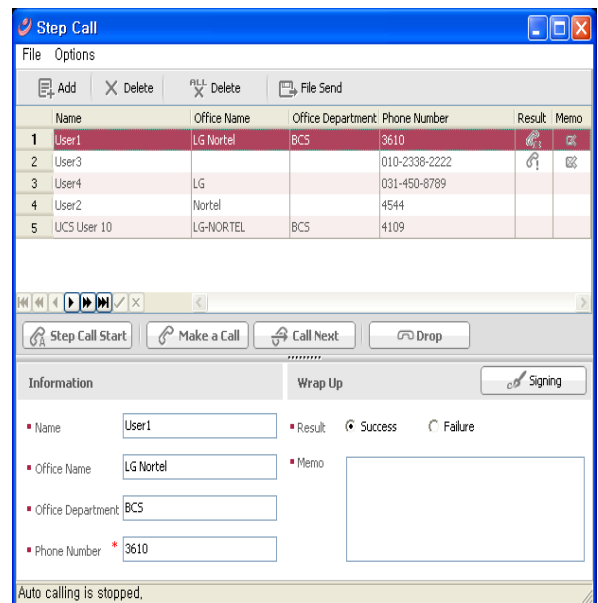
## 9.9 Step Call

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

To add contact(s) to an outbound calling list by Adding a button on the toolbar:

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

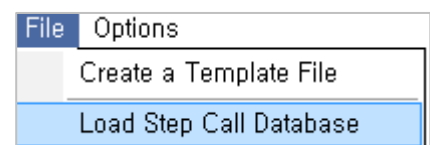
**NOTE:** Phone number should be filled out (Required).



To add contact(s) to an outbound calling list by Loading entries into the Step Call Database (.scd, .csv)

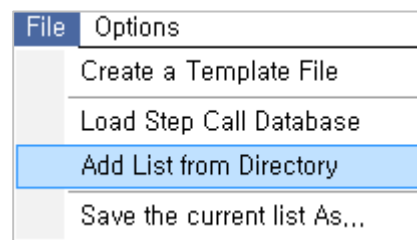
1. From the File menu, select Load Step Call Database.
2. Select a Step Call Database.

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




To add contact(s) to an outbound calling list by Adding a list from the Directory:

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






To make an outbound call using Step Call:

1. Activate 'DND' if you don't want to receive calls from others during Step Call.
2. Select a record in the outbound calling list.
3. Press the Step Call Start button .
4. The Phone number of the selected record will be dialed.


5. After the call is completed, the 'Result' and 'Memo' can be written by user as necessary; the interval between calls is set as shown.

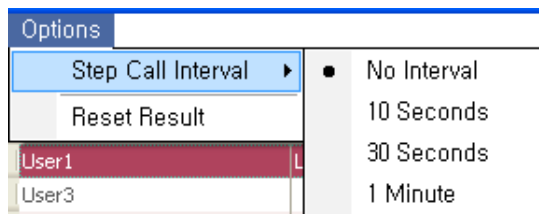
- Result input selections include:

- Success 
- Failure 


- User can memo about the conversation; if a memo is saved, the  symbol will be displayed.

- If  is pressed, the current time and UCS user name will be written automatically.


6. The next record on the list will be selected automatically.
7. Step call will be stopped when the end of the calling list is reached,  
OR
8. Step call can be stopped by pressing the  button.



Alternate method for making a Step Call:

1. Select a list from the outbound calling list.
2. Press the Make a Call button (); the call will be initiated.
3. When call is stopped, the user can write 'Result' and 'Memo' if necessary.

To end a Step Call:

1. Press the 'Drop' button (.

To create a Template File:

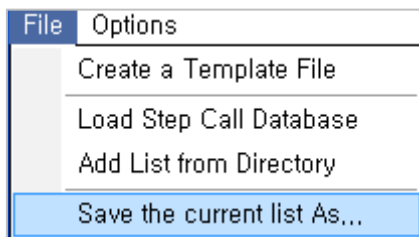
1. From the File menu, select Save the current List As... .
2. In the dialog box displayed, enter the desired file name and click on the OK button.
3. A .csv file will be created with the designated name.

To use the Template file created:

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

To save current Calling List to file:

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



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

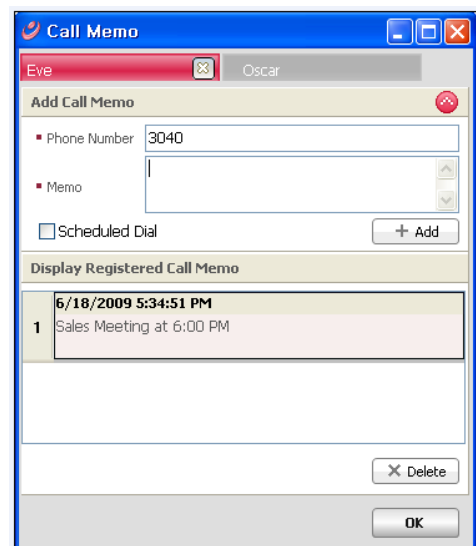
To send the current Calling List to others:

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

## 9.10 Call Memo

The Call memo is designed for notating important information during a call so that the information can be referenced on a later call to the same contact or when a call is received from the contact. The call memo will be retained in the recent Logs. Also, a user can confirm and modify the memo using the call memo window. The following methods can be used for activating a Call Memo window:

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

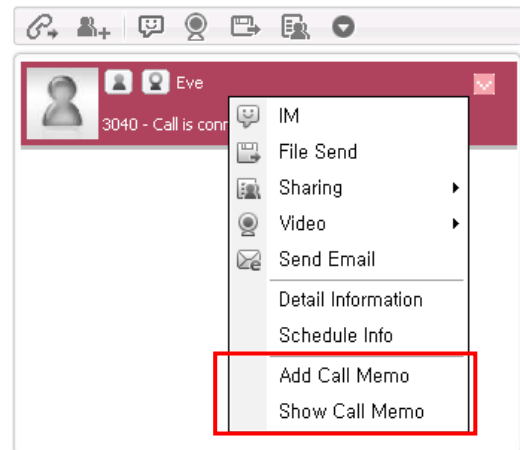


1. To activate a Call Memo window from the Call Tab: Click on the Call Tab when on a call in UCS client.



2. Select 'Add Call Memo' or 'Show call memo'.

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



To activate a Call Memo Window:

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

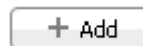
**NOTE:** Prior to closing the Call Memo window, the memo content is summarized on the screen.

To add a new Call Memo:

1. Open the New Call Memo area.

- - Open this area.
- - Close this area.

1. Enter the memo contents.



2. Click on the Add button (shown).

3. The saved memo will be located in recent Logs, and can be viewed when a call is placed on a UCS client.

Using Scheduled Dial:

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



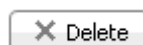
**NOTE:** the schedule dial will be activated with the user name, phone number and company name in the call memo; saved Call Memos also will display in this area, and can be modified or deleted.

To modify a saved Call Memo:

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

To delete a registered Call Memo:

1. Select the Call Memo.
2. Click on the Delete button.



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

To Close a Tab:



1. Click on the Close button within the appropriate tab (shown).

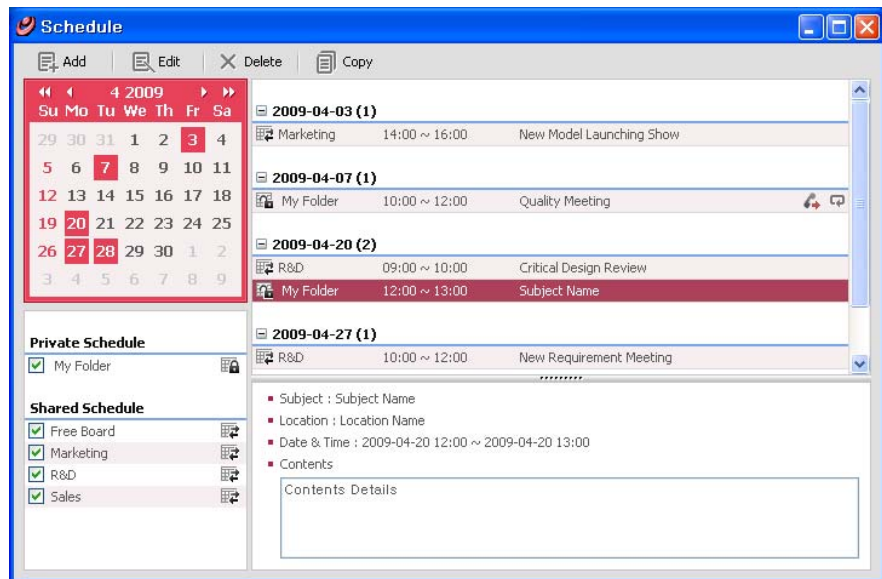
**NOTE:** if only one tab is open, the close button will not be visible.

To select a different open tab:

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

## 10 Scheduling Appointments

In the Schedule window you can view, add and modify scheduled appointments. Appointments can be viewable by and e-mailed to other *UCS Client* users. Appointments are displayed in the Schedule window, which is divided into 4 main components. At the top of the window are the appointment management icon tools. In the upper left is



the monthly appointment calendar used to select appointment dates. In the lower left is the folder selection area used to select appointment folders to display in the Appointment window. Finally, the Appointment window displays the summary appointments top portion and details of the selected appointment at the bottom of the window.

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

### 10.1 Managing Appointments

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

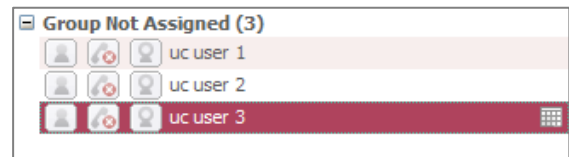
To add an appointment:

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

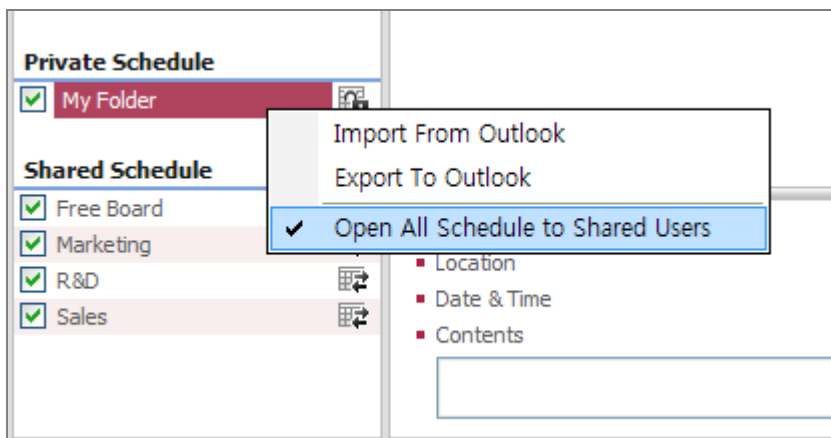
- The Subject and Location fields can be a maximum of 255 characters.
  - Contents field can be a maximum of 450 characters.
  - Up to 20 attendees can be listed and must have unique e-mail addresses.
3. Click on OK; the new schedule will be displayed on the calendar.

