

## 10.2 Instant Messaging Window

The following sections describe the layout and operation of the Instant Messaging window.

### 10.2.1 IM Window Layout

The Instant Message window uses a color scheme similar to the Desktop Suite Window mode.

Figure 8-45 IM – Window Example



The IM Window consists of a Title Bar, Menu Bar, IM History Section, IM input area and status bar. Each of these areas is described in the following sections.

#### 10.2.1.1 Title Bar

The Title bar shows the **Name** of the IM participant on the left side. If the **Name** is not available, the extension number is displayed.

The right side of the Title bar shows the **Minimize** and **Close** controls.

#### 10.2.1.2 Menu Bar

The Menu Bar has a single entry for **File**. Under the File menu are the options for **Save** and **Exit**. The **Exit** option terminates the IM session and closes the IM window. The **Save** option is described in section [10.3 IM Window Controls on page 8-44](#).

#### 10.2.1.3 IM History

The IM History area shows a running history of the IM conversation for this IM session. Each Instant Message from the conversation is enclosed in a rounded corner rectangle. The text is left-justified within each rectangle. The local user's messages are shown with a blue background on the right side of the History area. The remote user's messages are shown with a gray background on the left side of the History area. The most recent message is displayed at the bottom of the History area.

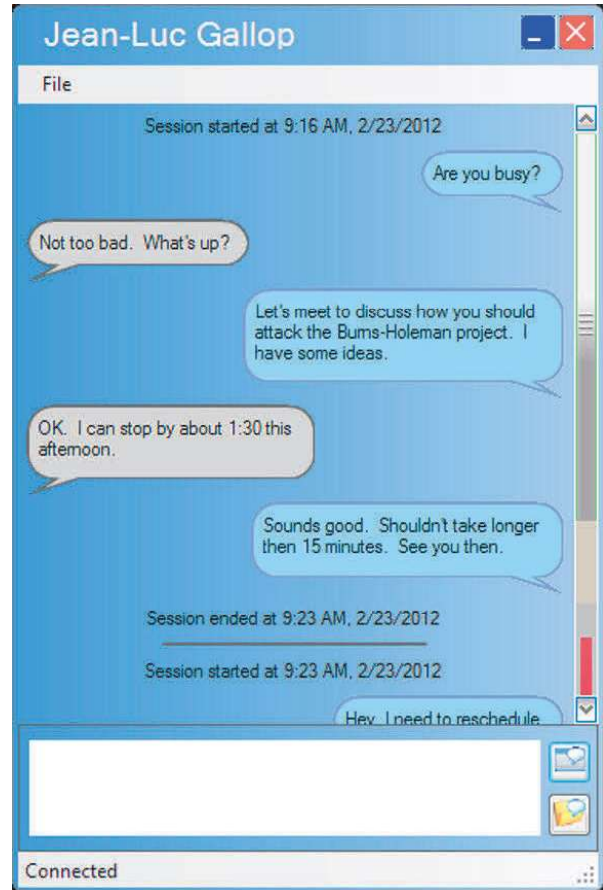
##### Scrolling in the History Area

A vertical scroll bar appears if the conversation extends beyond the size of the History area. The user can scroll through the message history during an active session. If the user has scrolled to view previous messages, such that the most recent message is not shown, then the History area will need to respond if a new message is received. The required response depends on whether the Instant Message window is currently the active window.

If the Instant Message window is not the active window, the History area automatically repositions to the most recent message and displays the newly received message.

If the Instant Message window is the active window, the History area is not automatically repositioned. Instead, the scroll area displays a color indicator to notify the user that a new message has been received (refer to [Figure 8-46 IM – New Message Received on page 8-41](#)).

Figure 8-46 IM – New Message Received



If the user has scrolled the History area so that the most recent message is not shown and then Sends a new message, the History area is automatically repositioned to show the new message.

**Copy within the History Area**

The user can highlight any of the text in the History messages and use the Copy function to add the text to the Copy/Paste buffer. The Copy function can be initiated using the keyboard Copy command or by using a right mouse click on the highlighted string to bring up the editing menu. The Copy command is the only function available in the edit menu.

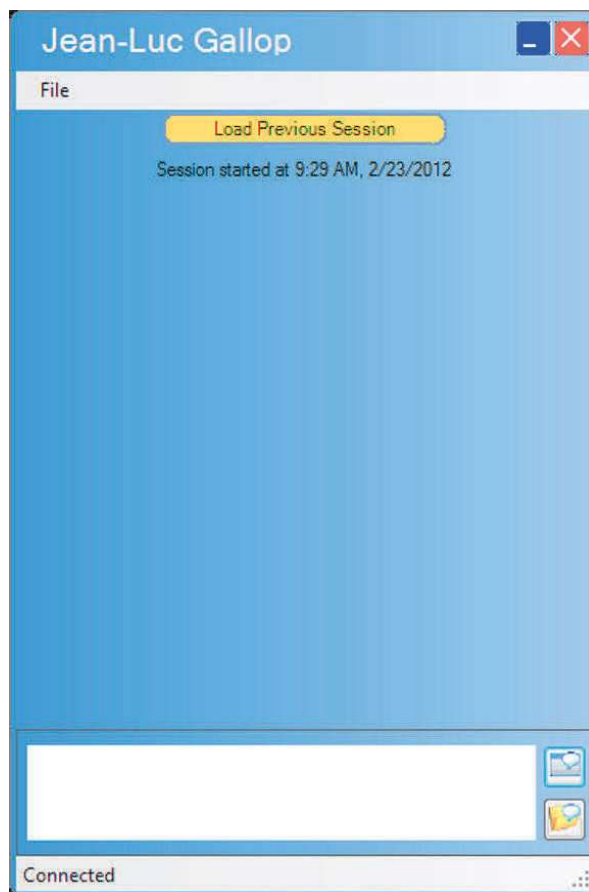
### Session Time Stamps

The start of each IM session is marked by a time stamp that appears before the first message. When the other party terminates the session, the local window shows a time stamp for the end of the session.

### Previous Session History

The UC Suite has the ability to maintain a history of the Instant Message sessions for each user. The previous IM sessions with a particular user can be recalled to the History area a session at a time. When the user scrolls to the first message in a session, a button is displayed in the History area allowing the user to load the previous IM session.

