estos ProCall Business

7.4.1.5939

1   Welcome to estos ProCall Business

The user help available leads you through the installation, configuration and handling of estos ProCall Business.

- An overview of basic functions is shown on the page What estos ProCall Business offers to you.

- Install estos ProCall Business and make the most important settings: Installation and Base Configuration.

- Information about how to integrate your contacts in estos ProCall Business Usage of existing contact data.

- Everything about the daily work with the programme can be found under Work with estos ProCall Business.

- To be able to configure estos ProCall Business ideally, please look up estos ProCall Business customize.

- You will find information about software updates and support on the page Product Support.

Help can be accessed any time from the estos ProCall Business program window via **Help**. Help opens by default on the subject which corresponds to the function just used by you.

In Help the following icons are used:

Icon	Meaning
➡	Note
⚠	Warning, caution
⬆	Change from earlier versions

2 What estos ProCall Business is able to offer you

The estos ProCall Business is a Unified Communications software suite for business. It combines computer-supported telephony (computer telephony integration, CTI) with features for company wide (and beyond company boundaries) online collaboration.

Whether it's telephone conversations, call routing, conference calls, presence information, instant messaging or chat - with estos ProCall Business you always have an overview of the communication events at your workstation.

With its configurable functions, estos ProCall Business can be adapted to your needs. estos ProCall Business works smoothly with the applications you are used to for e-mail and contact data management and thus integrates seamlessly into the work and communication processes in the business environment.

Learn more about the essential functions and performance features of estos ProCall Business here:

2.1 Contact search: Find information about the current contact.

estos ProCall Business automatically searches for the appropriate contact information (above all the call partner) for an incoming or outgoing conversation based on the call number and displays it. Which contact data sources are to be searched in which order is defined in estos ProCall Business. You can find more information about searching for contacts at Contact search.
If more contacts are found from several data sources for that phone number, the contact data which was last used is displayed as active.

Further you are able to search for the contact data of a person in the search window of estos ProCall Business by entering a name or parts of it. Then start the call or other activities from the contact detail window.

2.2 ActiveContacts - actively manage contacts

The ActiveContacts technology in estos ProCall Business shows further information in addition to the contact data and the phone status of the user, e.g., calendar data of Microsoft Outlook®. The information is constantly updated in "real time". Therefore, you are always informed when and how your contacts are accessible. You are able to start and control the communication via a software menu, depending on the available information.

2.3 Presence – see the availability of your contacts

Every user connected to the system owns a status further on reffered to as *Presence*. This information is aggregated according to defined rules based on the status of several services: Telephony status (telephony service), calendar status (calendar service), login-log off (system service) and the manually entered status, provided by the user.

The presence shows at any time the current availability of the person you wish to communicate with.

You find an overview of the displayed presence symbols and their meaning under Presence symbols.

3 Installation and Base configuration

The installation of the estos ProCall Business can be done in various ways.

The Base configuration of the estos ProCall Business is done directly after the successful installation of the software.

3.1 Installation

The installation of the estos ProCall Business can be done in various ways.

- Requirements
- Manual installation at a workstation by the *.msi* file
- Installation via update service via estos UCServer and the server-side remote installation and update service.

3.1.1 Installation at the workplace

To start the installation at the workplace please double-click the *.msi* file. This starts the Windows® installer leading through the installation procedure. Several configuration options are offered to the user:

⚠ The estos client TAPI driver for dialing from third party applications via a phone is automatically installed as well.

Version Information
The exact version number is displayed on the homepage.

⚠ If estos ProCall Business is installed on a 64-bit operating system, a note appears on this page that the 64-bit variant of the TAPI drivers are installed if required.

License
The licence agreement has to be read and accepted by the user before the installation can be continued.

Connection to the server
Please enter the server here to be connected with the estos ProCall Business.

The server name or its IP address must be entered in the input field.
The server can be searched for and selected in the local network with **Search server....** The list displayed contains the following information about the servers found:

Computer name	Computer name of the server
Version	Information about the installed version of the estos UCServer

Once the target folder for the program installation is entered the software installation completes by installing all files on the system.
Afterwards please start the Base configuration by activating the checkbox and select *finsish*.

3.1.2   Installation via update service

The estos ProCall Business can also be installed on the workstations by the estos UCServer integrated update service.
A Windows® system service will be installed on the workstation executing the installation procedure including the central base configuration loaded from the estos UCServer. The remote installation doesn't require a user intervention. Once finished the Windows® system service supervises the client software version running and starts the update procedure if necessary.
The user is informed about events and the installation progress in a bubble popup at the system tray. A manual intervention of the user is not possible while running remote installations.

The system requirements and the setup of the server based central software installation and update service are described at the help system of the estos UCServer.

3.1.3   Installation using group policies

You can install workstations in the network automatically with the help of the group policy. Proceed as follows:

1. Define which components should be installed on the single workstations. Use the Windows® Installer in administrator mode for this. Start *msiexec/a client.msi*. You can now define a directory in which the prepared installation should be copied.
    This need to be an accessible network share. Then select the software components to be installed on the workstations and specify the estos UCServer computer.
2. Start the Active Directory® user and computer management console in which you configure your domain users. Group your users (or computers) in such a way that you have organisational units. You can create group guidelines for each organisation-unit which controls the automatic installation of software.
    Open an organisatonal unit's properties.
    Go to Group policy. Add a new group policy.
    Open group guidelines with *Edit*.
    Add either under *computer configuration - software settings - software installation* or under *user configuration - software settings - software installation* a new package.
    Then select the installation package previously prepared via the administrative installation. Read the appropriate documentation on Windows Server®, Active Directory® and group policies.

3.2   Base configuration

The base estos ProCall Business configuration is carried out, as is appropriate, immediately after the software is installed. The base configuration can also be opened via the Windows® start menu under **estos ProCall Business My Computer Settings**. The following configuration options are available:

*   Language selction of the estos ProCall Business
*   Licenses
*   Lines options
*   Groupware connection

Basic user settings are configured in **estos ProCall Business Administration**. In addition to the central configuration, various settings can also be modified directly on a workstation using estos ProCall Business My Computer settings.

> ⚠ Configuration of certain behaviors or properties will require administrative authorization for estos ProCall Business. To do this, the user may need to be logged in as an administrator. A button enabling login as administrator will then appear on the corresponding settings page.

3.2.1 ProCall Business language

By default, estos ProCall Business is started in the language of the operating system. If this language is not available, estos ProCall Business is displayed in English.

The language used can be changed in the estos ProCall Business My Computer settings. Administrators may also specify the language through Active Directory® group policies. If so, the user may no longer change the language.

3.3 Licenses

estos ProCall Business requires licence keys to operate. Basic properties of estos ProCall Business are defined by the licence key.

Select license model
At this point there are the following possibilities:

Test 25 licenses free of charge (for 45 days)	An evaluation license is being used. estos ProCall Business may be tested using all available features for 45 days for up to 25 workstations. At the end of the test period, the licenses must be purchased and entered.
Add license	To enter a new license please use the button **"Add"**.

List of licenses used
This list shows the licenses entered and its properties.

Property	Description
Description	Description of licenses or its features
Valid until	Displays the license validity period
License	License key (35 digits)

Sum active licenses shows the summary of current valid licenses.

Add
Thereby, new licenses can be added to the list.
Any number of licenses can be entered.
The licenses have 35 digits and confirm to the following pattern:
XXXXXXXX-XXXXXXXX-XXXXXXXX-XXXXXXXX.

Remove
Remove the marked license from the list

Hardware-ID
A hardware ID which is used to create a license bound to the hardware.

3.4   Lines

Here you can select which extensions will be made available in the network.

A line usually corresponds to a phone. All lines available on the computer will be displayed in the list. **TAPI drivers** will provide the lines that should already have been installed on the system.

3.4.1   TAPI-driver

A TAPI-driver for your phone system is required to operate this software.

A TAPI-driver is a system component that is provided by the manufacturer of your telephony device (either free of charge or for a fee).

The TAPI-driver connects the CTI software to the telephony terminal device. Each TAPI-driver supports different functions depending on the implementation. Not all functions which you can perform on the phone itself are always available on the PC.

TAPI-drivers are installed in Settings - Control Panel - **Phone and Modem Options - Advanced**.

Open phone and modem settings:

3.5   Base configuration

The base estos ProCall Business configuration is carried out, as is appropriate, immediately after the software is installed. The base configuration can also be opened via the Windows® start menu under **estos ProCall Business My Computer Settings**. The following configuration options are available:

- Language selction of the estos ProCall Business
- User log-in information in the estos UCServer
- User settings: general user information
- User settings: contact address and user profile picture
- User settings: telephone numbers
- Groupware connection
- Start options

Basic user settings are configured in **estos UCServer Administration**. In addition to the central configuration, various settings can also be modified directly on a workstation using estos ProCall Business My Computer settings.

3.5.1   ProCall Business language

By default, estos ProCall Business is started in the language of the operating system. If this language is not available, estos ProCall Business is displayed in English.

The language used can be changed in the estos ProCall Business My Computer Settings.

3.5.2   User authentication

The estos UCServer supports two options for the user authentication:
Decide either to log-in with your Windows® user name or provide the user name and the password which were configured in the estos UCServer for you.

3.5.3   User settings: general user information

Your user information is displayed here.

Property	Description
User name (login)	This is the user name for logging onto the estos UCServer service. If Active Directory® is used, this name will be the same as the Windows® login name.
Identity	The user's identity to be clearly identified in the Federation scenario. This identity address ideally corresponds to the e-mail address of the user. Therefore this user is also accessible via the Federation from outside of the company.
First name	The user's first name (e.g. Arthur).
Last name	The user's last name (e.g. Dent).
Displayed name	This is the user's full name (e.g. Arthur Dent). This can occur several times and is only used for display purposes. If the field is empty, a suggestion is automatically shown when the first and last name are entered.
E-mail address	This is the email address of the user. Among other things, it will be used for notifying the user about missed calls and voice-mail messages.
(UC-)Password	The section for changing the password will only be displayed, if the user has been authenticated by estos UCServer itself. If Active Directory® is used, this section will not be displayed.

3.5.4   User settings: contact address and user profile picture

The contact address of the user and optionally a user picture are displayed here.

The contact address shows all relevant contact details of the user. If the user has been assigned a contact picture on estos UCServer, this will be displayed. The contact picture is displayed in different places in estos ProCall Business (depending on authorization).

3.5.5   User settings: phone numbers

The call numbers of a user are displayed as specified in his contact details. estos UCServer will detect the telephone lines for the phone numbers while loading the user profiles. The user will be assigned the phone lines associted with them automatically without further configuration.

➡ User phone numbers and line numbersmust be entered in the Supercanonical format in the integrated user administration. Phone numbers from Active Directory® will be shown as entered in the Active Directory®. When user profiles are loaded in estos UCServer, these numbers will be reformatted to supercanoncial format.

Property	Description
Business	The user's primary business phone number
Business 2	Other business phone number for the user
Private	The user's private phone number
Mobile	The user's cellphone number. This phone number is used, for example, to automatically set up call forwarding.
Voice mailbox	Phone number of the user's mailbox. The mailbox is the personal answer machine. This phone number is used, for example, to set up an automatic call diversion.

3.5.6 Groupware connection

Here you can define whether the contacts and calendar in your Outlook® should be accessed via Microsoft® Exchange Web Services (EWS).

Enable the option and click "Configure" to set up the connection to the mailboxes.

Profile dialog box
This dialog shows all configured mailboxes. New mailboxes can be added or removed here and the default mailbox can be selected.
Mailboxes read from Outlook® are grayed out and cannot be deleted.

Dialog: Add mailbox
estos ProCall Business can sign in at an Exchange Server either via Windows® login or by means of user name and password.
As a rule, the URL of the server required for Exchange Web Services can be detected automatically, and you only have to enter your e-mail address in this dialog box.

- **E-mail address**
  The email address of the mailbox to be added.

- **Microsoft® Exchange local**
  Select this choice if Microsoft® Exchange Server is installed in your company.
  - **Use Windows® login**
    If it is possible to authenticate against the Exchange Server using the domain, this option should be set.
    Otherwise estos ProCall Business asks for username and password.
  - **Automatically detect server URL**
    This URL is usually recognized automatically by estos ProCall Business.
    If this is not possible, the automatic detection can be deactivated here and the server URL can be entered directly.
  - **Server-URL**
    The address of the server through which the Exchange Web Service can be reached.
    As a rule, this is in the form "https://yourserver.domain/EWS/Exchange.asmx"
- **Office 365**
  Select this choice if your company uses Microsoft® Office 365.

To complete the setup, you may need to provide your login credentials.

3.5.7 Start options

Here you can define, when the estos ProCall Business will be started.

Start estos ProCall Business with Windows® logon.
If this option is selected, estos ProCall Business will start when the user logs on to the computer. This option can also be changed in the settings of the program itself.

Start estos ProCall Business now
With this option, estos ProCall Business will start for initial use immediately after installation has completed.

4   Usage of existing contact data

With estos ProCall Business it is possible to access the contacts in Outlook® and Exchange by means of Exchange Web Services.
If contacts from different data sources have been imported or a telephone book has been integrated on the estos UCServer, these can also be searched for in the estos ProCall Business and the contact details can be accessed.

5 Work with estos ProCall Business

You can find out how to use estos ProCall Business for your tasks from here. Please choose a subject.

- Program start and overview
- Manage contacts
- Use presence information
- Journal and Functions
- Communicate

5.1 Program start and overview

You can find out how to start or stop estos ProCall Business and become familiar with the programs' user interface from here. Please choose a subject.

- estos ProCall Business start and shut down
- Login account
- Main window
- Menu bar icon
- Speech bubble info

5.1.1 estos ProCall Business start and shut down

Start
It was already specified in the Base configuration (Start options) whether estos ProCall Business should automatically start with the Windows® login. You can also configure this at a later time via the estos ProCall Business My Computer settings in the Windows® start menu.

estos ProCall Business can be started manually at any time by the Windows®-start menu.

Exit
estos ProCall Business will be closed by **Close** item on the main menu or the corresponding entry on the context menu for the tray icon.

5.1.2 Login account

In the dialog "login account" the user account can be configured in order to log onto the estos UCServer.

Use Windows® login
If the system administrator activated the estos UCServer authentication via the Windows® domain, it is alternatively possible to use the Windows® login.

5.1.3 Main window

The main window of estos ProCall Business gives you access to the functions supporting your everyday work.

The significant sections of the main window will be described by the following material.
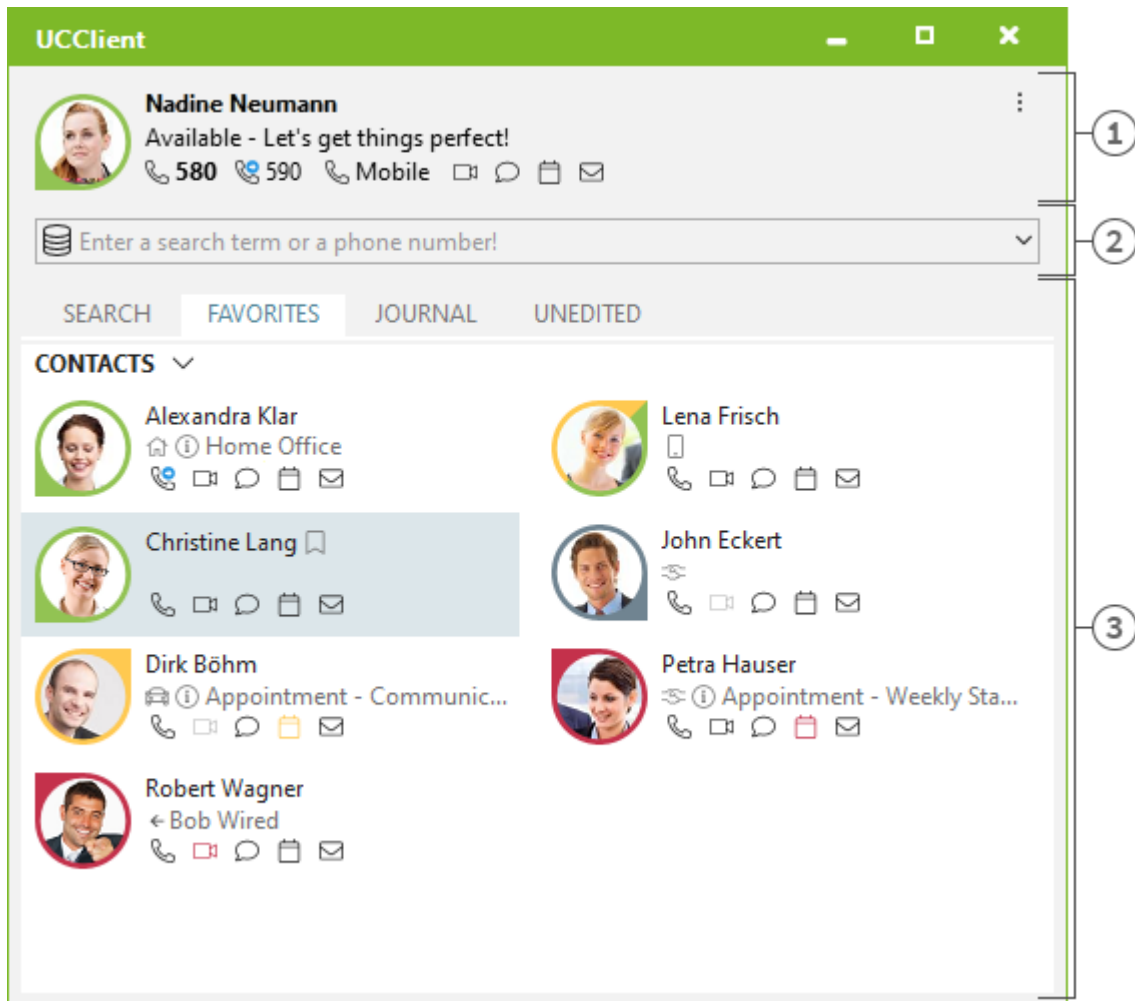
[1] My own presence
[2] Search input
[3] Tabs for Contact Search, Favorites, Journal and Unprocessed Calls

5.1.3.1 My presence

The **My Presence** section shows you the most important information about your presence, the status of your phone lines and audio/video devices, and your upcoming appointments. In addition to seeing this information, you can go to this section to change your presence state, configure call forwarding settings and access your calendar. You'll find more detailed information on the **My Presence** section at Your own presence.

5.1.3.2 Main menu

The main menu can be opened with the main menu button ▼ which is situated in the top right corner.

It has features which will support you in your daily routine or with which you can adjust estos ProCall Business to your personal needs.

- 🖥 **Display monitor**
  Click here to start and display the Monitor. You can store important contacts for quick access in the monitor and order them in groups and sub-groups.
- 📞 **Journal browser**
  This menu item will open the Journal Browser. In contrast with the Journal Tab on the main window, you will be able to track all available journal entries.
- ✉ **Inbox**
  This entry opens Outlook® to show you your inbox.

- ⚙ **Settings**
  Click here to open the Settings. Here you can define or change the most important estos ProCall Business settings.
- ⓘ **Help**
  Opens this online help
- ⓘ **About ProCall Business**
  Here you get information about the product version of estos ProCall Business and you have the possibility to get more detailed support informations and log files.
- ✖ **Exit**
  Ends estos ProCall Business.

5.1.3.3 Search input line

You can use the search input at any time to quickly find your contacts or to simply dial a number. You can immediately re-use the contacts found in the Search tab or save them in the Favourites tab or the Monitor for later use.

5.1.3.4 Tabs

The following tabs can be put in the foreground:

- Contact search
  Lists the hits for a contact search
- Favorites
  Space for your most important contacts and speed-dial keys
- Journal
  Collects the last calls made and received
- Unprocessed
  Saves the incoming calls and chats which you did not answer

5.1.4 Menu bar icon

The symbol in the notification area always gives you a fast access to the estos ProCall Business main windows. Just left click on the symbol.

During a call, you can always move the Conversation Window into the foreground. If a conversation window is not open or all conversation windows have been displayed, the main window will be shown. Furthermore, your current Presence Status will be shown on the tray icon.