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

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



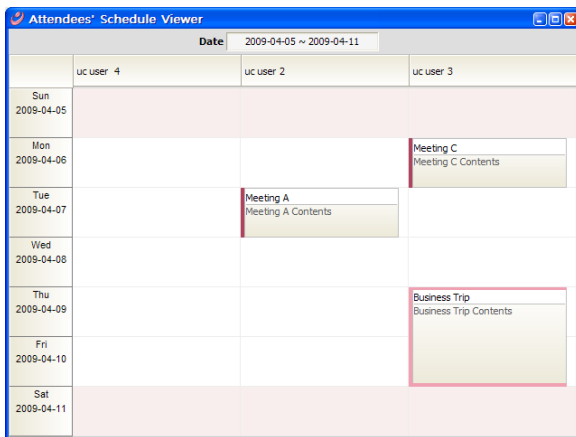
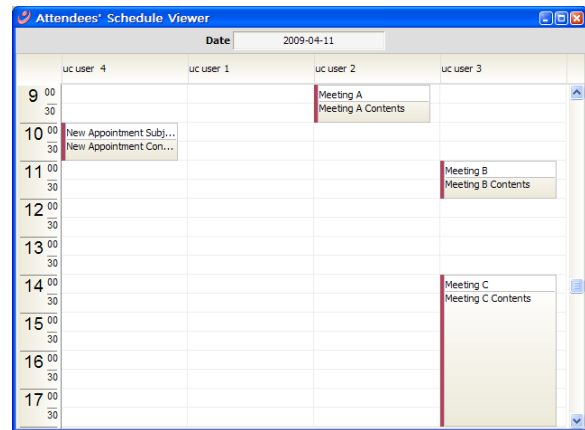
Also, you can allow other *UCS Client* users to view all your private schedules by checking the popup menu of your private schedule folder.



If you want to arrange the schedule with attendees, click Others button. Then, popup menu appears. You can start IM, Make a Call or and check attendee schedules.

To view an attendee schedules:

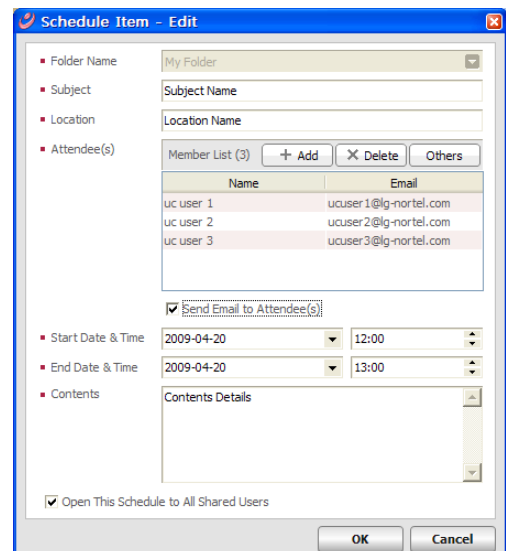
1. Click the Add icon.
2. Select Attendees for the schedule using the Select Member window.
3. Click the Others icon; the popup menu will display.
4. Click on a particular Attendee's Schedule Viewer; the Viewer will display.



5. If start date and end date of the appointment is the same date it will show one day schedule of all attendees. Otherwise, it will show the day period schedule.

To edit a schedule:

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



To delete an appointment:

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

To copy a schedule to another date:

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

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

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

To add an ICR scenario for a schedule:

1. Right-click on an appointment where the ICR scenario will be added.
2. Select Add ICR Scenario; the ICR Wizard window will display.
3. Enter Scenario Name and assign a scenario destination (refer to Section 11.4.4).
4. Click on the OK button.

To remove an ICR scenario from a schedule:

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

## 10.2 Folder List Display

---

*iPECS UCS Server* maintains two lists of schedule folders, a shared schedule and your private schedule folders. Schedules in the shared folder are managed in the *UCS Web Administration* by and are only managed by allowed users. Schedules in My Folder are your private schedules, which you maintain and manage. Appointments from the selected folders are shown in the Appointment window. To select a folder check the box next to the folder name.

For each day, the window shows the appointments for all checked folders organized by date. The list for each date can be minimized or expanded to display the summary.

## 10.3 Importing and Exporting the Calendar

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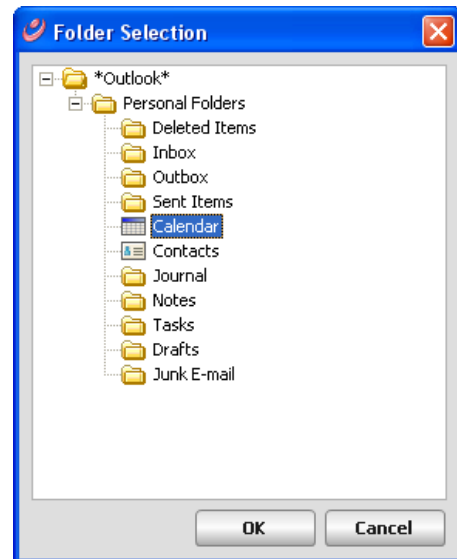
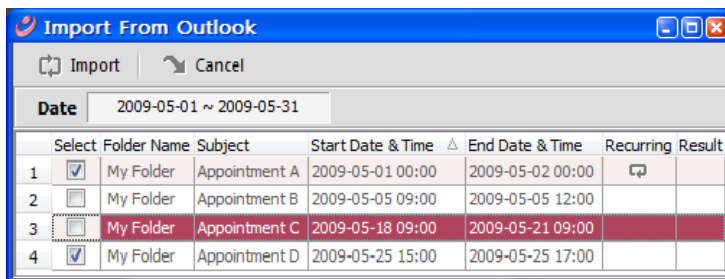
The appointments for the current month contained in a schedule folder and displayed in the calendar can be imported from or exported to Outlook. If you want to import or export schedules for other

months, simply change the month displayed in the calendar. Items contained in an unchecked schedule folder can not be imported or exported. Also, shared schedules not managed by you can not be imported for to or from your shared schedule folder.

To import a schedule:

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

**NOTE:** Recurring column indicates that it is a recurring appointment or not.



4. Select each checkbox for the schedules you want to import.
  5. Click on the Open checkbox of other UCS Client schedules which you want to be able to view.
- NOTE:** If Open All Schedule to Shared Users is unchecked in personal schedule settings, the Open column of Import from Outlook will not appear.
6. When finished making selections, click Import.
  7. Import status will be displayed in the Result column of the Import from Outlook window.

To export the contents to Outlook:

1. Right-click on the checked schedule folder, which will be exported.
2. Click Export To Outlook; the Export To Outlook window will display.
3. Click on the checkbox of schedules to export.
4. When finished, click on the Export button; the Folder Selection window will display.
5. Click on the target Outlook calendar folder to receive the export.
6. Click OK to export the schedule, updating Outlook schedules.
7. Export status will be displayed in the Result column on the Export to Outlook window.

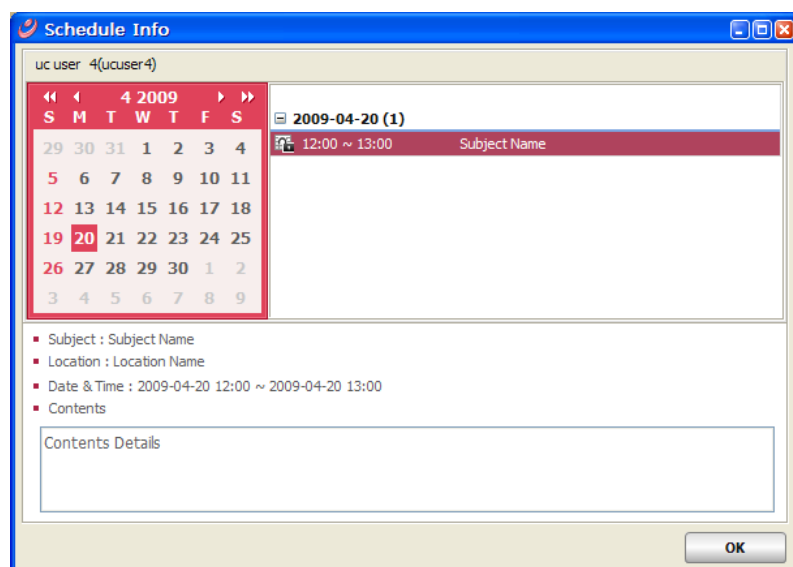
**NOTE:** Recurring appointments can not be exported to the outlook because of the applicability of existing appointment.

## 10.4 View Other UCS Client User Schedules

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

To view other UCS Client User schedules:

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

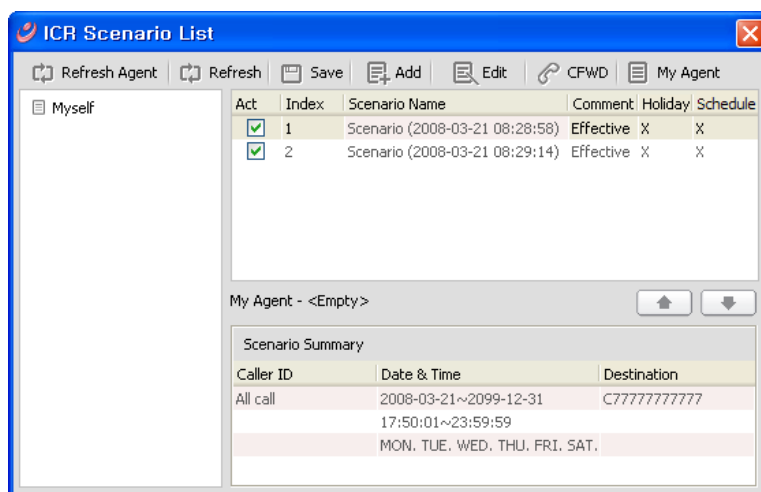


3. Select the month to view by navigating forward and backward from the current position using the arrow buttons in the upper-left part of the window.
4. Pick any date in the mini-calendar on the left side.
5. Click on the schedule, and the detail information will display on the bottom portion of the screen.
6. Click OK to close the window after viewing the schedule.



## 11 ICR (Individual Call Routing) Window Introduction

With *iPECS UCS Client* you can establish scenarios to route incoming calls. Each scenario defines rules to route incoming calls, time, day of week, date and caller ID to a destination you define. Up to 10 scenarios can be established using the *UCS Client ICR Wizard* and set the relative priority of each. You can define the relative priority of scenarios. Also you can select another *UCS Client* user as an

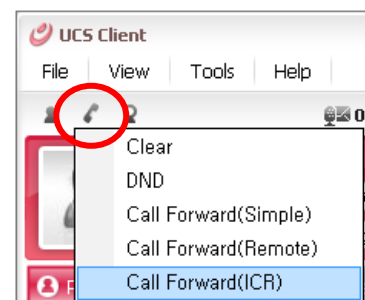


Agent, who is then able to view and modify your scenarios. When an incoming call is received, the *iPECS* notifies the *UCS Server*, which queries your ICR scenarios. *iPECS UCS Server* will compare the incoming call parameters to those of the scenarios. The call is then routed to the destination in the first highest priority matching the scenario.

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

To access the ICR window:



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

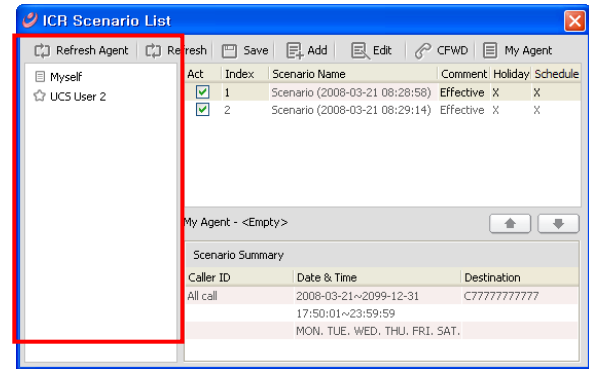


The following sections discuss the components of the ICR window and how to establish and activate ICR scenarios.