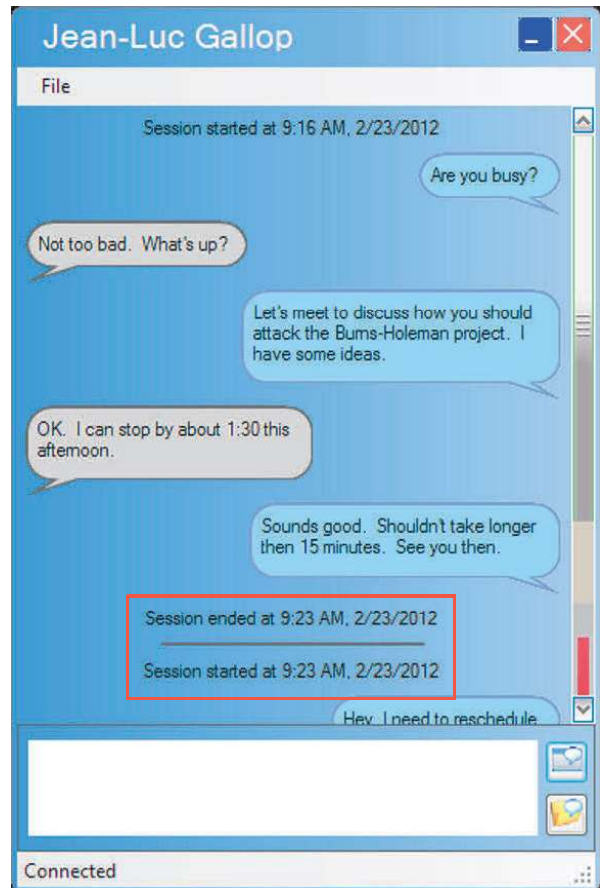
Figure 8-47 IM – Load Previous Session



The Load Previous Session button is only displayed if an earlier session exists. If the user selects this option, messages from the previous IM session with this user is loaded into the History area. The message list is positioned so that the last message of the previous session is shown at the top of the History area.

Each session is separated by the appropriate time stamps and a divider line, as shown in the figure below.

Figure 8-48 IM – Time Stamp Example



### 10.2.2 Input Area

The Input area allows the local user to enter a new message to be sent to the remote user. After typing a message, the user can send the message clicking on the **Send** button. There is also a Preferences setting on the Shortcuts menu labeled “Pressing the <Enter> key will send the chat message” that determines if the Enter key will send the message.

The text editing functions for Cut, Copy, and Paste are available to edit the text in the Input area.

The Input area also includes a **Save** button. The function of the **Save** button is described below in the IM Window controls section.

The Send and Save buttons include tooltips that show the button function when the mouse cursor is hovered over the button.

### 10.2.3 Status Bar

The Status Bar shows the current state of the IM session. The possible states for the IM session are as follows:

- Waiting** – Invitation to an IM session has been sent and waiting for the response.
- Connected** – IM session is currently in progress.
- Disconnected** – The connection to UC Server has been interrupted or the other party has closed the IM window. When the other party has terminated the session, the local window shows a time stamp for the end of the session.

Figure 8-49 IM – Session Disconnected



- <User Name> is typing** – Indicates that the remote IM participant is in currently entering a response. This status is triggered by the remote user entering keystrokes within the Input Area. The status returns to Connected when the user sends the message or a keystroke has not been entered for five seconds.

### 10.3 IM Window Controls

The Input area includes a **Send** button and a **Save** button. The **Send** button creates a new message using the text that is currently entered in the text editing area.

The **Save** button writes all of the messages in the current conversation to a text file. When the user selects the **Save** option from either the **File/Save** command or the **Save** button, a file selection window is displayed.

Once the user has specified the file location and presses the Save button, the current message history is written to the specified text file.

An example of the text file format is shown below.

12/6/2011 11:32:22AM IM with Dave Bentsen

[Dave Bentsen]: Are you busy?

[Dan Cervantes]: I have time for a quick meeting.

[Dave Bentsen]: Where shall we meet?

[Dan Cervantes]: Let's go to the Large Conference Room. How about in 10 minutes. I'll bring the PowerPoint to review and also the latest document from the customer.

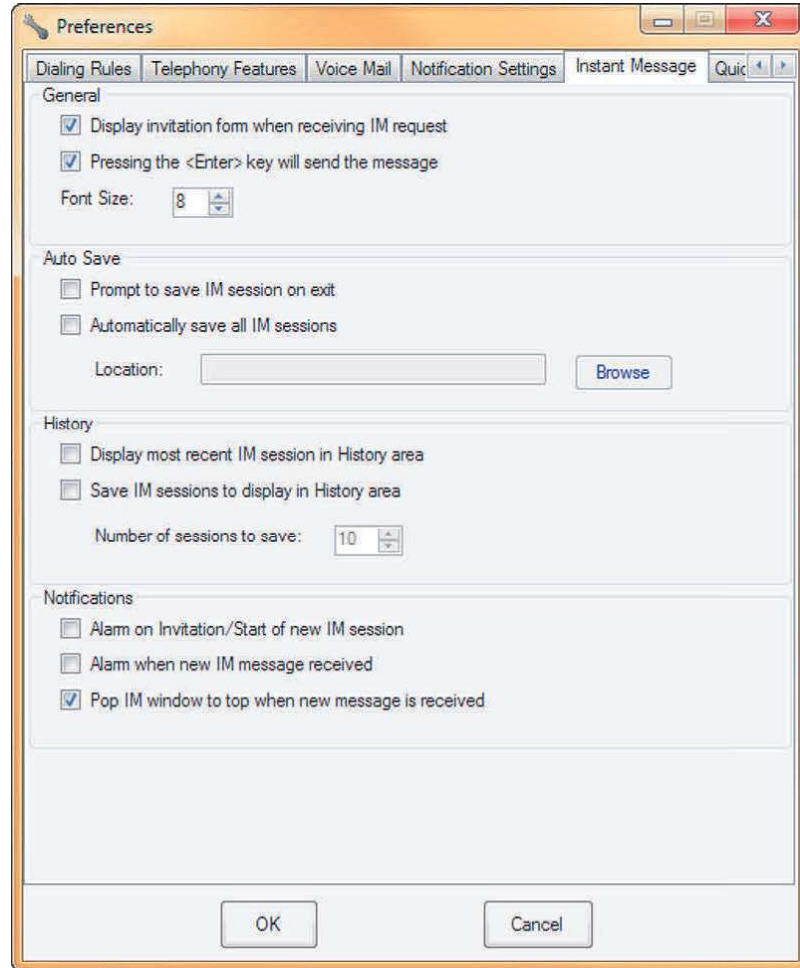
[Dave Bentsen]: That sounds good. I also have some comments that I received from an e-mail