In contrast, if you right-click on the tray icon, you will have access to the following features from the context menu:

- **Presence Profile**
  The Presence Profiles menu will display all configured presence profiles and allow quick changes to your own presence. In addition, a presence status that was potentially changed manually can be reset using the Restore Status option. For more information, see Your Own Presence.
- 🖥 **Display monitor**
  Use this function to start the Monitor. If the monitor is already running but currently hidden it is brought into the foreground with this command.
- 📞 **Journal browser**
  You can open the Journal browser with this menu item. Unlike the Journal tab in the main window you can consult all available journal entries here.
- ✉ **Inbox**
  The Inbox function switches to Outlook®. You can thus keep an overview of your e-mails received.

- **Settings**
  Open the estos ProCall Business withSettings in which you can adapt estos ProCall Business to your requirements.

- **Login account**
  The dialog "Login account" let you inspect the current server connection or log in to estos UCServer under a different user account.

- **Help**
  Opens this online help

- **About ProCall Business**
  Here you get information about the product version of estos ProCall Business and you have the possibility to get more detailled support informations and log files.

- **Exit**
  Exit estos ProCall Business

5.1.5 Speech bubble info

The speech bubble info window is a small information window on the lower edge of the screen, which e.g., shows missed phone calls, new emails and new chats.

If you have missed a call or received a new email, for example, the info dialog will be always displayed. Thus, you will immediately be able to see all of the important information at a glance. You can also change to the relevant view immediately if you click on the desired field:

Field	Function
Missed calls	This opens the Unprocessed tab in the main window. You can therefore see your missed calls at a glance.
E-mails	Click the e-mail field to open Outlook's Inbox and view your new e-mails.
Chats	Click the chat field to open the unedited. If there is one single unedited message the window Message is opened directly for a reply.
Fax messages	Click on the row with new fax messages to display the new fax messages which have come into the inbox. You will see all new fax messages here.

You can also close the informational speech bubble window either by clicking on the Close icon at the top left of the window or by deactivating the corresponding option on the Behavior tab on the Settings dialog.

5.2 Manage contacts

Here you can find out how to find contact details for a person in your database and how to organize this data. Please, choose a subject:

- Search contacts
- Contact details
- Telephone number formats
- Authorizations
- Favorites
- Monitor
- ActiveContacts

5.2.1 Search contacts
5.2.1.1 Search with input line

The connected data sources are browsed via the search input line. The contacts found will appear on the **Search** tab and can be immediately used for your work or, for example, dragged to the Favorites list for later use.

[1] Data source selection
[2] Search input
[3] Extended search / last search terms

You can use the search input with four different search variants:

- **Name search**
  The name search is the default search case. All contacts with the specified search term in the **last name, first name, company name** and **display name fields** (insofar as they exist) are sought.
- **Phone number search**
  A phone number search instead of a name search is started as soon as you enter a search term in the search input field which estos ProCall Business can interpret as dialable . All contacts are found who have the searched phone number in a phone number field.
- **Search by e-mail address**
  A search across all e-mail fields is started if estos ProCall Business recognises the search term as an e-mail address. All contacts are found who have the specified e-mail address.
- **Detail search**
  With help of the detail search you can search for terms in dedicated fields. For example you can search for all contacts with name "estos" in the city "Starnberg".

  The detail search uses a syntax where all search terms are seperated by comma. The position of the term in the line of commas determines the field where this term is search for.

  The fields *Name*, *First Name*, *Company*, *Zip code*, *City*, *Street* and *Telephone number* are available in the mentioned order. Enter the corresponding search term in the position of the search field.

  Detail search example

  - You are searching for the contact "Anna Meier". Enter the last name in the first position and the first name in the second position. The search entry is "Meier, Anna".
  - You are searching for contact "Anna Meier". The town and the postcode are in fourth position. The company name is left empty as this is not known. The search input therefore reads "Meier, Anna,Starnberg".
  - You can also use the postcode (Starnberg's postcode is "82319"). The search input then reads "Meier, Anna,, 82319" or "Meier, Anna,, 82319 Starnberg".
  - You are looking for contact "Meier" in "Munich Street". The street is in fifth position. The town is not known and is therefore left empty this time. The search input reads "Meier,,,,Munich". Please note that, as with all other search terms, the street name does not have to be written out in full.
  - You are looking for contact "Meier" with the phone number "08151123456" (Germany). The search input for this reads "Meier,,,,,08151123456".

- **Advanced search entry**
  The advanced search is started via the arrow symbol at the end of the search line. It is helpful for users who do not want to use the comma syntax while searching. When entering the search criteria the appropriate comma syntax is entered automatically in the search field.

5.2.1.2 Search tab

The search results are received on the **Search** tab if a new search has been started by entering the search criteria in the search field.

All available functions for the selected contact are displayed in the context menu. The contact menu appears if you click a contact with the right mouse button. Alternatively you can also press the context menu button or the Enter key on the contact.

Some functions which can be used on contacts will be highlighted as links on the shown contact. So if you want to call the contact, just move your mouse over the phone number and left click it. The following table lists all such availible functions.

Type	Description
Display name	Opens the Contact details for the contact. Alternatively, you can open the contact with a double click. Press the CTRL key at the same time (when possible) to open and edit the contact. If the current contact was automatically generated because a contact matching the search criteria was not found, that contact may be saved in Outlook® using this link, by double clicking in Outlook® or through Exchange Web Services.
Phone number	Dials the number on the phone and sets up a call to the subscriber. If you press the CTRL key down while you click on the phone number, the phone call is prepared. Press the CTRL key at the same time as the Shift key, while you click on the phone number, and the phone call is planned.
E-mail address	Opens the e-mail editor and enters the e-mail address as the recipient.
Presence identity (e.g. SIP-URI)	Start a new chat with the contact with presence identity.
Website	Opens the Web browser with the Internet address which was stored in the contact.
Data source (or data source icon)	Opens the contact folder storing the contact. Please note that this feature will only be available for Outlook® and Exchange contacts.

The presence symbol gives you the actual presence state of the found person. You can get all available presence informations about this contact in the tooltip by moving the mouse cursor over this presence symbol.

The search result list can be alternatively arranged with data source, display name, surname or company . The grouping lines can be shown or hidden. Settings can be changed in the context menu which can be accessed by a right click on the row header.

The contacts found can be sorted in ascending (A-Z) or descending (Z-A) order. Click to change the sequence on the column header where it is displayed.

The results list allows the selection of several contacts. Keep the CONTROL key pressed while selecting individual contacts with the mouse. These selected contacts can be dragged into the register card **Favorites** or the monitor, or functions may be carried out that are available for all contacts. That way, for example, you can write an e-mail to several recipients. So it is possible to write emails with more than one recipients for example.

The search result list also allows the selection and copying of single contact fields for the chosen contact. If it contains a action link, move the mouse cursor over the appropriate contact field or a little bit to the left or right beside it. As soon as the mouse cursor changes and indicates a text choice, you can select by holding down the mouse key and pulling the contact fields.

estos ProCall Business supports two different views in the results list

1. Only the details of the last selected contact will be displayed by default. All other contacts will only show with the most important entries, such as like Name, Company,, Presence and Data Source.
2. Alternatively, you can also display the contact details in the lower area of the search list. For this, pull the divider at the lower edge of the search list upwards with the mouse. You can remove the contact details area again by arranging the divider at the lower edge of the window. You can also move the divider with the CTRL+G key combination. Now use the arrow keys to change the new size of the detail area upwards or downwards. You confirm your input with the Enter key and cancel it with the ESC key.

5.2.2 Contact details

The contact details window contains all available informations and functions for the contact in question. You may open it with the entry **Open contact details…** in the context menu of the contact or by double click on the contact.

All functions available for the contact are to be found in the icon bar at the upper edge of the window:

- **Make call**
  You can dial every phone number of a contact. The numbers are categorized with symbols:
  o **Business phone number**
  o **Mobile phone number**
  o **Services - software**
  o **Further phone numbers**
- **Start a Chat with the contact.**
  This function allows you to start a text based chat.
- **Start an AudioChat with the contact.**
  Start an AudioChat with the contact. The icon is inactive or grey if the related contact doesn't offer the feature, if no Audio devices are available or if the feature is deactivated.
- **Start a VideoChat with the contact.**
  Start a VideoChat with the contact. The icon is inactive or grey if the related contact doesn't offer the feature, if no Video and Audio devices are available or if the feature is deactivated.
- **Share screen**
  Pressing the Share Screen button will allow a local screen to be shared with a remote contact, if the rights have been granted by the administrator.
- **Request Screen Sharing**
  Would you like to see another user's screen, you can also request to share the screen by clicking

Request Screen Sharing. The feature is available only if the related rights are granted by the administrator.

- **Create new contact**
  Click here if you wish to use the existing contact as a template for a new contact. A typical application is a further contact person in the company.

- **Edit contact**
  Use this function to open and change the original contact in an installed Microsoft Outlook® or the Outlook® Web App. Please note that this function is only available if the contact originates from Outlook®, the application belonging to the contact is available on your computer and the Exchange Web Service is set up.

- **Open calendar**
  With the help of this function you can display the opened contact's calendar. Please note that this function is only available for estos ProCall Business users who are configured on your Exchange system and that the subscriber's calendar must be enabled.

- **Contact folder**
  Select this entry to open the contact folder where the contact has been stored. Note that this feature will only be available if the contact originated from Outlook® or Exchange Web Services.

- **E-mail**
  If you have stored an e-mail address for the contact this function opens the e-mail editor with the recipient's address already filled in.

- **Website**
  If you have specified a Web site for the contact this function opens the browser and loads the relevant Web site.

- **Clipboard**
  This function copies all contact detail information to the clipboard. This information can thus also be used in other applications.

5.2.2.1 Overview tab

The tab **Overview** will show all informations about a contact which were stored. Here you can see all phone numbers, all addresses or the note for example.
Some entries are clickable like links. So you can just click on a phone number to call the contact for example, or send an email by clicking on the email address.

5.2.2.2 Journal tab

In the **Journal** tab all phone calls made with a contact can be found.
This inpersonated journal is mostly the same view as in the tab Journal in the main window.

5.2.2.3 Unprocessed tab

The **unprocessed** tab shows all entries marked as not dealt with or not read, which relate to the contact opened.
Please note that this inpersonated view is always grouped by days beacause grouping by contact does not make sense here. This is in contrast to the unprocessed tab in the main window.

5.2.3 Telephone number formats

5.2.3.1 Supercanonical number

… makes it possible to distinctivly indentify a caller. estos UCServer and estos ProCall Business do exclusive use this format internally for all phone numbers. For display the numbers can view reformated in a beautified form. Phone actions will be performed with the shortened version. Supercanonical phone numbers are starting always with a '+' character and have the following format: **+Country Area Number**.

No whitespace characters are used. The number consists only of numerics and the '+' character.
Example: +4901234567

5.2.3.2 *Service numbers*

… are official phone number which cannot be given in an international format. For example the german emergency number (110) or the directory assistence (118xx). To dial such numbers with the PC, they have to be longer than the internal numbers or they have to be configured as a rule for external numbers. These numbers will be given directly as dialable without any whitespaces.
Example: 11833

5.2.3.3 *Phone number*

Phone number	Description
Dialable phone numbers	… will be stored in exactly the format wich is needed to dial it on the PBX. This numbers may be reformatted with the rules stored in the estos UCServer if needed. Examples: ○ **Phone number** internal extension number ○ **Phone number external dialing code** Number of subscriber 12345 in the local area network ○ **External dialing code Country Area code Phone number** Number of a subscriber in a different country
Phone numbers for display	… will be used by estos ProCall Business, if this format can be generated with country codes and city codes available. **+Country (area code) number** Example: **+49 (30) 123456** Phone number of subscriber 123456 in Berlin, Germany

➡ The examples above are valid for germany and are strongly related to the according country. In the location settings you can see, which dial rules are valid for your location.

5.2.4 Authorizations

The display of contact information in Favorites or on the monitor is dependent on what information the user is allowed to see. To be able to control this, *authorizations* are necessary.
Additionally to the visibility the authorizations defines the availability of contact related functions which are accessible for the user throu the *ActiveContacts*

5.2.4.1 *Granting authorizations*

Any user can give another user permissions to his own contact and own lines. These permissions are always in addition to rights already assigned by the Administrator. You cannot take any rights away from another user.

Authorizations can be awarded through the context menu of the ActiveContacts (in Favorites or monitor), menu point **customize authorizations**.

Autorizations apply to contact data of the user and to dynamic informations and functions, which are provided by the estos UCServer. The authorizations on the contact have a fixed definition.

5.2.4.2 Change authorization levels

The Favorites or the monitor will be able to view and change the authorizations once granted simply by using the context menu under **Authorization Level:…**.

5.2.4.3 Table of user and contact authorizations

The authorizations which can be given to other users are differentiated in 5 levels:

- o Public:
  Public contacts see your name, title, company, business phone numbers and e-mail address.
- o Business:
  Business contacts will see certain contact information and also restricted information about your availability.
- o Team:
  Team colleagues see detailed contact information and differentiated presence information including notes.
- o Personal:
  Personal contacts see detailed contact- and presence information, inclusive a note ans private data.

The overview displays by which authorization level what contact data is transmitted to other users:

Information	Blocked	Public	Business	Team	Personal
Contact picture		X	X	X	X
Display name	X	X	X	X	X
Job title/position		X	X	X	X
Company		X	X	X	X
Department (Active Directory® only)			X	X	X
Office			X	X	X
Business address			X	X	X
Work phone		X	X	X	X
Business telephone 2			X	X	X
Mobile number				X	X
Pager			X	X	X

Private phone					X
additional phone numbers (Active Directory® only)					X
Business fax number				X	X	X
E-mail address		X	X	X	X	X
SIP address			X	X	X	X
SharePoint/Webseite				X	X	X

➡ The authorisation levels restrict only the contact details exchanged through presence information. The authorization level does not influence the contact search. Contact details, such as e.g., the mobile call number, continue to be visible via a contact search, independently from the authorization levels.

5.2.4.4 Administratively pre-set authorizations and authorization levels

The administrator can specify authorization levels or individual authorizations. In this case, authorization levels set by the administrator can no longer be reduced. The authorizations entered by the administrator are always the minimum authorizations.

➡ If single authorizations are administratively given instead of authorization levels, the authorization level can only be changed by the administrator.

In estos UCServer further information and functions are available to give authorizations to a contact. The following definition is valid for standard authorization levels:

Authorization	Description	Blocked	Public	Business	Team	Personal
View contact picture	A contact image stored for the user is visible		X	X	X	X
See presence	The other user is allowed to see the presence (Present, Absent...).		X	X	X	X
Set presence	The other user is allowed to change the presence. This right should be set only in the case of special				X	X

		positions of trust.				X	X
See note		The other user is allowed to see the note.				X	X
Set note		The other user may enter a note.				X	X
See private appointments		The other user is allowed to see the appointments marked as private from the calendar, if the user has released his appointments. This right should be set only in the case of special positions of trust.			X with the indication "Private"	X with the indication "Private"	X with subject and place
See public appointments		The other user is allowed to see the appointments marked as public from the calendar, if the user has released his appointments.			X	X	X
Phone:							
See existing phone numbers		The phone numbers assigned to the user (phone number/extension of all lines) are displayed when the mouse pointer is moved to the presence display.		X	X	X	<> X
See line status (free/busy)		The other user can see if the phone line is free or busy			X	X	X
First	See	The other user is			X	X	X

line	outgoing numbers	allowed to see who the user is calling with his primary phone. This right should be set only in the case of special positions of trust.					
	See incoming phone numbers	The other user is allowed to see who the user is currently being called by on their primary phone.			X	X	X
	See diversions	The other user is allowed to see that call forwarding is enabled on the phone.		X	X	X	X
	See the number of a set call forwarding	The other user may see to which destination number call forwarding is activated on the phone. This right should be set only in the case of special positions of trust.			X	X	X
	set Call forwarding	The other user is allowed to set up call forwarding on the line.					X
	Pickup call	The other user is allowed to pick up incoming calls on the first line.				X	X
Second line	See outgoing numbers	The other user is allowed to see with which caller the user is calling with				X	X

		his second phone. This right should be set only in the case of special positions of trust.				
	See incoming phone numbers	The other user is allowed to see who the user with his second phone is currently being called by.				X	X
	See diversions	The other user is allowed to see that call forwarding is enabled on the phone.		X	X	X	X
	See the number of a set call forwarding	The other user may see to which destination number call forwarding is activated on the phone. This right should be set only in the case of special positions of trust.				X	X
	set Call forwarding	The other user is allowed to set up call forwarding on the line.					X
	Pickup call	The other user is allowed to pick up incoming calls on the second line.					X
Audio/Video:							
See line status (free/busy)		The other user can see if the AV line is free or busy		X when busy, the AV icon is	X when busy, the AV icon is grayed	X when busy, the AV icon turns red	X when busy, the AV icon

				grayed out	out		turns red
see Conversation participants	The other user can see who is being talked to about AV.					X	X

5.2.5 Favorites

Frequently used contacts can be stored in estos ProCall Business in the Monitor. In addition, estos ProCall Business offers you the option of storing such Active contacts in the main window in the *Favorites* tab.

At the tab *Favorites* the most important contacts can be stored. They can be sorted in free allocatable groups without the need to use the Monitor window. For more information please refer to Monitor and ActiveContacts.

Special Favorites tab functions
Unlike the monitor, the *Favorites* tab has special functions. Contacts in the search result list can, for example, be added to this tab with the **Add to Favorites** context menu function.

5.2.6 Monitor

The estos ProCall Business monitor is the extended and more flexible version of the contact area in the main window.

The monitor is activated in the **Display monitor** in ▼Main menu. The monitor can be filled with contacts like the Favorites tab in the main window. The different sorts of contacts are described in the section about ActiveContacts.

5.2.6.1 *Functions in the monitor menu:*

The monitor has its own menu. In the docked state it can be opened with the help of the ▼ main menu button.

- o **Lookup contact**
  Click here if you are searching for a particular contact. The command opens the estos ProCall Business main window and automatically sets the input focus in the search input field.
- o **Journal browser**
  With this menu item in the **Tools** sub-menu, you can open the Journal browser. Unlike the **Journal** tab, you can search all available journal entries here.
- o **Inbox**
  The **Inbox** function in the **Tools** sub-menu switches to Outlook®. You can therefore keep an overview of the e-mails you receive.
- o **Display on incoming call (own line)**
  Activate this option in the **Characteristics** sub-menu if the monitor is to be displayed for incoming calls.
- o **Display on incoming call (all lines)**
  Activate this option in the **Characteristics** sub-menu if the monitor is to be displayed when a call comes in from a saved contact (or line).
- o **Docked to the edge**
  Set this setting in the **View** sub-menu if the monitor is to be docked at the edge of the screen

as a sidebar. You can also place the monitor next to a different screen edge by picking it up and dragging it to the appropriate position.

- o **Always on top**
  Set this setting in the **View** sub-menu if the monitor is always to be displayed. It can then no longer be covered by other windows.
- o **Automatically in the background**
  Set this setting in the **View** sub-menu if the monitor should automatically 'sleep' when it is not being used. Please note that this option is only available if the monitor has been docked to the side.
- o **Display group title bar**
  Activate this option if the monitor is to display the the groups' title bar.
- o ⓘ**About ProCall Business**
  Here you get information about the product version of estos ProCall Business and you have the possibility to get more detailled support informations and log files.
- o **Close monitor**
  Click here to close the monitor window. You can open it again by using the context menu on the task bar icon or using the menu button in the main window of estos ProCall Business.

5.2.6.2 Arranged in groups:

The estos ProCall Business monitor offers various possibilities for individual and intuitive grouping of ActiveContacts. So it is possible to group ActiveContacts and to move them around freely by Drag & Drop. Groups will be visualized by tabs in the monitor. So you can picture organisational structures or project teams.

You can arrange groups side by side, one below the other or behind each other. Just right click and hold the button on the title of the group and move it arround to the desired position on the monitor.Positioning arrows which are displayed help you and show you where you can place the groups. Release the mouse button over the positioning arrow which represents the desired position.

5.2.6.3 Functions in the group context menu

Find more options in th econtext menu of the according group. This menu will be displayed via right click on the title of the group or in a free space inside the group.