### 11.1 ICR User List

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

**NOTE:** the  icon represents your scenario list and, the  icon represents scenarios of users that registered you as their agent.



## 11.2 Scenario & Summary Screen

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

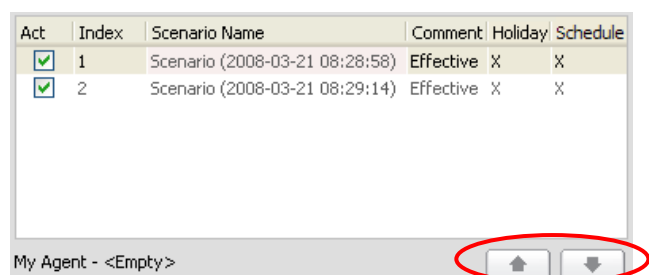
- Act – check box shows the status of the scenario (checked is active).
- Index – defines the priority of the scenario.
- Scenario Name – name assigned to the scenario.
- Comment – timing status of the scenario,
  - Effective – timing of scenario is active or future,
  - Expired – timing of scenario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

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

- Caller ID – Caller ID or Phone number for which the scenario applies.
- Date & Time – the day, date and time the scenario applies, Time zone.
- Destination – the destination User ID or Phone number.

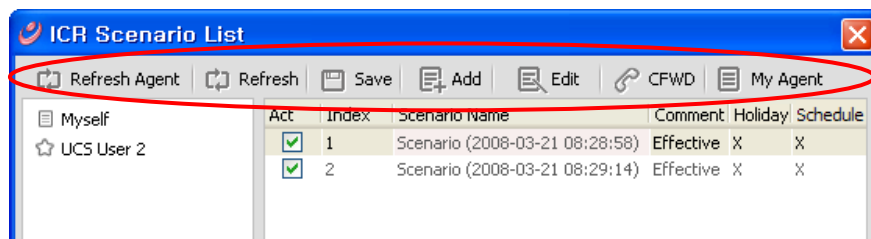
To adjust the priority of a scenario:

1. Select a scenario in the list.
2. Select up/down arrows to move the scenario in the list.
3. Click Save to store the new priorities.



### 11.3 ICR Icon Tools

The ICR icon tools are used to manage the User Scenarios. Icons refresh the ICR window and save, add, or edit scenarios. Using the CFWD icon,



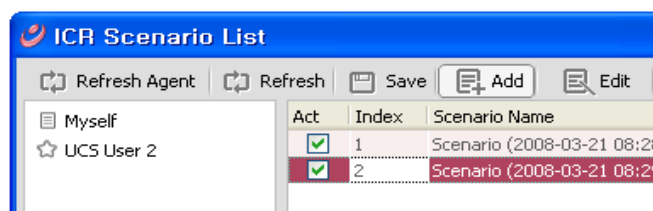
you can forward your traditional *iPECS* terminal using a scenario. Finally, with the My Agent icon, users can register or delete their Agent definition. The following list identifies the icons, and provides a reference for more detailed information on operation of the icons (as applicable).

- Refresh Agent – refreshes the user list (refer to Section 11.1).
- Refresh – refreshes the scenario list.
- Save – saves the scenario.
- Add – adds a new scenario (refer to section 11.4).
- Edit – edits the selected scenario (refer to section 11.4).
- CFWD – activates ICR Call Forward for the user's *iPECS* terminal (refer to section 11.5).
- My Agent – registers or deletes agent (refer to section 11.6).

### 11.4 ICR Wizard

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

To access the wizard, select Add or Edit from the ICR Scenario List window or select from the popup Scenario menu (refer to Section 11.7).



#### 11.4.1 Entering a Scenario Name

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

To add scenario name:

1. Enter a name in the Scenario Name box.

#### 11.4.2 Defining the Scenario Caller ID

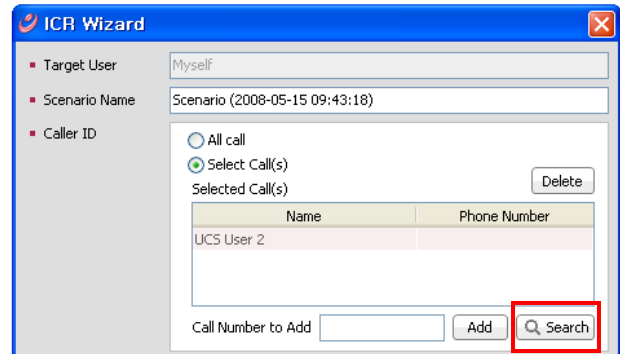
Each Scenario applies to all calls, only calls from specific Callers, or another *UCS Client*. Your Private directory or the *UCS* Shared directory can be searched to select callers, or you may directly enter Caller IDs that are subject to the Scenario routing.

To apply the Scenario to all calls:

1. Select the All call radio button.

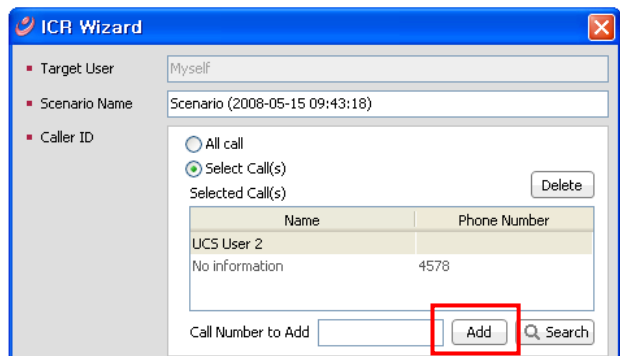
To search both the Presence and Shared directory:

1. Select the Select Call(s) radio button.
2. Click on the Spyglass icon; the Select Member window displays.
3. Select members to add.
4. Click OK to add the member.



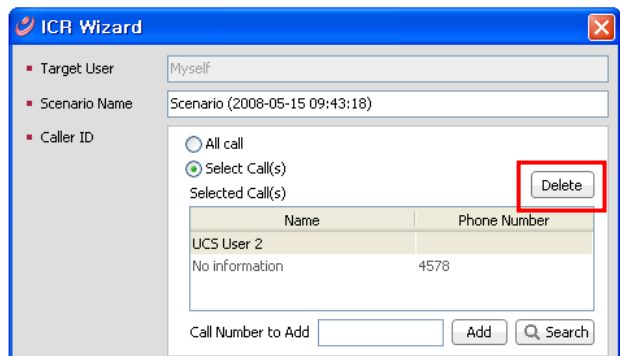
To enter a specific number:

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



To remove a Caller ID from the list:

1. Highlight the desired caller Id(s) by clicking on each.
2. Select the Delete icon.

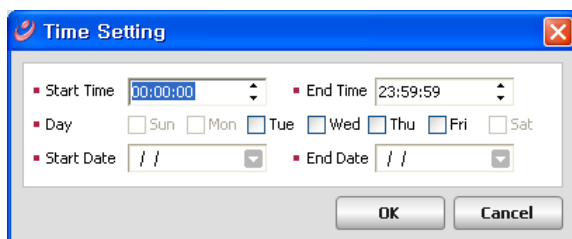


### 11.4.3 Setting the Scenario Timing

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

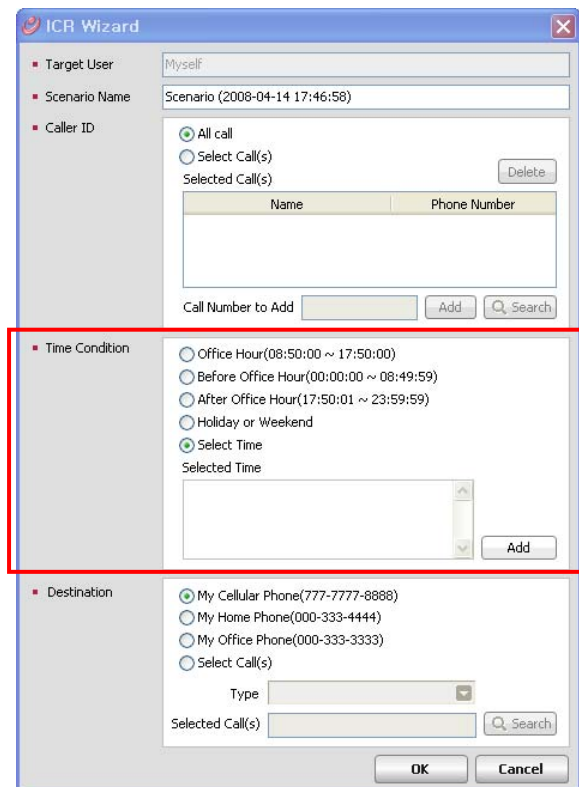
To set Scenario timing:

1. Select one of the predefined times or select Time and click Add button.
2. Select the desired start and end times; check the days of the week for the scenario and select a start and end date.
3. Select OK to save update.



The Time Setting dialog box contains the following fields and controls:

- Start Time:** A time picker set to 00:00:00.
- End Time:** A time picker set to 23:59:59.
- Day:** Radio buttons for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. Tue, Wed, and Thu are selected.
- Start Date:** A date picker showing //.
- End Date:** A date picker showing //.
- Buttons:** OK and Cancel.



The ICR Wizard dialog box contains the following sections:

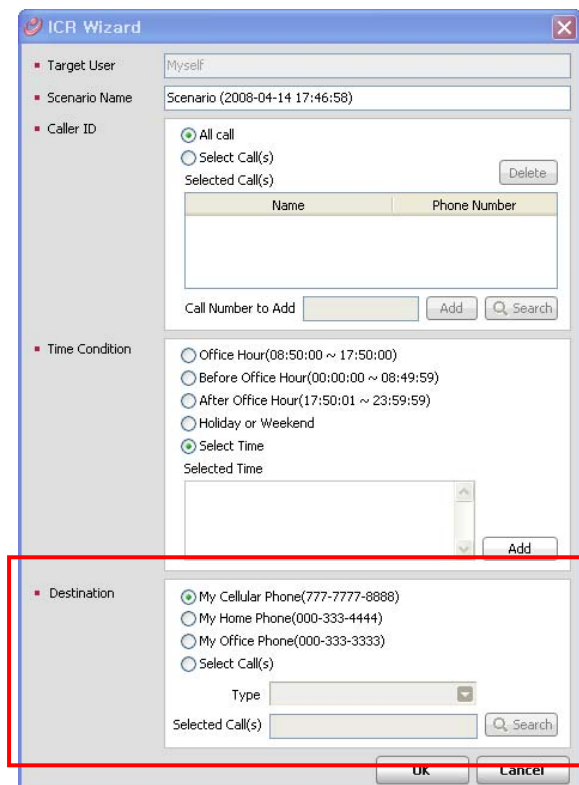
- Target User:** Myself
- Scenario Name:** Scenario (2008-04-14 17:46:58)
- Caller ID:**
  - ☒ All call
  - ☐ Select Call(s)
  - Selected Call(s):
  - Call Number to Add: Add Search
- Time Condition:**
  - ☐ Office Hour(08:50:00 ~ 17:50:00)
  - ☐ Before Office Hour(00:00:00 ~ 08:49:59)
  - ☐ After Office Hour(17:50:01 ~ 23:59:59)
  - ☐ Holiday or Weekend
  - ☒ Select Time
  - Selected Time:
  - Add
- Destination:**
  - ☒ My Cellular Phone(777-7777-8888)
  - ☐ My Home Phone(000-333-4444)
  - ☐ My Office Phone(000-333-3333)
  - ☐ Select Call(s)
  - Type:
  - Selected Call(s): Search
  - OK Cancel

#### 11.4.4 Assigning a Scenario Destination

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

To search either the Private or UCS Shared directory:

1. Click the Select Call(s) radio button.
2. Click to Select User from the drop-down Type menu.
3. Click Search.
4. Select a destination from the Select Member window.

