Powering connections

Connect Client User Guide

October 06, 2020

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Preface

This preface provides information about the objectives, organization, and conventions used in the *User Guide*.

Objectives of this Book

This guide explains how to install, configure, administer, and maintain the Connect client.

Organization

This guide includes the following sections:

Table 1: User Guide Contents

Chapter	Description
Chapter 1, Installing the Connect Client	Describes the requirements and procedures to install and launch the Connect client on Windows and Macintosh.
Chapter 2, Using the Connect Client	Describes the procedure to sign in and navigate through Connect client.
Chapter 3, Managing Contacts	Describes the procedures to: ■ Add and delete a contact ■ Create, edit, and delete a contact group
Chapter 4, Managing Availability States	Describes the availability icons and the process to change the availability status.
Chapter 5, Managing Phones	Describes the procedures to assign a desk phone, softphone, and external number to the Connect client.
Chapter 6, Managing Calls	Describes the procedures to manage and route calls and voicemails.

Table 1: User Guide Contents

Chapter	Description
Chapter 7, Managing Messages	Describes the procedures to: ■ Send a Message and group voicemail ■ Manage Message Notifications
Chapter 8, Integrating with Microsoft Exchange/ Office 365	Describes the procedure to: ■ Integrate Connect client and voicemail with Microsoft Exchange ■ Integrate Outlook contacts and calendar with Connect client
Chapter 9, Managing Conferences	Describes the procedures to: ■ Create, view, record, and cancel conferences. ■ Join a Connect conference from any non-Mitel network without entering any authentication details.
Chapter 10, Sharing Screen	Describes the procedure to share screens.
Chapter 11, Managing Workgroups	Describes the procedure to view workgroup information, filter queued calls, manage agents, and share voicemail.
Appendix A, Operator Features	Describes the features available only for Operators.

Conventions

This guide uses the following advisory notices:

Note

This information is extra, or supplementary.

The following typographical marking conventions are used in this document.

Marking	Meaning
Bold	Names of interface objects, such as buttons and menus.
Blue	Cross references with hyper-links. Click the blue text to go to the indicated section. **Note:** Table of Contents entries are also links, but they are not shown in blue.

CHAPTER

1

Installing the Connect Client

This chapter provides information about how to install the Connect client.

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Overview

The Connect presents a single interface to manage business communications using a desk phone, computer, or mobile phone. With support for Microsoft Windows, macOS, and Collaboration for Web, the Connect client simplifies your day-to-day communications and streamlines your work.

Operating System

For Microsoft Windows:

- Microsoft Windows 8.1
- Microsoft Windows 10

For macOS:

- macOS Mojave 10.14
- macOS Catalina 10.15

For Windows Server:

- Windows Server 2016, 64-bit (Standard)
- Windows Server 2012, 64-bit (Standard)
- Windows Server 2008 SP2 (Standard)

Minimum Hardware Configuration

For Windows:

- Processor (Windows 10): Intel Core™ i3-8100T or 8th Generation Intel® Core™ i3-8145U
- Hard Disk Space: 4GB
- RAM Total: 8GB
- RAM Available: 500 MB (1GB preferred)

For macOS:

- Processor: 3.6GHz quad-core Intel Core i3 or 1.4GHz quad-core Intel Core i5
- Hard Disk Space: 4GB
- RAM Total: 8GB
- RAM Available: 500 MB (1GB preferred)

Supported Servers

- Microsoft Exchange 2010
- Microsoft Exchange 2013
- Microsoft Exchange 2016
- Microsoft Office 365

Supported Browsers

For Microsoft Windows:

- Chrome 81.0.4044.92, 81.0.4044.113
- Firefox 75
- Edge 80.0.361.111, 81.0.416.53

For macOS:

- Chrome 81.0.4044.113
- Firefox 75
- Safari 13.1, 14.0

Supported Environments

- Citrix XenDesktop 7.6 LTSR
- Citrix XenApp 7.6 LTSR
- Citrix XenDesktop 7.15 LTSR
- Citrix XenApp 7.15 LTSR

Note

- Softphone is not supported in the Citrix environment.
- The US cloud users installing the Connect Client application in the Citrix environment also need to publish the Teamwork for desktop along with the Connect Client application to use the cross-launch functionality for individual Direct and Group messages.

Anti-Virus Folders Exclusions

On your computer, you must exclude the below folders and sub-folders from the Virus Checker software before installing the Connect Client.

Connect Client

```
<Drive>:\Users\%User%\AppData\Local\Mitel
<Drive>:\Users\%User%\AppData\Roaming\Mitel
<Drive>:\Program Files (x86)\Mitel
<Drive>:\Program Files (x86)\Mitel Presenter
```

Installing the Connect Client on Windows OS

Note

If you have installed the ST Communicator on your computer, the Connect client installer will uninstall the Communicator before installing the Connect client.

1. Do one of the following:
   - Open the e-mail notification from your Connect administrator that describes how to install the Connect client, and click the link to install the client.
   - In a browser, enter http://<*server IP or FQDN*>/ShoreWareResources/ClientInstall/default.htm, where *FQDN* is a fully qualified domain name. Select Connect client, and click **Next**.

     Note

     This is applicable only for MiVoice Connect users.
2. On the **License Agreement** page, select **I accept the terms in the license agreement**, and click **Next**.
3. Click **Next** to install the client in the default folder, or click **Change** to change the destination folder and continue.
4. On the **Ready to Install the Program** page, click **Install**.
5. On the **InstallShield Wizard** page, click **Finish**.
6. On the Start menu, click the **Connect** icon to launch the client.

Note

The Teamwork for Desktop application is packaged with the Connect Client application, which enables MiCloud Connect users to use Teamwork for Desktop application for messaging.

- The Teamwork for Desktop application gets automatically installed when the user installs the Connect Client application.
- The Connect Client application continues to function normally after the Teamwork for Desktop application is uninstalled. However, the Connect Client users are not able to perform any messaging operation. To get back the message functionality, the user must uninstall and re-install the Connect Client application.

Installing the Connect Client on macOS

1. Do one of the following:
   - Open the e-mail notification from your Connect administrator that describes how to install the Connect client, and click the link to install the client.
   - In a browser, enter http://<*server IP or FQDN*>/ShoreWareResources/ClientInstall/default.htm, where *FQDN* is a fully qualified domain name. Select Connect client, and click **Next**.

     Note
     This is applicable only for MiVoice Connect users.

   - The installation file is downloaded to the default downloads folder on your computer.
2. Double-click the installation file.
3. In the Connect screen, drag the **Connect** icon into the **Applications** folder and double-click the icon to launch the client.

Note
The Teamwork for Desktop application is packaged with the Connect Client application, which enables MiCloud Connect users to use Teamwork for Desktop application for messaging.

After installing Connect Client application, when the user logs in to Connect Client for the first time, the system automatically installs the Teamwork for Desktop application and logs in the user.

Upgrading Connect Client

When a newer version of Connect client is available, you see two kinds of upgrade notifications after you sign in. For more information on signing into Connect Client, refer to Chapter 2, Using the Connect Client on page 13.

- Recommended Upgrade- You can either install or skip the recommended update. However, in order to have the latest fixes and features, Mitel recommends you to upgrade your Connect Client to the latest version. Especially if the Connect client is two or more versions behind the current version.

  Click **Upgrade** in the upgrade notification area to get the latest version of Connect client, or click **Later** to upgrade at a later time.

- Required Upgrade—You cannot access the application without upgrading. You must upgrade the application or exit if you choose not to upgrade.

  Click **Upgrade** in the upgrade notification to get the latest version of Connect client, or click **Exit.**

If the upgrade fails, you receive an error notification. Click **Exit** in the error notification area to exit.

CHAPTER

2

Using the Connect Client

This chapter provides information about how to use the Connect client.

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Signing in to the Connect Client

You sign in to the Connect client from either the Mitel Authentication Portal or the Connect client login interface depending on your Mitel phone system and geographic location.

Signing in from the Mitel Authentication Portal

If you use a MiCloud Connect phone system located in the United States, Australia or Canada, use the following instructions to sign in to the Connect client from the Mitel Authentication Portal. For more detailed instructions, see the Mitel Unified Sign In article.

Note (for users in the Australia region)

This procedure is applicable for users who are using Connect Client version 213.100.4870 or later. Other users must follow the instructions in Signing in from the Connect Client Login Interface

1. To sign in, open the Connect client.
2. When the “Sign in to Mitel” screen appears, enter your Mitel username, which usually defaults to your business email address.

   If your username is associated with more than one Mitel account, a “Multiple accounts located” message is displayed. If this occurs, select the desired Mitel system from the drop-down menu or enter the Account Number/Partner Label for your Mitel account. For some customers, this message appears when you enter your password.
3. Click **Next**.
4. In the next “Sign in to Mitel” screen that appears:
   - If your account utilizes Mitel authentication, enter your Mitel password and click **Next**.
   - If your account utilizes Microsoft Active Directory authentication, use the following steps:
     - Click the **Single Sign On** button.
     - When the Microsoft “Enter password” screen appears, enter your enterprise password and click **Sign in**.
     - If the “Enter code” screen appears (multi-factor authentication is enabled), locate the code provided to you via the security method configured in Active Directory (text message, app message, phone call), enter the code in the Code field, and click **Verify**.