- o **Group**
  - ▪ **New...**
    Click here to create a new group. For this you must specify a group name and confirm with "OK".
  - ▪ **Rename...**
    Use this function if you wish to give the group a different name. Confirm the group name with the **OK** button in the dialog window.
  - ▪ **Delete...**
    With this function you can remove an existing group. Please note that this function cannot be undone and all ActiveContacts within the group are also deleted.
- o **View**
  - ▪ **No sorting**
    Select this mode if you want to choose the order of the contacts yourself (use the mouse).
  - ▪ **Sort by display names**
    Use this function to sort all ActiveContacts inside the group according their display name. Please keep in mind, that administrative groups, like the line group, cannot be sorted.
  - ▪ **Sort by presence**
    Unlike display names and numbers the presence status is not color assorted. Rather, each Active Contactis categorized into 3 groups and each category is shown in specified order.

- Online and available
  This includes following presences: available, busy, do not disturb, inactive
- Offline, but absent
- Not logged in or presence unknown

Thus, each category contains one or more contacts which are sorted alphabetically.

- **Sort by phone number**
  Run this function to sort all ActiveContacts of this group by their phone number.

o **Chat with** <Group name>...
  Click here to start a chat with all contacts of this group.

o **Add contact**
  This function opens a dialog window with which you can search for contacts and lines. Select the appropriate contacts or lines from the result list which are to be added and confirm you rselection with "OK".

o **Add key**
  Click here to insert a quickdial button in this group. A dialog will appear, where name, phoneline and the number to call should be entered. You may also enter a PBX code to make a special PBX feature available throu this speed-dial key. Close the dialog by clicking on **OK**.

5.2.6.4 *Visualisation of estos ProCall Business users on the monitor.*

estos ProCall Business users have a special role on the monitor (and in the tab Favorites). Their availability is displayed with a presence icon. Also displayed are phone number diversions and calendar entries of estos ProCall Business users. Further information in the segment ActiveContacts.

⭐ Contacts from the **Search** tab can be moved with drag&drop from the main window into the monitor.

➡ Incoming calls from contacts within a group are indicated by a triple red flash if the relevant group is not visible.

➡ To re-order the groups it may be necessary to display the groups' title bars. This is especially the case if there are no group tabs due to the current layout.

➡ The current layout can be reset at any time. Switch to the settings with Advanced.

➡ When using multiple monitors, the monitor can be docked on the screen between two screens. Please note, that the setting "Auto Hide" move it to the desktop edge of the monitor, because the monitor can not be hidden between the screens.

5.2.7 ActiveContacts

Contacts are displayed as *ActiveContacts* in the **Favorites** tab.
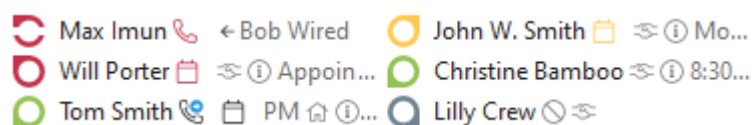
In addition to ActiveContacts, these entries can also display speed dial destinations.

5.2.7.1 ActiveContacts

ActiveContacts are showing the presence of a contact. Additionally they offer buttons for call establishment, chat capabilities and they grant access to the context menu offering further functions.

The tooltip help of an ActiveContact contains all available information in text format.

A double click on an ActiveContact opens a window showing the related contact details. A right click on an ActiveContact opens the related context menu offering further functions.

Moving the mouse over the ActiveContact buttons displays a tooltip help. A left click on an ActiveContact displays the function buttons listed below:

Icon	Description
📞	Call a contact by phone, plan a phone call or prepare a phone call.
📹	Start a VideoChat with the contact. The icon is inactive or grey if the related contact doesn't offer the feature, if no Video and Audio devices are available or if the feature is deactivated.
💬	Start a Chat with the contact.
📅	Schedule an appointment with the contact.
✉	Write a new email to the contact.
➡	The menu item **Authorisation level** enables users to change the user rights for the specific contact.

The actual presence of a contact and its services changes dynamically the availablility and status of the related indicators or buttons.

Depending on the existing authorizations for this contact the following icons are displayed:

| Icon	Description
Presence	The presence icon displays the contact status.
📞	The small phone icon displays a user's line and its status. A phone is displayed for each of the user's visible lines (maximum two). If the line is diverted the phone is complemented with a small arrow.
📅	The small calendar icon displays the status of the user's calendar if there is an appointment now or in the future (within 24 hours).
📱	If a user is not logged in with a Windows® Client or is in idle mode and simultaneously logged in with ProCall Mobile to the UCServer, the cell phone icon appears in ActiveContact.

5.3   Use presence information

Here you find out how to control and use the presence information. Please, choose a subject:

- o   Own presence
- o   The presence of the contacts
- o   Presence icons

5.3.1   Own presence

The **My presence** display in the Main window shows the user's currently set presence information (or the information determined by estos UCServer) . Therefore the user can see at any time how they are visible in the system for other users. The user interface visualizes upcoming appointments, status of phones, including set call forwardings and allows access to the settings of estos ProCall Business.

5.3.1.1   *My presence*
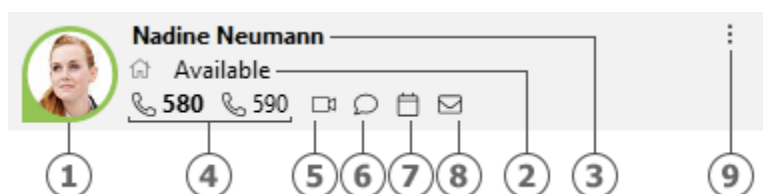
[1] My own presence
[2] Availability/Status/Notice
[3] Current logged in user
[4] My lines
[5] My audio/video devices
[6] My chats
[7] My calendar
[8] My inbox
[9] Main menu

This range consists of several parts (in the sequence of the numbering):

- o   **My presence**
  The large presence symbol shows you your current presence state (manually set or determind from the estos UCServer). For more information about the symbols and colours used by estos ProCall Business see Presence symbols. If you click on the presence symbol the menu for presence settings and presence profiles opens.
- o   **Currently logged-in users with status, memo and availability**
  The two lines of text contain, in the first line, the name of the user who is logged in, then below that the presence status in text form with the memo just set, if any. In addition, provided this was set, the availability stored in your presence profile is displayed as a symbol to the left of the presence status.
  Clicking on the name opens the "Presence settings and presence profiles" menu. By clicking on the presence status or memo text, you can immediately change the memo text. The selection list which then appears displays items of memo text which have already been used and which can be set again.
- o   **My line(s)**
  All phone lines of the user will be shown as symbols. You can find more information about phone lines in Lines options.
- o   **My audio/video devices**
  The item stands for the Audio-/Video devices available for Audio-/VideoChat. The item can be clicked or it can be opened per ALT+V keys to configure the usage of the Audio-/Video devices. Once the item is clicked a menu allows configuring if Audio- and Video devices are

to be used (for VideoChat), if Audio devices only are to be used (for AudioChat) or if no devices are to be used (Audio/VideoChat off). The selected configuration can be changed later any time by pressing the AV device item at the My Presence area. Further an Audio-/Video Wizard can be started to store the devices to be used with Audio-/VideoChat. The tooltip on the item gives you a description of the devices you are using. Additionally the color of the item describes the actual status of the devices. If it is "green" all devices are ready to use, "red" for devices are in use and "gray" means that no devices are available. A triangle symbol is used for VideoChat, a headset symbol is used for AudioChat. For more information about Audio/Video communication see Audio-/VideoChat.

o **My chats**
Signals new text chats in Tooltip that you have received, but still haven't read. Click on the button to open a dialog box for contact selection, to be able to start a chat with a participant. Selecting several contacts starts a chat with several participants (chat room).

o **My calendar**
Shows the current diary status and permits opening the diary if available. A tool tip will show the next scheduled appointment. Moreover, you can look into the context menu (right click) and read the diary so as to selectively reconcile your appointments with estos UCServer.

o **My inbox**
Signals new emails in Tooltip that you have received, but still haven't read. Click on the button to display the email inbox.

o **Main menu**
Opens the estos ProCall Business main menu.

5.3.1.2 *Presence settings and presence profiles*

This menu can be opened with clicking on the presence symbol and is used to change the own presence state and for configuring of presence profiles.

A presence profile is formed from the presence status, a memo and a call forwarding profile. Creating a separate presence profile is described later on in this section.

Presence entries
The first part of the menu displays the currently available presence profiles. There are four pre-defined profiles, one for each presence status. The menu entry describes precisely what is set on selection.

Reset status
With this, the user can reset a manually set presence state. This does not change the memo or set call redirections.

Set presence...
Opens a dialog with which all presence aspects can be set simultaneously. The user can select their status, the memo and a diversion profile here and set them by confirming with **OK**. **Cancel** closes the dialog without making changes to the presence.

Edit presence profiles...
Opens a dialog which can be used to configure presence profiles.
There are four default profiles, which can't be deleted but adopted to your needs.
The user can also create own additional profiles with the **New** button.
As well **Edit** as **New** open a further dialog which permits all aspects of a profile to be set.

5.3.2 The presence of the contacts

Every user connected to the system has his own status, his *Presence*. This information is established according to defined rules from the status of several services: Telephone status (telephone service),

calendar status (calendar service), logged on/ logged off (system service) and manually entered user status.

The presence gives information about the current availability of a call partner at any time.

An overview of the displayed presence symbols and their meaning can be found under presence symbols.

5.3.3 Presence icons

Every user connected to the system has his own status, his *Presence*. This information is established according to defined rules from the status of several services: Telephone status (telephone service), calendar status (calendar service), logged on/ logged off (system service) and manually entered user status.
The presence therefore dynamically informs of the availability of a communication partner depending on the current status of the various services.

Possible presence states

Status color	Meaning
	Available
	Busy
	Out of office
	Inactive
	Do not disturb
	Presence information unavailable

In addition to this presence information the following additional icons are used in estos ProCall Business:

Icon	Meaning
	If a contact is not logged on to a server their status is displayed with a gray symbol.
	If a contact receives a call on one of their lines their status flashes red/orange

Optionally, a user can set, in his or her presence profile, an availability which is signaled to other users. This availability can describe the following statuses:

Icon	Meaning

Icon	Meaning
🖥	**Break:** The user is currently on a break and probably cannot be reached.
🚗	**Business trip:** The user is currently on the road and may not be available.
🏠	**Home office:** The user is working from home and can be reached there.
🌴	**Vacation:** The user is currently on vacation and is therefore unavailable.

Besides to the contact-based presence information the telephone lines shows a different status:

Icon	Meaning
📞	Phone line ready, no active conversation
📞	Active conversation (external or internal)
📞	Changing between red and orange - incoming ringing
❶	Line faulty
🔵	Active call redirection
🚫	Active call protection (the icon for the redirection is not displayed with active call protection).

5.4   Journal and Functions

Here you can find out how to plan and track your communication with estos ProCall Business. Please choose a subject:

- o   Journal
- o   Journal browser
- o   Journal editor
- o   Unprocessed calls and chat

5.4.1   Journal

The **Journal** tab in the main window shows the last calls and chats. It contains the most important information in a view. The entries are always grouped by days.

The calls displayed use the same icons on the **Journal** tab as in the journal browser.

- o   Incoming external calls (connected)
- o   Incoming external calls (not connected)
- o   Outgoing external calls (connected) and calls (not connected)
- o   Incoming internal calls (connected)
- o   Incoming missed internal calls (not connected)
- o   Outgoing internal calls (connected) and calls (not connected)
- o   TextChat

- o Incoming audio chats (connected)
- o Incoming missed audio chats (not connected)
- o Outgoing Audio Chats
- o Incoming video chats (connected)
- o Incoming missed video chats (not connected)
- o Outgoing video chats

The **Journal** tab can filter the shown entries with various options:

- o **Today**
  Click here to display just the calls which were made or taken today.
- o **Last week**
  Click here to display just the calls which were made or taken in the last seven days.
- o **Last month**
  Click here to display just the calls which were made or taken in the last 31 days.

With estos ProCall Business it is possible to filter journal entries with a freely defined text. For example type '123' into the input field of the filter options to reduce the contents of the view to entries which are containing the text '123'. Please note that using the free text filter in this view only affects the currently loaded data and hides unwanted rows for a quick access. For a complete full text search in the complete database please use the journal browser instead.

In the **Journal** tab you can configure the shown columns. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ Unlike the journal browser, the **Journal** tab does not have to be updated manually. New journal entries are entered automatically.

➡ Unedited calls and chats will be shown in bold.

➡ Calls which are answered by other users are shown in blue.

➡ Journal entries can be sorted by clicking on their column headers (reverse ordre it by click again). Please note, that journal entries are sorted within their grouping setting (per day).

➡ Please note that the journal in the main window is only a brief view of the journal entries. You will find a detailed journal with all columns and journal entries in the Journal browser.

5.4.2 Journal browser

The journal browser of estos ProCall Business offers a more detailed view on your calls and chats than the journal tab in the main window. Here you can get all calls of arbitrary time frames and you can group them with differently, not only ba days.

The calls displayed use the same symbols in the Journal browser as in the main window:

- o Incoming external calls (connected)

- o Incoming external calls (not connected)
- o Outgoing external calls (connected) and calls (not connected)
- o Incoming internal calls (connected)
- o Incoming missed internal calls (not connected)
- o Outgoing internal calls (connected) and calls (not connected)
- o TextChat
- o Incoming audio chats (connected)
- o Incoming missed audio chats (not connected)
- o Outgoing Audio Chats
- o Incoming video chats (connected)
- o Incoming missed video chats (not connected)
- o Outgoing video chats

The journal browser has a series of filters with whose help certain calls can be displayed or hidden depending on their type.

- o **Default**
  Clicking on this button will reset all type-based filter settings to their default values. All calls that you have made will also be displayed again.
- o **Incoming calls**
  Activate this option to display just incoming calls. Deactivate this option to display both incoming and outgoing calls.
- o **Outgoing calls**
  Activate this option to display just outgoing calls. Deactivate this option to display both incoming and outgoing calls.
- o **Internal calls**
  Activate this option to display just incoming calls. Deactivate this option to display both incoming and outgoing calls.
- o **External calls**
  Activate this option to display just external calls. Deactivate this option to display both external and internal calls.
- o **Calls (not connected)**
  Activate this option to display just calls which were not connected. This also contains all missed calls. Deactivate this option to display both calls which were connected and calls which were not connected.
- o **Calls (connected)**
  Activate this option to display just connected calls. Deactivate this option to display both calls which were connected and calls which were not connected.
- o **With note**
  Activate this option to display just calls for which call memos were saved. Deactivate this option to display both calls with and calls without call memos.
- o **Without note**
  Activate this option to display just calls without call memos. Deactivate this option to display both calls with and calls without call memos.
- o **Phone number hidden**
  Activate this option to also display phone conversations that block the partner's phone number. Deactivate this option to only display those conversations that provided the partner's phone number.
- o **Public entries**
  Activate this option to also display calls by other estos ProCall Business users. Please note that private calls by other estos ProCall Business users are not displayed. Equally, the journal entries of other estos ProCall Business users cannot be changed as a rule. Deactivate this option to only display your own phone calls.
- o **Filter journal type**
  Use this feature to filter journal types. By default, all journal types will be displayed.

Journal type options include: TextChats only , AudioChats only, VideoChats only or phone calls only.

In addition, estos ProCall Business supports further functions for finding journal entries:

- o **Date filter:** Select the desired start and end date in the date fields in order to display just journal entries from within a certain period. Alternatively you can also use the pre-defined keys **Today**, **Last week** or **Last month** to set the time period.
- o **Text filter:** You can filter journal entries by a freely defined text. For example, type in the name of a sought after contact into the text field and press Enter. Alternativly you can start the search by pressing the **Start search** button.

The journal browser has the ability to group journal entries by certain criterias. You can change the grouping option in a drop down box in the area **View**.

- o **Group by days**
  All journal entries from the same day are grouped together.
- o **Group by contacts**
  All the same conversation partner's journal entries are grouped together.
- o **Group by project**
  All journal entries assigned to the same project are bundled.
- o **List view**
  The journal entries are displayed without grouping.

More journal entries
By default, a maximum of 100 hits will be returned from searches by estos ProCall Business. All additional journal entries corresponding to the search criteria can be requested by clicking the **Additional Journal Entries** button. That button is on the status bar. The button will be hidden when all log entries have been displayed.

The print function in the journal browser enables you to print either everything or only the selected journal entries as a list. It is printed the same as it is displayed on screen, i.e. with the current groupings and all visible columns.

You can freely change the columns to view in the journal browser. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ Unlike the **Journal** tab in the main window the journal browser must be updated manually, especially if new journal entries are added.

➡ Calls and chats marked as **Unprocessed** are highlighted in bold type.

➡ Calls which are answered by other users are shown in blue.

➡ The journal entries can also be sorted if you click the column headers (reverse sorting on second click). If a grouping has been set, the journal entries within each group are sorted according to the sort criterion.

5.4.3   Journal editor

The journal editor in estos ProCall Business permits you to look up and subsequently edit information on a call made or received. It can be opened by double click on the journal entry of a journal list for example.

If a contact was linked to the opened journal entry, all functions for the contact can be run via the tool bar. For detailed descriptions of these functions, please refer to Contact details.

In addition, you will find special functions in the icon bar which you can execute for a journal entry:

- o   **Save**
  Click here to save all changes to the journal entry.
- o   **Save and close**
  The journal entry is saved and the editor window is subsequently closed with this function.
- o   **Print**
  Click here to print out the journal entry.
- o   **Print preview**
  Click here to show a print preview of the journal entry. You can also print the journal entry from the preview.
- o   **Printer settings**
  Click here if you wish to change the printer settings for printing the journal entry.
- o   **Edited**
  If this button is activated the journal entry is marked as processed. Activate this button if you wish to mark the journal entry as processed.
- o   **Unprocessed**
  If this button is activated the journal entry is marked as unprocessed. Activate this button if you wish to mark the journal entry as unedited. Unprocessed journal entries are displayed in bold type in the journal view.

The following data in the journal entry can be changed or added to with the journal editor:

- o   **Link contact**
  When the contact selection button is clicked the contact selection dialog opens where you can link the selected contact to the journal entry by clicking **Ok**. Please note that this process transfers both the contact name and also the company name from the selected contact in the journal editor. If a contact is linked to a journal entry, all contact related functions can be executed from within the journal entry. So you can call the contact with a different phone number again or send him an email.
- o   **Change contact name**
  You can enter any name in the contact name field which also appears in the journal views. Please note that the contact name can thus deviate from the name of the linked contact.
- o   **Change company name**
  You can enter any name to be stored in the journal entry in the company name field. Please note that the company name entered may thus be different from the company name of the linked contact.
- o   **Edit call memo:**
  Enter your call memo in the journal editor's memo field.

⚠   Please note that you cannot change the journal entries of other estos ProCall Business users.

5.4.4 Unprocessed calls and chat

You will find phone calls and chats which require your particular attention on the **Unprocessed** tab. Depending on your settings, you will see all journal entries here that are marked as not dealt with or all "Call in absence" e-mail marked "not read". Further information can be found under Settings in the Incoming calls.

You will find the following functions on the **Unprocessed** tab's icon bar:

- o **Mark as edited**
  The selected entry or entries are marked as processed or read. The entries thus disappear from the view.
- o **Mark all as edited**
  Marks all entries in the view as processed or read. The view is then empty.
- o **Internal calls**
  Activate this option to additionally display internal calls. Deactivate this option to display just external calls.
- o **Grouped by days**
  Click here if the entries in the list are to be grouped by day.
- o **Grouped by contacts**
  Click here if the same subscriber's entries in the list are to be grouped.

In this view of estos ProCall Business it is possible to filter the entries with a freely defined text. For example, if you type in '123' into the input field of the filter options, you will only see entries which contain '123' in one of their fields.

In the tab **Unprocessed** you can freely configure the displayed columns. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ An overview of the entry icons can be found on the Journal.

➡ The phone calls can also be sorted if you click on the column headings (reverse sorting on second click). If a grouping is defined the phone calls within each group are sorted by the search criterion.

5.4.5 Call planning
5.4.5.1 Plan call

With the help of the *call planning* window you are able to mark calls which you wish to make in the future. Already planned calls can be viewed in the tab **Planned** in the main window.