The first line of the file shows the date and time that the IM session was started and the participant's **Name**. The IM conversation is then shown with each message starting on a separate line, separated by a blank line. Each individual message is tagged with the user name. The extension will be shown if the **Name** is not available.

## 10.4 Instant Message Options

A new tab will be added to the Preferences window which contains the options for the Instant Message feature. [Figure 8-50 IM – Preferences Screen on page 8-46](#) shows an example of the new Instant Message tab.

Figure 8-50 IM – Preferences Screen



The settings in the Instant Message tab are described in the following sections.

#### 10.4.1 General Settings

The General settings for the Instant Message tab are as follows:

**Display Invitation form when receiving IM request** – This option controls whether an invitation form is displayed when the user receives a request to join an IM session. If this option is selected, the invitation form is displayed before the IM window opens. If this option is not selected when the user receives a request to start an IM session, the IM window automatically opens.

The default is for this option to be enabled.



**Pressing the <Enter> key will send the message** – In the current release of the Desktop Suite, this option is shown in the Shortcuts tab and applies to the RTP Chat feature. When this option is selected, pressing the Enter key while typing an Instant Message in the Input area automatically sends the message. If this option is not selected, the Enter key inserts a carriage return into the Input area and the user must press the **Send** button to deliver the message.

The default is for this option to be enabled.

**Font Size** – This option controls the size of the font in the user's local IM window. This font size selection applies to both the History area and the Input area. The Font Size options available for selection are 8, 10, 12, and 14.

The default font size is 8.

## 10.4.2 History Settings

The History settings for the Instant Message tab are as follows:

**Prompt to save IM session on exit** – If this option is selected, a prompt to Save the History is displayed when the user closes the IM window. If this option is not selected, the prompt is not displayed.

The default is for this option to be enabled.

**Automatically save all IM sessions** – If this option is selected, all IM sessions are automatically saved to a file when the IM window is closed. When this option is selected, the Location field becomes active allowing the user to specify the folder where the files will be written. The Browse button opens a file selection window allowing the user to navigate through the file system to select the folder location.

The default is for this option to be disabled.

If this option is enabled, the user is not prompted to save the session when the IM session is closed, regardless of the previous setting.

**Display most recent IM session in History area** – If this option is selected, the most recent IM session between the two participants is displayed in the History area when a new IM session is started. If this option is not selected, then the History area will be blank when the IM session is started.

The default is for this option to be enabled.

**Keep history of most recent sessions** – This option allows the user to control how many previous sessions are saved for display in the History area. If this option is selected, the specified number of IM sessions can be recalled within the History area. The application automatically deletes IM sessions that are older than the specified number of sessions.

The number of sessions that can be selected are 5, 10, 25, and 50.

If this option is not selected, the application only keeps the previous session.

### 10.4.3 Notification Settings

The Notification settings for the Instant Message tab are as follows:

**Audible alarm when invitation/start of new IM session** – When this option is selected an audible alarm is generated when the invitation is displayed for the user to join an IM session. If the user has the invitation display disabled, the alarm sounds when the IM window is displayed at the start of a new session.

The default is for this option to be enabled.

**Audible alarm when new IM message received** – When this option is selected an audible alarm is generated for each new IM message received. The new message alarm occurs even if the window is not top-most or is minimized.

The default is for this option to be disabled.

**Pop IM window to top when new IM message received** – Selecting this option will pop the IM window to the front of the display when a new message is received. Even though the window will pop to the top, the keyboard input still remains with the window that had focus before the IM window was popped. This prevents the user keyboard input from accidentally be switched to the IM input area.

The default is for this option to be enabled.

# Outlook Integration

## Chapter 9

### SECTION 1 OUTLOOK INTEGRATION

The Outlook Integration allows users to make calls, End Call, Conference, Transfer, and perform screen pops through the Contacts folder within MS Outlook using UC Suite. The Outlook Integration is provided with UC Client or with InConnect. The UC Suite must be running for the Outlook Add-In to function, or the InConnect application has been installed.

The InConnect application is provided to deliver Outlook functionality with the Web Client.

The Outlook Integration is supported with the following Outlook Versions (32-bit and 64-bit):

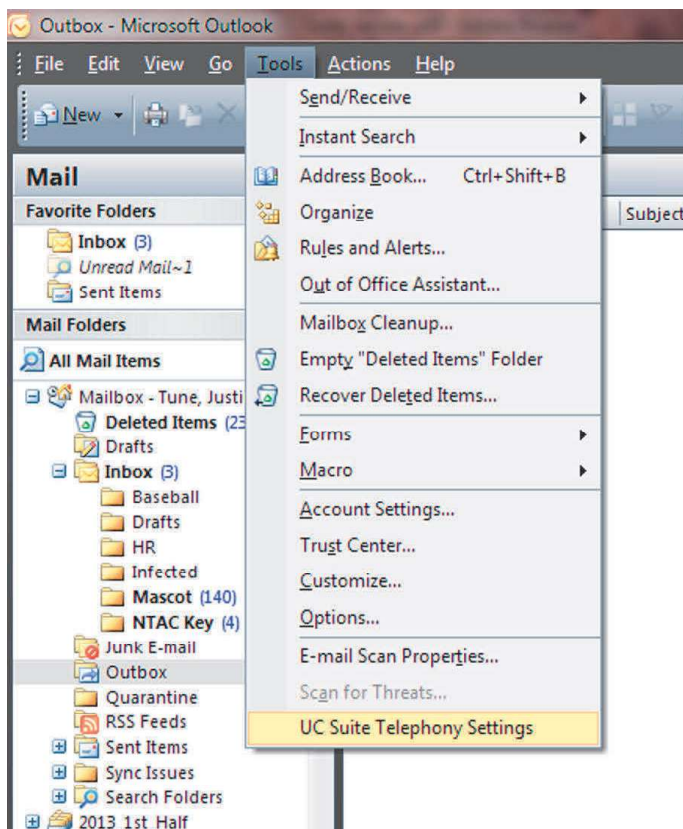
- Outlook 2007
- Outlook 2010
- Outlook 2013
- Outlook 2016

#### 1.1 Configuration

First choose **UC Suite Telephony Settings** from the Tools Menu within Outlook.

