Avaya Converged Office 2007 User Guide Microsoft Office Communications Server 2007

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About this User Guide

Some of the features described in this User Guide may not be available to all users. This guide describes how Office Communicator 2007 interworks with an Avaya Communication Server 1000 (Avaya CS 1000) system. It is assumed that users have a fully converged configuration that employs both Remote Call Control (RCC) and Voice over IP (VoIP). This common configuration allows users to control their desktop phones and use Office Communicator 2007 as their VoIP client. For more information, contact your system administrator.

About Avaya Converged Office 2007

Avaya Converged Office 2007 provides a unified communications client that enables people to communicate using a range of different communication options, including instant messaging (IM), voice, and video.

The combination of Office Communication Server 2007 and Avaya CS 1000 provides users with the ability to make or receive calls through their CS 1000 desktop phone or through Office Communicator 2007 (see Figure 1 on).

Avaya Converged Office 2007 combines the business-grade telephony of the CS 1000 with the real-time multimedia communication and control of desktop phones provided by Microsoft® Office Communicator 2007 products.

Figure 1 Office Communicator interface
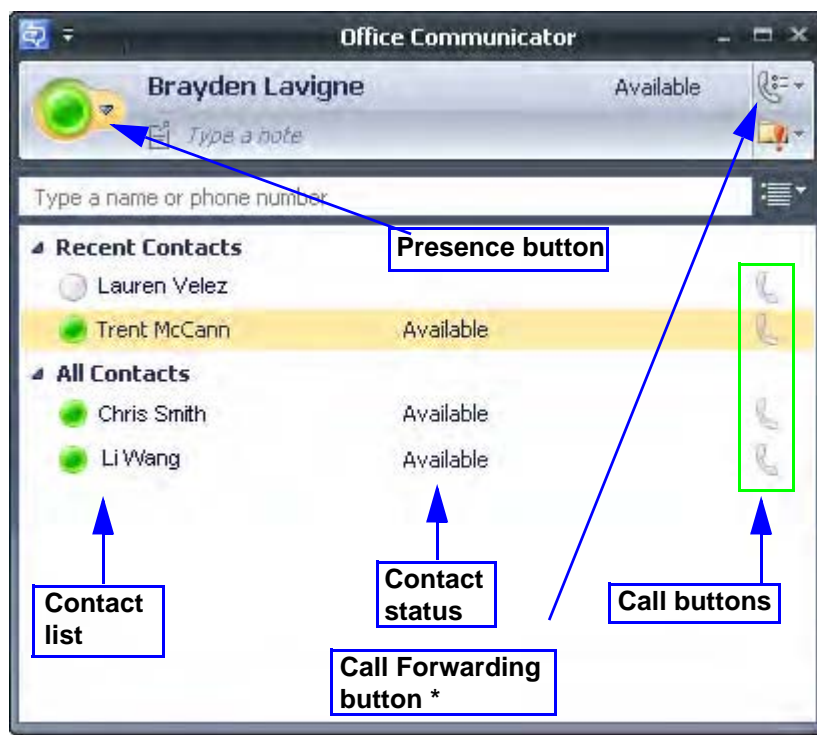
* - The Call Forwarding button is also an indicator that lets the user know when they are in control of their CS 1000 desktop phone.

Calling devices in Avaya Converged Office 2007

Users have two modes of communication available to them in Avaya Converged Office 2007:

- **Phone mode:** Using your desktop phone to originate and receive calls. Your phone can also be controlled using Office Communicator 2007 using Remote Call Control (RCC). With RCC, you are able to select another Office Communicator user and originate a call from your desktop phone. Also, when incoming calls come in to your desktop phone, clicking on the incoming popup ("toast") results in your desktop phone picking up and answering the call.

- **Computer mode:** Using Office Communicator 2007 as a VoIP soft phone. When working with the CS 1000, calls to your desktop phone can also be answered through the Office Communicator soft client.

This guide contains the following topics:

Using Office Communicator 2007

Signing in to Office Communicator

To begin using Office Communicator, you must first sign in using your address, user name, and password (see Figure 2).

Figure 2 Office Communicator Sign-in screen

The following procedure describes the process of signing in to Office Communicator.

To sign in to Office Communicator:
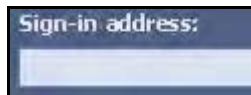
1. Depending upon your configuration, sign in may be automatic (see below), or may require manual sign in. To sign in manually, enter your address in the Sign-in address field.