To sign out from Connect client, click the drop-down below the **<username>** on the dashboard, and click **Logout**.

Signing in from the Connect Client Login Interface

If you utilize one of the following Mitel phone systems, use the following instructions to sign in to the Connect client from the Connect client login interface:

- MiCloud Connect phone system located in the United Kingdom
- MiVoice Connect phone system in any location

1. To sign in, open the Connect client.
2. Enter your Mitel username, which usually defaults to your business email address.

   If your Connect client and Microsoft Exchange email addresses are the same, sign in using your email address to integrate the Connect client with Microsoft Exchange. For more information, refer to Chapter 8, Integrating with Microsoft Exchange/Office 365 on page 90.
3. Enter your Mitel password.
4. Click **Show advanced**
   - To login using your Windows credentials, which is available to MiVoice Connect users only, select the **Use Windows Credentials** check box.
5. In the **Server** field, if you are a MiCloud Connect customer, enter the Fully Qualified Domain Name (FQDN) for your geographic region.
   - United Kingdom / Europe: **clientstart.sky.shoretel.eu**
6. To save your credentials, select the **Remember me** check box.

   This option remembers the password only if you exit the application, and not log out. If you log out, you must re-enter the password to sign in.
7. Click the **Login** button to sign into the Connect client.

To sign out from Connect client, click the drop-down below the **<username>** on the dashboard, and click **Logout**.

Depending on how your system is configured, you might need to enter your credentials manually rather than using the **Use Windows Credentials** check box.

Signing in to Teamwork Automatically

The Teamwork for Desktop application is packaged with the Connect client application. This allows MiCloud Connect users to use this application for messaging. Note the following:

- When signing in to the Connect client application, you are automatically signed in to the Teamwork for Desktop application.
- Logging out of the Connect client does not log you out from Teamwork for Desktop, which can be used independently of the Connect client. This means you can log out of the Connect client and continue using Teamwork for Desktop.

- If you log out of Teamwork for Desktop, the Connect client continues to function normally, but messaging functionality is disabled. To restore messaging functionality, log out of the Connect client and then log back in to the Connect client, which automatically signs in to and opens Teamwork for Desktop.

Opening the Connect Client Automatically

You can enable Connect client to open automatically when you start the computer.

1. On the dashboard, click the <username> tab.
2. On the second pane, click .
3. Click **Account** > **Login**.
4. Select **Automatically launch Mitel Connect when starting the computer**.

Changing the Password

Note

If your password is expired, the password expiry notification appears when you sign in. To change the expired password, enter the new password in **New password** and **Retype password** fields, then click **Save & Login**.

1. On the dashboard, click the <**username**> tab.
2. On the second pane, click .
3. Click **Account** > **Login**.
4. To change your password, if you sign in to the Connect client:
   - From the Mitel authentication portal, click the **Change New Password** button, enter the following in the Mitel Change Password screen that appears, and click **Next**:
     - Current password
     - New password
     - Confirm new password
   - From the Connect client login interface, enter the following in the Account > Login screen and click the **Set New Password** button:
     - Current password
     - New password
     - Confirm new password

Navigating through the Connect Client Interface

The Connect client consists of three panes based on the options you select on the dashboard, as shown in Figure 1.

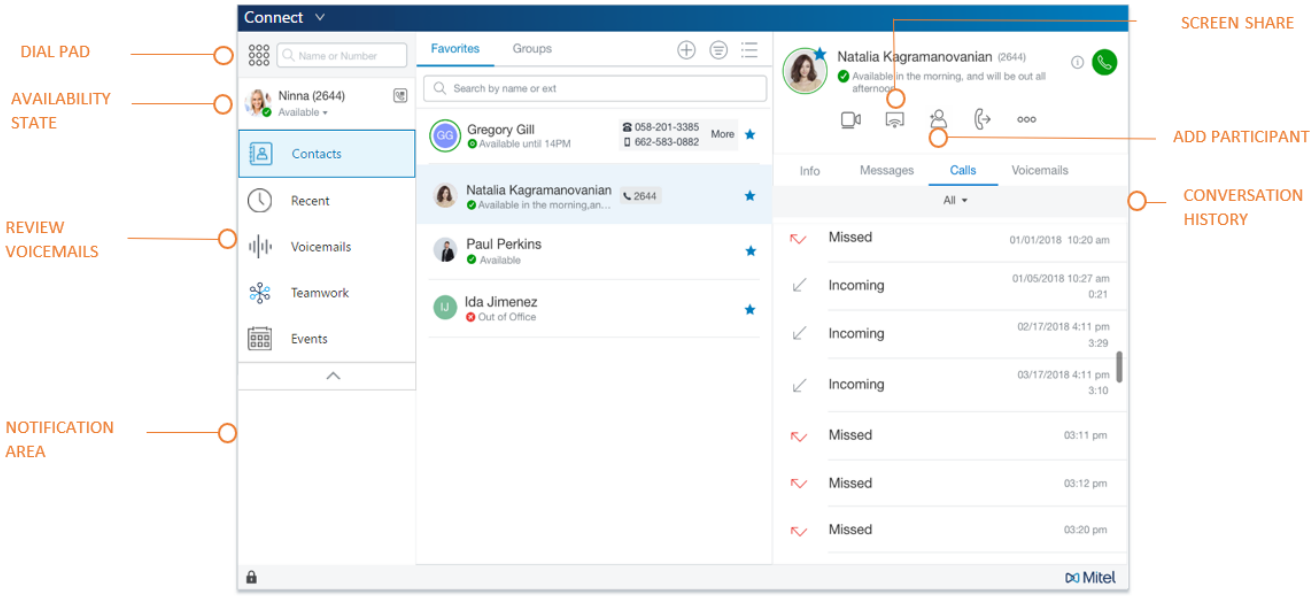

Figure 1: Connect Client

- **Connect menu bar**—Use the **Connect** drop-down on the client menu bar to do the following:
  - View information about the Connect.
  - Check for updates.
  - Open the Settings page (for Windows) or Preferences page (for macOS).
  - Show or edit the toolbar. This is available to only MiVoice Connect users.
  - Set the Connect client to be on top while navigating through other applications. For macOS, this option is available in the **Window** tab on the Mac menu bar.
  - Navigate to the Mitel support page. For macOS, this option is available in the **Help** tab on the Mac menu bar. This is available to only MiCloud Connect users.

- Access the user guide and training videos. For macOS, this option is available in the **Help** tab on the Mac menu bar.
- Send log files to the Mitel Support. For macOS, this option is available in the **Help** tab on the Mac menu bar.
- Exit the Connect client.

- **Dial Pad**—Use the dial pad to dial a phone number.
- **Quick Dialer Search Bar**—Use the quick dialer search bar to search for a name, number, an email address, or company name.
- **Dashboard**—Dashboard is the default and the main navigation pane:
  - **<username>**—Use the <username> tab to view your profile information. If the Connect client is integrated with Microsoft Exchange, it imports your active directory picture which is associated with the Outlook. For more information about integrating with Microsoft Exchange, refer to Chapter 8, Integrating with Microsoft Exchange/Office 365 on page 90.

Note

LinkedIn is no longer integrated with the Connect client.

  - **Contacts**—Use the Contacts tab to view your contacts, add a new contact, create groups, and add contacts to Favorites or Groups.
  - **Recent**— Use the Recent tab to view your list of incoming calls ( ), outgoing calls ( ), and missed calls ( ). It displays calls in chronological order with the most recent at the top.

    The date, time, and the call duration are displayed for all incoming and outgoing calls. For the current day's calls, the time and call duration is displayed. For the previous day's calls, the word "Yesterday" is displayed along with the time and call duration. For earlier calls, the date, time, and the call duration are displayed.

    The consecutive calls made or received from the same number are grouped together, and the number of calls are displayed next to the contact name. The badge on the Recent tab indicates the number of missed calls.

    Click on the user's name or extension number to view the contact card in the third pane.
  - **Voicemails**—Use the Voicemails tab to view your new, saved, and deleted voicemails. The badge on the Voicemails tab indicates the number of unheard voicemail messages.
  - **Teamwork**—Use the **Teamwork** tab to view your chat logs.
    - **MiCloud Connect users:** Click the **Teamwork** tab to open the conversation details in the Teamwork for Desktop application. The orange dot on the Teamwork tab in Connect Client indicates that there are new messages received in Teamwork for Desktop.

In the Connect Client dashboard, the dot that indicates new messages appears only when the Teamwork for Desktop application is in the background. The dot disappears when the Teamwork for Desktop application is brought to the foreground.

- **MiVoice Connect users:** Click the **Messages** Tab to open the conversation details in the third pane. The badge on the Messages tab indicates the number of unread messages**.**

Note

The badge on the Connect client icon on your computer task bar indicates the total number of missed calls and unheard voicemail messages.