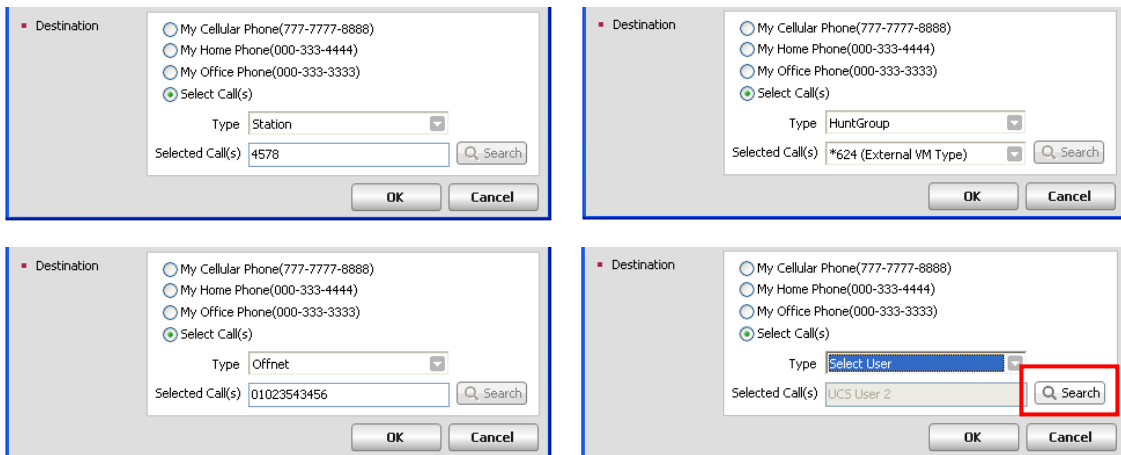


The ICR Wizard dialog box is shown with the following settings:

- Target User:** Myself
- Scenario Name:** Scenario (2008-04-14 17:46:58)
- Caller ID:**
  - ☒ All call
  - ☐ Select Call(s)
  - Selected Call(s):
  - Call Number to Add: Add Search
- Time Condition:**
  - ☐ Office Hour(08:50:00 ~ 17:50:00)
  - ☐ Before Office Hour(00:00:00 ~ 08:49:59)
  - ☐ After Office Hour(17:50:01 ~ 23:59:59)
  - ☐ Holiday or Weekend
  - ☒ Select Time
  - Selected Time:
  - Add
- Destination:**
  - ☒ My Cellular Phone(777-7777-8888)
  - ☐ My Home Phone(000-333-4444)
  - ☐ My Office Phone(000-333-3333)
  - ☐ Select Call(s)
  - Type:
  - Selected Call(s): Search
  - OK Cancel

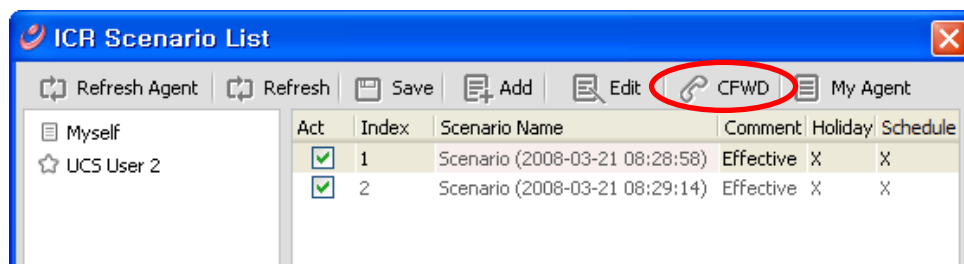
To enter a specific destination:

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



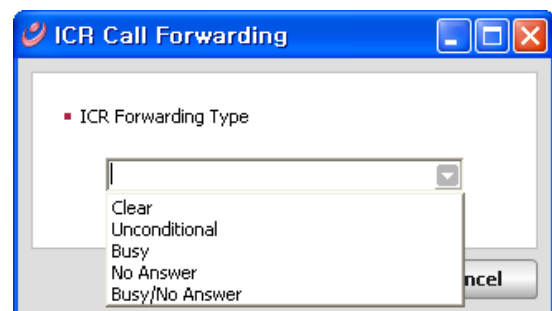
## 11.5 Activating ICR Call Forward

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



To activate the ICR Call Forward feature:

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



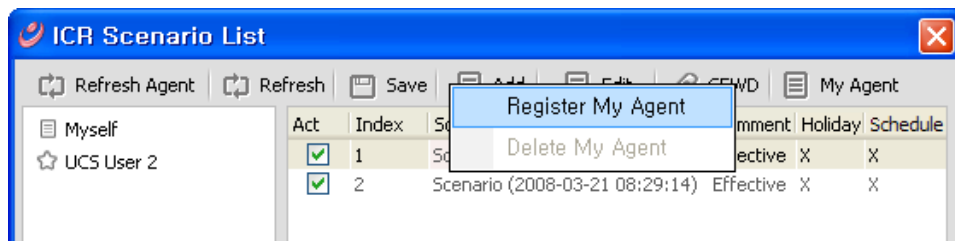
- Clear
  - Unconditional
  - Busy
  - No Answer
  - Busy/No Answer
4. Click on the OK button activate ICR.

## 11.6 Using My Agent Control

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

To manage Agent definitions:

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

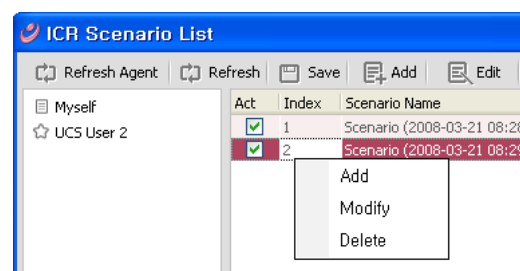


## 11.7 Scenario Menu

In addition to the ICR icon tools, the Scenario menu can access the Scenario Wizard. From the Scenario menu you can add, edit and delete a scenario. Adding and editing a scenario is discussed in Section 11.4

To delete a scenario:

1. Right-click on a scenario in the Scenario list, the Scenario menu appears.
2. Click Delete; the confirmation window appears.
3. Select OK to delete the scenario.





## 12 Collaborative Session Tools

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

### 12.1 Instant Messaging Introduction

IM is an IP-based near real-time communication service for text and graphic information. You can create and send a message to other *UCS Client* users in the IM session. Other users can create and send responses as they desire. An IM may be text or a drawing and can be supplemented with Emoticons.

An IM session can be created as an ad-hoc session, or a meeting can be established by creating a Chat Room. A Chat Room can be public allowing all *UCS* users entry, or it can be password protected allowing only specific users to enter the room. Message dialog can be stored locally as a Rich Text Format (RTF) file.

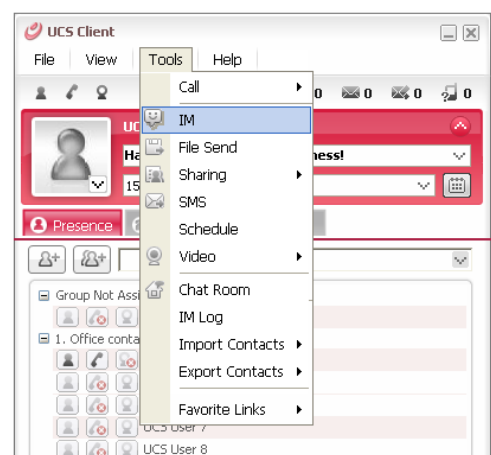
**NOTE:** You must be online to initiate, be invited to or join an IM session.

#### 12.1.1 Initiating an Ad-hoc IM Session

For an ad-hoc session, IM window (refer to Section 12.1.3), may be opened from a main window, as part of an active call or video conference using the IM icon tool. Once an IM window is opened, additional participants may be added using Invite from the IM menu. Up to 6 users can simultaneously participate in an ad-hoc session.

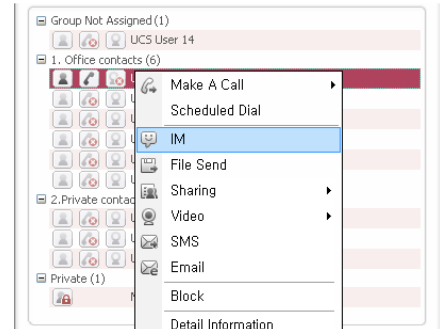
To start an IM session from the main application menu:

1. Select Tools from the main menu, which displays the Select Member window.
2. Select the desired members from the Member List area, and click Add to list the member in the Added Member List.
3. Select OK to display the IM window (refer to Section 12.1.3.1).



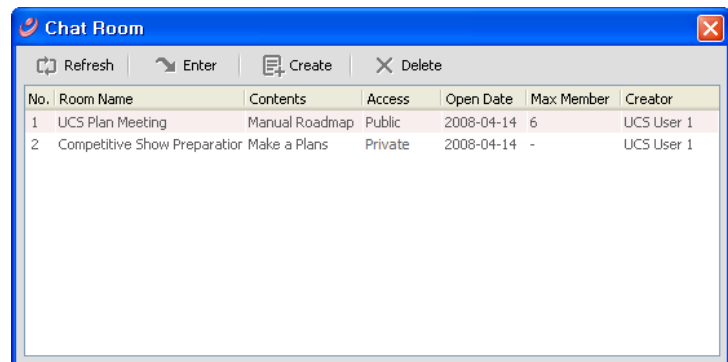
To start an IM session from any of the Main, video or other windows or popup menus:

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



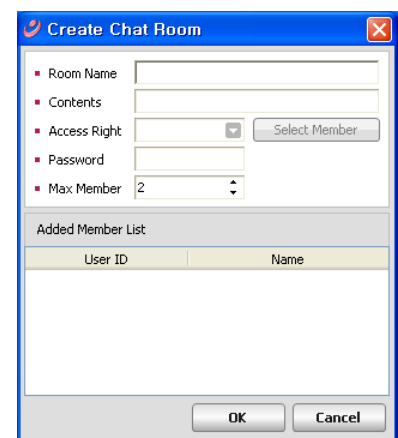
### 12.1.2 Creating a Chat Room IM Session

The Chat Room permits an IM session with multiple users at one time. The Chat Room can be Public, meaning any user may enter the room, or Private, meaning a user must enter a password assigned for the Chat Room to gain access. To further control entry to a Private Chat Room, users allowed access may be defined from in the Create Chat Room window.