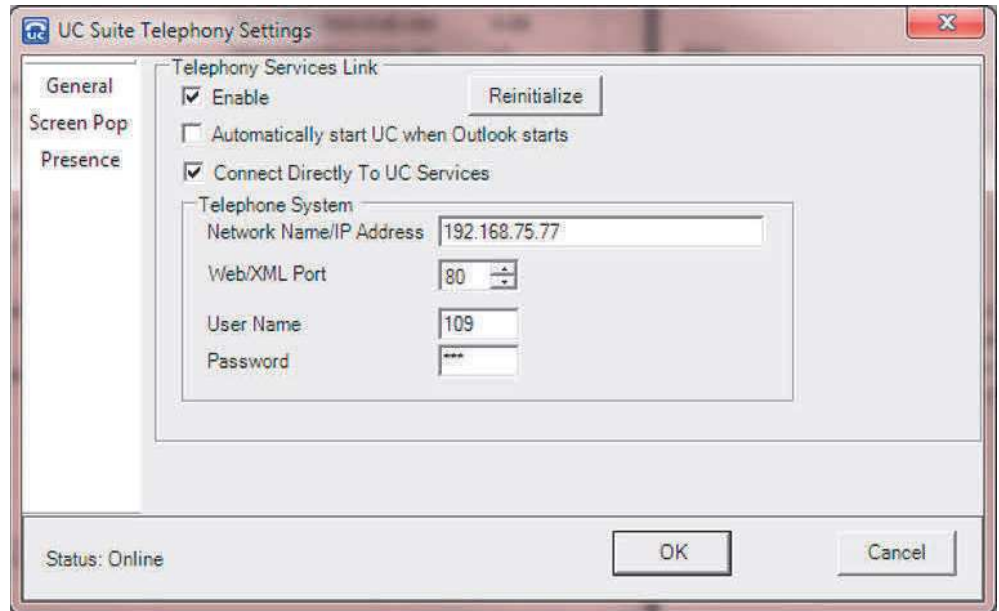
When making calls to outside numbers using the Outlook Add-In, the dialing rules from **Control Panel** → **Phone** and Modem Options will be followed.

Figure 9-1 Outlook Configuration



The UC Suite Settings window will open.

Figure 9-2 NEC Desktop Telephony Settings



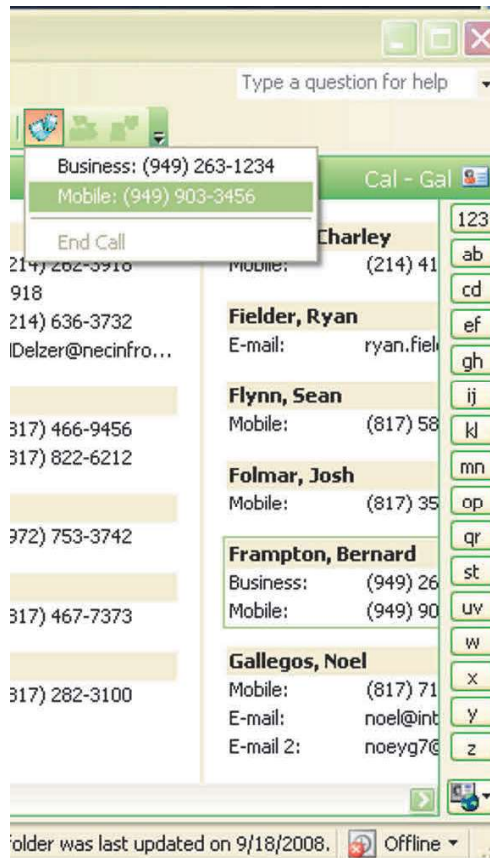
- General: Check the **Enable** box to enable the Outlook Add-In.
- General: Check the **Automatically launch NEC Desktop Suite when Outlook starts** if this is desired.
- General: Click on the **Reinitialize** button to start the connection to the SV9100.
- General: The **Connect Directly To Shared Services** check box will allow the Outlook Add In to communicate directly with the UC Server module for telephony control and events. This option should be used if the user is not running the UC Client in conjunction with the Outlook Add-In.
- General: Define the **Network Name/IP Address** of the UC Server.
- General: Define the **Port Number** on the UC Server system for communications with clients.
- Screen Pop: The **Activation** option determines at what point the contact will be located and displayed.
- Screen Pop: Click on the **Pick Folder** button to specify an Outlook folder other than the default Contacts folder.
- Screen Pop: The **Call Filter** option determines which types of calls initiate a screen pop (all calls or external calls only).
- Presence: Check the **Automatically assign Presence to any new calendar event** to select either a Presence state or a pre-defined Presence Profile that will automatically be associated with any new calendar event. (UC Suite 4.0 and higher).

- Presence: The **Presence Profile** option includes a drop down list of the currently defined Presence Profiles. (UC Suite 4.0 and higher)
- Presence: The **Presence State** option allows the user to select a Presence State that will automatically be assigned to any new calendar event. If this option is selected, then the Subject, Location, Remarks, and Start/End time will automatically be included in the Presence event, based upon the corresponding fields within the calendar event.
- Even though the scheduled Presence event will be associated with a new calendar item, the user will still have the ability to update the Presence settings by accessing the individual calendar event. (UC Suite 4.0 and higher)
- Presence: The Do not copy event text into Remarks field option allows the user to not automatically include the event text within the Remarks field of a Presence event. This rule will be applied regardless of whether the automatic assignment of Presence is utilized. (UC Suite 4.0 and higher)

## 1.2 Making a Call

When the Outlook Contacts folder is the active window, there are two methods for making a call to any of the numbers associated with a contact. The first method uses the UC Suite Dial button on the Outlook toolbar.