- **Events**—Use the Events tab to view your past and upcoming calendar appointments.

  To view your Outlook appointments, synchronize your Connect client with Microsoft Exchange. For more information about Synchronizing with Office 365, refer to Chapter 8, Integrating with Microsoft Exchange/Office 365 on page 90

- **Workgroups**—Use the Workgroups tab to view active workgroup calls for a user and the current workgroup state of the user. To view information about workgroups, you must be a member of a workgroup and have the appropriate license type.

Note

The Workgroup feature is available only for MiVoice Connect users.

You can expand or collapse the dashboard view by clicking the up/down arrow icon. In collapsed view, you can mouse hover on each icon to view the tool tip.

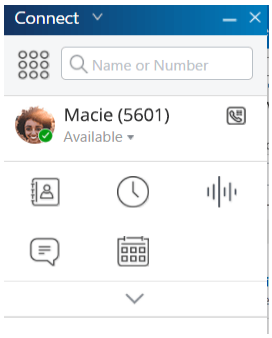

Figure 2: Dashboard Collapsed View

- —This icon indicates that the connection to the Connect server is secure, and the client is sending encrypted data. When this icon is yellow, it indicates that the connection is not secure, and the client is sending either encrypted or unencrypted data. Hover over the icon to view the tool tip.

- **Second Pane**—The second pane displays information based on what you select on the dashboard. You can resize the second pane manually based on your requirement. This setting is retained on the machine you logged in to if you:

  - Close and reopen the second pane
  - Open the third pane
  - Log out of and then log in to the Connect client

Note

If the same user logs in to the Connect client from another machine, the second pane opens with the default settings and all other settings are lost.

- **Third Pane**—The third pane displays information based on what you select on the second pane. For example, if you click a contact on the second pane, the third pane displays the contact card. From the contact card you can access the conversation, calls, and voicemail history along with the information of the contact.
  - **Contact Card**—View and manage the selected contact.
    - **Info**—View the details of the selected contact.
    - **Messages**—View the conversation history of the selected contact and type your messages to the contact.

Note

The **Messages** tab does not appear for MiCloud Connect users. MiCloud Connect users can click the icon that appears on the contact card to send messages to contacts on the Teamwork for Desktop application.

    - **Calls**—View the call history of the selected contact.
    - **Voicemails** —View the voicemail history of the selected contact.

  Click the minimize button at the top-right corner of a pane to close the pane.

Note

The third pane is closed automatically if the user clicks any items on the **Dashboard**. However, if there is any active session on going, that session is not lost and can be viewed on the **Dashboard**.

Pinning Tabs for Quick Access

You can pin a tab to the dashboard for quick access. The pinned tab remains open in the second pane with the dashboard. While navigating through the other tabs, you can view the pinned tab in the second pane after you close the open tabs. You can pin only one tab to the dashboard.

To pin a tab to the dashboard:

1. On the dashboard, select the tab.
2. Click icon. To unpin the tab, click icon.

Connect Client Location

You can set the Connect client to be always on top when navigating through other applications.

For Windows:

1. On the client menu bar, click the **Connect** drop-down.
2. Select **Always On Top**.

For macOS:

1. On the Mac menu bar, click **Window**.
2. Select **Always On Top**.

Adding Shortcuts to the Client Toolbar

Note

This feature is available only for MiVoice Connect users.

From the client toolbar, you can add shortcuts for your most used or preferred operations. The configured buttons function as shortcuts to access operations that require more actions to accomplish the same task. You can use these shortcut buttons to perform a one-click operation for monitoring a call, starting a voice recording, opening the agent queue monitor, activating the softphone, or any other option defined by your organization.

To enable this feature, your administrator must first configure the Client Toolbars programmable buttons in Connect Director for each user.

The list of configured shortcuts is displayed in a client window. To view or hide the client toolbar from the Connect client, click the **Connect** drop-down on the client menu bar and toggle **Show Toolbar**.

To select which shortcut buttons are displayed in your client toolbar:

1. Click **+** icon at the bottom right of the toolbar panel.
2. Select the buttons to add to the toolbar panel.

Note

You can add up to 140 buttons to the client toolbar.

You can drag and drop to re-order the buttons. The keyboard shortcuts to the first 10 buttons are auto-assigned based on your order on the client toolbar. For macOS, use CMD+0-CMD+9, and for Windows, use ALT+0-ALT+9 as keyboard shortcuts. You can hover the mouse over the buttons to view the tool tip. For a Monitor Extension button, you can also view the availability state of the extension that you are monitoring.

Selecting Preferred Language

You can select the language for your desk phone and the Connect client interface.

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click and then click **Language.**

Note

If you have an operating system in Spanish, French, German, or Simplified Chinese, the Connect client uses the same language of the operating system. For other languages, the Connect client uses English as the default language. The Mitel collaboration for Web page always uses the same language as that of the operating system, regardless of the language selected in preferences.

3. From the **Deskphone & voicemail menus** drop-down list, select the desired language for your desk phone.
4. From the **I want to use this application in** drop-down list, select the required language for the Connect client interface.

   You must exit and restart the client for the change to take effect.

Setting a Sound Notification

You can create a sound notification to identify a specific event, such as a voicemail, a call from an internal or external number, a monitored call, a shared call, or to identify a new or an existing conversation.

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Notifications** > **Sounds**.
4. In the **Audio Alerts** field, select **ON**.
5. In the **For event** field, click the drop-down list on the right, and select any of the following:
   - new voicemail
   - call from an internal number
   - call from an external number
   - new message initiating a new conversation
   - new message initiating an existing conversation

Note

The message configuration options for setting sound notifications in the Connect Client application does not appear for MiCloud Connect users.

- monitored call
- shared line call

6. Select **Play alert**, click the drop-down list on the right, and select a required sound from the list.

Note

Other than the default list of sounds, you can also add or remove a new .wav file.

Connect Client Logs

The Connect client creates a log file each time you log in. The logs are used to help Technical Support with debugging problems that may arise during the operation. You can send the log files to your Connect Administrator while opening a troubleshooting ticket.

To send the client log files:

- For Windows:
  1. On the Connect Menu Bar, click the **Connect** drop-down list.
  2. Select **Send Client Logs** and follow the on-screen instructions.
- For macOS:
  1. On the Mac menu bar, click the **Help** tab.
  2. Select **Send Client Logs** and follow the on-screen instructions.

Connect Collaboration web client logs from iOS device

The Connect Web Collaboration client creates a log file each time you log in from your iOS device. The logs provide data that helps Technical Support troubleshoot issues during the sessions. You can download the log file for a session using your iOS device and attach the file to a ticket.

Following are the steps to access and download the log files for a Connect Web Collaboration client session on your iOS device:

1. Launch “**Connect Web Collaboration client**” in Safari on the iOS device.
2. Introduce yourself.
3. On the top left corner of the meeting title, tap and hold the meeting title for 2 seconds.

A pop-up dialog box may display depending on your phone setup stating, “This site is attempting to open a pop-up windows” message with **Allow** and **Block** buttons.

4. Select **Allow** to open a new page and access the logs from the session.
5. Select the **Share** button.
6. Choose **Create PDF**.
7. Click **Done**.
8. Select **Save file to.....** to save the file in the desired location.
9. You can attach the file to an email explaining the issue and send it to Mitel technical support at ITsupport@mitel.com or to a ticket in the Mitel Global IT Support portal at https://itsupport.mitel.com.

Alternate steps if popup dialog box does not populate:

1. Select the **Share** button.
2. Choose **Create PDF.**
3. Click **Done**.
4. Select **Save file to desired location** such as your local drive.
5. Attach the log to your IT ticket or email to Mitel IT support.

Sharing Data with Mitel

The Connect client sends the user interaction data anonymously to Mitel by default. The data is analyzed by technical support for enhancing the Connect client application.

Note

All anonymous data is encrypted and cannot be traced back to the user.

To disable sending user interaction data to Mitel:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Account** > **Access**.
4. Clear the **Yes, I want to help Mitel build better products! Send anonymous data to Mitel** option.

You must exit and restart the Connect client for the change to take effect.

CHAPTER

3

Managing Contacts

This chapter provides information on how to manage your contacts.

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Managing Contacts

The Connect client enables you to organize and manage your contacts.

To view the system directory that shows all the contacts in your organization, click in the **Quick Dialer Search** bar. The contact names with special characters and numbers are displayed first, and followed by names in the alphabetical order by the last name with alpha headers.

To find a contact, type any of the following in the **Quick Dialer Search** bar:

- First Name
- Last Name
- Email address
- Company name
- Extension number
- Double token (single letter and double letter of the contact's name). For example, you can type P R or Pa Ro to search for Patrick Roberts.

Figure 3 describes the process of adding a contact and viewing the contact's information.