You will find all the functions which you can use for a planned call in the editor's icon bar

- o **Make call**
  Click the upper half of the button to call the subscriber. The phone number which was specified in the phone number field in the editor dialog is always used.
  In the lower half of the push button, you are able to view the contact context menu with the arrow. Here, you will find every activity available for the linked contact. For a detailed description of these functions, please refer to contact details.

- **Save**
  Click here to save the planned call and all changes. The saved call appears on the tab **planned** in the main window.
- **Save and close**
  The planned call is saved with this function and the editor window is then closed.
- **Print**
  Click here to print out the planned call.
- **Print preview**
  Click here to display a print preview of the planned call. You can also print out the planned call from the preview.
- **Printer settings**
  Click here if you wish to change the printer settings for printing the planned call.
- **Delete planned call**
  Click here to delete the planned call. The editor window is then closed. Please note that this action cannot be undone.

Change the status of the planned call

In the section **Status** on the tool bar, the status of the planned call can be define with the aid of the drop-down box:

- **Set to in process.**
  Select this entry if you wish to show that you are currently processing the planned call.
- **Mark as completed**
  Select this entry if you wish to show that you have successfully processed the planned call.
- **Mark as not started**
  Select this entry to indicate that the planned call is pending.
- **Mark as waiting for someone else**
  Select this entry if you have to wait for someone before you can make this call.
- **Mark as deferred**
  Select this entry to mark the planned call as postponed.

The following data for the planned call can be defined or changed with the editor:

- **Change subject:**
  The topic field is generated automatically when creating a new planned call. You can customise this according to your requirements here.
- **Link contact**
  Clicking the contact selection button opens the contact selection dialog with which you can link the selected contact to the planned call by confirming with "OK". Please note that both the contact name and also the company name are transferred from the selected contact to the editor by this process.
- **Change contact name**
  You can enter any name in the contact name field which also appears in the journal views. Please note that the contact name can thus deviate from the name of the linked contact.
- **Change company name**
  You can enter any name which is to be saved in the journal entry in the company name field. Please note that the company name entered can thus deviate from the name of the linked contact.
- **Change phone number**
  The phone number which is dialed when the upper half of the Call button is clicked is shown here. If you have linked a contact to this planned call you can dial one of the contact's phone numbers in the dropdown list. You can nevertheless also enter any phone number in the field.
- **Define start date**
  Enter the start date in the relevant field. This defines when the planned call is to be made. Alternatively you can open a calendar via the dropdown arrow and simply select a day.

Note: If neither a due date nor a reminder date have been activated, these will also be entered automatically when selecting the starting date.

o **Enter date due**
Define here by when the planned call should have been made. You can either enter the date directly or use the calendar which you can open via the dropdown arrow.
Note: if you have not yet defined a reminder date this is automaticallly set when the due date is selected.

o **Set reminder**
Activate this option and enter the reminder date with a time to be reminded of the call. The Reminder window opens at the given time. Please note that the reminder function is only performed for planned calls which are marked as not processed.

o **Change project PIN**
Here you can assign the planned call to a particular project. You must first define the projects for this. You can create new projects in the settings under Projects.
Please note that the project PIN can only be changed if this feature has been activated in the settings on the Projects page.

o **Change memo**
Here you can enter a memo text for the planned call which you wish to save.

5.4.5.2 Planned calls

The tab **Planned** gives an overview of all phone calls which are planned with estos ProCall Business.

Display of planned calls
The planned calls have different icons depending on the processing status:

o **In progress**
The planned call is presently being processed.
o **Completed**
The planned call has been successfully processed.
o **Not started**
Processing of the planned call has not yet begun.
o **Waiting**
Waiting for someone else to process the plannned call.
o **Deferred**
Processing of the planned call has been postponed.

In addition, the planned call is highlighted differently depending on its status:

o Planned calls which have not yet been processed are shown in bold text
o All planned calls due in the past which have not been completed are highlighted in red.
o Completed planned calls are crossed through and appear light grey.

The view on the "Planned" tab can be customised. Entries which fulfil certain criteria can be shown or blanked out.

o **Without date or reminder**
Activate this option to also display all planned calls which have neither a date nor a reminder set.
o **Completed calls**
Activate this option to additionally display all calls which have already been marked as completed.

The status of the planned calls can be changed via the icon bar or the context menu. Mark the relevant entries in the list and click the appropriate button.

- Set to in process.
  Select this entry if you wish to show that you are currently processing the planned call.
- Mark as completed
  Select this entry if you wish to show that you have successfully processed the planned call.
- Mark as not started
  Select this entry to indicate that the planned call is pending.
- Mark as waiting for someone else
  Select this entry if you have to wait for someone before you can make this call.
- Mark as deferred
  Select this entry to mark the planned call as postponed.

Further functions for processing planned calls are available in the icon bar:

- Delete
  Select this function to delete the selected entries. Please note that the deleted entries cannot be restored.
- Update
  Click this button to update the view.

In this view of estos ProCall Business it is possible to filter the entries with a freely defined text. For example, if you type in '123' into the input field of the filter options, you will only see entries which contain '123' in one of their fields.

In the **planned** tab columns can be freely configured. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

> Either the estos ProCall Business editor or the Outlook® editor opens to edit the planned calls depending on your settings in the Planned section.

> The planned calls can also be sorted if you click on the column headers (reverse sorting on second click). Please note that the planned calls are sorted within their group, in other words per day.

5.4.6 Reminder window

The reminder window reminds you of calls which you have planned. It is always displayed when a reminder for a planned call is shown. The calls are displayed in a list.

Planned calls are highlighted differently in the overview. Details about this can be found in the help file for the call schedule.

You will find the following functions in the icon bar:

- Make call
  Click the upper half of the button to call the subscriber. The phone number which was specified in the phone number field of the planned call is always used.

  In the lower half of the push button, you can call up the contact context menu with the arrow. Here, you will find any operations available for the contact. For a detailed description of these functions, please refer to Contact detail window

o ▤ **Open planned call**
Click this button to open the call schedule in the list. Alternatively you can also open a call with a double-click on the list entry.

o ▤ **Remind later**
Use this function to be reminded of the planned call again later. Mark the relevant entries in the list and select the appropriate time period for this.

You can also switch off the reminder for the planned calls. Select **Do not remind again** from the menu for this.

o ▤ **Delete planned call**
Use this button to delete the selected planned calls form the list. Please note that this function cannot be undone.

➡ When you close the reminder window it is first displayed again when a reminder for the next call is due.

➡ A complete overview of all planned calls can be found in the main window in the "Planned" tab.

➡ The reminding time can be changed if you open the planned call in the editor. Further information under Planning calls.

5.5 Communicate

Here you can find out how estos ProCall Business can support you in your daily work. Please, choose a subject:

o Call window
o Line settings
o Call forwardings
o Chat and chat room
o Audio-/Video conversation window
o Screen Sharing

5.5.1 Call window

The call window is the information and control centre for your phone calls. In addition to the visualisation of the call state, dialog partner and other relevant informations about the call, it is also possible to control the call. The window combines logically related telephone conversations in one interface and in this way allows the convenient control of one or more conversations on a telephone.

The call window is opened for each incoming and outgoing call and closes automatically after the call is ended.

5.5.1.1 Call window overview:
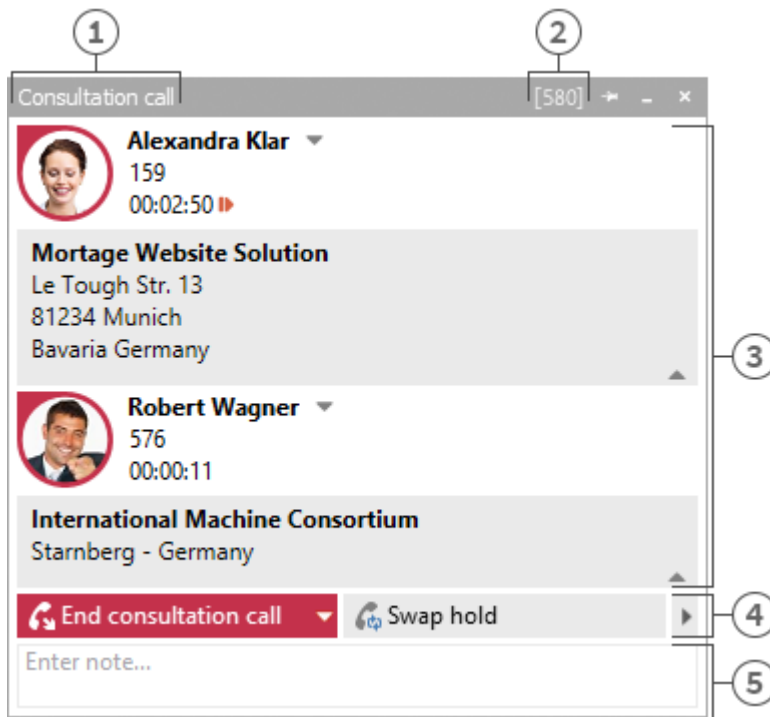
[1] Call state
[2] Active line
[3] List of calls
[4] Control
[5] Call Memo

The call window, as shown above, is divided vertically into three areas.

- o A list of calls
  The call window can manage and control one or more calls or even a conference call. All calls which belong together are displayed in a call window.

- o Phone control The call control area enables you to control the active call.

- o Call Memo
  The memo area extends the phone information and control with a collection of information about the call. The memo entered is written into the journal of all call participants when the window is closed. If previously terminated conversations are removed from the conversation window, the memo present at the time of removal will be stored.

5.5.1.2   Overview of the individual call in the call window:
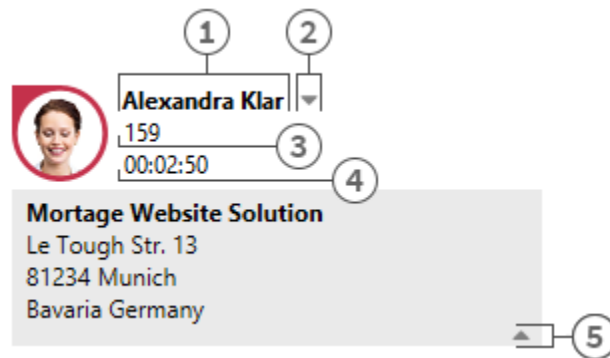
[1] Call partner
[2] Contact chooser
[3] Phone number
[4] Call duration
[5] Hide contact details

- Status icon
  The status icon shows the current state of the call. A list of status icons used can be found here. Apart from the visualisation, you can open the journal created for he current call participant via the icon. If the window contains several calls you can select a call by means of the icon and call this contact again. A tooltip on the icon displays a brief summary of the most important call information.

- Call partner
  estos UCServer and estos ProCall Business search automatically for a contact for the phone number during a call. The contact found is displayed here if available. If no contact could be found you can create a new contact here.
  You can read about which data sources can be searched in which order during a contact search in Contact search. If several contacts are found a button appears next to the contact to enable selection of a contact.

- Contact selection If several contacts are found for the current phone number, you can select a particular dialog partner by means of the contact selection. estos ProCall Business stores this selection and will show you this contact as your dialog partner the next time he calls again. Further information about searching for contacts in estos UCServer and ProCall Business can be found under contact search.

- Number The number is displayed next to the status icon. The tooltip always contains the call status and number.
  You can change the dialog partner's number for a prepared or ended call here. A new contact search is automatically triggered if you change the number.

- Call duration Displays how long you have been connected with the dialog partner.

- Show contact details Use the arrow icon to display or hide additional information.

5.5.1.3 Conference
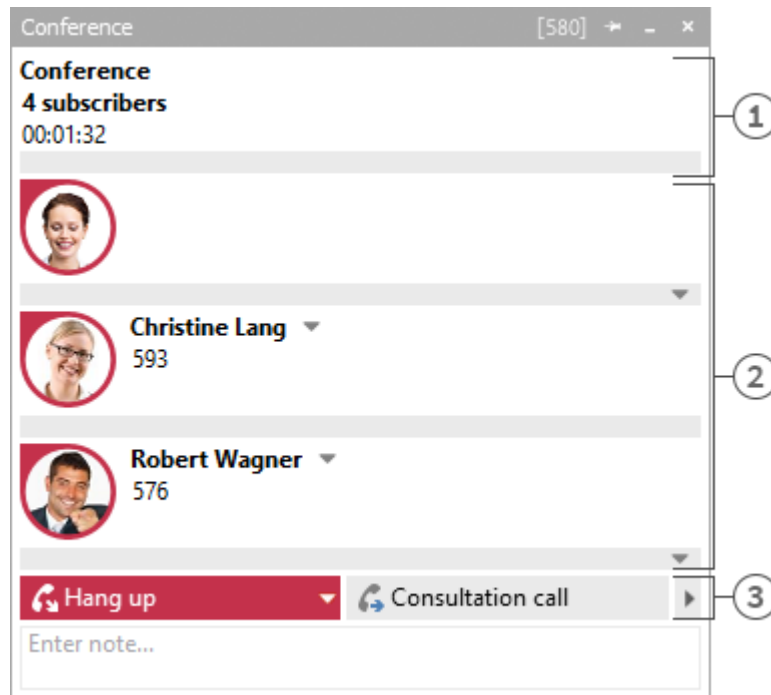
[1] Conference controller
[2] Conference participant
[3] Controls for the conference

The call window is displayed in the format shown above as soon as you initiate a conference. You can no longer directly control the individual calls but only the conference which is displayed as the uppermost entry in the call list. How long the conference has been running is shown next to the number of conference participants. The further elements of of the call window are similar to those described above.

5.5.1.4 The various control options:

Depending on the telephony status you can perform various control actions on the current call. The visibility of the individual buttons is significantly influenced by the function range of the phone system.

Icon	Meaning
	Set up dialing for the phone number currently stored in the call window:
	The currently selected contact in the call window offers several numbers. Via the icon **select** can choose another of the contact's phone numbers. The call is not yet initiated. The icon **ca** the call.
	Accept an incoming call. The phone switches to hands-free mode. Analogue phones do not s this feature.
	End current call. Reject incoming ringing call.

	End consultation call End conference. End auto-dial.
	The current phone status either permits ending various calls or you can connect subscribers other by hanging up. The combo menu displays which actions are supported. The **hang-up** ends the current call.
	Hold current caller. The subscriber is either put on hold or a callback is initiated depending o phone system.
	Retrieve subscriber on hold
	Begin callback. A window opens for searching for contacts or entering numbers. The window contains the last targets for callbacks and forwardings.
	Call on hold. Current call participant is on hold and call participant which was on hold gets connected.
	Initiate conference. Initiate a conference with the current dialog partner and the dialog partr hold.
	Add dialog partner to the conference being held.
	Forward call. A window opens for searching for contacts or entering numbers. The window c the last targets for callbacks and forwardings.
	Forward call. You have access to your contact's further phone numbers via the check box. Th can quickly forward a call on your cordless or mobile phone. **The Forward** button opens the dialog as described under *Forwarding*.
	If the number called is engaged you can start automatic redialing via this icon. An attempt is to call the subscriber again after a certain period of time. At what intervals and how often th redialing should take place can be defined in the settings Outgoing calls define.
	Activates the Callback when no answer or engaged function. A callback to this subscriber is s as soon as the remote station is available again.
	Opens a dialog for subsequent selection of DTMF tones. Input can be made with both the ke and the mouse.
	If various buttons are not visible either the current phone status or the phone system driver do permit this action.

5.5.2 Line settings

All lines assigned to the user or computer are indicated as icons in My Presence. These change color in accordance with the telephone status of the line. Many different operations can be carried out on this line via the menus opened with a click.

5.5.2.1 Entries in the line menu:

- **Set as default line**
  If a user has more than one line, he can define via the menu which one is to be the standard line. All telephone operations not requiring specification of the user's own line relate to this line. The line is shown in bold typre.
- **Telephony control**
  If a line is busy with a call, you can only have a controlling influence on the call on this line. No other operations are offered.
- **Set call diversion...**
  Permits direct set-up of call diversion without having to configure a Call diversion profile. The last call diversion is saved and automatically recorded in the last dialog.
- **Cancel call diversion**
  Shows all items of call diversion set up on this line. If the call diversion set up can be attributed to a Call diversion profile, the name of the profile is displayed.
- **Set call forwarding**
  Shows all configured Call diversion profiles currently set up on the line.
- **Switch protection against incoming calls on/off**
  Permits activating or deactivating protection against incoming calls on the line.
- **Configured feature codes**
  If feature codes for your telephone system were configured on the estos UCServer these will be displayed here.
- **Extended settings**
  - **Configure call forwardings...**
    Allows configuration of Call diversion profiles.
  - **Rename line...**
    Here, you can change the name for the line. That way, it is easier to distinguish between different terminals using the same phone number.

5.5.3 Call forwardings

Call diversions can be set in several contexts in estos ProCall Business.
Call diversion profiles have been integrated to support the User in being able to reuse several different often-used call diversions and at the same time to be able to divert several lines.

If a call diversion is to be set on one of your own lines this can be done via the lines button in the "My presence" area.
This opens a dialog which lists the currently available call diversions and allows them to be reset or edited.

A call diversion profle consists of a name, the line which is to be diverted (or the lines which are to be diverted), the type of diversion and the target phone number.

New
With **New** a new call diversion profile can be established. This opens a dialog. In this dialog, the user defines the name of the profile and selects the line to be forwarded. He can also select **All** if he has several lines and wishes to forward calls from all of them.

Edit
The currently selected diversion profile can be edited with this icon.

Delete
Deletes the selected profile.

5.5.4   Remote Office

The Remote Office makes it possible to work on the road or at the home office. With this function it is possible to use any other telephone (remote office telephone) instead of your own phone.

This feature can be turned on and off from Line Settings. If the feature is not visible there, the telephone system does not support it.

If the feature 'Remote Office' is turned on, the behavior will change as follows:

- Calls to your phone will be forwarded to the Remote Office phone.
- If the PC is used to select phone number, the Remote Office Phone will ring first. If the call is answered, you will be connected with the selected phone number.

5.5.5   Chat and chat room

The message system in estos ProCall Business allows conversations (Chat) between two and up to 30 participants. If individual users are not logged in while the conversation is ongoing, they are shown all conversations after logging in. Participants can be added to or removed from the conversation at any time.

When a message is received, the chat window opens to display the message.

5.5.5.1   Start chat

There are various ways of initiating a chat.

- **Chat to a single user:**
  Everywhere you see another user or contact in estos ProCall Business you can begin a chat with this user via the context menu or via the ActiveContacts icons. This is possible in any presence state of the contact. In the presence state *Do Not Disturb (DND)* the message may be delivered later. If the Chat icon is clicked the **Chat window** opens. At the text field the message can be entered. Once finished the icon *Send* can be pressed. By pressing the *Smiley* button, a smiley from the Smilies list and added to the message. The message sent and the message received by remote users will be displayed with contact name and time stamp in the upper text chat message window. If either Audio- or Video-Chat are available, a request to use those chat modes with the contact can be sent using the corresponding green button (see the corresponding information below).

- **Chat with a group**
  In Favorites and on the monitor you can start a chat with the user group via the context menu of a group. Only those internal users will be added who are active on the same estos UCServer. If a estos SIP Proxy is used, internal users can also be active on another estos UCServer and thus not be added to a group chat. Alternatively, you can also create a new chat room from the chat with an individual user using the button "Create chat room", which can be found in the "Further Actions" menu.

- **AudioChat with a single user**
  Wherever in the estos ProCall Business a contact appears an AudioChat (if available) can be established with it using the context menu or using the ActiveContacts icons. If a **Chat window** is open (see above *Chat with single user*) an AudioChat can be established with the user by pressing the related green button. The AudioChat can be dropped anytime by pressing the red *hang-up* button. Further functions of the AudioChat dialog are explained at the chapter Audio/Video conversation window.

- **VideoChat with a single user**
  Wherever in the estos ProCall Business a contact appears a VideoChat (if available) can be established with it using the context menu or using the ActiveContacts icons. If a **Chat Window** is open (see *Chat with Single User* above), VideoChat with that user can be requested by pressing the corresponding green button. As long as the other participant has not accepted the VideoChat request, the request can be terminated by clicking the red *Hang Up* button. Further information about the Audio- or Video-Chat features can be found in the Audio-/Video-Chat Window section.

- **Share screen**
  If a **Chat window** is open your local screen can be shared with a remote contact by pressing the Share screen button. The feature is available only if the related rights are granted by the administrator.