2. Enter your user name in the User name field.

3. Enter your password in the Password field.
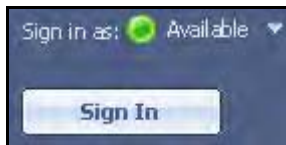
4. Click the **Sign In** button.

To start Communicator automatically when you log on to Windows:

1. On the Windows desktop, click **Start**, point to **All Programs**, and then click **Microsoft Office Communicator 2007**.

2. In the Office Communicator window, verify that your user name is correct, enter your password and then click **Sign In**.

3. In the Office Communicator Title bar, click the **Menu** button.

4. Click **Tools**, click **Options**, and if not already selected, select the **Automatically start Communicator** when I log on to Windows check box.

To change your sign-in account:

1. To change your sign-in account, you must first sign out of Communicator 2007. On the Office Communicator Title bar, click the **Menu** button, point to **Connect**, and then click **Sign Out**.

2. In the Office Communicator Title bar, click the **Menu** button, point to **Connect**, and then click **Change Sign-In Address**.

3. In the **Options** dialog box, under My account, specify a new account in the Sign-in address box, and then click **OK**.

4. In the Office Communicator window, type the user name and password for the account, and then click **Sign In**.

Publishing phone numbers

Office Communicator allows users to publish additional or alternate phone numbers where they may be reached (for example: home phone number). The following procedure describes how to publish a phone number in Office Communicator.

To publish your phone numbers:

1. Click the **Menu** button in the title bar.
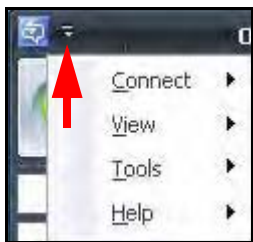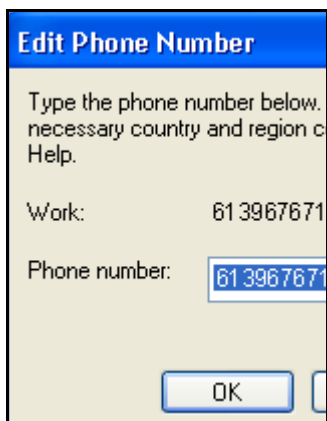
2. The menu appears. Select **Tools** and then **Options**.

3. On the Phones tab, enter the phone numbers to be published by clicking the appropriate button (for example, to enter your work number, click the Work Phone button).
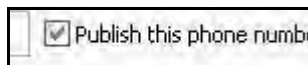
4. Ensure that the **Publish this phone number** box next to each phone number is checked.

Edit Phone Number

Type the phone number below.
necessary country and region c
Help.

Work: 61 3967671

Phone number: 61 3967671

OK

5. Click **OK** and then click **OK** again to return
to the OC Client screen.

Number format

Your published work number may need to be in the following formats:

+Public Phone Number;ext=xxxxx

OR

ESN xxx-xxxx - where "ESN" indicates that it is the full internal or private phone number.

For example:

Work Phone:

 +16135551212;ext=3431212

ESN 343-1212

Home:

+16135551313

> *Note:* The Published number must be a format that is supported by your company. Please consult the administrator on the correct format of the phone number. For example: Public Phone numbers (like your home and mobile) may need to be in the format of:
>
> + Country Code Phone number
>
> Example: +16135551212, where +1 is the prefix for phone numbers in North America.

Setting user presence

Office Communicator enables you to display your current availability status. The following procedure describes how to manually change your user availability status.

To configure user presence in Office Communicator:

1. To change your status, click the **Presence** button in the upper left portion of the Office Communicator window.

2. Select the appropriate status from the list.

3. To add additional status information, click in the **Type a Note** box and type a message.

> *Note:* If you have an Out of Office message set in Outlook, that message displays in the Note box automatically.

Initiating and receiving calls

Office Communicator provides users with a number of options when it comes to initiating and receiving phone calls. Calls can originate from the Office Communicator client, Instant Messenger, or Microsoft Office programs like Outlook.

Users can still use their desktop phone to originate a phone call. When a call is placed through the desktop phone, Office Communicator is updated with the phone number that was called and the status of Office Communicator changes to "On the phone."

When it comes to receiving incoming calls, users also have a number of options on how to handle those calls. They may answer the call on their computer or their desktop phone, they can redirect the call to another number, or they have the option of replying to the caller through Instant Messenger (IM).

Office Communicator calls

If Office Communicator is configured to make phone calls, the quickest way to make a call is to click the Call button next to a contact in the Contact List. The following procedure describes the steps required to initiate a Communicator call.