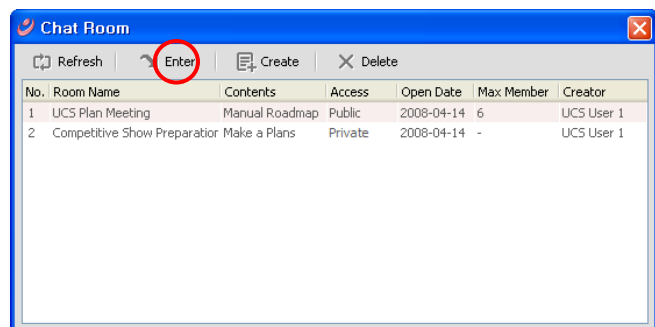
To create a Chat Room:

1. Select Chat Room from the main application Tools menu; this will display the Chat Room window.
2. Click the Create icon to show the Create Chat Room popup.
3. Enter the appropriate information to create the Chat Room.
4. Click on the desired members in the Select Member window.
5. Click OK to finish creating the Chat Room.



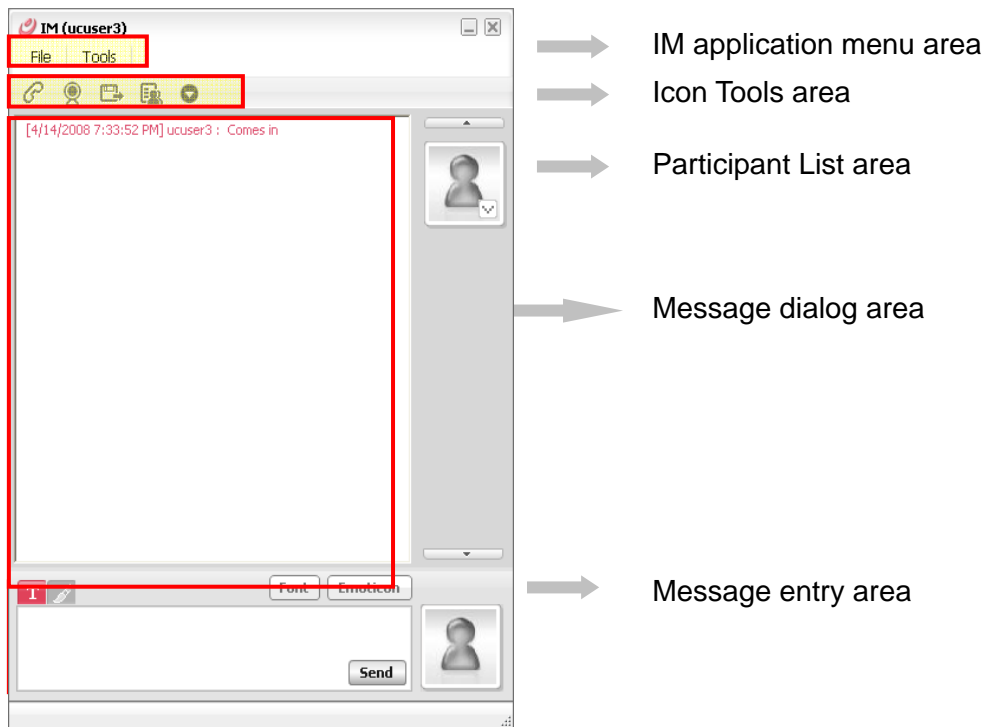
Once a Chat Room is created, users may enter the room. To enter a Chat Room:

1. Click on the desired Chat Room from the Chat Room window.
2. Click the Enter icon.
3. If the Room is password protected, enter the password and click OK (refer to Section 12.1.3).



### 12.1.3 IM Window Introduction

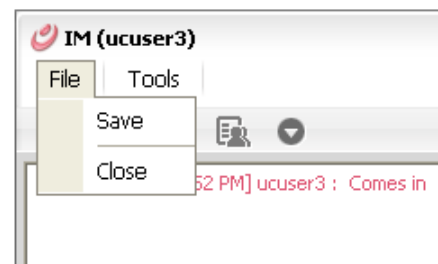
The IM window is comprised of a number of areas including the IM menu, icon tools, Participant List area with Picture IDs, message dialog area and message entry area.



#### 12.1.3.1 IM Application Menu

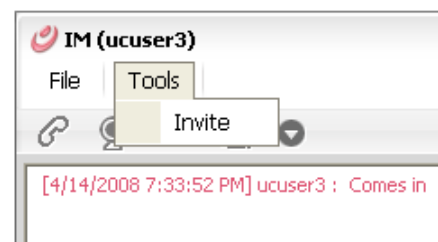
The IM application menu has the File and Tools selections. When ending a session, text from the IM message dialog can be saved locally as a RTF file. To save an IM message dialog:

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



From the Tools menu additional users can be invited to an active IM session. To invite a user to an IM session:

1. Select Invite from the IM Tools menu; the Select Member window displays.
2. Select the desired members from the Member List area, and click the right arrow button to move the members to the Added Member List, OR



- Members can also be added using the Presence window by dragging and dropping to the IM window.

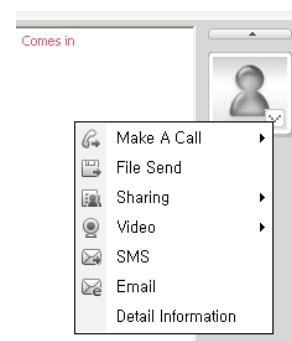
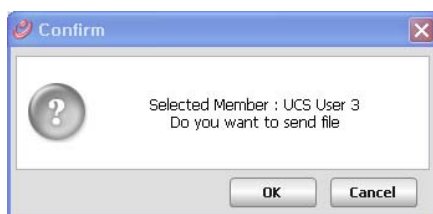
### 12.1.3.2 IM Participant List

The Participant List area displays the Picture ID associated with each participant in the session. You may display summary information about individual participants and can use collaboration tools from the Picture ID.

To access the tools from a Picture ID:

- Click the down arrow in the lower-right corner of the Picture ID.

**NOTE:** Drag a file from the explorer and drop it on the Picture ID of a selected contact to send the file to that contact.



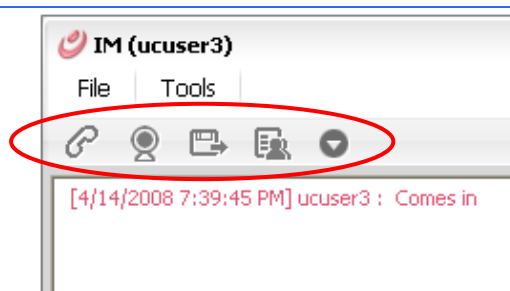
To display summary information for the associated user:

- Click on the Picture ID to display the ID Summary popup.
- Select Close to close the pop-up.



### 12.1.3.3 IM Icon Tools

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



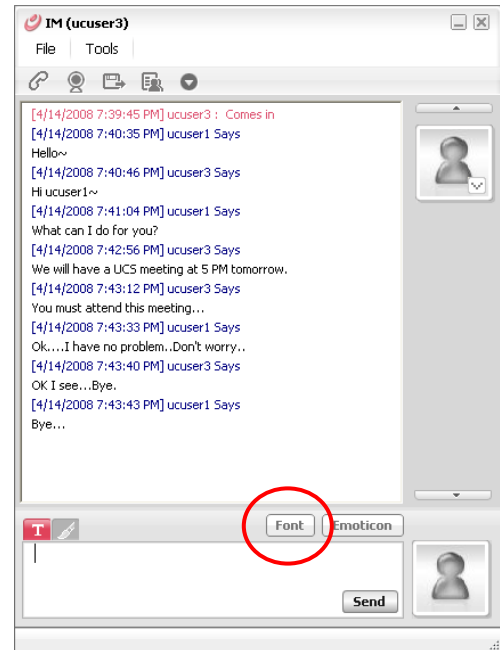
### 12.1.4 Sending IM Messages

With the IM window displayed, you can send and receive messages with text, drawings, Emoticons and Web page addresses or a Universal Resource Indicator (URI).

### 12.1.4.1 IM Text Message

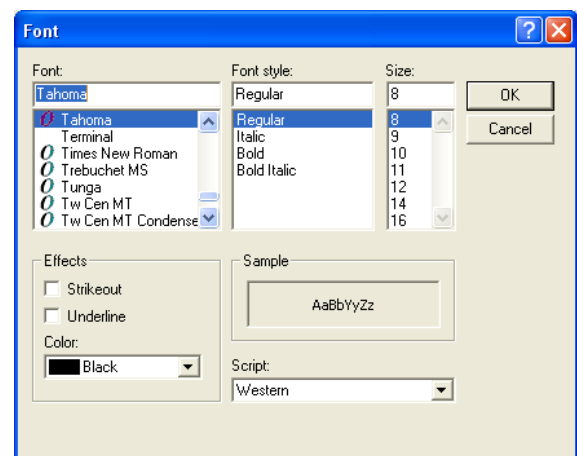
As a default, the IM session is set for text messages. The font used can be adjusted and emoticons can be added. To send a text message:

1. If not highlighted, click the Text tab on the left above the message entry area.
2. Enter the desired text in the message entry area.
3. Click on Send to display the message in the dialog window and send the message to other participants.



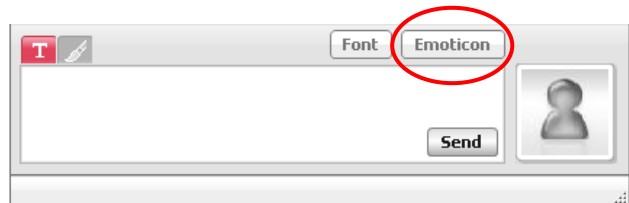
To modify the font:

1. Select the Font icon to the right above the message entry area; the font formatting screen will display to change the font, style and size.



To include an Emoticon in a message:

1. Click on the Emoticon button; the Emoticon selection window will display (shown).



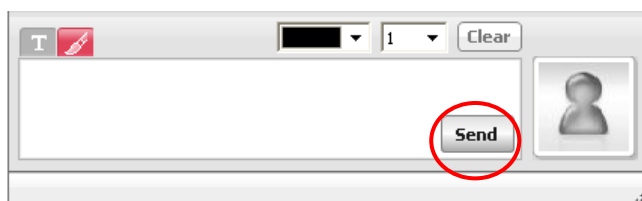


- Click on the desired emoticon; it will appear in the message entry screen.

#### 12.1.4.2 IM Drawing Messages

To send an IM message with a drawing:

- Click on the paint brush icon on the left above the message entry area.
- Click and hold the left mouse, using the mouse as the brush.
- Draw the desired image.
- Click Send to send the drawing; the message entry area will be cleared.



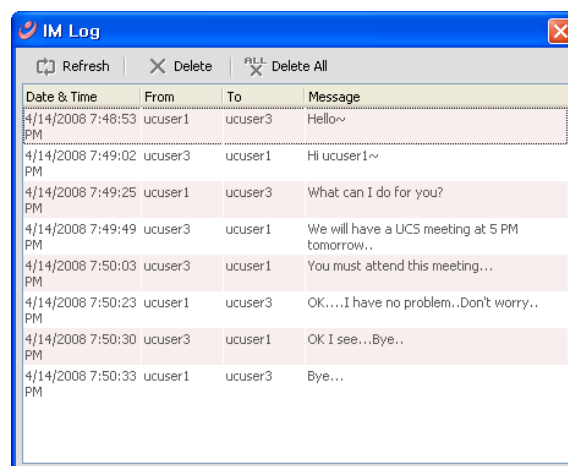
When the paint brush icon is highlighted, the brush color and size format boxes are shown on the right above the message entry area.