- **Request Screen Sharing**
  Would you like to see another user's screen, in the **Chat window** you can also request to share the screen by clicking Request Screen Sharing. The feature is available only if the related rights are granted by the administrator.

➡ The Audio/VideoChat feature is available only if it has been enabled, if Audio and Video devices installed and if the system administrator granted the right to use it. How to change the Audio/V functionality is described in chapter Presence at the bullet point *Audio/Video devices*. How to co the Audio/Video devices for the usage with the Audio/VideoChat is described in chapter Audio/ Wizard.

5.5.5.2   *Chat status*

Messages sent by the user always have a status that is indicated with an icon in the status bar of the message or of the message block. The meaning of the icon is given in the tooltip.

5.5.5.3   *Chat with a group*

Every chat participant can add or remove other users to/from the chat room or exit or rejoin the chat room later. The chat room can also be given a descriptive name, for example to be able to find it again later in the journal.

- **Add party**
  After clicking the button to add users the search dialog opens in which you can see all internal users. Select one or more users and confirm the dialog to add the participants.
  You can also add subscribers to the window by drag & drop.
  The maximum number of participants is limited to 30.

- **Remove participant**
  To remove a subscriber from the chat open the subscriber's context menu and select the relevant entry.

- **Join chat room**
  If you have exited a chat room or were removed from the chat room by another participant, you can rejoin the chat room. You will find this function in the "Further Actions" menu.

- **Leave chat room**
  If the chat room was created by sending the first chat message, you can exit the chat room at any time. Then you will no longer receive any messages of other participants. You will find this function in the "Further Actions" menu.

- **Set or modify chat room names**
  You can name or change the name of a chat room at any time, provided you are a participant of the chat. To make changes, click in the Name line of the chat, which you will find above the participant list.

5.5.5.4 Chat messages

- **Delete chat history**
  You have the option, both in a chat with a single user and also in a group chat, to delete the entire chat history, by using the "Delete chat history" button which can be found in the "Further actions" menu. The chat history is only deleted from your view, and the action does not affect the chat history of your other chat partners.

- **Delete individual chat messages**
  If you want to delete specific chat messages, move your mouse over the message you want to delete. This will cause a red X symbol to appear, which you can use to delete your message. The message will only be deleted from your view; and the action does not affect the chat record of your other chat partner.

5.5.5.5 Links:

estos ProCall Business supports the following links in the chat window:

- **Phone numbers:**
  Phone numbers are highlighted as such and can be selected by clicking them as long as they comply with the rules for the currently selected line's location. (phone:+4912345612, +49 123 456 - 12, 12 etc.)

- **E-mail links:**
  E-mails are recognised and the default mail program is started by clicking it. (mailto:info@info.de, info@info.de etc.)

- **Web links:**
  Recognises all Internet links such as. (http:, https:, www:, www2:, file:, ftp:, gopher:, ntp:, prospero:, telnet:, news:, wais:)

- **UNC paths:**
  Recognises UNC paths. (\\server\directory\file)

➡ If links contain whitespaces estos ProCall Business cannot find the beginning and the end of th(e)
itself. If you place these links between < and > brackets the link is correctly recognised. <Link w(ith)
space(s)>

➡ To be able to chat with one participant, the Public authorization level must have been granted,
least. This authorization level may also be set administratively for internal users using global se(ttings)
or group policies (see also Authorizations).

5.5.6   Audio-/Video conversation window

The Audio-/Video conversation window is active while an Audio-/VideoChat conversation is present. Using the AudioChat mode no Video area is displayed thus the AudioChat window size is smaller than the VideoChat window size. But the usage for establishing Audio/VideoChats and the device handling is identical between Audio and VideoChat. The Audio/Video conversation window comprises of the contact area at the upper left corner and below a coloured keypad for Audio/VideoChat call control (e.g. accept calls, hang-up calls), a Text Chat area, below an area for Screen Sharing and a status line at the bottom. If Video is present the conversation window includes a video area at the right side including control buttons (overlays) becoming visible once the mouse moves over. The Chat area (text mode) at the left lower side can be used in any call state. If multiple video streams are shown (e.g. camera views and a shared screen) the major video picture can be changed by clicking on one of the minor video pictures. If the Audio-/Video conversation window is maximized the view changes to full screen mode. The full screen mode can be stopped by pressing the Escape key. The text based chat doesn't depend on any callstates and can be used any time.

Several Audio/VideoChats are supported simultaneously. Each Audio/VideoChat is represented by a conversation window. Only one conversation window can be active at the same time. Additional calls are in "on hold" state. If another call is accepted additionally to an existing call, the first call is automatically placed on hold. A call that is on hold can be activated by a "Retrieve" button.

In addition to the described methods how to accept and reject calls some USB devices offer the possibility to control the calls with device buttons (Human Interface Device "HID" buttons). This means that an Audio-/VideoChat can be accepted or dropped per device button. The microphone can be muted per device button. The supported devices and how to configure them can be found at the chapter Audio/Video Wizard, call control per device buttons.

5.5.6.1   *Incoming Audio-/VideoChat*

An incoming Audio-/VideoChat opens the AV conversation window. At the left upper corner the calling contact is displayed. A specific ringer sound plays at the speaker standard device to indicate the incoming Audio-/VideoChat to the user. While ringing an incoming VideoChat the local picture is shown at a large Video area at the right side of the window. The picture appears to be mirrored in order to allow users to check their apperance as using a real mirror:

- **Accept an AudioChat**
  If the green button with the headset and text has been pressed for accepting calls, the call will be accepted. The status bar on the bottom left indicates the quality of the media connection.

- ▪ ▶ **Accept VideoChat**
  If the green button with the triangle and text has been pressed for accepting calls, the call will be accepted. The status bar on the bottom left indicates the quality of the media connection. The local video image will be small and the remote participant's video image will appear large. The local Video area can be hidden by pressing a small triangle item at the lower right side of the large Video picture. The triangle item is a toggle button thus once pressed again the local video area appears back again.

- ▪ ■ **Reject an Audio/VideoChat**
  If the red button with the rectangle and text has been pressed for rejecting calls, the call will be rejected and the audio- or video-chat window will be closed.

5.5.6.2 *Outgoing Audio-/VideoChat*

With an outgoing Audio-/VideoChat the AV conversation window opens. At the left upper corner the called contact is shown. A specific ringback sound is played at the configured Audio device (e.g. headset) as soon as the remote device could be contacted and rings. If VideoChat is used the local picture is shown at the large right Video area. While running an outgoing VideoChat the local picture is shown at a large Video area at the right side of the window. The picture appears to be mirrored in order to allow users to check their apperance as using a real mirror. During the call establishment phase several operations are possible:

- ▪ ■ **Hang-up the Audio/VideoChat**
  If the red button with the rectangle item is pressed the outgoing Audio/VideoChat is disconnected and the Audio/Video conversation window is closed again. The called contact finds a small "bubble" message at the Windows® system tray in order to allow a comfortable call back per mouse click.

5.5.6.3 *Connected Audio-/VideoChat*

If the called contact accepted the Audio/VideoChat the parties can communicate with each other. Several options are possible:

- ▪ ■ **Hang-up the Audio/VideoChat**
  If the red button with the rectangle item is pressed the Audio-/VideoChat is disconnected and the Audio/Video conversation window is closed again. A specific disconnect sound is played to the Audio standard device indicating the closed call.

- ▪ ▁▂▃▄ **Quality and status line**
  During an Audio-/VideoChat the quality of the data stream is indicated by a small triangle bar item. The more black bars are shown the better is the data stream quality. Moving the mouse over the item additional information is presented to the user as tooltip text: overall quality (good/bad), transmit statistics ("TX" values), receive statistics ("RX" values), Codec used(e.g. "Opus" with Audio and "VP8" with Video), Video resolution (e.g. 640x480), consumed bandwidth in kilobit per second (kb/s), Jitter buffer in milliseconds (ms), Round-Trip-Time "RTT" in milliseconds (how long the signal takes forth and back) and the calculated available bandwidth for Audio- and Video signals (mostly not fully consumed). The

"ICE (TURN/STUN) Info" contains information about the IP-addresses and ports of the current media connection. Along with the IP-address, the connection type of the ICE candidates is displayed in parentheses ("host" - local IP in the LAN, "srflx" and "prflx" – usually publically available IP in the WAN (STUN), "relay" – usually publically available IP in the WAN (TURN)). The media connection status is shown next to the triangle bar symbol (e.g. connected). To the right the elapsed time for the Audio/VideoChat counts up.

- **Mute button for Audio/Video devices**
  Near the red *Hang-up* button a small triangle button opens a menu for "muting" the microphone or the camera devices (if present).

- **Microphone mute overlay button with VideoChat**
  In the small, local Video picture an overlay button to mute the microphone appears while moving over with the mouse. While being muted the overlay button appears striked out. Pressing again the button turns back to normal.

- **Camera mute overlay button with VideoChat**
  In the small, local Video picture an overlay button to mute the camera appears while moving over with the mouse. While being muted the overlay button appears striked out. Pressing again the button turns back to normal.

- **Adapt Video picture size with VideoChat**
  In the main Video picture an overlay button to adapt the main Video size appears (to remove black stripes) while moving over with the mouse. Pressing the button again the Video size turns back to normal.

- **Control the remote Camera with VideoChat**
  If the remote camera supports remote control and if the remote user enabled the feature with the Audio/Video Wizard the local user can move the remote camera. The camera can be turned to the left (arrow key left), to the right (arrow key right), upwards (arrow key up) and downwards (arrow key down). Further it is possible to zoom-in (key "-") and to zoom-out (key "+"). The controlling user may also move the remote camera by using the mouse in the main Video picture with the related overlay buttons.

- **Share screen**
  By pressing the Share screen button a local screen can be shared with a remote contact. The feature is available only if the related rights are granted by the administrator.

- **Request Screen Sharing**
  Would you like to see another user's screen, you can also request to share the screen by clicking Request Screen Sharing. The feature is available only if the related rights are granted by the administrator.

- **Change devices**
  In an active Audio/VideoChat you can change your input/output devices here.

The configuration of your Audio/Video devices to be used with Audio/VideoChat can be done with the Audio/Video Wizard.

The conversation window of a Audio-VideoChat includes also a Text Chat capability.

5.5.7 Screen Sharing

To enhance cooperation with estos ProCall Business you can share your screen with other ProCall Business users. So that the other user can see your screen content and control your mouse and keyboard once you have activated it.

Screen Sharing can be started from the context menue of an ActiveContact. The context menue is opened by a right-click on the ActiveContact. The feature is available only if the related rights are granted by the administrator. Further the Screen Sharing can be added to an existing chat in the Chat window or while an Audio/VideoChat. More further a Screen Sharing session can be started from the Contact details.

If you are sharing your screen to another party, a small "Active Screen Sharing" status window appears. Clicking on the status window moves closed or minimized conversation windows back to the foreground.

5.5.7.1 Share a local screen with another user

If you have shared your screen with another user a conversation window is opened showing the connected user. At the beginning of a Screen Sharing session the remote control per mouse and keyboard is deactivated. The remote control per mouse and keyboard can be activated by clicking on the "Allow control" button. It can be disabled by clicking on the button toggled as "Disable control" button. If the conversation window is closed but a Screen Sharing session is still active a small "Active Screen Sharing" status window still remembers about its activity.

5.5.7.2 Request Screen Sharing

Would you like to see another user's screen, you can also request to share the screen. The other party must confirm or reject to share it. The remote control per mouse and keyboard can be enabled with the "Allow control" button and it can be disabled with the "Revoke control" button.

5.5.7.3 Select a screen for Screen Sharing

If more than one screen exists in a system, a menu for the "Share screen" button can be opened in a conversation window, making it possible for you to select the local screen to be shared, based on a preview image. If no screen is selected or if only one screen is available, the main screen will be used. In order to ensure the privacy of the remote user, preview images are not displayed during screen share requests.

5.5.7.4 Using Audio-/VideoChat while running a Screen Sharing session

While a Screen Sharing session is already running an AudioChat can be added to the conversation. A camera video stream can be added to the AudioChat by opening the small menue near the "Hang up" button by selecting "Camera on". Also while an Audio/VideoChat is already running a Screen Sharing session can be added to the conversation. The upper big red "Hang up" button disconnects the entire session. The "Revoke Screen Sharing" button ends the Screen Sharing session only.

5.5.7.5 Full screen mode

If a user shared a screen with you the screen appears initially in a conversation window. If you maximize the conversation window you can see the session in full screen mode. If you move the mouse to the middle of the upper screen border a window bar appears including further control buttons e.g. to end the full screen mode. The full screen mode can also be terminated with the Escape key.

To use the Screen Sharing, this feature must be available on the computers of both participants.

An administrator UAC (User Account Control) prompt per Screen Sharing is not supported.
Applications started with UAC as administrator can't be used within a Screen Sharing session.

6   Customise estos ProCall Business

estos ProCall Business functions can be customised to your needs in many places. The first is the **settings** dialog, which you can acces via the main menu.

The dialog is divided into the following catagories:

- Appearance and behavior
- Telephony
- Integration

6.1   Appearance and behavior

In this category you can customize the view of the client, control the behavior in certain events, assign hotkeys and shortcuts, add locations and use advanced service functions.

- View
- Characteristics
- Actions
- Hotkeys
- Shortcuts
- Advanced

6.1.1   View
6.1.1.1   Element width

The contacts and function buttons in the monitor and in the Favorites tab are displayed in columns if the window width permits. With the "Element width" option you can influence as from which width a further column or a column less is displayed. Please note that the entire available window width is always used.

6.1.1.2   Level of detail

The level of detail can be selected separately for the main window (Favorites, talk and chat windows, etc.) and the monitor. There are 3 levels available:

Low	This is the most compact setting, displays just the color of the presence and the name of the contact in one line.
Medium	At this stage, the corresponding contact picture (if available) for each contact and CTI information is displayed (phone lines, Calls, diversions).
High	Compared to the "Medium" level, just with larger Contact imagse and additionally the position in the company.

6.1.1.3   Deposited contact with presence color

If this option is activated, every registered contact is stored in the monitor and in Favorites with his current presence color. The background of unregistered contacts remains unchanged.

> Changes to the settings on this page have an immediate effect on estos ProCall Business (preview). These settings are, however, only stored when confirmed with **OK**.

6.1.2   Characteristics

6.1.2.1   *General*

Display estos ProCall Business with Windows® log-on
Use this option if estos ProCall Business is to be started automatically when the system re-boots. The client is always started minimised in this case.

Show start process
Check this checkbox if you want more detailed information to be shown on the screen when estos ProCall Business starts.

6.1.2.2   *Monitor*

- **Show at program start**
  Automatically re-opens the monitoring program, when ProCall Business is re-started. This setting is useful when you want to temporarily close the monitor window during your session, however it should be re-started when ProCall Business is also re-started.
- **At program startup as last**
  In this mode, the monitoring program will only be displayed when it starts, if it had been open when the last ProCall Business session ended.

6.1.2.3   *Show speech bubble for*

If at least one of this settings are active a speech bubble will show you the according information near the windows taskbar.

- **Missed calls**
  Display of all unanswered calls
- **Unread E-Mails**
  Display of new emails in the Inbox (Only if the Exchange Web Service (EWS) is set up.)
- **Chats**
  Display of unanswered chats
- **Fax messages**
  Display of new Fax messages in the Inbox

6.1.3   Actions

Automate estos ProCall Business:
estos ProCall Business enables you to execute numerous of actions if defined events occur (ringing phone for example). The following tabel givs you a brief overview:

Event	Description
In case of an incoming call	Occurs when your phone rings.
In case of an outgoing call	Occurs, when you have established a call and the phone rings with your respondent.

At the end of a call	Occurs when the call (not connected) or the conversation (connected) was ended.
When call is answered	Occurs when you accept an incoming call or your dialog partner accepts an your call.
When the remote call party changes	Occurs when the dialog partner changes during the call.
After logging on to the server	Occurs when the user could log on estos UCServer successful.
After logging off from the server	Occurs when estos ProCall Business properly log off from the server. This is particularly the case when estos ProCall Business shuts down, but not when the compound is separated from the estos UCServer.
In case of an appointment (busy)	Occurs when an appointment in Outlook® which is marked with the "busy" attribute becomes due.
In case of appointment (out of office)	Occurs when an appointment in Outlook® which is marked with the "absent" attribute becomes due.
Automatically opened contact detail window	Occurs when a contact details window open by estos ProCall Business automatically.
After xx minutes idling	Occurs, when you have pressed no key or moved your mouse in xx minutes.

6.1.3.1   Create new action:

57.   Click **Add new action** and select the event when the action is to be executed in future.
58. Click **Choose action** and select the action which is to be executed by the selected event.
59. Make sure that the checkbox to the left of the selected event is active (checked). The action will only then be executed. You can also uncheck the checkbox if the action should not to be performed at present but will be needed later.

6.1.3.2   Activate/deactivate action

You can create an action for later use or temporarily deactivate an already created action if you deselect the hook on the left, beside the event field. As soon as the hook is input again, the event happens.

6.1.3.3   Remove actions

Actions which are no longer required can be removed with the "Delete" button at any time. The action to be removed must first be marked. Alternatively you can select the **Remove action** entry in the event field.

The events "at appointment (engaged)" and "at appointment (absent)" work only if data should be

transferred, what can be changed by the settings under calendar.

➡️ A call diversion which is preset "at appointment (busy)" or "at appointment (absent)" as an action in the events, is also set as not activated in estos ProCall Business.

➡️ A call diversion which is preset "at appointment (busy)" or "at appointment (absent)" as an action in the events, is reset at the end of the appointment again.

⚠️ If no actions have been defined to an event this entry is deleted when the settings dialog is closed.

6.1.4 Hotkeys

The term hotkey describes the option of defining system-wide key combinations which permit phone numbers to be dialed or calls to be ended (hang up) out of almost all programs. You define the key combination in this settings dialog.

Dial selected phone number, otherwise start Contact Search.
To dial a number with the shortcut key, the number has to be selected with mouse in the according window, then press the shortcut key. If there is no phone number selected, estos ProCall Business tries to search for a contact instead.

ⓘ You can use the hotkey in Outlook® itself. You can thus dial any phone number in a contact by marking the phone number. Use the hotkey also to transfer a contact to the phone status window. You can also start callback from the journal with the hotkey.

⚠️ Dialing from a console application (DOS window):
If the phone number cannot be selected directly by the mouse, then first activate the DOS Console's Editing Mode using [ALT]+[Spacebar].

Use this hotkey also for accepting a call
If this option is selected, incoming calls can be answered with the same hotkey as is used for dialing (if your phone supports this feature).

Shortcut key for hanging up
Here you can define the hotkey for ending the active connection. Type in the key combination (special keys such as Alt, CTRL and Shift are also possible). You delete the hotkey with the Del key.

Display main window
This Hotkey brings the main window of estos ProCall Business on screen and you can immediatly start searching contacts.

ⓘ These hotkeys are configured system wide, so no other application can use the same key combinations for other actions.

⚠️ Dialing with the hotkey uses the Windows® clipboard and the keyboard shortcut [CTRL+C]. The contents of the clipboard can be changed at the same time and the shortcut [CTRL+C] not used as a hotkey. Consider these restrictions with the use of this function.

⚠ Phone numbers or contacts cannot be dialed (or searched) from applications that have been started with higher administration rights than estos ProCall Business.

If the hotkey has been pressed in such an application, an information dialog will provide a reminder. estos ProCall Business can only display this reminder if the hotkey is used in combination with or (a Windows® restriction).

6.1.5 Shortcuts

To increase productivity, certain application features can be assigned to key shortcuts. Thereby, certain tasks and features can be started, opened or executed using a simple shortcut.

The list contains all available features, sorted by units, that can be assigned to shortcuts.

Assign a shortcut to a feature:
Click on the second column so that a text entry cursor will appear. Then simply press the desired key combination.

Delete a shortcut:
The Delete button can be used for this purpose. If you are currently in the process of assigning a new key, simply press [Del].

Reset all shortcuts to their default values:
The two buttons "Reset" and "Reset All" are available for this purpose.

ⓘ The shortcuts for features that have been grayed out cannot be modified. This can be because of the following reasons:

60. The shortcuts may have been assigned by the manufacturer.
61. The shortcut was assigned by the System Administrator on the server.