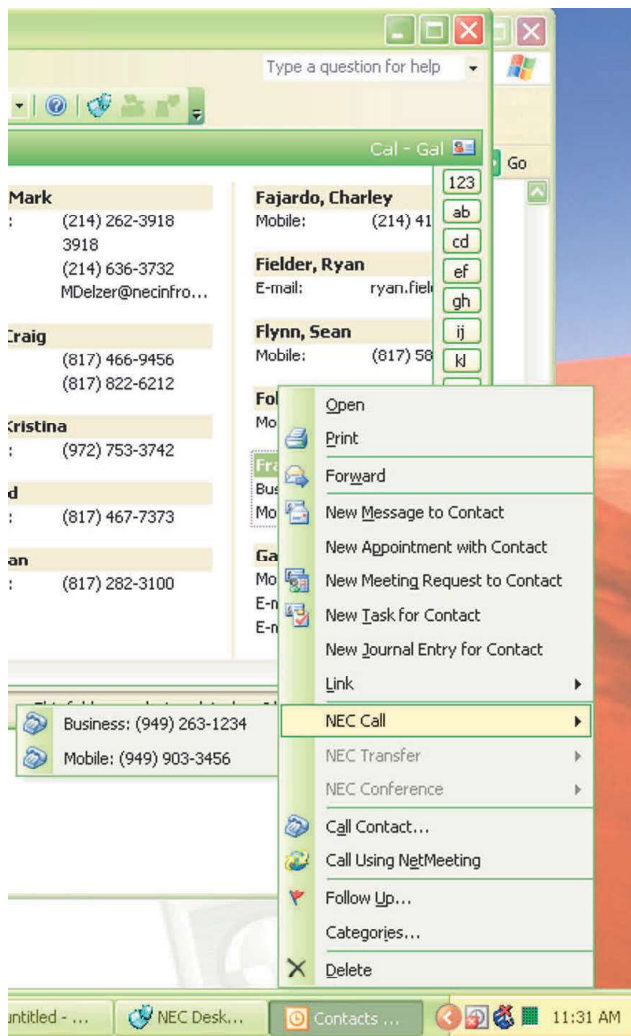
Figure 9-3 NEC Dial Button



- A **single click** on the button will drop down all numbers associated with the highlighted contact.
- A **second click** will dial the number selected.

The second method to dial the contact is by right clicking the contact and choosing **NEC Call**.

Figure 9-4 Right Click for NEC Call



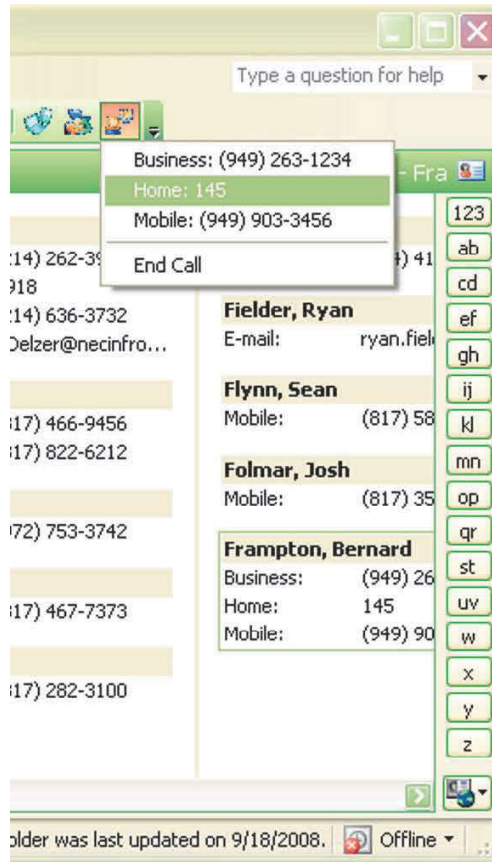
- A submenu will open off of the NEC Call with all numbers associated with the highlighted contact.
- Highlight one of the numbers and click to dial the number.



### 1.3 Conference

When the extension the Outlook Add-In is associated with is on an active call, there are two methods for making a Conference Call with a contact and the active call. The first method uses the NEC Conference button on the Outlook toolbar.

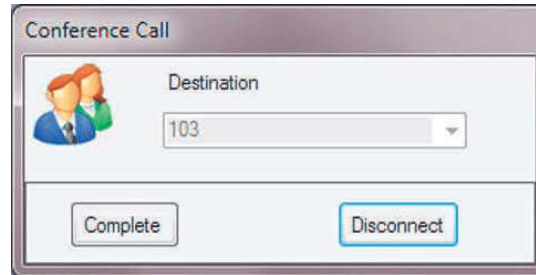
Figure 9-5 NEC Conference Button



- A **single click** on the button will drop down all numbers associated with the highlighted contact.
- A **second click** will initiate a Conference to the number selected.

The Conference Call window will appear.