To initiate a call from the Office Communicator client:

1. Click the **Call** button next to any name in your Contact List. This automatically places a call to that contact.

2. To select an alternate number or location, click the **Call** arrow. You may also select **New** to enter a new phone number.

3. You can type in the name of the person you wish to call, or enter their phone number directly.

4. If the contact is also using Office Communicator, you can click **Communicator Call** on the Call menu to place a Communicator-to-Communicator call (a call from your desktop to a contact's computer or Communicator device).

5. Office Communicator also allows you to type a subject for the call in the **Conversation Subject** box at the top of the Call menu.

6. To terminate a call, user can use **End Call** button.

Answering a call through the Office Communicator client

The following procedures describe how to set your preferred calling device and how to answer incoming calls in both Computer mode and Phone mode.

To configure your default calling device:
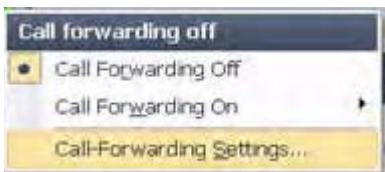
1. Open the Call-Forwarding Settings in one of two ways:

   • **Tools > Call-Forwarding Settings...**

   • Click the arrow next to the Presence button and select **Call-Forwarding Settings...**

2. There are two possibilities for an incoming call, depending on the preferred calling device value you choose.

   In the Outgoing calls section of the Call-Forwarding window, choose either Phone mode (which will direct incoming calls to their desktop phone) or Computer mode (which will direct incoming calls to the Office Communicator client).

To answer an incoming call in Computer mode:

1. If the Preferred Calling Device is set to Computer, you will receive a popup notification of an incoming call.

   At this point, you can answer the call by clicking on the popup.

2. You can also send the incoming call to your desktop phone. To redirect the call to your desktop phone, click on the **Redirect** button and select **Answer Using Phone.**

   You also have the option of redirecting the call to another number, or you can send the caller a message through Instant Messenger (example: "I'll call you back in 10 minutes.").

4. To decline a call, click the **Ignore call** button in the alert.

To answer an incoming call in Phone mode:

1. If the Preferred Calling Device is set to Phone, you will receive a popup notification of an incoming call.

   At this point, you can simply answer your desktop phone.

2. You can also send the incoming call to your Office Communicator client. To redirect the call to your Office Communicator client, click on the **Redirect** button and select **Answer Using Communicator**.

   You also have the option of redirecting the call to another number, or you can send the caller a message through Instant Messenger (example: "I'll call you back in 10 minutes.").
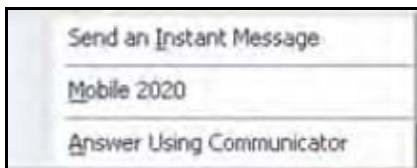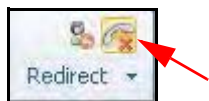

4. To decline a call, click the **Ignore call** button in the alert.

Calls through Instant Messenger (IM)

If Office Communicator is configured for make phone calls, you can add audio to an instant message conversation.

To initiate a call from an IM conversation:

1. In the Instant Messenger window, click the **Call** button to call your contact. You are connected once your contact answers.

2. If Office Communicator is configured for conferencing, you can add other users to the conference call by clicking the **Invite** button.

3. Select the invitee from the list that appears. Note that the availability status of each invitee is displayed.

Video calls in IM

Users equipped with a web cam (in a system configured for video) can add video to an open instant message conversation with other Office Communication users. Your video image displays automatically once a connection has been established. Your contact can see your video feed whether or not he or she has a web cam.

> ***Note:*** Video calls are only possible between two users who both
> have web cams and are in the same mode (both users must be in
> either Phone or Computer mode at the time of the video call).

To incorporate video into your instant message conversation:

1. In an instant message conversation, click
   Start video call.

2. If Office Communicator is configured for
   conferencing, you can add other users to
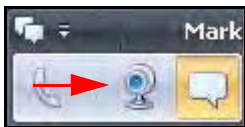   your video conversation by clicking the
   Invite button.

Calls from Microsoft Office

Converged Office enables users to initiate a voice conversation from Microsoft Office
programs like Outlook.