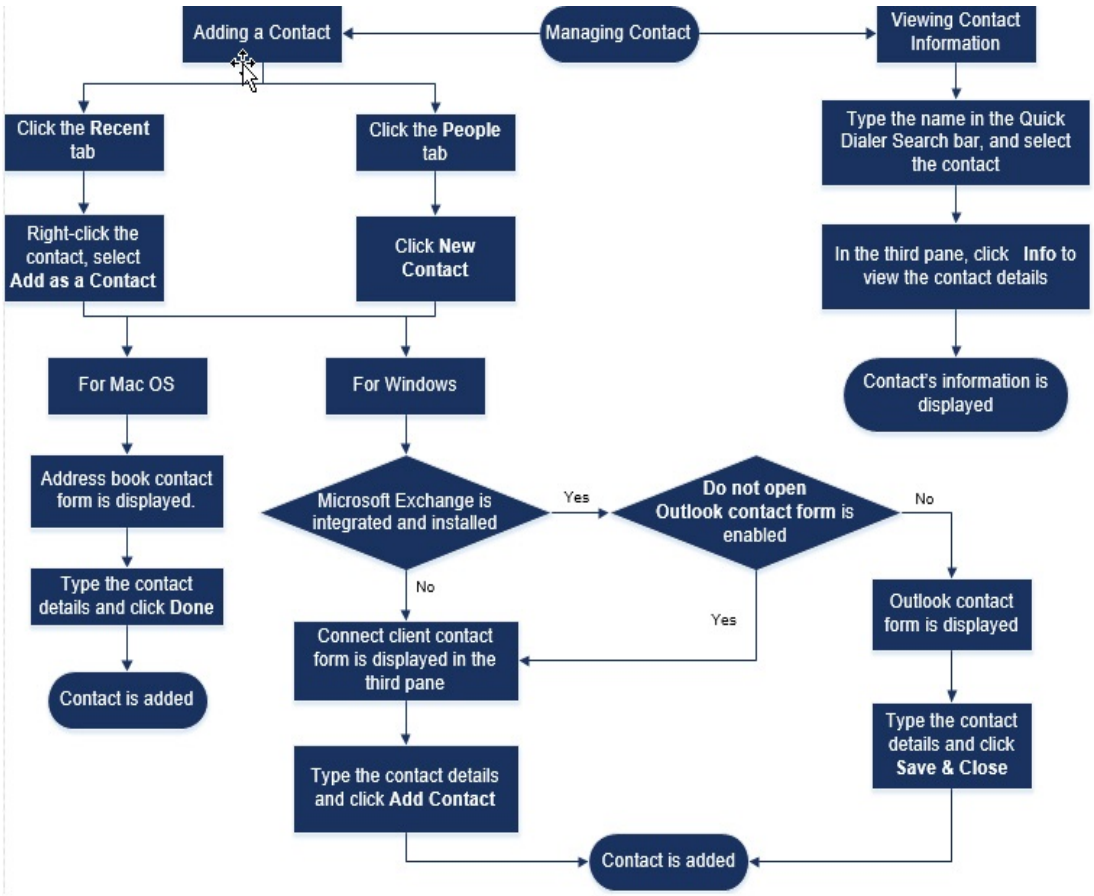

Figure 3: Managing Contacts

Note

The maximum number of contacts you can add in the Connect client is 200 for MiCloud Connect customers and 500 for MiVoice Connect customers.

Adding a Contact on macOS

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact**.
   - Click the **Contacts** tab and click ⊕ at the top right corner of the second pane, and then select **Add Contact**.

     The address book contact form is displayed.

Note

The address book opens only if you have enabled the Connect client in the System Preferences on your Mac.

2. Type the contact details in the required fields.
3. Click **Done**.

You can add an external number to your contact list from the contact card:

1. Type the external number in the **Search** field, and the contact card opens in the third pane.
2. Click ⊕ on the Avatar in the third pane.

Adding a Contact on Windows

You can add a new contact using the Microsoft Outlook contact form and the Connect client contact form.

Note

You can add a new contact through Outlook contact form only if:

- Your Connect administrator has configured the Microsoft Exchange account in Connect Director.
- Microsoft Outlook is installed on your computer.

To add contact using the Microsoft Outlook contact form:

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact**.

- Click the **Contacts** tab and click ⊕ at the top right corner of the second pane, and then select **Add Contact**.

  An Untitled Outlook Contact form is displayed.

2. Type the contact details in the required fields.
3. Click **Save & Close**.

Note

If you have installed the Microsoft Outlook on your computer, the Outlook contact form opens by default when adding a new contact. However, you can set the Connect client to open the Connect contact form instead of Outlook contact form.

To open the Connect contact form instead of Outlook contact form when adding a contact:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙ and then click **Outlook**.
3. Select the **Do not open Outlook when adding contact to Connect** option.

To add a new contact using the Connect contact form:

1. Do one of the following:
   - Click the **Recent** tab, right-click the contact, and select **Add As a Contact**.
   - Click the **Contacts** tab and click ⊕ at the top right corner of the second pane, and then select **Add Contact**.

   The Contact form opens in the third pane.
2. Type the contact details in the required fields.
3. Click **Add Contact.**

Adding an External Contact on Windows

You can add an external contact to your contact list from the Connect Client:

1. Click the **Recent** tab, select the number in the second pane, click ⊕ at the top left corner of the third pane and the **Create Contact** page is displayed.
2. Type the number in the Search field, click ⊕ at the top left corner of the third pane and the **Create Contact** page is displayed.
3. Type the contact details in the required fields.

4. Click **Create.**

Note

You cannot add any external number using Microsoft Outlook contact form.

Viewing Information of a Contact

1. In the **Quick Dialer Search** bar, type the contact name or extension number and select the contact.
   - By default, the system directory search results are displayed.
   - If you have enabled the **Enable searching for contacts in my exchange public contact folders** option, you can view the search results from **Direct Matches** and **Exchange Public Matches**.
     - By default, the Connect client displays the search results from **Direct Matches**.
     - To search for a contact from your Exchange Public folders, click **Exchange Public Matches**. From the drop-down list, select the folder, and the contact.

   The Contact card opens on the third pane.

Note

For more information about the **Enable searching for contacts in my exchange public contact folders** option, see To enable searching for the contact from the Exchange Public Contact folders: on page 95.

2. On the Contact card, click **Info** to view the contact's details.

To see the company name, department name, and phone number of a contact:

- From the **Quick Dialer Search** bar:
  a. Right-click the contact on the second pane.
  b. Select the **Show Company Name**, **Show Department Name**, and **Show Phone Number** options to view or hide the contact information.
- From **Favorites** and **Groups**:
  a. On the second pane, click .
  b. Select the **Company Name**, **Department Name**, and **Phone Number** options to view or hide the contact information.

The phone numbers of the contact are displayed in the order; Extension (), Business or Work (), Mobile (), and Home ( ). If a contact has configured all the four phone numbers on the Connect client, by default, the first two phone numbers in the order get displayed in the second pane.

To view all the phone numbers, click **More**. The Contact card opens on the third pane. Click **Info** where all the phone numbers and email id of the contact are displayed.

Note

The **More** option is displayed only if the contact has configured more than two phone numbers.

Importing the Contact Folders

For macOS, you can import the contact folders from the Mac address book into the Connect client. If the Microsoft Outlook is installed on your computer, the Mac address book synchronizes with the Microsoft Outlook or Office 365 contact folders.

To import the contact folders from the Mac address book:

Note

You must enable the Connect client in the System Preferences on your Mac to import the contacts from the Mac address book.

1. On the dashboard, click the <**username**> tab.
2. On the second pane, click .
3. Click **Contacts/Outlook**.
4. Select **Sync my Mac Contacts** option.
5. Click **+Show contact folders** and select the folders that you want to import into the Connect client.

For Windows, if you have integrated the Connect client with Microsoft Exchange, you can import the contact folders from Microsoft Outlook or Office 365 into the Connect client. For information about importing the contact folders from Microsoft Outlook or Office 365 into the Connect client, refer to Synchronizing the Connect client with Microsoft Outlook or Office 365 Contact Folders on page 94.

Editing an External Contact

1. In the **Quick Dialer Search** bar, type the contact name or the number.
2. From the search results, click the contact name that you want to edit.
3. The contact card opens in the third pane, click **Info** on the contact card.
4. Click **Edit**, and update the fields.
5. Click **Save** to confirm the update.

Deleting a Contact

To delete a contact from Connect client when it is not integrated with Outlook:

1. In the **Quick Dialer Search** bar, type the contact name or extension.
2. Click the name of the contact that you want to delete.
3. Click **Info** on the contact card.
4. Click **Delete**.
5. In the confirmation dialog box, click **Delete**.

Note

You can delete only the external contacts that you have added to the Connect client. However, you cannot delete contacts available through the system directory of your organization.

You can delete the contacts imported from the Outlook all at once using the Connect client interface.

To delete the contacts imported from Outlook:

1. On the dashboard, click **<username>** tab.
2. On the second pane, click and then click **Outlook**.
3. Click **Remove Synced Contacts**.
4. In the confirmation dialog box, click **Remove**.