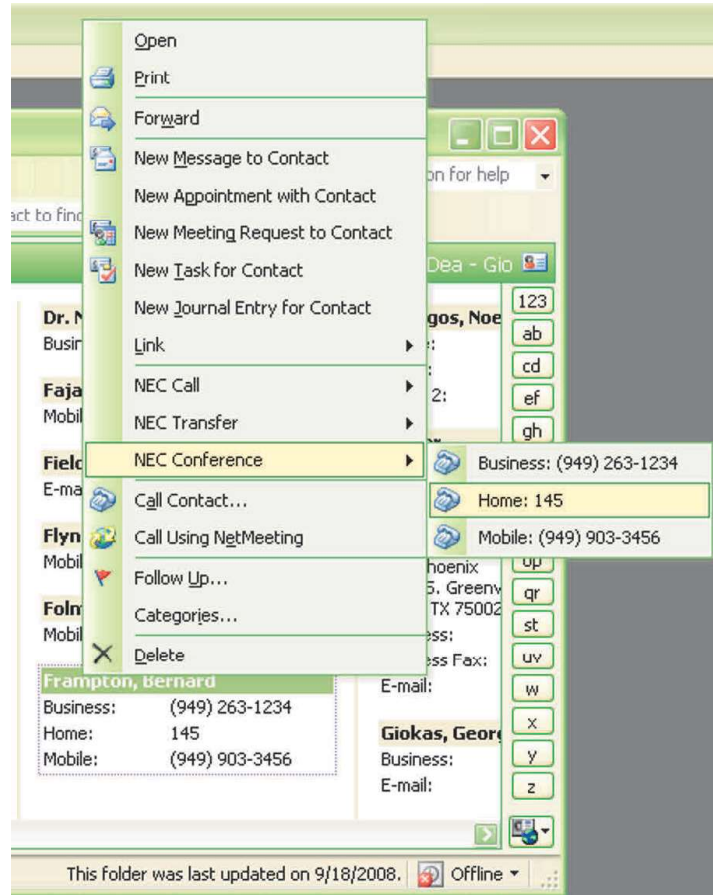
Figure 9-6 Conference Call Window



- Once the destination party answers, click the **Complete** button to complete the Conference.
- Either before the destination party answers or after they answer, click the **Disconnect** button to disconnect with the destination party and be reconnected to the original caller.

The second method to Conference in a contact is by right clicking the contact and choosing **NEC Conference**.

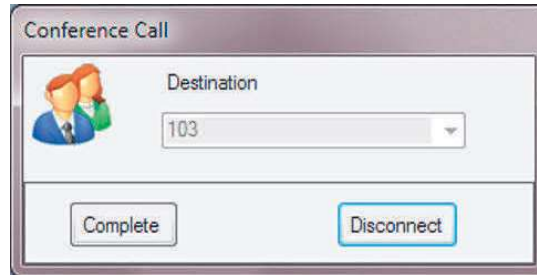
Figure 9-7 Right Click for NEC Conference



- A submenu will open off of the NEC Conference with all numbers associated with the highlighted contact.
- Highlight one of the numbers and click to conference the number with an active call.

The Conference Call window will appear.

Figure 9-8 Conference Call Window



- Once the destination party answers, click the **Complete** button to complete the Conference.
- Either before the destination party answers or after they answer, click the **Disconnect** button to disconnect with the destination party and be reconnected to the original caller.

### 1.4 Transfer

When the extension the Outlook Add-In is associated with is on an active call, there are two methods for transferring the call to a contact. The first method uses the NEC Transfer button on the Outlook toolbar.

Figure 9-9 NEC Transfer Button

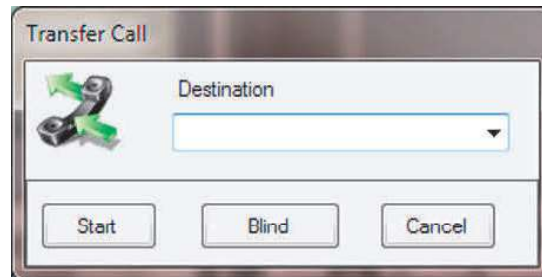


- A **single click** on the button will drop down all numbers associated with the highlighted contact.
- A **second click** will initiate a Transfer to the number selected.

The Transfer Call window will appear.

---

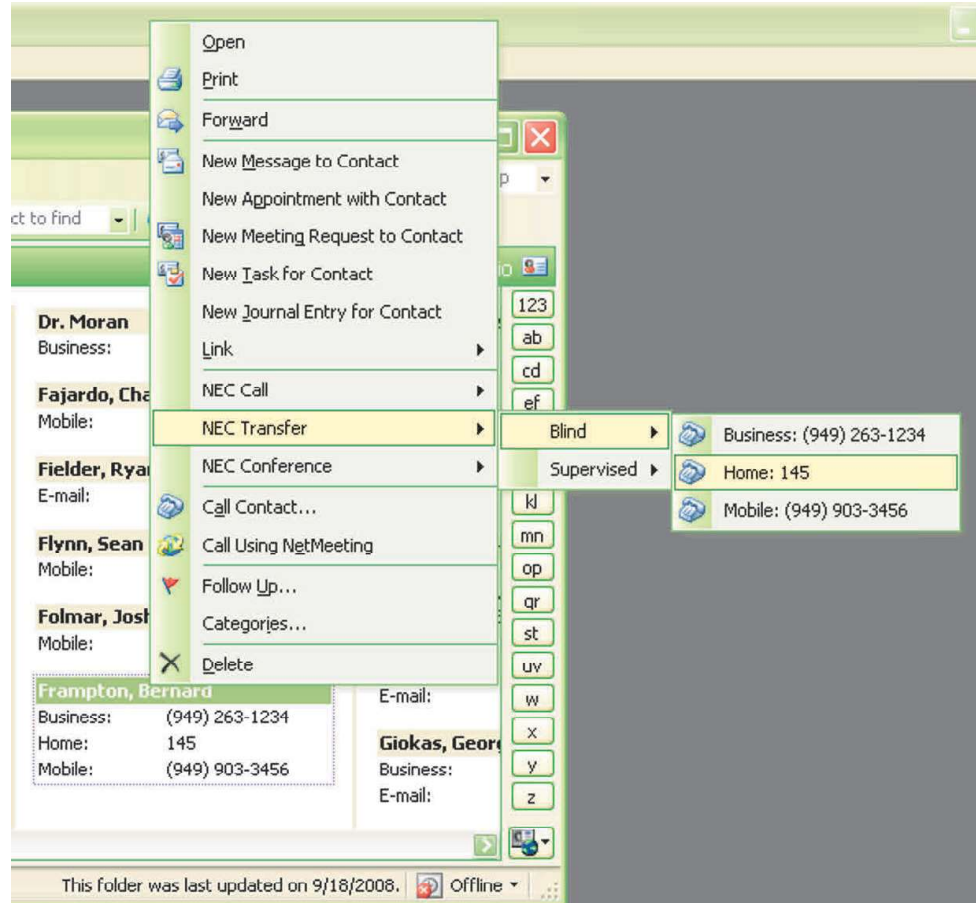
Figure 9-10 Transfer Call Window



- Click the **Start** button to begin a supervised Transfer.
- Click the **Blind** button to make a blind or unsupervised Transfer to the number selected.
- Click the **Cancel** button to cancel the Transfer.
- Click the **Complete** button to complete the Transfer.
- Click **Voicemail** to transfer the call to the Contacts Voicemail box.
- Either before the destination party answers or after they answer, click the **Disconnect** button to disconnect with the destination party and be reconnected to the original caller.