⚠ If a conflict is discovered between the choosen hotkey and a hotkey from another application, an alternative hotkey should be choosen, or remove the other hotkey from the other application first.

6.2 Location

Location settings make it possible for phone numbers to be correctly dialed and displayed.

Only with the correct Location settings it is possible to ensure that external phone numbers can be dialed correctly and phone numbers are displayed properly.

This section of the help file will describe the individual configuration parameters on the Location Settings dialog. If a location is depicted, the following pages will provide all information necessary for configuration. If several networked locations must be setup, all information for special configuration scenarios can be found in the Location Designs section.

Country/region:
Choose your country from this list.

Area code
Enter your local area dialing code here. This is for example 030 for Berlin or 44 for Zurich (Switzerland). The leading 0 is not necessary and is removed by the system when the settings are saved.

Display Advanced Settings
The location settings have many options that will only be needed in special cases. Settings that are not mandatory for normal operation will not be displayed by the wizard.

The advanced settings include:

- Rules for the detection of internal and external phone numbers
- Rules for formatting the line phone numbers
- Special formatting of phone numbers that will be registered by the telephone system
- Special formatting of phone numbers that will be transferred to the telephone system for dialing
- Least cost routing
- Vanity phone numbers

6.2.1.1 *Formatting*

These rules apply to phone numbers reported by the TAPI driver of the phone system.

You can enter several extension numbers, separated by commas, in all fields. Normally the extension numbers are identical (default value: 0).

Remove access codes for outside lines for phone numbers

- **reported as incoming:**
  Enter the extension numbers to be deleted from the phone number in case of incoming calls.
- **reported as outgoing:**
  Enter the extension numbers to be deleted from the phone number in case of outgoing calls.
- **reported as a forwarded call:**
  Enter the extension numbers which must be removed from the phone number in case of forwarded calls.

Remove codes for outside lines for the ConnectedID

- **reported as incoming**
  Enter the extension numbers which should be removed from the number for incoming connected calls.
- **reported as outgoing**
  Enter the extension numbers which should be removed from the number for outgoing connected calls.
- **Ignore ConnectedID**
  If the driver for the telephone system reports inconsistent number formats for ConnectedID (different forms of numbers to get an outside line for incoming, outgoing or connected calls), you must ignore the ConnectedID. As a result, you will not see the actual number of the person at the other end, but only the number of the person called or calling.
  This option is the last chance to catch inconsistent numbers from the driver. Please try first to make the reported numbers consistent by configuring the driver or the telephone system. **Only activate this feature when it is absolutely necessary**.

6.2.1.2 *Dialing prefixes*

Outgoing PC dialing:
An external access prefix (also referred as external dialing code) is the number on the telephone that must be used to make an external call. The entry of this number will be required for dialing from ProCall even for

automatic external access on the telephone. Normally, the following external dialing codes are identical (default value: 0).

- ▪ **Local access code:**
  Enter the access code you need for calls to destinations in your own area.
- ▪ **National access code:**
  Enter the access code you need for calls to national destinations.
- ▪ **International access code:**
  Enter the access code you need for calls to international destinations.
- ▪ **Private call external dialing code:**
  Enter the access code required for placing external phone calls. The placeholders: e, E, u or U (see Projects); may also be used.
- ▪ **Number for an outside line required to activate call forwarding:**
  Here, enter the number for an outside line which you require for call forwarding.

Determine external access prefix…
The wizard will provide support in determining the external access prefix (also known as "external dialing code", "trunk access code" or "outside line access code"). Access to a telephone at the location and an external telephone (cell phone) will be needed. If there is uncertainty about the external dialing code, start the wizard and follow its instructions. All settings for the external dialing code will be set automatically.

6.2.2   Advanced

Core services

Phone number format, PC dialing
This option determines the phone number format for outgoing calls. Phone numbers are transfered in this format to the phone system.

- ▪ Apply dialing rules (standard)
  Phone numbers are always formatted according to the dialing rules.
- ▪ Always international super-canonical/E164
  Phone numbers are always converted into the super-canonical phone number format (e.g. +1891234567, also known as international E.164 format) before they are sent to the phone system. Only activate this option, if your phone system and the TAPI driver supports this phone number format.

Always enter the area code for local phone numbers.
If the area code must be dialed for calls in the local area, this option must be enabled. In some cases, IP Centrix providers require the call to be dialed with the corresponding area code.

Automatically re-dialing extensions
If a number to be dialed is longer than the maximum phone number length allowed in the corresponding target country, the number will be divided into sections and the first section dialed and then the remaining section dialed as a DTMF number after the connection has been made. This currently applies for countries like the United States, Russia and Taiwan. The maximum phone number length is defined in the countries.xml and cities.xml files. If the option has been deactivated, the telephone system will have to emulate this behavior.

Abbreviate Phone Numbers before Dialing
Long phone numbers from other locations will be abbreviated to the DDI phone numbers before dialing. The rules to be determined for this will be displayed under PC Dialing. If dialing between locations requires cross-network identifiers, the rules will have to be configured manually from PC Dialing.

6.2.3   PBX system

Location is using a PBX
Activate this option, if the location has a telephone system.

Public line type
Please select the type of the public line: DDI trunk line (for Direct Dial-In) or a Multipoint connection line. Sometimes DDI lines are also referred to as DID lines (for Direct Inward Dialing). A DDI line enables external parties to call internal phones directly using phone number ranges. DDI numbers comprise of a PBX base number (addressing the PBX) plus a number range (or several ranges) to address internal phones from outside. A Multipoint connection typically is used for smaller offices or for home usage. One or more phone numbers (Multi Subscriber Number = MSN) are used in this case. The MSNs may be totally different, e.g. they don't have to use numbering ranges.

PBX base number (only with a PBX using a DDI line)
If you have a DDI line you should enter the PBX base number here. For example if you have the number +1 (30) 12345-222, the PBX base number is 12345.

Extension Numbers (DDI - Direct Dialing In) (only with a PBX using a DDI line)
If all extension numbers have the same length configure an extension number space. If extensions are used with different lengths configure extension number prefix.

Extension number space
Please enter here the extension number range (DDI range or space) that is allocated by the phone company for the related PBX. For example, if you have the DDI number range from +1 30 12345 30 to +1 30 12345 69, enter "from 30 to 69". Or for example using three-digit extensions while the entire range is available for DDI enter "from 100 to 999".
All internal phone numbers available in this range are displayed automatically as external, international phone numbers.

Extension number prefix
Please specify the lowest and the highest first digit of the extension numbers. If e.g. the internal numbers 20, 300-499 and 5000 are used please configure '2' as the first prefix and '5' as the second prefix. The length of the internal numbers are set to '2' to '4' in this case. Depending on the length of the internal numbers the program calculates the numbers to be used as external and international types.

Length of internal phone numbers:
Enter the length of longest and shortest internal phone numbers. If all extensions are the same length, for example 121 (three digits), both entries should be "3".

Extension phone number format:
External phone numbers: displays the international phone number for the location (only for a system connection).
Internal phone numbers: displays the internal phone numbers for the location

6.2.4   Least cost routing

Least cost routing is the automatic selection of the cheapest call-by-call provider for a call. You must configure rules in order to make this choice for a call. For the ProCall Business LCR to be able to offer LCR, there have to be rules setup. These kann be setup manually oder implemented from different web services.

Information about current rates of Call-by-Call providers can be found on the internet under www.estos.de/produkte/unified-communications/procall4plusenterprise/lcr.html.

- **Provider**
  The Provider list will contain all stored Call-by-Call providers with their respective dialing codes.

- **Zones**
  The Zones list will contain the zones for the Least Cost Routing feature.
- **Assignment of zones to providers**
  Through the Allocation of providers, the system will know when to use which provider. In addition to differentiation based on the day (Monday-Friday, Saturday & Sunday), the providers may be allocated to the configured zones based on time

Reset
Deletes all LCR settings.

Import and export
You can import and export all LCR settings. The following formats are supported:

- Own LCR-data format (*.lcrxml)
- Agfeo LCR-data format (*.lcr)
  For Germany you can obtain LCR-data in this format from several providers in the Internet.

6.2.4.1   Least cost routing assignment

Every zone can be assigned to a provider. This assignment is separate for Monday to Friday, Saturday and Sunday. Different providers can be used at different times for each of these days.

The time (in 48 half-hours) is plotted to the right of the table. The configured zones are listed at the bottom. Each line of the table shows which provider is used for the zone at the respective time.

Select the provider which you wish to assign. Next, click on the cells date and time in the table where the provider is to be used.

6.2.4.2   Provider

A provider is a provider of call-by-call telecommunications services. In order to use a provider for a phone call the provider's network dialing code is dialed before the phone number.

Examples for Germany

Provider	Pre-selection network prefix
Arcor	01070
Tele2	01013

6.2.4.3   Zones

A zone represents a list of phone numbers which can be called for a certain tariff. You can assign a provider to every zone accoring to date and time.

Zone name
Enter a name for for the zone, e.g. longis distance or mobile.

Area code list
All phone numbers which start with digits provided in the list belong to this zone. The phone numbers will be compared when processing the Dialing Rules. Entries must be made in international format (such as: +49171).

Examples

Area code	Meaning
+1	All numbers which begin with +49, in other words all phone numbers in Germany (apart from special numbers).
+1905	All phone numbers which begin with +1905, in other words all numbers in Toronto, Canada.
+117	All phone numbers which begin with +4917, in other words all mobile phone numbers in Germany with a 017x dialing code.

Instructions
You typically configure zones for local calls, long-distance calls and mobile phone networks and several zones for other countries.

Priority of longer dialing codes
If there are several dialing codes configured in different zones which fit the phone number, the zone which has the greater number of digits in its dialing code is used.
Example: the number +4917123456789 is dialed. If +4917 is entered in zone 1 and +49171 in zone 2, zone 2 is used because more digits match.

Priority of zones without providers
If there are several dialing codes configured in different zones which are identical and one zone has no provider assigned to it the zone without a provider has priority.

6.2.4.4   Line phone numbers

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. The phone number should be formatted using international notation after the formatting process. The configured rules will be processed from top to bottom until the first match has been found.

Check:
The rules can be checked immediately. Enter the corresponding expression in the Phone Number field. If the phone number was detected and how it has been implemented can be seen in the output row. The rule used for recognizing and formatting will be highlighted.

➡ Specific Examples for the Use of Rules for Adjusting Line Phone Numbers:

  ▪ Phone Numbers with Cross-network Identifiers (Cisco)
  ▪ Internal and external phone numbers outside of the base number range (lines do not carry the DDI phone numbers, but rather internal line identifiers).

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

6.2.5 Projects

estos UCServer permits the user to assign calls to previously defined projects, to send certain code numbers to the phone or the phone system when dialing or to mark calls explicitly as private.

Parameters are, for example, used with targeted MSN assignment, the initiation of private calls in phone systems or for dialing project parameters. You can define several parameters here and give them names. They can then be used in the call window. The parameters are always saved in the journal on the estos UCServer.

Parameters have two functions:

- Parameters for dialing. These are sent to the phone system and activate specific features before making the call.
- Parameters for the Journal. These are included in the journal (server-side) and are subsequently used for invoicing by project parameters.

Define projects:

90. Enter a readable name for the project in field **name**. This name appears later in the call window and the journal.
91. Enter the **parameter** which is dialed before the actual number in the column of the same name.

    The following rules apply:

Character	Deployment
0-9 * #	Digits which are dialed normally
C	Here you wait for the remote station to accept the call.
e, E	Place-holder for entering a PIN. With E, the number of digits for entry is not important. With e, the number of digits is defined by the number of letters (eee for three digits).
u, U	Place-holder for entering a user ID. With U, the number of digits to be entered is not important. With u, the number of digits is defined by the number of letters (uuu for three figures).
p, P	Dialing pause: p for 0.5 seconds, P for 1 second
N	Place-holder for the number to be dialed. If the place-holder is not specified the number is automatically added to the end.
J	Defines, if available, that the user login and pin number entered by the user is noted in the journal.
X	Defines, if present, that the number to be dialed should be dialed with an external code. If the 'X' is missing the number is dialed in national format (03012345678).

92. Select one of the following **options** which is to apply for the project:
    Journal entry only: The parameter is not sent to the phone but just saved in the journal.
    Dialing and journal entry: This parameter is used for outgoing dialing is saved in the journal entry.

Dial only: This parameter is only used for dialing.
Dial Private Call: The Access Code for Private Calls option is used for this (see Dialing Prefixes). Doing so may be necessary in order place private calls, depending on the telephone system and configuration. Phone numbers used for private calls will not be visible to others and will be additionally flagged in the journal.

Examples of use:

- For the journal only:
  You wish to assign project parameters to calls. Create an entry and name it e.g. Project Test and give the parameter 12345. Select the Journal entry only option. The parameters are logged on the server side only.
- Selective external dialing code:
  Assume you have have a normal external dialing code of 'o' and a further external dialing code which is '8o'. Create an entry and name it 'External2'. Enter '8o' as the phone number. Select the 'Dial only' option.
- Select project parameter:
  Assume you can dial the project parameter '4444' on the phone with the combination *604444#. Create an entry and name it 'Current Project'. Enter *604444# as the phone number. The X means that an external dialing code must be added after the project parameter. You can then also make internal calls with this project parameter.
- Private call 1. Example:
  Assuming you can dial a private call on the phone with your personal PIN '1234' by means of the combination *601234#: create an entry and name it 'Private'. Specify the number as *60eeee#X. The 'X' means that an external code must follow the parameter. You can then also make internal calls with this parameter. The 'eeee's mean that you still have to enter a four-digit PIN. If you then dial in the call window with this setting you are asked to enter this PIN. You can, of course, enter the PIN for private calls here directly, in other words *601234# (if no other person has access to your computer).
- Private call 2. Example:
  Assuming you can dial a private call on the phone with your personal PIN '1234' by means of the combination 51234: after entering the PIN you no longer have to dial an external code. Create the entry and name it 'Private'. Enter 5eeee as the phone number. This time, no X is used (no external code after the parameter). The 'eeee's mean that you still have to enter a four-digit PIN. If you then dial in the call window with this setting you will be required to enter the PIN. You can, of course, also enter the PIN for the private call directly here: 51234.
- Example of a calling card provider:
  With the rules you can deal with dialing a calling card provider for private conversations. Enter the phone number format required by the calling card provider in the project parameters field.
  E.g.: 0080012345678CP#eeeeeeeee#uuuu#N#
  The calling card provider is dialed via the number 0080012345678. After the call has been answered there is a one-second delay; the 8-digit user ID and then the four-digit password is subsequently transmitted, followed by the number to be dialed. The placeholders for 'e' and 'u' were queried by the user in the client. User recognition and the PIN can be saved on the client if desired.
  The subsequent dialing of digits after a pause or waiting for an answer from the remote station is realised with DTMF tones. This is only possible if your TAPI driver supports this feature.

6.2.6   Check rules

Here you can check the configured rules. Enter a phone number and check if the phone number is used correctly for displaying or dialing.

Format for dialing
Formats a phone number that will be transferred to the telephone system for dialing. The formatting process will perform the following steps:

Formatting for call forwarding
Formats a phone number that will be transferred to the telephone system for call forwarding. The formatting process will perform the following steps:

Format for display
Formats a phone number for display.

ConnectedID outgoing
Formats the outgoing ConnectedID reported by the driver. The formatting process will perform the following steps:

ConnectedID incoming
Formats the incoming ConnectedID reported by the driver. The formatting will perform the following steps.

CallerID
Formats the CallerID reported by the driver. The formatting process will perform the following steps.

CalledID
Formats the CalledID reported by the driver. The formatting process will perform the following steps.

Call forwarding
Formats the phone number for call forwarding reported by the driver. The formatting process will perform the following steps.

6.2.7 Area code rules

These settings are only required for countries in North America.

The area code rules determine which dialing rules must be used for dialing a number in the North American Numbering Plan (NANP). The number must be dialed differently depending on how far the number you wish to dial is from your own location. For example, a free call must be dialed differently to a chargeable call.

The target number to be dialed decides which dialing rules are used. The number's area code and the three digits which follow it are decisive.

Own area code
Calls within the local area can be free and chargeable. Configure which dialing rules must be used.

- All calls in the local area are free.
  Phone numbers with the same area code as your own location are always dialed with the *local call* dialing rule.
- There are calls within the local area which are chargeable.
  If there are chargeable phone numbers with your own area code, select the dialing rule *local call (chargeable)*.
    - Configure chargeable phone numbers
      Configure the Prefix rule for which phone numbers wit the dialing rule *Local call (costs involved)* have to be selected. All other phone numbers in the local area are dialed with the dialing rule*Local call*.
    - Configure free phone numbers
      Configure the Area code rule for which phone numbers with the dialing rule *Local call* have to be selected. All other phone numbers in the local area are dialed with the dialing rule *Local call (costs involved)*.

Other area codes
Calls to other area codes may be free. Configure which dialing rules must be used.

- All calls to other area codes are long-distance calls.
  Phone numbers with a different area code are always dialed with the *long-distance call* dialing rule.
- There are calls to other area codes which are free.
  Switch on this option, if there are cost free phone numbers with a different area code and which have to be dialed with the rule *local call other area code*. Configure for every area code area code rule for which phone numbers with the rule *local call other area code* have to be selected.

Automatic configuration
You can access these rules automatically on the internet. For this purpose, the supplier http://www.localcallingguide.com is used. Please always check the accuracy of the imported data, no guarantee is accepted for completeness. If this service is not available, you need to configure the rules yourself.
Information as to which phone numbers must be dialed as local calls from your location is available from your phone company.

6.2.8   Dialing prefix rules

These settings are only required for countries in North America.

A dialing code rule defines a series of phone numbers which must be dialed with a certain dialing rule.

A phone number consists of an area code and a (subscriber) phone number. The first digits of the phone number are known here as a prefix.

Area code
Enter the area code which is to apply for this rule.

List of prefixes
Here you can enter a list of prefixes. If one of these prefixes matches the number to be dialed this rule applies.

Example
A phone number which fulfils this rule reads: +1 (202) 333-5678
Enter 202 as the area code
Enter 333 as the prefix

6.2.9   Location concepts

Configuration options for systems with several locations are displayed in the locations designs. If the telephone system to be set up involves a single location, it should be configured based on the Location Settings. An attempt should be made to include the following issues in the system design:

- **Consistent Phone Number Range:**
  - Internal phone numbers corresponding to DDI
  - Internal phone numbers that have not been assigned multiple times
  - Location phone numbers can be assigned in blocks
  - Extensions can be quickly dialed across locations (in connection with or without a cross-network identifier)

  - Configure the individual locations based on the key performance indicators for the respective location.
  - In Advanced Location Settings, enable *Enable Location Integration* and *Determine Phone Numbers from Other Locations*.
  - To the extent that direct dialing of an abbreviated phone number across locations is possible, also enable *Abbreviate Phone Numbers before Dialing*. If dialing through cross-network identifiers is

available, corresponding rules should be configured under PC Dialing. Alternatively, the telephone system can take over the conversion of the phone numbers to be dialed.

- **Arbitrary Phone Number Range:**
  - Internal phone number does not correspond to DDI
  - Internal phone numbers can be assigned multiple times
  - Location phone numbers cannot be grouped into blocks

The internal phone numbers must be converted to fully canonical external phone numbers for arbitrary phone numbers ranges and for phone numbers outside phone number range (DDI/internal). For this, enter the transformations in Internal Rules. In this manner, the fully canonical representation can be sought from the internal phone numbers in the associated databases and, vice versa, the fully canonical phone numbers can be abbreviated before dialing the internal extension numbers. The rules necessary for this should be entered under PC Dialing.

6.2.9.1   Dialing rules

The dialing rules influence the formatting of phone numbers when dialing from a PC.