   All your contacts imported from Outlook are deleted at once. The **Remove Synced Contacts** option is disabled and the **Sync my Outlook contacts** option is cleared.

Deleting an External Contact

1. In the **Quick Dialer Search** bar, type the contact name or number.
2. From the search results, click on the contact name that you want to edit.
3. The contact card opens on the third pane, click **Info** on the contact card.
4. Click **Delete**.
5. In the confirmation dialog box, click **Delete**.

Adding a Contact to your Favorites List

1. In the **Quick Dialer Search** bar, type the contact name or extension.

2. From the search results, click the **Star** icon next to the contact name that you want to mark as favorite.

   Alternatively, you can mark a contact as favorite by clicking the **Star** icon on the Avatar in the third pane.

   You can mark a contact favorite from both Direct Matches and Exchange Public Matches.

To remove the contact from the favorites list, click the **Star** icon next to the contact name or on the Avatar.

Viewing Favorites

1. Click the **Contacts** tab on the dashboard.
2. Click the **Favorites** tab on the second pane to view the list of contacts marked as favorites.

   In Favorites and Groups lists, you can see the contacts in **List** mode and **Compact** mode. On the second pane, click to view in List mode, and click to view in Compact mode.

   - List Mode: The contact's name, extension number, phone number, department name, and availability status are displayed.
   - Compact Mode: The contact's name and availability status are displayed.

Searching Contacts

You can search the contacts added to your Favorites or Group. To search a contact, enter the contact's name, or extension in the **Search** field in the Favorites or Group tab.

The search results open on the second pane displaying the contact's name, availability status, extension number, and phone number.

If the contact is online and has set an additional note to the availability status, the additional note is displayed. If the contact is offline, the availability status is unknown.

For more details about viewing information of a contact, refer to Adding an External Contact on Windows on page 30.

Sorting Contacts

You can sort the contacts in your Favorites and Groups list by last name, first name, availability state, and last contact.

To sort your contacts in Favorites or Groups:

1. On the dashboard, click **Contacts> Favorites**.
2. On the second pane, select **Favorites** or **Groups**.

3. Click and select one of the following:
   - Last Name
   - First Name
   - Availability
   - Last Contact

Viewing Call Stack Information of a Contact

You can view the availability state and call stack information of a contact if the contact is added to your Favorites or Groups list. To view the call stack information, do one of the following:

- Click **Contacts** > **Favorites** or **Groups**. Hover on a contact to view the tool tip.

  Tool tip displays the contact's availability state and call stack information.

- Open the contact card and click at the top right corner of the contact card to view the contact's availability state and call stack information.

  If the contact has included an additional note to the availability status, the additional note will be displayed instead of the default status.

You can answer the Incoming calls, Parked calls, and On Hold calls from the contact's call stack. To answer a call from the call stack of a contact, refer to Exporting Call Data on page 54

Managing Contact Groups

Creating a Contact Group

1. On the dashboard, click **Contacts** > **Groups**.
2. On the second pane, click and select **Add Group**.
3. In the **Group Name** field, type the group name.
4. In the **Group Members** field, do one of the following:
   - Type the contact name and select the contact.
5. In the **Quick Dialer Search** bar, type the contact name or number, and then drag the contact from the search results to the **People** field.

Note

You can use the **More** option to list the complete members for larger numbers.

6. Click **Create** to save the group, or **Discard**.

Reordering the List of Contact Groups

1. Click the **Contacts** tab on the dashboard.
2. Click the **Groups** tab to view all the groups created.
3. Click the group header and drag it to the required position.

Any changes to the order of groups is persistent between the client restarts.

You can hide or view members for a particular group. Click ⌄ on the group header to expand or collapse the group.

Editing or Deleting a Contact Group

1. On the dashboard, click **Contacts** > **Groups**.
2. Click on the group header you want to edit.
3. Click next to the group name.
4. In the **Group Name** field, edit the group name.
5. In the **Group Members** field:
   - To add a contact to the group, type the contact name and select the contact.

     Tip
     Type the contact name or the number in the **Quick Dialer Search** bar, and right-click the contact on the second pane, and select **Add Contact to Group** to add the contact to the required group.

   - To remove a contact from the group, click **x** next to the contact.
   - To reorder the contact names, select a contact, drag the selected contact to the required order.
6. Click **Save** to save your changes, or click **X** at the top-right corner of the third pane, and in the confirmation dialog box, click **Discard** to remove the user changes.

To delete a group, do the following:

1. On the dashboard, click **Contacts** > **Groups**.
2. Click on the group header you want to delete. The group expands in the third pane.
3. Click next to the group name in the third pane, and click **Delete**.
4. In the confirmation dialog box, click **Delete** to confirm the group deletion.

CHAPTER

4

Managing Availability States

This chapter provides information about managing availability states for users and their contacts.

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Setting Alert for Contact's Availability State 39
Changing Availability State 41
Selecting a Predefined Availability State 41
Adding a Note to Availability States 41
Configuring a Custom Availability State 41
Allowing a Contact to Manage your Availability State 42

Understanding Availability States

You can check or verify the availability status of a contact on the Connect client before communicating with that contact. The Connect client automatically updates the availability status of users as they make and receive calls. When integrated with Microsoft Exchange, the Connect client also displays users' meeting status.

You can monitor the availability of up to 500 contacts. This can be configured by your Connect administrator.

The different availability states are described in Table 2.

Table 2: Availability States

Color	State	Predefined/ Customizable	Description
Green	Available	Predefined	The contact is available for a call or IM session.
Yellow	In a Meeting	Predefined	The contact is in a meeting, but you can still reach the contact through an IM session. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing as explained in Playing Envelope Information for Voicemail on page 75.
Red	Out of Office	Predefined	If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 75.
Red	Do Not Disturb	Predefined	The contact is busy and does not wish to be reached. However, you can reach this contact through an IM. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 75.
Red	Vacation	Predefined	If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 75.
Gray	Custom...	Customizable	The contact has a custom status, depending on the configured option. If you dial this contact, the call will be routed to the contact's voicemail inbox or to the number configured using the availability routing, as explained in Playing Envelope Information for Voicemail on page 75.

Table 2: Availability States

Color	State	Predefined/ Customizable	Description
Orange	Ringing	Predefined	When you receive an incoming call, the availability state flickers and changes to orange.
	On the Phone	Predefined	When you answer an incoming call, the availability state changes to orange. When you are already on a call and receive another incoming call, the availability state starts flickering and changes to Ringing.

Setting Alert for Contact's Availability State

If you want to communicate with a contact who is currently not in Available state, you can set the Connect client to notify you when the contact's status changes to Available.

To receive a notification do either of the following:

1. In the **Quick Dialer Search** bar, type the contact name or extension, and select the contact. In **Contact Card**, click ooo and select **Alert When Available**.
2. If the contact is added to your **Favorites** or **Groups** list, right-click the contact in **Favorites** or **Groups** tabs, and select **Alert When Available.**
3. In the **Quick Dialer Search** bar, type the contact name or extension, right-click the contact in second pane, and select **Alert When Available**.

A notification appears on the dashboard alerting you when a contact becomes available.

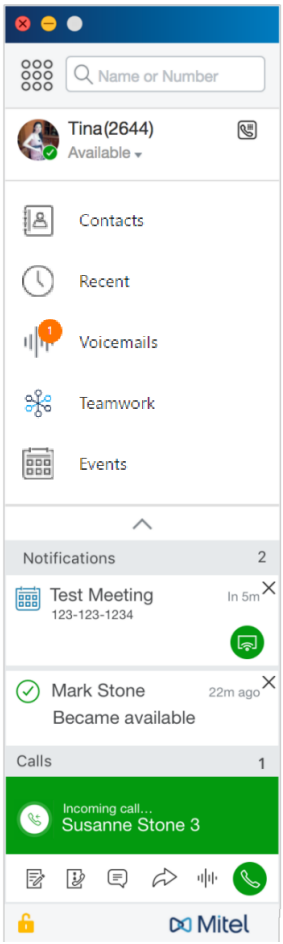

Figure 4: Alert when Available notification

You can set the alert only for the contacts available through the system directory of your organization. However, you cannot set this alert for any external contacts that you have added to the Connect client.

Note

Alerts are disabled when the Connect client restarts or quits.

Changing Availability State

The Connect client automatically updates your availability state when you use the system, but you can select a predefined availability state or configure a custom availability state.

Selecting a Predefined Availability State

1. On the dashboard, click the drop-down menu below the **<username>**.
2. Select one of the following availability states:
   - Available
   - In a meeting
   - Out of office
   - Do not disturb
   - On vacation

   A check mark is displayed next to the current set state.

Adding a Note to Availability States

You can add a custom note to each availability state on Connect client.

To add or edit an availability state note:

1. In the drop-down, hover over the selected availability state, and click .
2. In the **Additional Note** field, enter the description.

   You can enter description up to 50 characters.
3. Click **Done** to save the changes, or **Cancel** to discard.

If you do not want to add or edit the note, click **Back** to go back to the availability state drop-down menu.