- Adjust the color and line thickness from the drop-down menu choices.
- Select Clear to removes drawings from the message entry screen allowing a new drawing to be made.

#### 12.1.5 IM Log

If enabled, each IM sent is stored in the IM Log. To enable the IM Log, refer to Section 4.1.3.4. Only text is saved to the log, Emoticons and drawings are not stored. The IM Log includes the date, time, sender, and receiver(s) of the message as well as the message text. The Log can be search by any of the columns shown in the IM Log window.



## 12.2 File Send Introduction

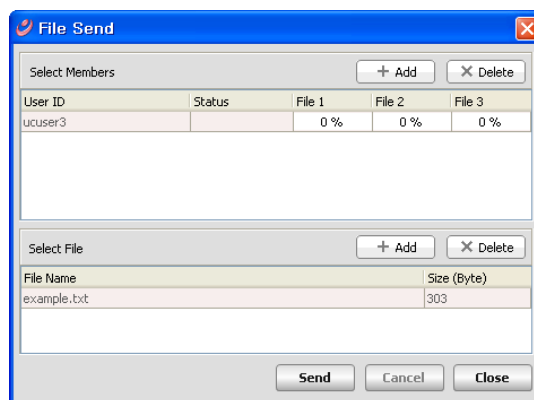
*iPECS UCS Client* users may send files from their PC to other *UCS Clients*. Up to three files can be sent to up to five selected *UCS Clients* at a time. The maximum file size that can be sent is 300MB. The receiving *UCS Clients* must be online and authorize receipt of the file before the file can be sent. Received files are stored in the *UCS Client* PC directory defined in Setting window, refer to Section 4.1.3.4.

### 12.2.1 File Send Window

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

To access the File Send window:

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



#### 12.2.1.1 Sending Files

To send files from the File Send window:

1. Click the Add members icon.
2. Select recipients from the Select Member window (refer to Section 12.2.1.2).
3. Click the Add files icon.
4. Select files from the Browse for Folder window (refer to Section 12.2.1.3).
5. Click on Send, the File column shows the transfer status.

Status indications in the Status column are:

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

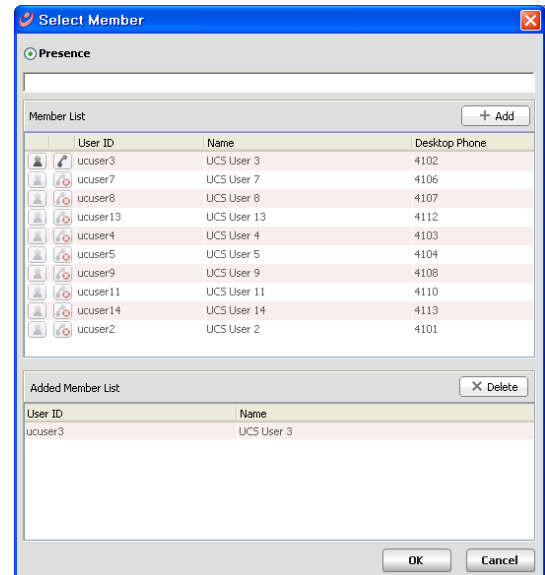
### 12.2.1.2 Adding Member Recipients

When you select the Add member icon, the Select Member window displays. From this window, you may select members to receive files; a user must be online to be selected as a recipient. To select users to receive files:

1. Select recipients from the Member List.
2. Click on Add to move members to the Added Member List.
3. Click OK to add the users as a recipient and return to the File Send window.

OR

4. Recipients can also be added by selecting them from a main window and dragging & dropping them to the Select Members list in the File Send window.



### 12.2.1.3 Adding Files to Send

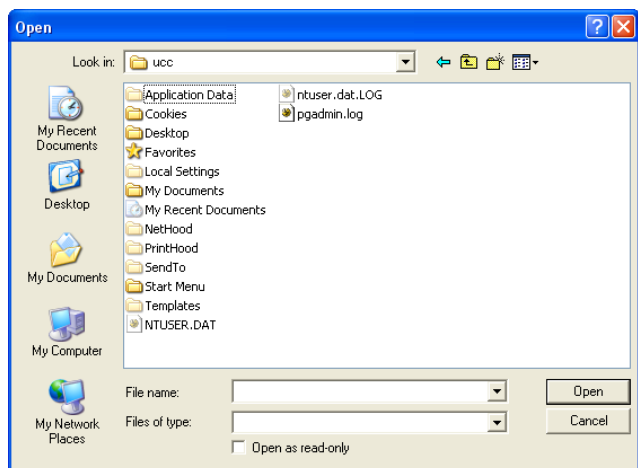
When you select the Add files icon, the Open window displays. From this window, you may browse folders in the PC to locate the files you wish to send.

To select files to send:

1. Select the Add icon.
2. Browse to locate the appropriate files on your PC.
3. Select the desired file, and click OK to add file to be sent.

OR

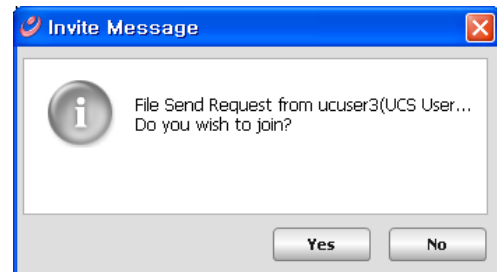
4. Files can also be added from a directory screen by dragging and dropping to the Select File area of the File Send window.





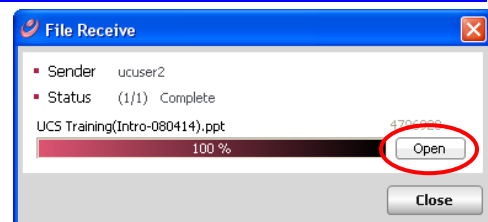
### 12.2.2 Recipient Authorization

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



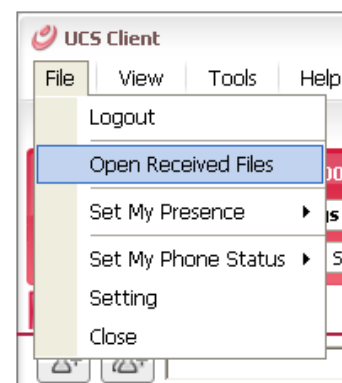
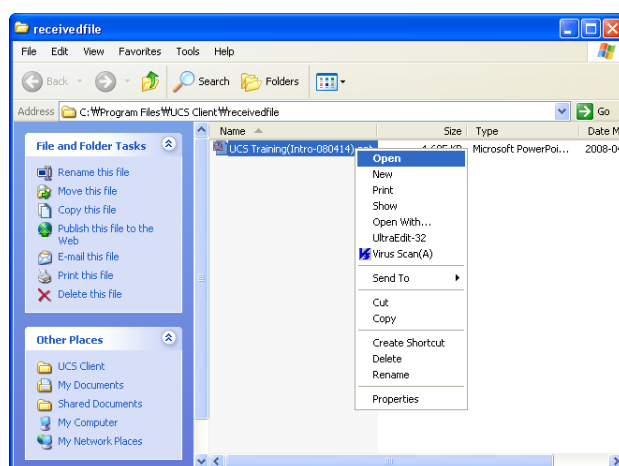
### 12.2.3 Opening Received File

When files are received, they are stored in the directory defined under section 4.1.3.4.



The files can be opened immediately from the File Receive popup, using the normal PC file open sequence or from the *UCS Client* File menu:

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



## 12.3 Application Sharing

The application sharing function permits *iPECS UCS Clients* to share the information displayed in the Sharing Master Page with up to 5 other *UCS Client* users. You can share documents, spread sheets,

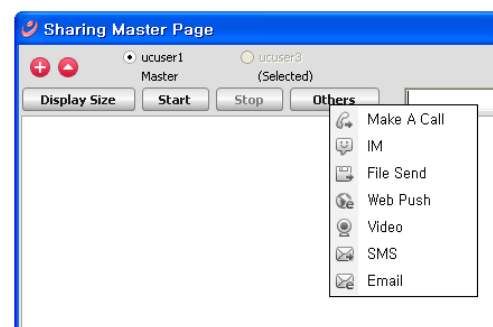
presentations and drawings in real-time. The initiator or master maintains control of the shared material and can edit the material, which is immediately shown to other *UCS Clients* in the sharing session. The master can pass control to another user in the session, permitting the new master full session control.

Once the sharing session begins, any information which may appear in the master's sharing window, such as an incoming call popup will be displayed to other users depending on sharing options, see section 4.1.3.4. To participate in a sharing session the user must be online.

**NOTE:** To share your browser window, it must be enabled with the Any windows selection in the Application Sharing Window, see section 4.1.3.4. As you move the browser window to the Sharing Master Page, other users in the sharing session see the web page.

### 12.3.1 Application Sharing Window

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



#### 12.3.1.1 Starting an Application Sharing Session

To initiate an Application Sharing session:

1. Open the Sharing Master Page by selecting Application Sharing from any of the main, video or other windows or popup menus.
2. Select participants for the sharing session (refer to Section 12.1.3.2).
3. Select files to be shared (refer to Section 12.3.1.3).
4. Click on Start to begin the session; this will send an invite message to the selected participants.
5. If the invitation is accepted, files are shared in the Participant Application Sharing window (refer to Section 12.3.2).


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

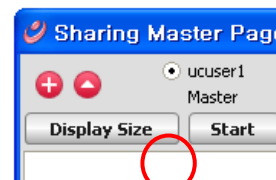
**NOTE:** Use one-click application sharing in the Tools menu (IM / Video / Call Tab), by clicking on the desired Tools menu item; a sharing session will begin with the selected contact and item.

### 12.3.1.2 Adding Application Sharing Session Participants

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

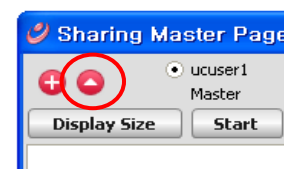
To select participants:

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




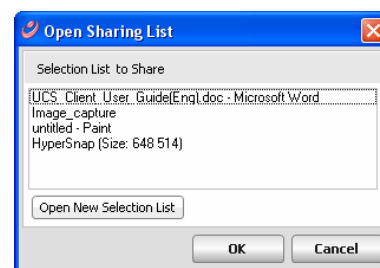
### 12.3.1.3 Adding Files to Share

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



To select files at any time during the session:

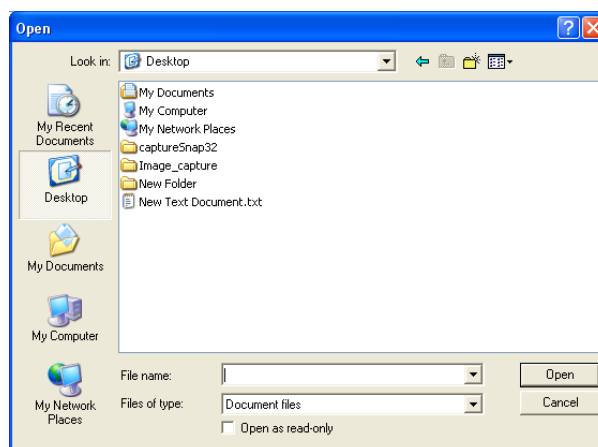
1. Click the Open (  ) icon; the Open Sharing List opens displaying available opened and minimized files.
2. Select files to be shared from the list.
3. Click on OK to accept the change.