The second method to Transfer a call to a contact is by right clicking the contact and choosing **NEC Transfer**.

Figure 9-11 NEC Transfer Right Click

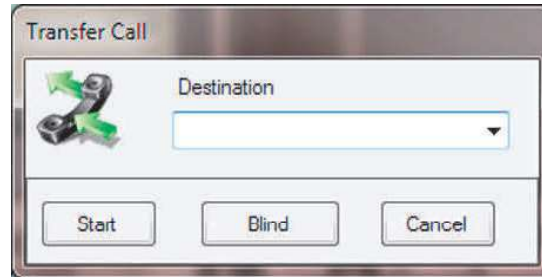


- A submenu will open off of the NEC Transfer with all numbers associated with the highlighted contact.
- Highlight one of the numbers and click to transfer the active call to the number selected.

The Transfer Call window will appear.

---

Figure 9-12 Transfer Call Window



- Click the **Start** button to begin a supervised Transfer.
- Click the **Blind** button to make a blind or unsupervised Transfer to the number selected.
- Click the **Cancel** button to cancel the Transfer.
- Click the **Complete** button to complete the Transfer.
- Click **Voicemail** to transfer the call to the Contacts Voicemail box.
- Either before the destination party answers or after they answer, click the **Disconnect** button to disconnect with the destination party and be reconnected to the original caller.



### 1.5 End Call

When the extension the Outlook Add-In is associated with is on an active call, the user can end the call by clicking any of the three buttons, **UC Suite Dial**, **NEC Transfer**, or **NEC Conference**, and choosing **End Call**.

Figure 9-13 End Call

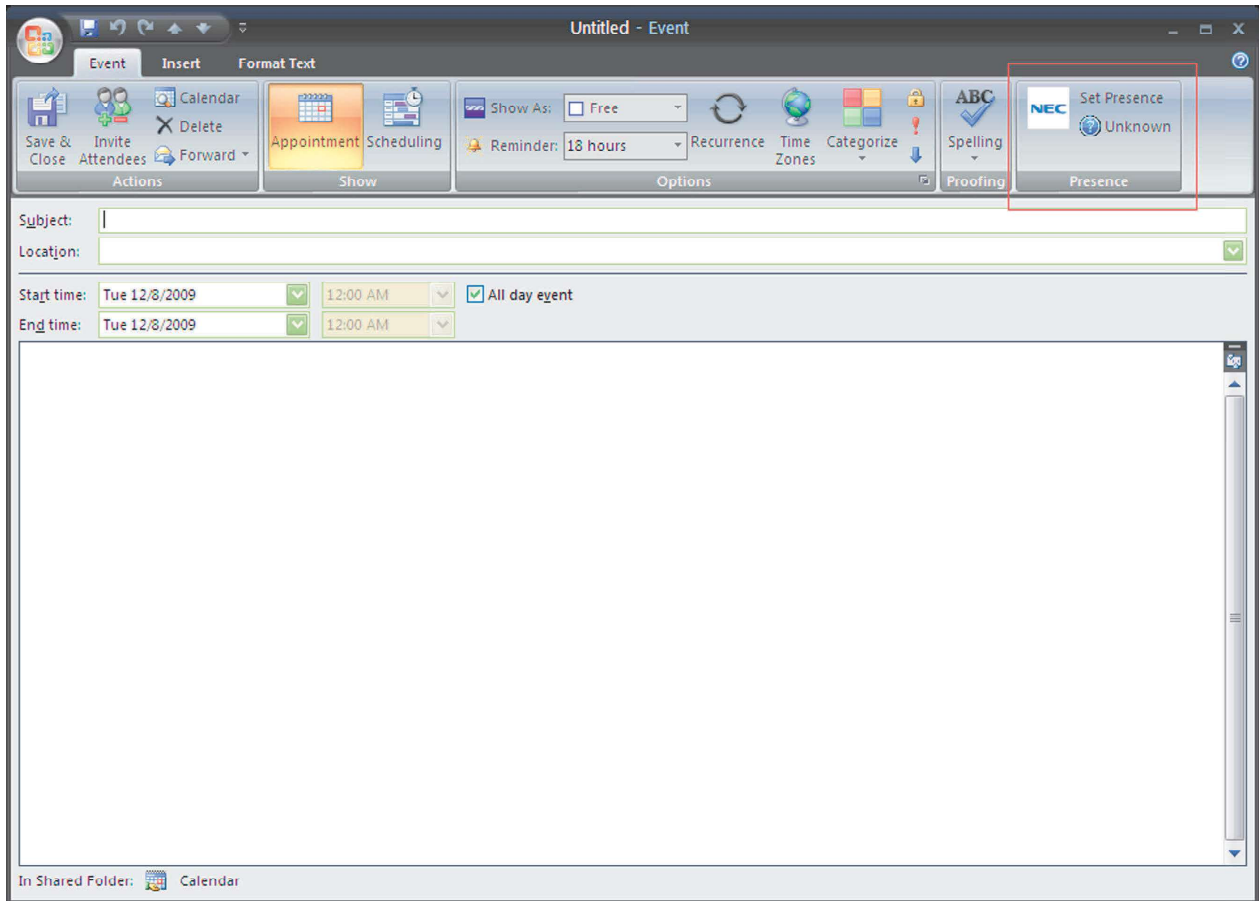


## 1.6 Presence Setting from Outlook Calendar

A UC Client user can associate a Presence State with an Outlook Calendar appointment. Recurring appointments in Outlook only make the initial presence state change. New toolbar items are added to the Outlook appointment dialog with the following items:

- NEC Logo – this button identifies the toolbar. When this button is clicked, the About box for the UC Suite will be displayed.
- Set Presence – this button opens up a supporting dialog which allows the user to specify the details of the Presence setting for this appointment.
- Current Presence State – This button shows the current Presence state that has been selected for the appointment. If a Presence State is not selected, the status will show “No Presence State”. If a Presence State is not Selected, then the Appointment will not result in a scheduled Presence event. Rolling the mouse over this button will show a tool tip, which displays the current Phone Setting.