The phone number is formatted in this order:

105. **Formatting**
     All characters apart from + * # 0 1 2 3 4 5 6 7 8 9 a b c d e f g h i j k l m n o p q r s t u v w x y z are removed. All letters are turned into capitals.
106. **Vanity phone number recognition**
     If the number contains one of the configured vanity numbers and if the letters following it are valid according to the ITU E.161 rules the number is first converted into dialable digits.
107. **Further formatting**
     All digits apart from + * # 0 1 2 3 4 5 6 7 8 9 are removed.
108. **Recognition of specific numbers**
     A decision is made based on specialnumbers.xml as to whether it is an special number (normally emergency numbers). If the number is stored in the xml file it is dialed externally without further formatting.
109. **Recognition of specific external numbers**
     The decision will be made based on the rules for External Phone Numbers about whether an external phone number is involved or not. If an external phone number is detected, it will be dialed externally without additional formatting.
110. **Recognition of internal numbers**
     A decision is made by means of the internal numbers as to whether it is an internal number in the system. If an internal number is recognized it is dialed without further formatting.
111. **Phone number standardisation**
     The phone number will be converted to the international numbering plan.
112. **Transfer of Project Settings**
     If dialing has been initiated in connection with a Project Identifier to be dialed through the telephone system, it will now be applied to the phone number to be dialed.
113. **Transformation of external phone numbers into internal numbers**
     If you have configured a system phone number (system line) a check is made as to whether the phone number is an internal number. If an internal number is recognized the number is shortened.
114. **Using the PC dialing rules**
     The phone number runs through the special rules for PC dialing.
115. **Abbreviation of long Phone Numbers from Other Locations**
     To the extent that the Location Networking has been configured so internationally formatted phone numbers from other locations will be abbreviated to their DDI phone numbers, the phone number will now be abbreviated accordingly
116. **Transformation into a dialable number**
     The phone number is reformatted according to the rules of the configured country in a dialable phone number. The dialing rules of countries are saved in the Configuration file *countries.xml*.

117. **Using external dialing codes**
The appropriate external dialing code(s) is/are added if the number has not been identified as internal yet.

118. **Using the PC final dialing rules**
The PC final dialing rules are applied directly before the phone number is sent to the phone system.

119. **Dialing the number**
The number is sent to the phone system.

➡ Dialing Phone Numbers directly without using Dialing Rules
Prefixing the phone number with an exclamation point **!** will avoid the use of dialing rules. The phone number will then only be transferred directly to the telephone system driver without any formatting.

4

6.2.9.2 *Phone number formatting*

A phone number which is sent from the phone system to the PC has to be formatted accordingly before further processing. The ProCall Business always uses Super-canonical phone numbers.

The phone number is formatted in this order:

120. **Formatting**
All digits apart from + * # 0 1 2 3 4 5 6 7 8 9 are removed.

121. **Application of the formatting rules**
The rules of the Formatting rules are applied. For further processing, the modified (if necessary) phone number is used.

122. **Removal of the external dialing code**
External dialing codes are removed if present. If an external dialing code is found the phone number is treated as an external number.

123. **Recognition of internal numbers**
Provided that no dialing prefix was removed, it is decided by the length and rules for internal phone numbers whether it is an internal phone number.
- Detection of Special External Phone Numbers, when the phone number is external
- Phone numbers in the DDI Phone Number Range, when the phone number is internal
- Detection of Special Internal Phone Numbers, when the phone number is internal (the phone number may have been modified)
- Detection of Phone Numbers from Other Locations, when the phone number is internal (phone number will be given the appropriate long distance dialing codes).
- If the length of the phone number corresponds to the specifications for an Internal Phone Number, when the phone number is internal
- Phone number is external

124. **Removal of call-by-call dialing codes (only outgoing phone numbers)**
Existing CallbyCall prefixes are removed for outgoing phone calls. The used prefixes are saved in a Configuration file *providers.xml*.

125. **Standardization of the number**
The phone number is now converted in a super-canonical phone number.

6.2.9.3 *External rules*

External phone numbers:
If a telephone system is used, a difference must be made between internal and external phone numbers. Normally, internal phone numbers are recognized based on the extension range and the length of an internal phone number that has been configured for the telephone system. Deviating from this, it may be necessary to

classify certain numbers that would normally be understood as internal phone numbers as external phone numbers.

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. Subsequently, the phone numbers will not be formatted further, but should however be transferred in international format. The configured rules will be processed from top to bottom, until a match has been found.

Check:
The rules can be checked immediately. Enter the corresponding expression in the Phone Number field. If the phone number was detected and how it has been implemented can be seen in the output row. The rule used for recognizing and formatting will be highlighted.

➡ Specific Examples for the Use of Special External Rules:

- ▪ Detection of external phone numbers that would normally be understood as internal phone numbers (emergency numbers that are within the internal phone number range, but have not been assigned an extension (110, 112 and 911).

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

6.2.10 Formatting rules

You can change and individually format phone numbers with special rules. This can be done using Search/Replace or Regular expressions. Besides the formatting rules, phone numbers can also be changed internally/externally via those rules. Depending on whether the phone number has been registered by the telephone system or sent for dialing to the telephone system, the sequence of processing the rules will be changed. Additional information about the sequence in which the rules will be applied are described in the sections Phone Number Formatting and Dialing Rules.

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. The configured rules will be processed from top to bottom until the first match has been found.

Formatting Phone Numbers that have been registered by the Telephone System
Note the order of the Phone number formatting.

- ▪ **Incoming**
  Phone numbers for incoming calls which are reported to the PC by the phone system are formatted with these rules.
  These phone numbers come directly from the phone system as dialable digits. They consist exclusively of digits and also * and #.
  The phone number may include an external dialing code and, optionally, be an international, national, local or internal phone number.
- ▪ **Outgoing**
  Numbers for outgoing calls which are reported to the PC by the phone system are formatted with these rules.
  These phone numbers come directly from the phone system as dialable digits. They consist exclusively of digits and also * and #.

The phone number may include an external dialing code and, optionally, be an international, national, local or internal phone number.

Formatting Phone Numbers before They are transferred to the Telephone System for Dialing:
The sequence in which phone numbers will be adjusted for Dialing has to be observed.

- **PC dialing**
  Phone numbers for outgoing calls which are to be dialed.
  These rules will be applied after the phone number has been transferred in International Format.
  At networked locations, this list will show generated expressions, given a corresponding configuration in the Advanced Location Settings, in order to convert long phone numbers from other locations into DDI phone numbers.
- **PC dialing final**
  Phone numbers for outgoing calls which are to be dialed.
  These rules are applied directly before the phone number is sent to the phone system.
  The phone has already been formatted for dialing (with the External Dialing Code).

➡ Specific Examples for Formatting Phone Numbers:

- Removing cross-network identifiers for registered phone numbers.
- Setting the cross-network identifier when a call should not go through the external telecommunications provider but rather through the internal location network.
- Replacing phone numbers when they should not be visible for other users at the application layer level.

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

6.2.10.1 Internal rules

Internal phone numbers
If a telephone system is used, a difference must be made between internal and external phone numbers. Normally, internal phone numbers are recognized based on the extension range and the length of an internal phone number that has been configured for the Telephone systeme. Deviating from this, it may be necessary to classify certain numbers as internal.

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. Subsequently, the phone numbers will not be formatted further, but should however be transferred in international format. The configured rules will be processed from top to bottom, until a match has been found.

Check:
The rules can be checked immediately. Enter the corresponding expression in the Phone Number field. If the phone number was detected and how it has been implemented can be seen in the output row. The rule used for recognizing and formatting will be highlighted.

➡ Specific Examples for the Use of Special Internal Rules:

- Detection of internal phone numbers not covered by the rules configured in the Telephone System.

- Conversion of internal phone numbers to external, when internal phone numbers and extensions (DDI) are different.
- Detection of internal phone numbers in system groupings with substitution through their representation in international format.

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

6.2.11 Vanity

Letters marked on the phone's keypad makes it possible to apply for numbers whose alphameric conversion corresponds to a certain name or concept. These are phone numbers which can be written as a text. Vanity phone numbers can be used in different areas (0700, 0800, 0180...). For example: 0800HANSMEIER.

Resolve vanity numbers:
Here you can define phone numbers for which you wish to use vanity numbers. Enter the dialing code without the national identifier number, e.g. 700, 800.

6.3   Regular expressions

Regular expressions are patterns with which strings can be searched. It is thus possible to determine whether the string fulfils specific parameters (length, begins with certain numbers, etc.) or to replace certain parts of the string.

Search for
This expression is used on the string. If a match is found, the string is replaced with the *replace with* expression. Hint: The caret (^) key can be found at the upper left of a keyboard with German layout.

A brief overview of the permitted expressions:

Character	Description
^	The beginning of the digit chain. The expression "^0" finds "0" only at the beginning of the phone number.
^	The caret directly after the left bracket ([) has another meaning. It is used to exclude the other characters within the bracket. The term "[^0-8]" permits digits from 0 to 8 only.
$	The dollar character labels the end of the character string. The term "152$" is valid for phone numbers which end with "152" only.
|	The slash allows both digits each side of it. The expression "8|9" allows "8 or "9".
.	The dot (.) permits any character (or any digit).
*	The asterisk (*) shows that the characters to its left must be present 0 times or more.

+	The plus sign (+) is similar to the star except that the character to its left must be present at least once.
?	The question mark (?) shows that the character to its left must be present 0 or 1 times.
()	The round bracket marks the expressions which are available in the **replace with** field.
[]	The square bracket marks a number of characters which are permitted at this location.

Replace with
Insofar as a match with the string was found, the string is replaced by the expression entered here. Parts of the found string can be inserted here:
\1 reads out the first expression marked with '()' in the *search for* field.
\2 reads out the second, etc..

Examples:

Effect	Search for	Replace with
Removal of a leading 0	^0(.*)	\1
Replacing a 80 at the beginning of a number (e.g. targeted external dialing code) with 0	^80(.*)	0\1
Removal of a private PIN which is added to the beginning of a phone number as 50xxx	^50[0-9][0-9][0-9](.*)	\1
Suppression of all numbers which are signalled internally (3 digits)	^[0-9][0-9][0-9]$	
Add an external dialing code code (leading 0) for all numbers with more then 3 digits	^([0-9][0-9][0-9].+)	0\1
Add the phone system base number (03012345) to all internal numbers (1 to 3 digits in length)	^([0-9][0-9]?[0-9]?)$	03012345\1
Add your own area code to all numbers which do not start with 0 and are at least 4 digits long (and thus not internal numbers).	^([^0][0-9][0-9][0-9].*)	08151\1

6.3.1   Advanced

Display all messages
estos ProCall Business often uses message windows which you can automatically suppress for future similar cases with the "Do not show again" option. Use this function to re-display all message windows which would otherwise not be opened again.

Reset layout
Click here to reset the current layout of the client to default. This implies restoring the default column widths in the tabs (e.g. journal, planned calls etc.) and a reordering of all contact groups in the monitor and the tabs in the main window. Saved contacts, lines and function keys are preserved.

6.4 Telephony

In the **Telephony** section you can make settings for the behavior of incoming calls.

- Incoming calls
- Call Protection

6.4.1 Incoming calls

Support for Hotline-Services (client function)
The hotline service analyses the number called for incoming calls (multi-entity capability). Analysis of the number called can be used to differentiate between various companies if you have to announce yourself differently depending on the number called (e.g. for a secretarial service).

Activate the option **Display called contact**, so that the contact information is displayed in the Call window of an incoming phone call. What information should be displayed can be defined via a template.

> ➡ If the matching client contact should be opened automatically during the phone call, then it can be specified in the settings Actions.

6.4.2 Outgoing calls

Call preparation
The option **Always prepare phone calls** enables you to set projects projects or set the private marker on the calls. This setting is not needed if projects or the marking of private calls are not used.

Automatic redialing
If an outgoing call does not go through because the line is busy, you can start automatic redialing in the call window. You can define how often the system will try to connect the call and at which intervals. Automatic redialing is terminated as soon as the line is no longer busy or the set number of attempted calls has been reached.

Caller ID suppression
You can activate the suppression of caller ID for outgoing calls if this is supported by your telephone system. You may activate caller ID suppression for all outgoing calls or choose case by case whether you wish to suppress caller ID. If you wish to suppress caller ID in individual cases only, an additional button for activating or deactivating this option appears in the call window. Please keep in mind that this option must be activated before you start the call so that the caller ID can be suppressed.

6.4.3 Planned calls

With planned calls, you can have yourself reminded at a specified time of calls to be made or plan upcoming calls in advance. Planned calls appear in the main window on the tab of the same name.

estos ProCall Business offers you two options for managing planned calls:

estos ProCall Business

- **Administration with estos UCServer (recommended):**
  Planned calls are only saved in estos UCServer and can be added and changed in the estos UCServer editor.
- **Management with Outlook®**
  Planned calls are saved exclusively in Outlook® and can only be saved with the Outlook® editor. Please note that the possibilities for subsequent alterations to the phone number and the linked contact are limited as only Outlook® contacts can be subsequently linked.

6.4.4 Projects

estos ProCall Business helps the user assign calls to previously defined projects. This feature is also available from the Journal as well as the telephone system itself. The project identifier should be selected from the server through the system as would be appropriate for the project settings. Making private calls through so-called calling card providers is the exception to this. If a call is marked as private, the call through the telephone system can be configured using the identifying numbers.

If the **Mark private calls** option is activated a call can be marked, for example, as private in the call window.

🔒 To prevent others seeing private numbers or callers they can be marked as private. Any call information is not visible to others in the journal.
Prerequisite: estos UCServer is set to not save phone numbers. See also Telephone Journal in the estos UCServer help file.

➡ If private conversations are not allowed in the company, having the administrator deactivate this option in estos UCServer or in the group policies is reasonable.

Use projects and code numbers
In estos ProCall Business, projects are predominantly configured for the journal. In addition, specifics PINs and calling card providers can be defined for private conversations. If the project has been defined as a private call then the PIN will be used for the call and it will not logged in the journal.

The following rules apply:

Character	Deployment
0-9 * #	Digits which are dialed normally
C	Here you wait for the remote station to accept the call.
e, E	Place-holder for entering a PIN. With E, the number of digits for entry is not important. With e, the number of digits is defined by the number of letters (eee for three digits).
u, U	Space for the input of a user ID. With 'U' the number of digits input is not important. With 'u' the number of digits is defined over the number of the letters ('uuu' for three digits).
p, P	Dialing pause: 'p' for 0.5 seconds, 'P' for 1 second.
N	Space for the number to be chosen. If the space is not set, the number is automatically

	transferred to the end.
J	Defines, if available, that the user login and pin number entered by the user is noted in the journal.
X	If available, the phone number should be dialed with an external prefix. If 'X' is absent the phone number is dialed in national format (03012345678).

In the user interface configured projects are visualised centrally and locally with differently coloured Icons:

Projects configured in estos UCServer.

Project for the journal

Project for dialing

Project for dialing and for the journal

Project configured in estos UCServer which is processed as a private call

Projects configured in estos ProCall Business:

Project for the journal

Project configured in P estos ProCall Business which is processed as a private call

6.4.5   Bluetooth

Support for Bluetooth Cell Phones
Cell phones can be connected with the PC using Bluetooth. This connection will make controlling and monitoring of the telephone possible. Furthermore an audio device connected to the PC (e.g. headset) can be used for conversations by cell phone. The telephone must support the Bluetooth Hands-Free Profile. This is also be used with a speaker phone in the car.

Connect New Devices with the PC (Bluetooth pairing)
The cell phone must be connected with the PC (Bluetooth pairing) in order to be able to use it. During pairing, Bluetooth must be active and visible at the cell phone while new phone devices in the Bluetooth configuration of the Windows® Control Panel are being searched. If pairing is successfully completed the new phone device appears listed available in the Bluetooth configuration of estos ProCall Business.

All cell phones that have been connected with the PC can be automatically used. Alternatively, only those telephones that are desired for use can be selected from the list of connected devices. If the cell phone is successfully connected with estos ProCall Business you see at the Presence area of the Main window a green line symbol. If no Bluetooth connection exists the line symbol turns to be grey. If you have more than one line available and you wish to do an outbound call you have to select the related line symbol of the cell phone to be used. Then enter the phone number of the destination party at the search line or select an ActiveContact in the Favorites area and press the symbol for calling.

Phonebook
The Phonebook of the mobile phone/cell phone can be optionally integrated.

Offline journal
If the Bluetooth connection will be interrupted and becomes available at a later moment, calls that have been made in the meantime are synchronized with the journal based on the imported call list.
Please note that no call duration can be determined from the imported entries for the journal.
iPhone® mobile phone via Bluetooth
The transferred content of the imported call log has been changed by the last iOS versions.
The imported call log contains only the most recently calls per subscriber, each for incoming, outgoing or missed calls.

Call Protection
The settings for Call Protection are also valid for cell phones connected via Bluetooth with the estos ProCall Business client.

Enable PC audio devices
If you like to use the PC audio devices for speech conversations via cell phone, the setting "Enable PC audio devices" must be checked (default setting).

Deactivate hands-free system driver
Because of technical restrictions only one hands-free driver can be active at the same time. estos ProCall Business can automatically disable the system driver to enable this functionality.

Configuration of the PC audio devices
The PC audio device can be configured with the Audio/Video Wizard. The Wizard is started automatically during the initial setup procedure. But the Wizard can be started anytime by pressing the Audio/Video symbol at the Presence area of the main window. If you have enabled the checkbox "Enable Hook switch support" ("HID" buttons) in the Wizard, calls via cell phone can be accepted or dropped per PC audio device buttons.

> ➡ Conversations via cell phone, via Audio/VideoChat and via Softphone can be done using the same PC audio device (e.g. headset).

Conversations per Bluetooth and PC audio devices
An active call is being represented by the Call window. In the conversation window near the call control buttons a small menu allows using further features like sending DTMF tones or moving audio from the PC towards the cell phone or back.
If you have paired your cell phone with estos ProCall Business and you establish a call by using your cell phone (e.g. accept or dial a call), audio is active on your cell phone. But if you establish a call by using the PC, the PC audio devices are being used. This is because if you are with your cell phone in the Bluetooth signal range of the PC but not at your desk, audio should be automatically active at your cell phone.

Technical information
You may pair several cell phones with estos ProCall Business at once. Please be aware that one active audio stream via Bluetooth is supported with one of the paired cell phones. Thus if another paired cell phone does calls while the PC audio devices are already in use, you talk on the related cell phone.
PC audio devices are supported using sampling rates between 8 kHz and 96 kHz (8, 16, 22.05, 32, 44.1, 48, 96 kHz). It is recommended to use a headset.

6.4.6   Call Protection
6.4.6.1   Link Call Protection to "Do Not Disturb" presence status

You can link "Call Protection" settings to the "Do Not Disturb" presence status. This requires that the telephone system supports that function for your telephone, or this function must be enabled in UCServer for the Softphone line.

"Do Not Disturb" presence status controls Call Protection
Setting a "Do Not Disturb" presence status activates "Call Protection" for all telephone and softphone lines and also for AudioChat and VideoChat (incl. screen transfer).

Call Protection controls "Do Not Disturb" presence status
Activating "Call Protection" for a line causes your presence status to be automatically set to "Do Not Disturb". "Call Protection" on other lines is not affected by this, nor by the option '"Do Not Disturb" Presence Status Controls Call Protection'.

Apply Call Protection to all communication devices
If you change Call Protection (DND) on your desk telephone, this setting is applied to all telephone and softphone lines and also to AudioChat and VideoChat. If 'Call Protection Controls "Do Not Disturb" Presence Status' is activated as well, presence status is set accordingly.

6.4.6.2   Reject calls when busy

If the telephone system is configured so you can receive a second call (call waiting), a second call that comes into your telephone or softphone is signaled to you during a telephone conversation. In addition, the various communication devices in ProCall (telephone, softphone, audio chat, video chat) work independently of one another. Second calls may therefore occur on just one communication device, or on a set of communication devices. The following settings allow you to control this behavior.

Busy on Busy
If this option is activated, second calls made to the line on which you're making a call are declined with "Busy".

Busy on Busy across multiple devices
If this option is activated, new calls that come in on other lines during a telephone call are declined with "Busy".

> If unconditional call forwarding (forward all calls (both internal and external)) is set for a line, Busy on Busy will not be activated for that line.

6.5   Integration

In **Integration** the calendar sharing is set. This menu item is only available if the connection to Microsoft® Exchange or Office 365 is set up.

- Calendar

6.5.1   Calendar

Appointment dates are transferred from the client to estos UCServer in order to permit estos ProCall Business to display them and pass them on. They are stored temporarily, consulted for creating your own presence and displayed to other users who have the appropriate user rights.