To initiate a call from Outlook:

1. Click the Presence button next to a
   person's name in any Outlook
   e-mail message or meeting
   invitation.
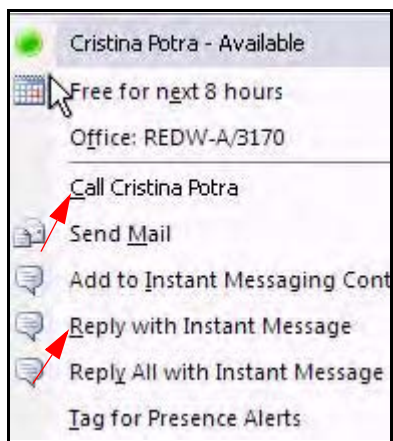
2. From the Presence menu, you can initiate a call or instant message conversation with that person.
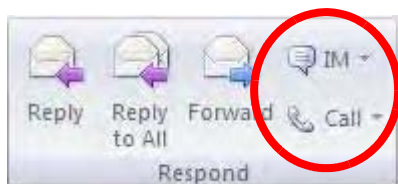
3. Outlook 2007 has IM and Call buttons that allow you to contact one or more people directly from the message.

Holding and retrieving calls

Holding Calls

The Hold Call service places a connected call on hold at the same device. Essentially, this is equivalent to pressing the Hold key on a phone. In this case, however, the hold button is part of the Office Communicator interface.

Consistent with the behavior when initiated from a phone, a call on hold cannot be disconnected. Both Computer mode and Phone mode calls can be put on Hold.

To place a call on hold:
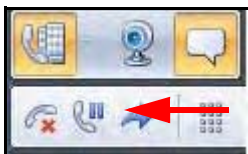
1. Click the **Hold call** button.
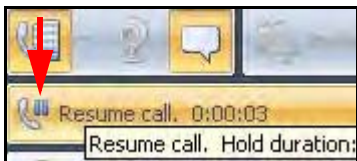
2. To take a call off Hold, click on the **Resume call** button.

Retrieving missed calls

If your system administrator has configured this feature, you will receive an e-mail message notifying you of missed instant message conversations, phone calls, and other conversations.

To retrieve missed calls using Office Communicator:

1. You can follow up on missed communications from the e-mail message in Outlook. To quickly open these e-mail messages, click the **View missed notifications** button in Communicator.

2. Select the **Missed Conversations** option.

3. If using Microsoft Office Outlook, click the **IM** or **Call** links that appear in the notification e-mail in order to follow up on missed conversations.

Handling Announced, Unannounced, and Personal transfers

There are three main types of transfers: Announced, Unannounced (Single Step), and Personal Transfer.

Announced Transfer

The Transfer Call service transfers a call held at a device to an active call at the same device. The held and active calls at the transferring device are merged into a new call. For example, you receive a call that might be better handled by a coworker. By clicking the Transfer Call button, the caller is placed on hold while you call the number of the coworker to whom you are transferring the call.

Single Step Transfer

The Single Step (Blind) Transfer Call service (also known as Unannounced Transfer) transfers an existing connection at one device to another device. This transfer is performed in a single step to prevent the device performing the transfer from placing the existing call on hold.

The transferring connection may be in the Alerting, Connected, Failed, Held, or Queued state.

A regular Single Step Transfer (in both Computer and Phone modes) can be done by either selecting a user or entering a phone number.

To initiate a Single Step Transfer in Phone Mode:

1. Click the **Transfer call** button (see Figure 3).

Figure 3 Call to be transferred

2. Select **Transfer** to transfer the call to another person (see Figure 4).

Figure 4 Transfer call

3. Select the contact who will receive the call (Figure 5). Click **OK**.

Figure 5 Select contact for Transfer

4. To transfer the call to a number, type the number in the number field at the top of the Transfer Call window (see Figure 6 on page 29).

Figure 6 Enter number manually

Personal Transfer

The Personal Transfer is a transfer to a number that is listed as alternative contact for yourself (for example, a second desktop phone, home, Cell, or other).

To perform a Personal Transfer, select the **Personal Transfer** option from the list (see Figure 7). You can then select the appropriate number (one of your alternate contact numbers) as the recipient of the transfer.

Figure 7 Personal Transfer

Redirecting calls
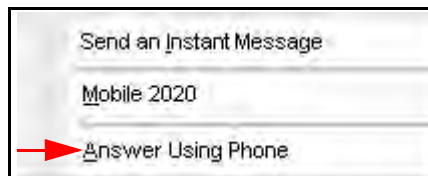
Office Communicator allows you to redirect incoming calls to your other numbers (for example, your home phone number).
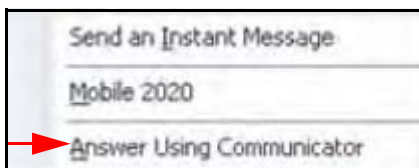
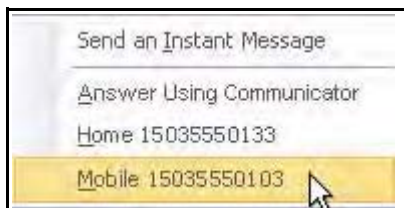**To redirect incoming calls using Office Communicator:**

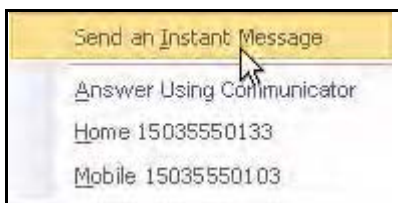1. To redirect a call, click the **Redirect** button.