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

To select other documents:

1. Click on the Open New Selection List.
2. Select the document type, Document or Paint Board can be selected. Selecting Paint Board opens a blank paint file. If Document is selected, the Open window displays.
3. From the Open window, browse folders in the PC to select files to share.



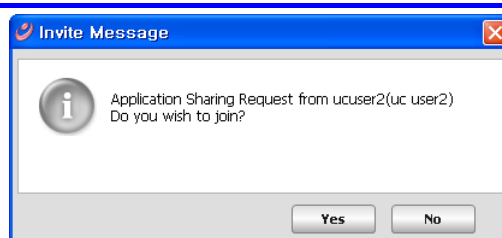
4. Select the desired file(s).
5. Click OK to add the file to the Sharing List.

Certain types of files such as Internet browsers may not be recognized by the sharing module as applicable to sharing. In this case, selecting Any Windows in the Shared window allows a window to be dragged to the Sharing window for display to participants, see section 4.1.3.4.

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

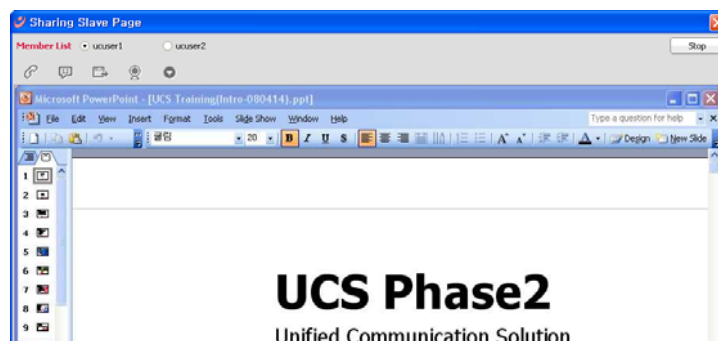
### 12.3.2 Application Sharing Participant Window

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



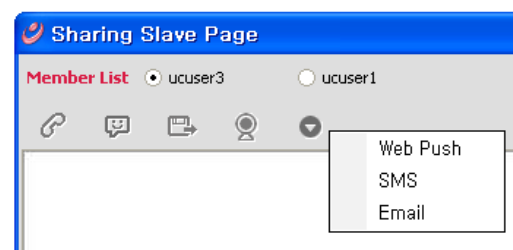
If the user selects Yes to join the session, the Sharing Participant window displays. This page displays the Member List at the top of the window. The sharing master user is shown with the radial button next to the user name marked. The window displays the active shared file shown in the master's window.

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












#### 12.3.2.1 Other Participant Tools

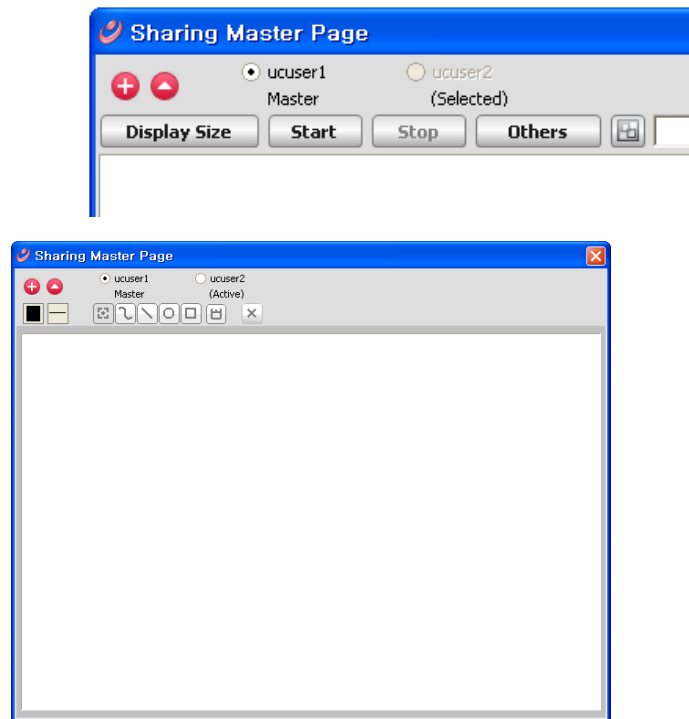
The window includes icon tools so the participant can call and initiate other collaborative sessions with a selected participant by selecting the appropriate icon tool.



### 12.3.2.2 Drawing in Program Sharing mode

Picturing tools are included for creating drawings such as free-form line during application sharing by clicking one of the Drawing mode icons next to the Others button.

-  - Color sets
-  - Sets line width
-  - Select the picture drawn
-  - Drawing free-form line
-  - Drawing line
-  - Drawing ellipse
-  - Drawing rectangle
-  - Clear All
-  - Exit

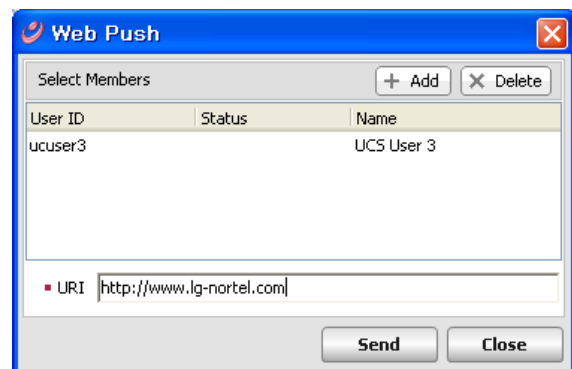


## 12.4 Web Push

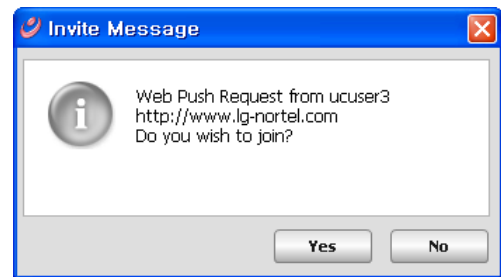
Web Push service permits you to control Web Page views for other users. In Web Push you send or push a Web Page address (URI) to the online *UCS Client* of selected users, up to 5 users may be selected. After the selected users accept the Web Push, their PC Web browser opens and displays the Web page.

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

1. Click Web Push from any of the main, video or other windows or popup menus.
2. Click the Add member icon in the top right of the Web Push window.
3. Select the desired recipients (default maximum 5) from the list of users displayed.
4. Enter the Web page address (URI).
5. Click Send to send the request to the recipients.



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



## 12.5 Video – Conferencing

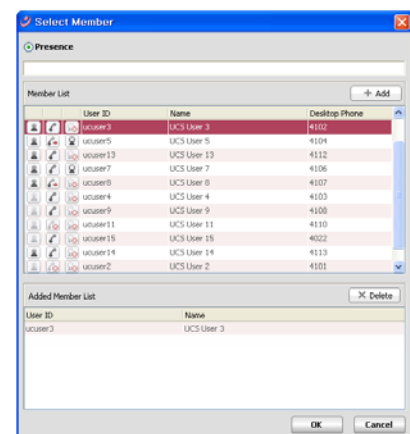
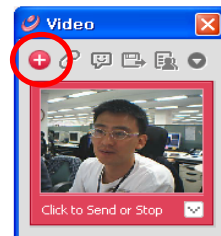
The *UCS Client* uses a Web Cam and application to implement real-time video communications over an IP-based network.

### 12.5.1 Video – Conferencing (Normal Mode)

Up to 6 *UCS Client* users may be included in a Video Conference at a time. Also, a *UCS Client* can only take part in a single Video Conference at a time.

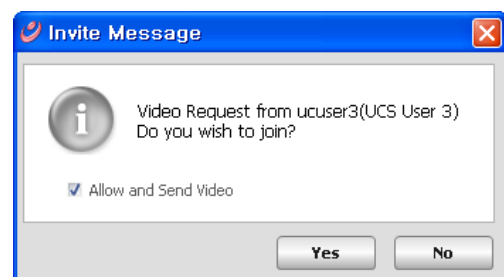
To initiate a Video Conference:

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



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

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



To turn video transmission on or off,

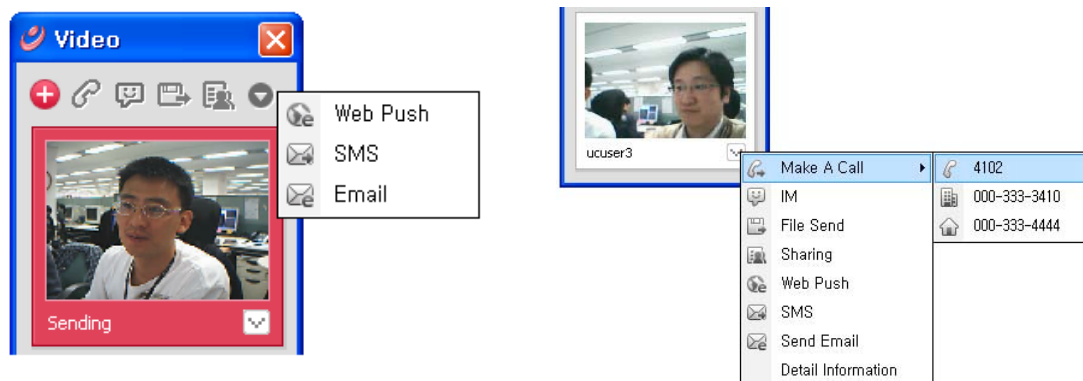
1. Right-click below “My image.”
2. Click on the Stop button.

The Video window displays all parties, maximum 6, in your video conference. You can display a single party if desired. To display video from a single party in the Video Conference, double click the video frame of the desired party.



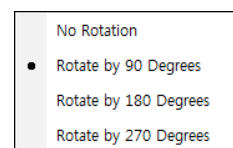
**NOTE:** Resize the video window by clicking on the lower-right corner and drag to the desired size.

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



To rotate a video image:

1. Right-click on the video image.
2. Select one of the rotation degrees to make it upright.



### 12.5.2 Video – Conferencing (Presentation Mode)

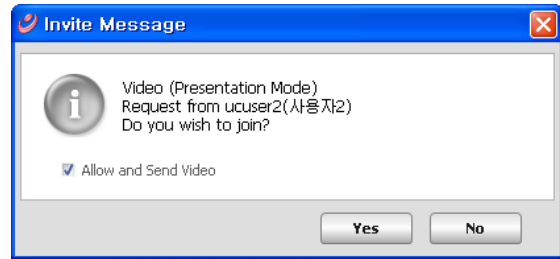
Using Presentation Mode the organizer of the video conference can see video of all participants (up to 32), but each participant can see only the organizer’s video.

**NOTE:** For high quality video, more CPU power is required to process the video frames (refer to Section 2.1).

To initiate a Video Conference (Presentation Mode):

1. Click Video (Presentation Mode) from any of the main popup menus.

2. Click on the Add icon from the Video (Presentation Mode) window to display the Select Member window.
  3. Select parties from the Member List.
  4. Click OK; each selected party will receive a video call Invite Message popup and the inviting party will receive the Invite Status Message (status can be Accepted, Denied or No response).
  5. If the invitation is Accepted, click on Send from the Invite Status Message window to transmit video.
  6. To add additional parties, repeat steps 2 through 6.
- NOTE:** Automatically send the video of the participants is connected, but the organizer of the video is sent to the organizer, click the Send button.