Figure 9-14 Outlook Presence Appointment Screen

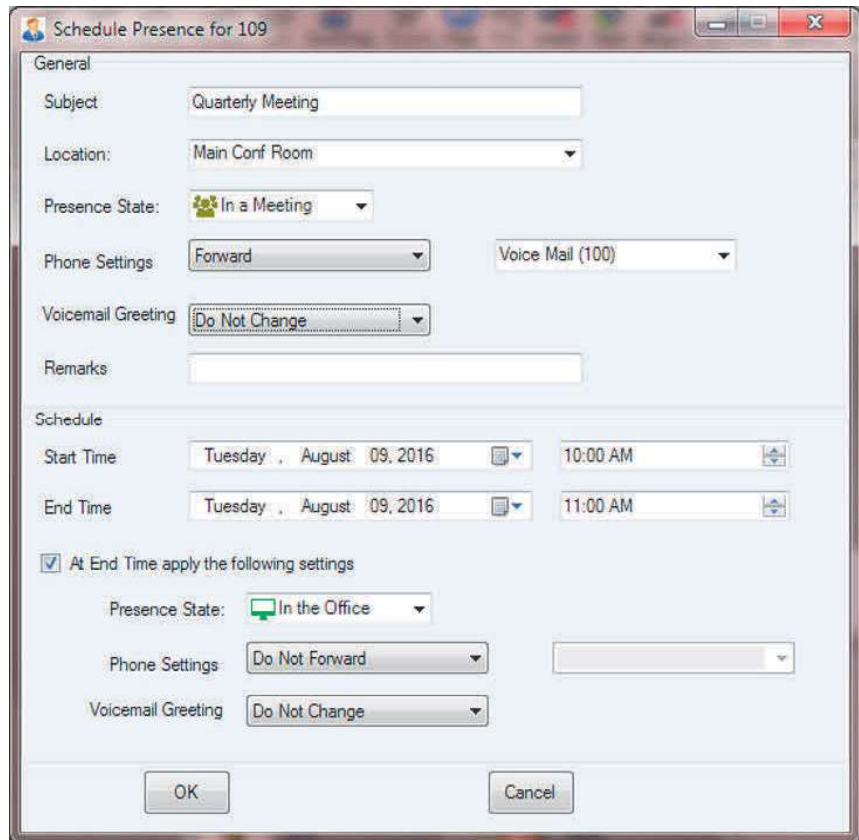


### 1.6.1 Assigning a Presence State

When a new appointment is defined in Outlook, a Presence state will not be associated with the appointment. If the user does not assign a Presence state, then the appointment will not have any affect on the user's Presence settings.

When the user selects the Set Presence button, the Schedule Presence Window is displayed:

Figure 9-15 Schedule Presence Screen



The following fields will be pre-populated with the values that are specified in the Outlook Appointment form:

- Subject
- Location
- Start Time
- End Time

➔ *If you set an Outlook appointment for less than 30 minutes, when you open the Presence Form, it will change the duration to 30 minutes.*

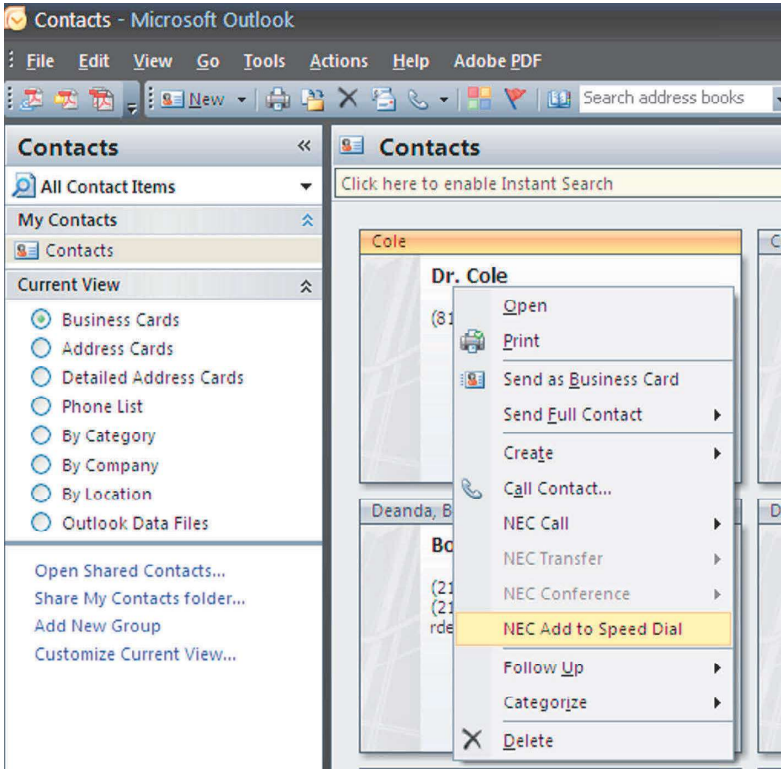
The Presence State field will be unselected (Blank) upon initial entry into this field. All other fields will use the same default as described for the Presence Detail form within the Desktop.

### 1.7 Adding Outlook Contact to Speed Dial List

The Outlook integration will also be enhanced to allow the user to designate that the phone numbers for an Outlook Contact entry be added to the Desktop speed dial list. This will be accomplished by adding a new entry to the NEC section of the Contacts pop-up menu.

When the user right-clicks a Contact entry, the “NEC Add to Speed Dial List” option is displayed.

Figure 9-16 Screen



This will create an entry in the speed dial list for every phone number in the selected entry. These numbers will be labeled using the Full Name and Phone Number Type within the Speed Dial List.

Currently there will be no synchronization between the Outlook entry and the Speed Dial entry after the numbers are captured.