Configuring a Custom Availability State

1. On the dashboard, click the drop-down menu below the **<username>**.
2. In the drop-down, click **Custom** and select one of the availability state color:
   - Green - Available
   - Yellow - Busy
   - Red - Not available

Note

The color of the availability state cannot be customized.

3. Enter your custom status. Click **Done** to save changes, or **Cancel** to discard.

   Click **Back** to go back to the availability state drop-down menu.

The custom availability status and color is displayed on the **<username>** tab.

Note

To view your availability state in Microsoft Outlook after integration with the Connect client, ensure that you launch the client before launching Outlook on Windows.

Allowing a Contact to Manage your Availability State

You can configure a contact to manage your availability state on the Connect client.

To manage your availability state, the contact must meet the following requirements:

- The contact must have added you to a contact group.
- The contact must have a Workgroup Supervisor or Operator license type and be configured with a specific class of service in Connect Director.

Note

The Workgroup feature is available only for Connect MiVoice Connect users.

To allow access to a contact to manage your availability states:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Account > Access**.
4. Type in the contact name for whom you want to allow access, and close the page.The contact is configured to change your availability state until you revoke access by removing the contact from the **Access** page.

CHAPTER

5

Managing Phones

This chapter provides information about managing your desk phone, softphone, and external phones.

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Managing your Desk Phone

This section provides information about assigning a desk phone to your Connect client.

Assigning your Desk Phone

1. On the desk phone, press the **Assign** soft key.
2. In the **Extension** field, enter your assigned extension number, and press **Next** or the down key.
3. In the **Voicemail password** field, enter your voicemail password, and press **OK** or the **#** key.
4. Verify the desk phone status in the Connect client as follows:
   a. Launch the Connect client.
   b. Verify the status on the dashboard:
      - If the deskphone is successfully assigned, is displayed on the dashboard next to the **<username>**.
      - If the **Desk Phone** icon is not displayed, then repeat steps 1 to 3.
   c. Verify the desk phone status on the second pane:
      - Click the **<username>** tab to display the second pane.
      - In the **Primary Assignment** tab, verify if the **Desk phone** option is displayed.

Customizing your Desk Phone

Note

When using a Mitel 6900 series IP phone, wallpaper and ringtone must be set on the phone, not in the Connect client.

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click the **Deskphone** tab to display the desk phone options.
   - In the **Wallpaper** field, in the drop-down list, select the preferred wallpaper.
   - In the **Ringtone** field, in the drop-down list, select the preferred ringtone.

Removing the Desk Phone Assignment

1. On the dashboard, click the **<username>** tab.

2. Click the **Primary Assignment** tab.
3. To reset the current extension assignment, click **Go Back To My Desk Phone**.

   The deskphone option is removed from the **Primary Assignment** tab. The corresponding extension number is also unassigned from the desk phone.

Using the Softphone

When you select softphone as your primary assignment, incoming calls are routed to the Connect client. The desk phone functionality is disabled until you assign your desk phone again to the Connect client.

Note

If you are a MiCloud Connect user, then you must have a DID number assigned to your account to use the Softphone feature in the Connect client.

Assigning Softphone

1. On the dashboard, click **<username>**.
2. In the **Primary Assignment** tab, select **softphone**.

   If the Softphone option is not displayed, contact your Connect administrator.
3. Select one of the following from the drop-down list:
   - Default
   - Communications

     Communications device option is available only in Windows.
   - Microphone
   - Headset Microphone

     The **Headset** option is shown in the drop-down list only after you plug a headset into your computer.

After the softphone is successfully assigned, is displayed on the dashboard next to the **<username>**.

Customizing the Softphone

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click the **Softphone** tab to display the softphone options.

If you do not see the Softphone tab, contact your Connect administrator.

4. To switch to a different audio device, in the **Capture audio through** field, click the drop-down list, and select the preferred audio device.

   If required, plug your audio device into the computer's headset port or use the computer's built-in speakers.

5. Select **On startup assign me to my softphone** to handle calls and voicemails on the softphone from the time you first log in to the client.

6. Select **Enable auto gain control** to enable the automatic control.

Note

A variety of Plantronics and Jabra headsets are supported with the Connect client on MiVoice Connect and MiCloud Connect. The following functions are supported:

- Answer and end calls
- Mute and unmute calls
- Hold and resume calls
- Ring indication

The following features are not supported:

- Intercom
- Bridged Call Appearance

For more information, see https://oneview.mitel.com/s/article/What-are-the-supported-headsets-for-Softphone-and-IP-Phones.

Assigning External Phones

Note

The Connect administrator can enable, disable, or configure the external assignment option from Connect Director.

1. On the dashboard, click the **<username>** tab.

2. Select **External Assignment Number**.

3. In the **Add Label** field, enter a name for the number. For example, Home or Mobile.

4. In the **Add Number** field, enter the phone number.

   If you enter the format of the number incorrectly, the **Cannot save this number** pop-up message is displayed.

You cannot use a phone number that is assigned to Connect for iOS or Android.

5. In the **Number of Rings** field, select a number from 1 through 20. By default, the number of rings is set to 3.

6. To choose a method to connect to the external number, click the drop-down list and select one of the following:

   - Automatically connect
   - Press 1 to connect

7. Click **Add.**

   After the external number is successfully assigned, is displayed on the dashboard next to the **<username>**.

   To add a new number, click **Add New Number**.

   To delete a number, select the number from the drop-down list and click **Edit**. In the **Edit Number** field, click **Remove** to delete, or click **Keep Number** to retain it.

If you have more than one external number, you must select one number from the drop-down list to assign to the Connect client.

Note

You can add up to seven external numbers, and assign your extension to any one number.

You can select the number of rings after which you want the calls to be routed to voicemails.

1. On the dashboard, click the <username> tab.

2. On the second pane, click .

3. Click **Call Routing > Availability Routing**.

4. Click **Change** next to the **rings before incoming calls are routed to the voice mail routing** option.

5. Select 6 or more rings from the **rings before forwarding** drop-down list.

6. Click **Save**.

CHAPTER

6

Managing Calls

This chapter provides information about making voice calls and using related features in the Connect client.

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Making a Voice Call

You can make a call from:

- Quick dialer search bar
- Directory
- Recent
- Dial pad

To make a call from the quick dialer search bar or from the system directory:

1. Type the contact details in the quick dialer search bar on the dashboard.

   Enter the first or last name, extension, company name, department name, phone number, or an email address of the person you would like to search for. For more information about searching for a contact, refer to Adding an External Contact on Windows on page 30.

2. Do one of the following:

   - Double-click the contact in the second pane.
   - Click the contact, and click in the third pane, which dials the default number of the user.

   If the user has configured more than one number, to call the user at a particular number, click in the third pane, and select the number.

1. Click the **Recent** tab on the dashboard.
2. Do one of the following:

   - Double-click the contact in the second pane.
   - Click the contact, and click in the third pane.

To make a call from the dial pad:

1. Click on the dashboard.
2. Enter the extension or the mobile number, and press enter.

Answering a Voice Call

The Connect client displays a call notification on the dashboard for every incoming call. If you have enabled the system notification for incoming calls, the Connect client also displays a system notification with the following information:

- Name of the Contact. If the caller is not listed in the system directory of your organization, the name is displayed as Unknown.
- Phone Number
- Dialed Number Identification Service (DNIS) if available
- Huntgroup or Workgroup name, if the caller belongs to any. This is applicable only for MiVoice Connect users.

  To enable the system notification for an incoming call, refer to Managing Incoming Call Notifications on page 53.

To answer an incoming call, do one of the following:

- On the system notification, click **Accept** to answer or **Ignore** to send the call directly to voicemail.

Note

For users with Extension only license, only Accept button is displayed on the system notification.

- On the dashboard, click to answer, and click to directly transfer the call to voicemail.

  To reject the call and respond through IM, click and type the message or select the canned message, and click **Send**. Click to end the active call.
- Use shortcut keys,
  - On Windows, press **Ctrl + A**
  - On macOS, press **Cmd + A**

Note

When there are multiple calls ringing, pressing the shortcut keys answers the first call in the UI stack.

- To answer a call using the Plantronics headset:

Note

You must install the Plantronics hub. If you do not install the Plantronics hub or the hub is down, the headset acts as a normal audio device, and you cannot use the headset buttons to perform call functions. To download and install the Plantronics hub software, refer to the Plantronics website.

  - Set your extension to Softphone. (For more information, see Assigning Softphone on page 45.)
  - Press the call answer button on your headset.

    You can use the call control functions available on your headset. For more information, refer to the Plantronics website.

You can place a voice call on hold and resume when required.

- In the call notification area, click to place the call on hold and click to resume.
- On the contact card, click to place the call on hold and click to resume.

You can send a call note on an active call. For more information about adding a call note, refer to Managing Call Notes and Viewing Routing Slips on page 62.

Managing Incoming Call Notifications

To receive a system notification for an incoming call:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Notifications** > **Popup**.
4. To enable notifications, select the **Show a system notification for an incoming Call** check box.
5. In **Keep notification on screen for** field, select the time from the drop-down list.