2. You can redirect a call to your desktop phone from Office Communicator by selecting **Answer Using Phone**.

3. You can redirect a desktop phone call to your Office Communicator client by selecting **Answer Using Communicator**.

4. You can also redirect the call to one of the other numbers in your list.

4. If you click **Send an Instant Message**, the call is declined and a conversation window opens enabling you to send an instant message to the caller.

For example, you may be too busy to take the call, so you send the caller an instant message telling them that you will return their call when you have a moment.
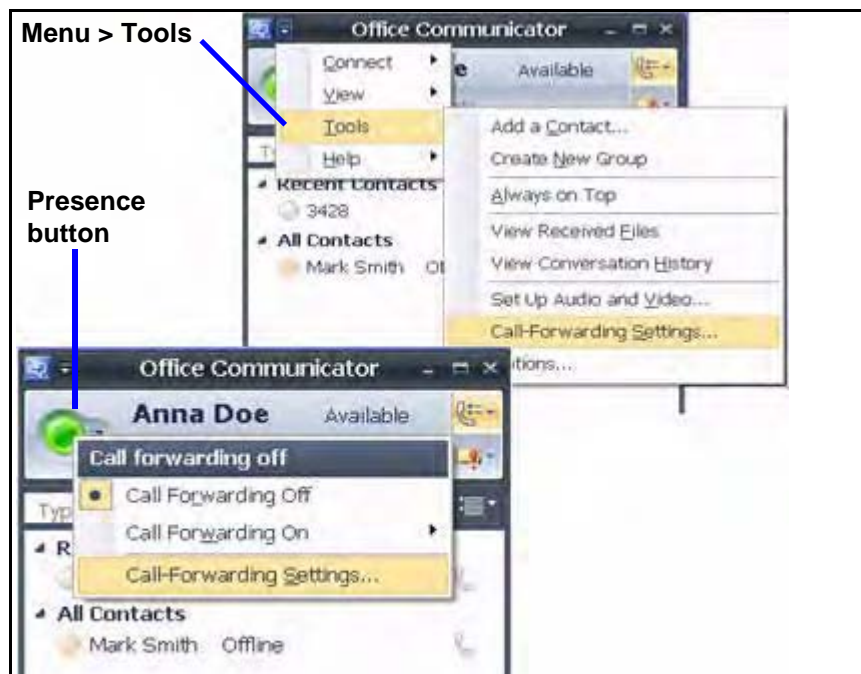
Forwarding calls

Users can forward all calls by selecting Call Forwarding On, and then select the number to which they want to forward calls. The Call Forwarding service allows the computing function to control the forwarding feature at a specified device based on user-defined conditions.

Selecting device for Call Forwarding

In Office Communicator 2007, depending upon your unique system configuration, you can access your preferred device through the Call-Forwarding menu item.

There are two ways to access the Call-Forward Settings menu: Through the Tools option in the Menu, or through the Presence button (see Figure 8).

Figure 8
Accessing Call-Forwarding through the Presence button

If your system is configured for Call Forwarding, you will see a menu similar to that shown in Figure 9.

To Forward calls to another phone number:

1. Click the **Call Forwarding** button.

2. Point to **Call Forwarding On**.

3. Click a number, or click **New Number** to enter a new phone number. When you enter a new number for Call Forwarding, ensure that it is in the correct format. Contact your administrator to confirm the correct formatting.

Figure 9 Forward calls to another number

Once the Call Forwarding Setting is selected, you can set your preferred device to either Phone or Computer mode (see Figure 10 on).

Figure 10
Call-Forwarding Settings

⚠	**CAUTION** If you wish to have Call Forwarding to your voice mail, ensure that the Call Forward is set on your desktop Avaya Communication Server 1000 phone, as opposed to Office Communicator. In the event that Office Communicator loses connectivity, it will not correctly reflect the Call Forward status when connectivity is restored.

Index