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

1. Click Yes; the Video preview window will open with a preview of the PC Cam output.
2. Click Send from the preview window to transmit video (as applicable).

To turn video transmission ON or OFF:

1. Right-click below “My image.”
2. Click on the Stop button.

The Video window displays all parties (up to 32), in your video conference (Presentation Mode), or you can display a single party if desired. To display video from a single party in the Video Conference (Presentation Mode):

1. Double click the video frame of the desired party.
2. Resize the video (Presentation Mode) window by clicking and dragging on the lower right corner to the desired size.

The video (Presentation Mode) window also can be re-arranged by clicking on the Display Settings icon and then selecting the desired arrangement.

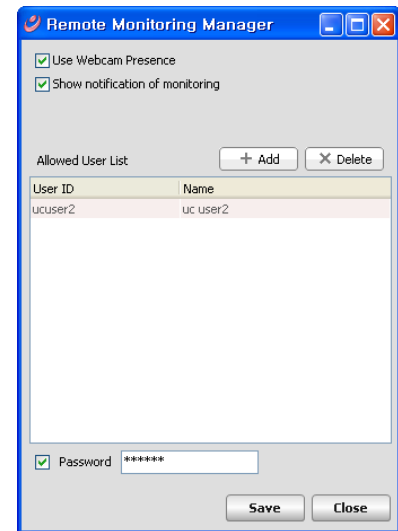


### 12.5.3 Video – Remote Monitoring

A *UCS Client* located at a remote site can view the visual status of another client. To be able to view the visual status of another client, that client should be enabled to also be monitored by you. If the client is set for you to be monitored, the remote monitoring presence icon will be display on the right-side of the presence window.

To allow remote monitoring:

1. Click on the Remote Monitoring Manager from the main menu (**Tools>Video>Remote Monitoring Manager**).
2. Check Use Webcam Presence, to be monitored when Show notification of monitoring is also selected.
3. Click on the Add button to add a user to Allow.
4. Enable a password by clicking the checkbox (as desired) and enter a password to use.
5. Click the Save button.



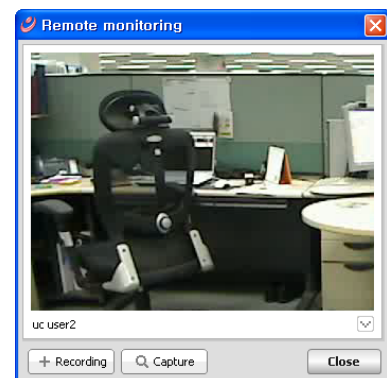
To start remote monitoring:

1. Click Start a Remote Monitoring from the presence menu (**Video>Start Remote Monitoring**); the Remote Monitoring window will display.

To start recording:

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

**NOTE:** The recording capacity of your PC is limited only by the amount of free space on your hard disk. Therefore, if your PC does not have enough hard disk capacity, it will not save recording.

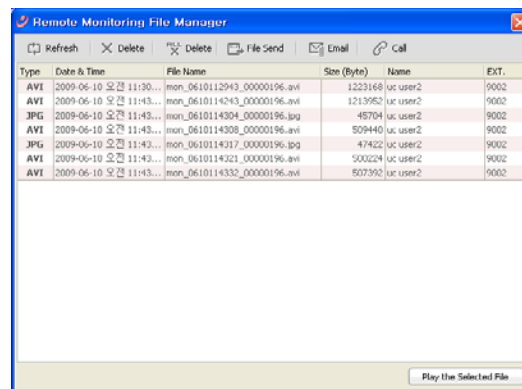


To start monitoring capture:

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

Using Remote Monitoring to manage Recorded files:

1. Select the Remote Monitoring File Manager from the main menu (**Tools>Video>Remote Monitoring File Manager**), the Remote Monitoring File Manager window will display.



- Refresh – update the file list.
- Delete – to delete the selected file.
- All Delete – to delete all the files.
- File Send – selected using a file transfer can be sent to other users.
- Email – send an email to the selected file attached.
- Call – make a call (remote monitoring of the target).

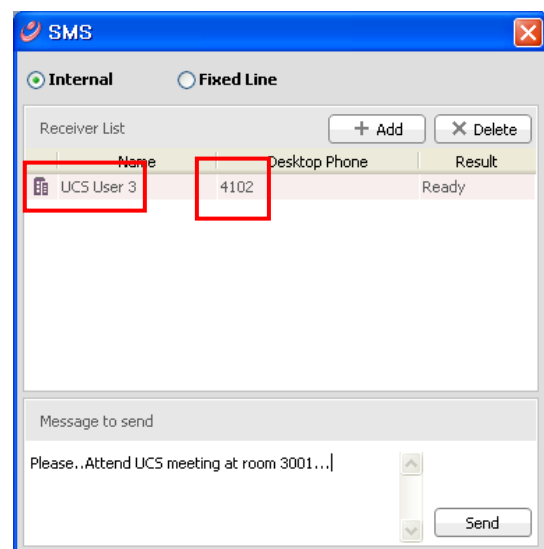
## 12.6 Short Message Service (SMS)

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

The *iPECS* system must be equipped and enabled to allow sending and receiving external SMS (Fixed Line SMS). Internal SMS is for internal users. All terminals including *UCS Clients*, *Phontage* Soft Phones and LG-Nortel IP Phones can send and receive text messages with other *iPECS* system users.

To send a text message:

1. Select SMS from the main, video or other windows or popup menus, the SMS window displays
  2. Select the Internal radial button to send to other *iPECS* users.
- OR



3. Select the Fixed Line radial button to send an external SMS.
4. Click the Add icon.
5. From the Select Member window, Select desired members and click OK.
6. Enter the message in the Message to Send area.
7. Press the Send button, the Result popup confirms transmission.

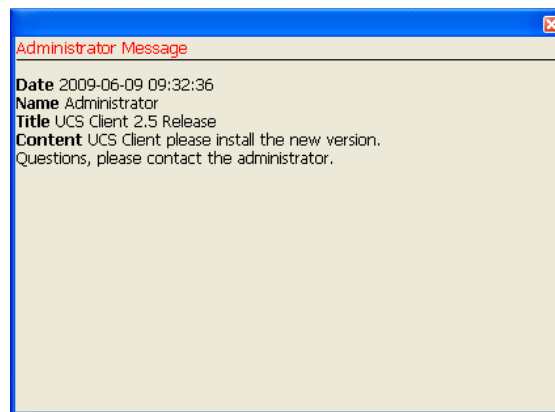
To receive a text message:

1. Click the SMS icon in the Message and Status bar (refer to Section 5).

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## 12.7 Administrative Messages

The *UCS Administrator* can send administrative messages to all *iPECS UCS Clients*. While the Client is online or at login, the *UCS Client* may display an administrative message in the center of the desktop screen.



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## 12.8 Whiteboard










*UCS Clients* can efficiently collaborate with other clients participating in a meeting using Whiteboard which can draw some pictures in both ways. The drawing function of the Whiteboard uses polylines, lines, ellipses and rectangles to create pictures on the whiteboard window; pictures also can be deleted and moved.


To initiate a Whiteboard collaboration:

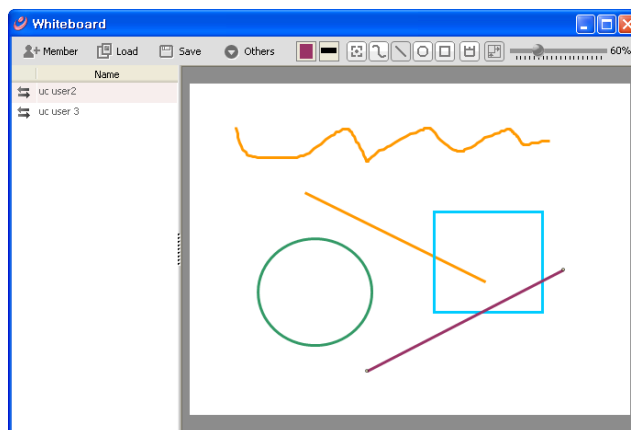
1. Select Whiteboard from the main menus; the Whiteboard window will display.
2. Click the on the Member icon.
3. From the Select Member window, select desired members and click OK.
4. Each selected party will receive a Whiteboard call invite message popup (the inviting party will receive an invite status message), which the party can accept, deny or not respond.
5. If the invitation is accepted, click on Send from the invite status message window to transmit the Whiteboard.

6. To add additional parties, repeat steps 2 through 6.

- Member icon – add a user to participate on a whiteboard.
- Load – open the saved file to bring a picture.
- Save – save the file as a picture is drawn.

-  – sets the Color
-  – sets line width
-  – select the picture drawn
-  – drawing free-form line
-  – drawing line
-  – drawing ellipse
-  – drawing rectangle
-  – clear All
-  – automatically fits the Whiteboard window size on a drawing area, or zoom to (if the button is down).

-  60% – drawing area the user to manually zoom to.



## 12.9 Desktop Sharing

The *UCS Client* users can share their desktop screen with another user. When on a call, the user can give control of their desktop to another party on the call for drawing pictures, etc. using the Whiteboard.

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



To adjust the Screen Resolution:

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

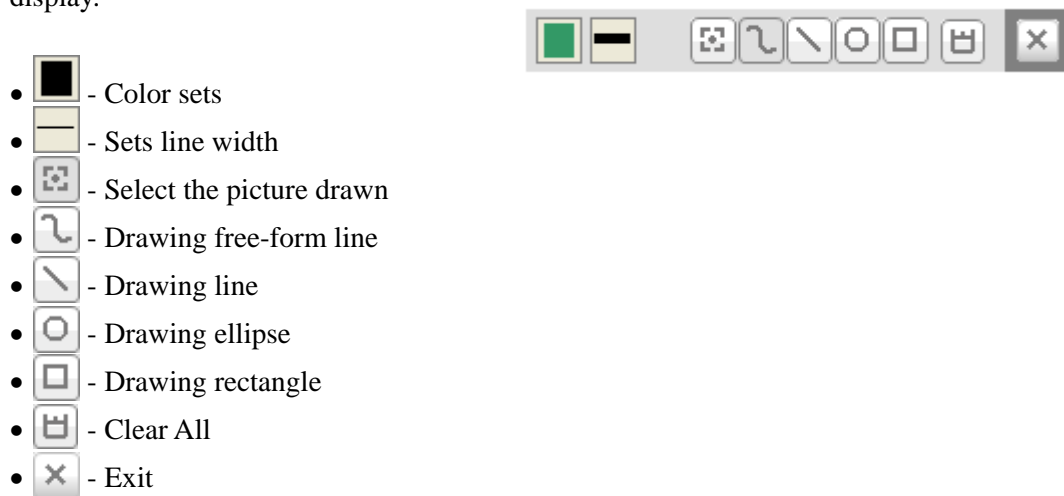
To initiate Desktop Sharing:

1. From the main screen, click Desktop Sharing, and the Select Member window will appear.  
OR
2. Click Desktop Sharing from the presence popup menu; the Desktop Sharing window will display.

3. From the Select Member window, select the desired member and click on OK.
4. Each selected party will receive a desktop sharing call invite message popup, while the inviting party will receive an invite status message. The invitation can be accepted, denied or ignored.
5. Click on the Send button from the invite status message window to transmit desktop sharing.

To initiate drawing mode:

1. Click on Drawing Mode from the desktop sharing popup menu; the drawing tools window will display.



To change the control:

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

# iPECS



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