Exporting Call Data

Users can export the call history details and the associated call notes by using the 'Export Call Data' feature. To export the call data, do the following:

1. Click the **Recent** tab on the dashboard.
2. Under the **All** tab in the second pane, click .
3. Use the drop-down menu to do the following:
   - **Today** - Export the entire call history with the contacts for the present day.
   - **Last week** - Export the entire call history with the contacts for the last seven days.
   - **Last month** - Export the entire call history with the contacts for the last month.
4. Click the **Export** button from the drop-down menu.

   The **Save As** dialog box is displayed. The default file format is .csv, and the default path for saving the file is `C:\Users\<user>\Downloads`.
5. Enter the file name, and select the location or accept the default location, and click **Save**.
6. Locate the file on your computer, and double-click to open the .csv file, or you can rename the file in the .xlsx format and open it.
7. Review the information about the call data.

Answering Call from Call Stack of a Contact

Note

This option is available only if your Connect administrator has enabled the **Allow Call Pick Up** and **Show Caller ID name and number for other extensions** options in Connect Director.

You can answer incoming calls, parked calls, and calls on hold from a contact's call stack.

To answer a call:

1. View the call stack of a contact. Refer to Viewing Call Stack Information of a Contact on page 35 for information about call stacks.
2. Click beside the call you want to answer.

   When you answer a call from the contact's call stack, the answered call is removed from the contact's call stack and appears on your call stack.

Note

You can also answer the parked calls from the contact card. Click , in the pop-up window click to answer the call.

Viewing Call Interaction History with a Contact

1. In the **Quick Dialer Search** bar, type the name or extension number and select the contact.
2. In the third pane, click **Calls**.

   In the drop-down, by default, **All** is selected. It displays the entire call history with the contacts.

   To view only the missed calls, select **Missed** in the drop-down.

   Your call history with the selected contact is displayed in the third pane. Click each call entry to view the call origin, the call duration, the call routing slip, and to enter a call note.

Transferring a Call

The Connect client allows you to do the following kinds of transfer operations or other actions related to transfers:

- Blind Transfer
- Consultative transfer
- Park
- Intercom
- Whisper
- Voicemail

Figure 5 describes the different types of call transfer options; Transfer, Consult, Park, Intercom, Whisper, and Voicemail options.

Figure 5: Transferring a Call

Transferring a Call Using the Blind Transfer Option

In Blind Transfer, you cannot to talk to the person that you want to transfer the call to, prior to making the call transfer. You can do the blind transfer using the drag and drop option, the contextual menu, and from the call notification area.

Note

You can do the blind transfer either before or after answering a call. To answer a call, see Answering a Voice Call on page 52.

To do a blind transfer using the drag and drop option:

1. In the **Quick Dialer Search** bar, type the contact name or the extension number.
2. On the dashboard, drag the call from the call notification area and drop it on the contact in the second pane.

To do a blind transfer using the contextual menu:

1. In the **Quick Dialer Search** bar, type the contact name or the extension number.
2. Drag the call from the call notification area and hover over the contact for two seconds to view the contextual menu. Select **Blind transfer** from the contextual menu to complete the call transfer.

Note

Under **Groups** and **Favorites** if the contact list is long, you can drag the call to the list and scroll through the list to locate the contact to whom you want to transfer the call.

To do a blind transfer from the call notification:

- Before answering the call:
  - **a.** On the dashboard, click in the call notification.
  - **b.** In the second pane search field, type the contact name or the phone number.
  - **c.** Click **Transfer**.
- After answering the call:
  - **a.** In the second pane, click .
  - **b.** In the second pane search field, type the contact name or phone number.
  - **c.** Click **Transfer**.

Transferring a Call Using the Consult Option

In consultative transfer, you can to talk to the person that you want to transfer the call to, prior to making the call transfer.

- Before answering the call:
  - **a.** On the dashboard, click in the call notification.
  - **b.** In the second pane search field, type the contact name or the phone number.
  - **c.** Click **Consult**.

d. In the **Consulting** window, click to complete the call transfer.

- After answering the call:

  a. In the second pane, click .

  b. In the second pane search field, type the contact name or phone number.

  c. Click **Consult**. The active call goes on hold and the **Consulting** window appears.

  d. Click to complete the call transfer.

Parking a Call

You can park a call using the contact card or the contextual menu. If the call is not answered at the specified extension, the call is returned to you with the routing slip indicating that you have already spoken to this caller.

To park a call using the contact card:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click the **Park** option.
5. Click to park the call.

To park a call using the contextual menu:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the **Quick Dialer Search** bar, type the contact name or number and select the contact.
3. Drag the active call in the notification area and hover over the selected contact for two seconds to view the contextual menu.
4. Select **Park** from the contextual menu to complete the call transfer.

appears next to the contact name indicating that the call is parked on the contact's call stack.

Park and Page

To park a call and page a contact:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)

2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click the **Park** option.
5. Click PP to park and page the call.

Park and Intercom

You can use the park and intercom option to place an intercom call in which the recipient phone automatically answers with mute activated and broadcasts your message through the recipient's speaker phone, headset, or handset.

To park and intercom a call:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click the **Park** option.
5. Click to park the call and place an intercom call to the selected contact.

Transferring a Call Using the Intercom Option

- Before answering the call:
  - **a.** On the dashboard, click in the call notification.
  - **b.** In the second pane search field, type the contact name or the phone number.
  - **c.** Click **Intercom**.
  - **d.** On the **Consulting** window, click to complete the call transfer.
- After answering the call:
  - **a.** In the second pane, click .
  - **b.** In the second pane search field, type the contact name or phone number.
  - **c.** Click **Intercom**. The active call goes on hold and the **Consulting** window appears.
  - **d.** Click to complete the call transfer.

Transferring a Call Using the Whisper Option

- Before answering the call:

  a. On the dashboard, click in the call notification.

  b. In the second pane search field, type the contact name or the phone number.

  c. Click **Whisper**.

  d. On the Consulting window, click to complete the call transfer.

- After answering the call:

  a. In the second pane, click .

  b. In the second pane search field, type the contact name or phone number.

  c. Click **Whisper**. The active call goes on hold and the **Consulting** window appears.

  d. Click to complete the call transfer.

Transferring a Call to Voicemail

On the dashboard, click in the call notification to transfer the call directly to your voicemail without answering the call.

To transfer the call to another contact's voicemail:

1. On the dashboard, click in the call notification to answer the call.
2. In the second pane, click .
3. In the second pane search field, type the contact name or phone number.
4. Click **Voicemail**. The active call goes on hold and the **Consulting** window appears
5. Click to complete the call transfer to voicemail.

Making a Conference Call

A conference call involves more than two parties connected in a call. The number of people you can conference together in a call depends on your system configuration. Contact your Connect administrator for the details about your system's conference capabilities.

You can set up a conference call using either of the following approaches:

- In a blind conference call, you conference the people together without the other person first answering your call.
- In a consultative conference call, you talk to the person before adding that person to the conference call.

Creating a Blind Conference Call

To do a blind conference using the contact card:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or extension and click **Conference**.

To do a blind conference using the contextual menu:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the quick dialer search bar, type the contact name or number and select the contact.
3. Drag the active call in the notification area and hover over the selected contact for two seconds to view the contextual menu.
4. Select **Conference Blind** from the contextual menu to initiate the conference.

Creating a Consultative Conference Call

To do a consultative conference call:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or extension and click **Consult**.

   The active call is placed on hold automatically, allowing you to consult the third person.
4. Click to initiate the conference call.

Creating an Intercom Conference Call

You can add a participant to an active call by placing the active user on hold and then using the intercom conference feature to call the third user without ringing the phone line.

To do an intercom conference call:

1. Answer an incoming call. (To answer a call, see Answering a Voice Call on page 52.)
2. In the second pane, click .
3. In the second pane search field, type the contact name or extension and click **Intercom**.

   The active call is placed on hold, and the call to the third user is automatically answered on the phone line.
4. Click icon to initiate a conference call.

Managing Call Notes and Viewing Routing Slips

Call note allows you and the other members on the call to add, view, and edit notes for an incoming call, a call that is on hold, and an active call.

Routing Slips displays the history and call routing details of the call.

Table 3 describes the various call note and routing slip status for an incoming call, call on hold, and active call.

Table 3: Call Note and Routing Slip Status

Icon	Description
	Indicates that the return routing slip is open. This icon is displayed when the call that you parked is returned to you and when the routing slip is open.
	Indicates that the return routing slip is closed. This icon is displayed when the call that you parked is returned to you and when the routing slip is closed.

Icon	Description
	Indicates that the routing slip is closed. To open, click the icon.
	Indicates that the routing slip is open. If there is only one call, by default, the routing slip of the call is open. If there are multiple calls, by default, the routing slip is open only for the oldest call on the dashboard. For the other calls, click the icon to open the routing slip.
	Indicates that the call note is closed and there is no text. To open, click the icon. You can add the text to the call note.
	Indicates that the call note is open and there is no text. You can add the text to the call note.
	Indicates that the call note is closed and it has text. To open, click the icon. You can then view or edit the text.
	Indicates that the call note is open and it has text. You can view or edit the text.