A user has the option of limiting the amount of appointment data which is made available to the system. The following options can be selected:

- **None**
  No data is transferred to the server. This data is then not displayed to other users and the information is not included when determing your own presence status.
- **Public appointments only**
  Only appointments which are marked as public are transferred to the server. They are then available for other users and for determining your presence.
- **Public appointments as well as the status and times of private appointments (default setting)**
  All appointments are transmitted to the server, but for private appointments only the start and end time and the appointment status (busy, absent, etc.) are transmitted. This will show their presence in private appointments according to the appointment status for other users, without giving other users access to any other information (such as the subject).
- **Private and public appointments**
  All appointment information is transferred to the server and is available to other users and can be used to determine your presence status.

6.6   Services

- Mail dispatch
- SMS text dispatch

6.7   Notifications

The estos ProCall Business supports the sending of messages for unanswered calls

The contents of a message can be customized by means of a template. The contents of the email will be opened with the help of a XSL template as an html. See XSL Templates.

Recipient

- **no participant**
  No e-mail notifications for missed phone calls are dispatched.
- **first participants, who have not answered the call**
  The first participant whose phone has rung receives the notification about the missed phone call.
- **last participants, who have not answered the call**
  The last participant whose phone has rung receives the notification about the missed phone call.
- **all participants, who have not answered the call**
  All participants whose phone has rung receive a notification about the unanswered phone call.

➡   The estos ProCall Business supports the detection of parallel connections, group calls, cyclical call distribution and forwarding in the call phase. This makes it possible to avoid duplication of delivery of unanswered calls, even if the call rang on several telephones.

Send e-mails from the client
If you do not have your own mail server, emails can be delivered by the client. However, we recommend having emails sent via the Email-Delivery des estos ProCall Business. You can also use an external mail server. This enables the dispatch of missed phone calls as e-mails, for example, to a mobile phone even if the personal computer is not running.

Send e-mail as well if the call is answered by third party
If this option is enabled an Email is sent to the called party even if the call is accepted by another party (e.g. per pickup).

Use the caller's e-mail address as the sender
If this option is active, the e-mail notification has the caller as a sender. With this option you permit a direct contact with the caller.

> If you use a Groupware solution for absence notifications, the caller receives a message with the absence note you provided. With this the caller is informed when the person can be contacted again or if specified in the absence note they can contact a colleague.

Attach caller contact details to the email as a vCard
Contact information determined through contact search can be automatically attached as vCard to an email. This allows access to all the caller's contact data, even when on the road.

Give Telephony link the following prefix
Enable this option, if a phone number should be formatted as a link when sending notifications of unanswered calls by email. The target will be specified in the hRef attribute of the introductory <a> tag. This target may be standardized with the help of a prefix. The following prefixes are available for pre-selection.

- **tel:** (Preset setting for Android, Blackberry and iOS, for example)
- **phone:**
- **callto:**

Furthermore, you have the option of assigning an individualized prefix (up to 9 characters plus colon). Note: the prefix must be terminated by a **colon**. If you do not want to use prefixes then disable this option. In that case, phone numbers will not be formatted as links in notification messages.

Exceptions

- **With internal calls**
  No notifications are generated for internal calls.
- **Calls with hidden phone number**
  No notifications are generated for calls with hidden numbers.
- **If no contact data could be found**
  No notifications are generated for callers in which contact data couldn't be found.
- **With repeated phone calls on the same day**
  If the caller makes more than one attempt on the same day, no notifications will be sent.
- **For phone calls repeated without user login**
  If calls are made repeatedly and the user has not log into the system, for example, because they are on vacation.
- **If the call rang for less than 2 seconds**
  If the caller rang for less than 2 seconds and you don't return calls from colleagues or customers who accidentally dialed your number.
- **If the calling number has been stored in this list**
  Permit the exclusion of certain extensions or phone numbers from notifications. Such numbers may include, for example, the reception desk.

Use this language
You can set the language in which the e-mails are sent. The languages for which files exist in the *languages* directory are available.

6.8   E-Mail dispatch

estos ProCall Business supports sending email. This transmission feature is used for administrator error notifications and events, as well as for notifying users of unanswered calls.

SMTP server
Host name, or IP address and port number, for the mail server. By default, the port number will either be 25 (SMTP), 465 (SMTPS) and 587 (SUBMISSION). The TLS encryption will be used (except on port 25) if supported by the mailserver.

Login name (optional)
User name for the SMTP connection (SMTP AUTH)

Password (optional)
Password for the SMTP connection (SMTP AUTH)

Sender's e-mail address
The sender's e-mail address.

Recipient's e-mail address
The administrator's e-mail address for the delivery of error messages.
You may enter multiple adresses separated by a semi-colon.

Allow e-mails with UTF-8 (UNICODE) contents
Allows the server to send e-mails in UTF 8 code. If you deactivate this option, e-mails can send only characters known in the ISO Latin code page of the operating system.

Force TLS
Activates forced TLS encryption. If the server does not provide any encryption, transmission will fail.

Validate...
A test message will be sent, which may take a few minutes. A pop-up dialog will then appear, which will report on the success or failure (including potential error message) of the test.

6.9   SMS dispatch

estos ProCall Business can offer SMS dispatch using several providers. To use these services, you must be registered with one of the providers listed who will invoice you for this service.
Fees may vary depending on the provider. With some providers you have to have a static IP in order to use the service. Simply compare the various providers and pick out the most favourable one for you.

Configuration

- Select one of the SMS providers listed.
- Enter the data specified by the provider into the field user name and password.
- Various providers allow the use of gateways to take advantage of certain features. A short text describes the individual gateways and their features.
- Depending on the provider, you can also include the return address with the query. If this option is offered by the provider, you can choose between three different ways of defining the return address. If you choose to use the mobile phone No. configured in the user profile, only those users having a mobile phone number may use the SMS function.
- Sending a test SMS permits you to test the configuration.

➡ In principle, every service provider can be connected if it has a HTTP GET or POST interface. For this the configuration file has to be adapted accordingly in the installation list *config\smsprovider.xml*. The template can be found under *config\default\smsprovider.xml*.

6.10 XSL templates

The estos ProCall Business uses XSL Templates (short: XSLT) for the display of XML data as html sites. The XSL Template files are in the *Templates* or *Templates/default* directory.

Template	Deployment
unanswered.xslt	E-mail notification of unanswered or forwarded phone calls. View XSL templates for e-mail notification

XSLT processor
estos ProCall Business provides the data as XML files. These XML files are processed into an HTML page with the help of an XSL template and an XSLT processor. Either Sablotron or the Microsoft® XML Parser are used as an XSLT processor.

Development of own templates
You can develop and use your own templates. You should familiarise yourself with XSLT syntax for this. You can find help on the subject at SelfHTML or the Microsoft® MSDN pages.
If you wish to use templates you have developed yourself these should be stored in the *config* directory. Your changes will then not be lost if an product update is installed.

6.11 XSLT for e-mail notification

The *unanswered.xslt* file is used for e-mail notification of unanswered or forwarded calls.

The XML files on which the template is used are created by the ProCall Business. File *sample_unanswered.xml* contains example files for an unanswered call. File *sample_redirected.xml* contains example files for a forwarded call. The files are to be found in the *templates/default* directory.

You can use the *msxlt.exe* program supplied to apply an XSLT to an XML file. Open a command line in the installation directory:

```
msxsl.exe templates\default\sample_unanswered.xml
templates\default\unanswered.xslt -o unanswered.htm
```

If the logLevel is set under Events on debug, a XML file is provided in the list *logs* for every unanswered phone call. You can use this for the development of your own XSL templates.

6.12 Configuration file location

Location configuration
The configuration of the locations is always stored in an *xml* file. The file is in *config\locations.xml*.

Country dialing rules
The dialing rule table contains the country dialing rules. These are stored in the *countries.xml* file. It contains the names of the countries and the appropriate dialing rules for local, national and international calls.

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<countries xmlns="http://www.w3.org/2001/XMLSchema.xsd">
<country ID="49">
 <countryCode>49</countryCode>
 <name>Germany</name>
```

```
<SameAreaRule>G</SameAreaRule>
<LongDistanceRule>0FG</LongDistanceRule>
<InternationalRule>00EFG</InternationalRule>
</country>
</countries>
```

Icon	Meaning
E	Country code
F	Area code
G	Local number
I	Optional dialing code
N	Optional long distance provider

Call-by-call country dialing codes

The *providers.xml*l file contains the known call-by-call dialing codes for individual countries.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<providers xmlns="http://www.w3.org/2001/XMLSchema.xsd">
<provider ID="10???" countryID="41">
<name>General</name>
</provider>
<provider ID="10703" countryID="41">
<name>Smartphone</name>
</provider>
<provider ID="01090" countryID="49">
<name>O2</name>
</provider>
</providers>
```

Day	Meaning
countryID	ID of the country in countries.xml
ID	Provider dialing prefix (*?* is a place-holder for any digit)

Dialing codes and place names

The *cities.xml* file contains the known place names for the country dialing codes.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<cities xmlns="http://www.w3.org/2001/XMLSchema.xsd">
<city ID="+1201" countryID="1">
<name>New Jersey</name>
</city>
```

```
<city ID="+4989" countryID="49">
<name>München</name>
</city>
</cities>
```

Day	Meaning
countryID	ID of the country in *countries.xml*
ID	Area code

Special phone numbers

The *specialnumbers.xml* file contains the known country special phone numbers. These are numbers which are not internationally dialable, e.g. emergency or information numbers. No dialing code is added to these numbers during formatting.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<specialnumbers xmlns="http://www.w3.org/2001/XMLSchema.xsd">
<specialnumber ID="110" countryID="49">
<name>Notruf</name>
</specialnumber>
</specialnumbers>
```

Day	Meaning
countryID	ID of the country in countries.xml
ID	Phone number

6.12.1.1   Telephone number formats

Supercanonical number

A phone number format which allows the unique international identification of the participant. The estos UCServer and estos ProCall exclusively use the super-canonical phone number format for all phone numbers. For the display the simplified number is sometimes used (if available). Phone calls are carried out with the shortened phone number.
Supercanonical phone numbers always begin with a + and have the following format: **+Country City Number**
But no spaces are used. e.g. +49301234567
The number should only contain digits and +.

Service numbers

are special public phone numbers which cannot be given in international number format. These are for example emergency numbers (110) or directory enquiries (118xx). In order to be able to dial these numbers from a PC they must either be longer than the internal phone numbers or configured as external rules. these numbers are specified directly as dialable numbers:

DDI Phone number

Direct Dialling In phone number. External phone number of a participant in the system. This phone number can be displayed in its short form as well as in the international form bconsisting of country, dialing code and DDI. DDI numbers will be shown in short form for the same location, the system uses the international form internally.

Phone number
No spaces are used. Example: 11833

Dialable phone numbers
are always kept in the format required by the phone system in order to reach the subscriber. The number is formatted according to the rules in estos UCServer.
Examples:
Phone number internal extension number
Phone number external dialing code Number of subscriber 12345 in the local area network
External dialing code Country Area code Phone number Number of a subscriber in a different country
The above examples apply for Germany and depend to a large extent on the regions. You can see which dialing rules apply for your location in the location settings.

Phone numbers for display
are used by estos ProCall insofar as this form consisting of the country code and the area code can be determined.
+Country (area code) number
Example:
+49 (30) 123456 Phone number of subscriber 123456 in Berlin, Germany

6.12.2 Audio/Video Wizard

With the **initial startup** of the estos ProCall Business the user can decide if Audio and Video devices are to be used (for VideoChat and Audio applications), if Audio devices only are to be used (for AudioChat, Softphone, Bluetooth) or if no devices are to be used (Audio/Video off). The selected configuration can be changed later anytime by pressing the AV device item at the Presence area. If an Audio or Video device is configured to be used an Audio/Video Wizard starts.

During **normal operation** the Audio/Video Wizard opens automatically if the device configured for Audio/VideoChat is removed and if another device could be selected. If another device is configured the new one is further on used but the old one stays known. Thus, the previous settings remain known for laptops with docking stations and will be corresponding set in the event of changes to the docking state without intervention.

- **Audio configuration**
  With the Audio Wizard the microphone and the speaker devices can be configured to be used with Audio/VideoChat. Pressing the "Devices" button opens the Windows® sound devices e.g. for configuring the Windows® standard devices or just for review. While the Wizard is open devices may be plugged in or removed. The list updates accordingly.
  The use of USB headsets or Bluetooth / DECT headsets with USB dongle is recommended (see below the list of supported and tested devices). Otherwise the device control could not work or the presence (e.g. connected, on / off) of the device could not be recognized.
  When using a Bluetooth headset directly coupled with the PC, the microphone and speaker devices should be set with the name "Hands Free AG Audio" in the device name. Bluetooth headsets also offer a speaker device with the name "Stereo" in the device name. This is only intended for music playback, because it is muted by the PC when "Hands Free AG Audio" devices are activated while having calls. If the connection status of a directly coupled Bluetooth headset changes, the device names are updated accordingly on the audio wizard. In some cases the microphone speech quality is improved when the "device echo cancellation" is deactivated (see below). It is recommended not to pair more than one Bluetooth audio device.

6.12.2.1 *Device echo canceller*

Most audio devices offer hardware echo cancellation with high quality (default on). If echo cancellation on the device is deactivated or not available, software echo cancellation (based on WebRTC) is used automatically. If hardware based echo cancellation is active and strange noises or unwanted blanking effects are heard from the other party (e.g., when both are speaking), the behavior may improve if the device echo canceller is disabled.

6.12.2.2 *Device automatic gain control*

Some audio devices offer a hardware-specific automatic gain control "AGC". If AGC is deactivated or not available on the device, a software AGD (WebRTC based) is automatically used. If the hardware-specific AGC interferes, it can be disabled here (Default setting on).

6.12.2.3 *Noice cancellation*

Sometimes the microphone is near a noise source, e.g. a built-in laptop microphone, air conditioner or fan is running. The voice quality can increase if noise reduction is activated in such environments (default setting off).

6.12.2.4 *Call control via audio device buttons*

If the selected device supports call control with device buttons (Human Interface Device "HID" buttons, e.g. for accepting or dropping calls) a checkbox "Enable Hook switch support" is offered (otherwise disabled grey). If the option is checked Audio/VideoChats can be accepted or dropped per device button. The list of supported HID devices can be found below. For example incoming Audio/Video chats are accepted and ended by the corresponding press of a button on the headset. Several phone calls can also be handled simultaneously. For example, if there is already a conversation, additional callers can be accepted by pressing a button. The existing conversation will be placed on hold.

Some devices (for example with a hands-free function) have separate buttons for accepting and ending calls. You can refuse a call with the End call button or accept a call with the Accept button. If the device offers a swap calls function, pressing the Answer button allows users to change between conversations. If the microphone was switched to Mute during a call, muting will be suspended when switching to another call. The list of supported audio devices with control options is at the bottom of this page.

In the case of the use of Plantronics headsets, please note that the "Plantronics Hub" software must be installed (for details, see below under Plantronics devices).

> ➡ The test button offers a simple way to verify that your current device configuration is working with the software. After pressing the microphone test button a LED bar lits according to your speech for some seconds. After pressing the playback test button a sound is played for some seconds to the selected speaker device. Pressing the button again while the test runs cancels the test.

- **Video settings**
  With the Video Wizard the camera device can be configured to be used with VideoChat. The actually selected camera starts immediately and a test picture is shown. This helps identifying the selected camera device and the camera can be adjusted before a VideoChat starts the first time.

If the selected camera device supports to be remote controlled per software the option "Enable remote control of the local camera" checkbox becomes enabled (otherwise disabled grey). If checked the local user can move the remote camera. The camera can be turned to the left (arrow key left), to the right (arrow key right), upwards (arrow key up) and downwards (arrow key down). Further it is possible to zoom-in (key "-") and to zoom-out (key "+"). The controlling user may also move the remote camera by using the mouse in the main Video picture with the related overlay buttons (see also Conversation window). The list of supported devices can be found below.

6.12.2.5 Audio/video hardware with control option

6.12.2.5.1 Logitech®:

Logitech® Hardware	Call control	Mute	LED	Camera control
USB Headset H570e Mono	yes	yes	yes	n/a
USB Headset H570e Stereo	yes	yes	yes	n/a
USB Headset H650e Mono	yes	yes	yes	n/a
USB Headset H650e Stereo	yes	yes	yes	n/a
USB DECT Headset H820e Mono	yes	yes	yes	n/a
USB DECT Headset H820e Stereo	yes	yes	yes	n/a
USB B530	yes	yes	no	n/a
USB Speakerphone P710e	yes, including swap calls	yes	yes	n/a
USB Camera BCC950	yes	yes	yes	yes
ConferenceCam CC3000e	yes, including swap calls	yes	yes	yes

6.12.2.5.2 Plantronics:

Calls can be controlled by Plantronics devices if the "Plantronics Hub" headset software was installed on the computer. This software comes provided on CD or can be downloaded from the manufacturer's web site. If an old version of "Plantronics Spokes" is installed, the current "Plantronics Hub" software must be installed. Use the Plantronics Hub software to adjust the behavior of Plantronics headsets. For example, the smart sensor can be set (if available), which accepts calls when the headset is donned and end calls when removed. Moreover, the automatic muting of the smart sensor can be adjusted there, which can be helpful in some situations, but also undesirable. The software can be opened via a Headset icon in the Windows® System-Tray (use the mouse on the icons of the taskbar). If a Bluetooth USB dongle was supplied with the headset, it should be used on the PC as otherwise the device controller may not function, for example.

Plantronics Hardware	Call control	Mute	LED	Sensor	Ringer

Blackwire C320	yes	yes	yes	no	no
Blackwire C325	yes	yes	yes	no	no
Blackwire C720 (USB)	yes	yes	yes	yes	no
Blackwire C720-M (USB)	yes	yes	yes	yes	no
Savi W440A (D100)	yes	yes	yes	no	yes
Savi 7xx	yes	yes	yes	no	yes
Voyager 5200 UC (BT600)	yes	yes	yes	yes	yes
Voyager Focus UC (BT600)	yes	yes	yes	yes	yes
Voyager Legend UC (BT300)	yes	yes	yes	yes	yes
Calisto 620 (BT300C)	yes	yes	yes	no	no
Encore Pro HW301N/A-DA45/A	yes	yes	only mute LED	no	no

Smart Sensor is a name of Plantronic for call control functionality (while putting on = accept call; while putting down = end call)
Intrusion Ringer describes a headset's own ringing sound for incoming calls.

6.12.2.5.3   Sennheiser:

The following headsets from the manufacturer have been successfully tested and are suitable for Call Control, other models from the manufacturer are available with Call Control.

Hardware	Call control
Circle SC 260 USB CTRL	yes
Century SC 630 USB CTRL	yes
DW Office	yes
DW Pro 1	yes
Presence UC	yes

6.12.2.5.4   Jabra™:

The following headsets from the manufacturer have been successfully tested and are suitable for Call Control, other models from the manufacturer are available with Call Control.

Hardware	Call control
Jabra™ Engage 75	yes
Jabra™ Evolve2 65	yes
Jabra Pro™ 9460 EMEA	yes
Jabra Evolve™ 65 UC Stereo	yes
Jabra™ BIZ 2400 II Mono USB	yes
Jabra™ SPEAK 510 UC	yes
Jabra™ SPEAK 710	yes
Jabra™ SPEAK 810	yes

6.12.2.5.5   Gigaset:

Hardware	Call control	Mute	LED
Gigaset ION	yes, including hold, swap calls and refuse calls	yes	yes

6.12.2.5.6   Yealink:

The following headsets from the manufacturer have been successfully tested and are suitable for Call Control, other models from the manufacturer are available with Call Control.

Hardware	Call control	Mute	LED
Yealink UH36	yes	yes	yes

6.12.2.5.7   Polycom®:

Other hardware	Call control	Mute	LED
Polycom® CX100	yes, including swap calls	yes	yes

6.12.2.6   Technical requirements for audio devices

The audio devices for softphones and audio / video chat are supported with sampling rates of 8 kHz ... 96 kHz, mono / stereo, in 16/24 bit PCM format. All devices in the system should be set in this ranges.

7   Info about estos ProCall Business

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For product updates visit https://www.estos.de/

Frequently asked questions and answers and also support are available at https://support.estos.de

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