To enable routing slips and call notes:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Telephony**.
4. Select **Show access to routing slip and call note for each call in the dashboard**.

The call stack displays routing slip and call note icons.

You can click to view or hide the routing slip and click to view or hide the call note for a call. You can also edit the previous call note during an active call.

Note

By default, the routing slip is open for the oldest call on the dashboard. For the other calls, click to open it.

Making a Video Call

To make a video call, the Primary Extension must be assigned to your Softphone. (For details about how to assign your extension to the softphone, see Assigning Softphone on page 45.)

1. Find and select a contact. (For more information, see Managing Contacts on page 28.)
2. To make a voice call, do one of the following:
   - In the third pane, click .
   - In the search results, double-click the contact.
   - From **Favorites** or **Groups**, double-click the contact.
3. To start broadcasting your video to the other party, click .

A select layout button appears on the third pane, when a screen share and a video call are active at same time. Click drop-down to share:

- All
- Data
- Video

with other members on the video call. (For more information on Screen sharing, see Sharing Screens with a Contact on page 112.)

4. To end the video, click **Turn off Video Camera** icon.

Setting Up Video Camera Preferences

You can set up the Connect client to use the video camera:

- By default
- Prompt you to turn on the camera
- Wait for you to activate the camera manually, which lets you have complete control of your video camera.

To set up the video camera:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Video > Permissions**.
4. Select one of the following video options:
   - Automatically start my camera without asking
   - Ask me if I want to use my camera
   - Never ask me, I'll turn the camera ON myself
5. Click **Video > Camera Setup**, and select the video device from the drop-down list. (You can view a preview from the selected video device.)

Managing Voicemail

Callers can leave a voicemail message if a call is not answered. The voicemail message is delivered to your assigned desk phone, the Connect client, and your email inbox.This section includes the following topics:

- Forwarding Calls to your Voicemail Inbox on page 66
- Leaving a Voicemail Message on page 66
- Accessing Voicemail Messages on page 67
- Viewing Voicemails from a Contact on page 68
- Listening to a Voicemail Message on page 68
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- Deleting a Voicemail Message on page 70
- Restoring a Deleted Voicemail Message on page 70
- Configuring Email Notifications for Voicemail Messages on page 70
- Managing System Notifications for Voicemail Messages on page 71
- Changing your Voicemail Password on page 71

Note

To alert you about an incoming voicemail message you can set an email notification or a system notification. For more information, see the following topics:

- Configuring Email Notifications for Voicemail Messages on page 70
- Managing System Notifications for Voicemail Messages on page 71

Forwarding Calls to your Voicemail Inbox

When you receive an incoming call that you don't want to answer, click in the notification area. The caller is directed to record a voice message.

After a caller leaves a voicemail message, you receive a badge notification on the Voicemail tab on the dashboard and on the Connect client icon on your computer task bar.

Leaving a Voicemail Message

1. Dial a contact. (For more information, see Making a Voice Call on page 51.)
2. When you are prompted to leave a voicemail message, record your message.

Sending a Group Voicemail

1. On the dashboard, click the **Contacts** tab.
2. Click the **Groups** tab, and click on the group header to which you want to send a voicemail.
3. Click **Send Voicemail**.
4. To record the message through the desk phone, click .

   To record the message through the computer speaker, click .
5. To start recording the message, click .

   To stop recording, click .

   To play the recorded message, click .
6. Enter a title for your recording in the **Subject** field.
7. Specify any of the following options for the message:
   - Urgent—recipient can see an exclamation (!) mark next to the voicemail.

- Private—recipient cannot forward a private voicemail.
- Receipt—sends an acknowledgment to the sender when the recipient has listened to the voicemail.

8. Click **Send**.

Accessing Voicemail Messages

Each voicemail displays the following:

- Name and number of the voicemail sender.
- Date on which the voicemail was received. If you receive it on the current day, “Today” is displayed along with time and duration.
- Duration of the voicemail.
- Icons to indicate Saved ( ), Private ( ), and Urgent ( ) voicemails.

To access a voicemail message:

1. On the dashboard, click the **Voicemails** tab.
2. To access the voicemail messages for a specific category:
   - Click the **All** tab to view all (heard, unheard, and saved) the voicemail messages. The unheard voicemail messages are displayed in bold font, and preceded by a blue dot.
   - Click the **Unheard** tab to view the unheard voicemail messages along with the duration.
   - Click the **Saved** tab to view the saved voicemail messages that you have marked for easy retrieval.

   You can choose to reply, forward, save, or delete the received voicemails.

   Click on the user’s name or extension number to view the contact card in the third pane.

   To mark the message as heard or unheard, right-click the voicemail message and select **Mark as Heard** or **Mark as Unheard**.

Note

You cannot mark the Workgroup voicemail messages as heard or unheard.

3. The **Deleted Voicemails** tab is displayed only if you have any deleted voicemail messages. To access the deleted voicemails, click on the **Deleted Voicemails** header. By default, the Deleted Voicemail tab is in collapsed view and displays the number of deleted voicemails on the header.

From the Voicemail tab, you can add the contact from whom you have received a voicemail message to your Favorites or Groups list. Right-click the contact's voicemail message, and select **Add Contact to Group**. From the drop-down list, select <**group name**> to which you want to add the contact.

Viewing Voicemails from a Contact

1. In the **Quick Dialer Search** bar, type the name or extension number and select the contact.
2. On the Contact card, click **Voicemails**.

   All voicemails from a selected contact are displayed in the third pane. Click each voicemail entry to reply, forward or delete the voicemail.

Listening to a Voicemail Message

1. On the dashboard, click the **Voicemails** tab.
2. In the second pane, select the voicemail.
3. Click to play the message through desk phone or to play through the computer speaker.

Note

If a voicemail message is marked as private, the computer speaker and the deskphone speaker options are disabled. The private voicemail message can only be played through the deskphone.

4. Click to play the voicemail message, and click to pause the voicemail message.

   Use the progress indicator to skip forward or backward within the message.

Note

If you have assigned your Connect client to Softphone, desk phone option will be displayed.

You can choose to reply, forward, or delete the received voicemail.

Saving a Voicemail Message

1. On the dashboard, click the **Voicemails** tab.
2. On the second pane, click the **All** tab.
3. Right-click the voicemail you want to save, and select **Save Voicemail**.

   The save icon is displayed next to the voicemail name.

To remove the voicemail from the Saved list, right-click the voicemail you want to remove, and select **Unsave Voicemail**.

Replying to a Voicemail Message

1. Access your voicemail messages as described in Accessing Voicemail Messages on page 67.
2. Click the voicemail that you want to reply to.
3. Click **Reply** and select any of the following icons:
   - to record the message through the telephone.
   - to record the message through the computer microphone.
4. Click REC to record your message.
5. Click to stop recording.
6. Click to play your recorded message.
7. Edit the **To** and **Subject** fields as required. While replying to a private voicemail message, you cannot add more members to the **To** field.
8. Specify any desired options (Urgent, Private, Receipt, and Include Original) for sending the response.
9. Click **Send** to send the voicemail, or **Cancel** to discard the recorded voicemail.

Forwarding a Voicemail Message

Note

You cannot forward private voicemail messages.

1. Access your voicemail messages as described in Accessing Voicemail Messages on page 67.
2. Click the voicemail message that you want to forward.
3. Click **Forward** and select any of the following icons:
   - to record the message through the telephone.
   - to record the message through the computer microphone.
4. Click REC to record your message.
5. Click to stop recording.

6. Click to play your recorded message.
7. Edit the **To** and **Subject** fields as required.
8. Specify any desired options (Urgent, Private and Receipt) for sending the message.
9. Click **Send** to forward the voicemail, or **Cancel** to discard.

Deleting a Voicemail Message

1. Access your voicemail messages as described in Accessing Voicemail Messages on page 67.
2. Do one of the following:
   - Right-click the voicemail you want to delete, and select **Delete Voicemail**.
   - Select the voicemail you want to delete and click **Delete.**

Restoring a Deleted Voicemail Message

1. On the dashboard, click the **Voicemails** tab.
2. Click on the **Deleted Voicemails** header to view the deleted voicemail messages.
3. Select the voicemail you want to restore.
4. Click **Restore**.

Configuring Email Notifications for Voicemail Messages

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Notifications > Voicemail**.
4. Select the **Send email notification about incoming voicemail to <email address>**.

   Your email address configured on the Connect Director is displayed.
5. Do the following to customize the email notification:
   - To receive the voicemail as .wav file format, select the **Attach voicemail as a wave file** option.
   - To mark the voicemail as heard in your voicemail inbox, select the **Mark voicemail as heard** option.

Managing System Notifications for Voicemail Messages

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙.
3. Click **Notifications > Popup**.
4. To get a system notification for an incoming voicemail:
   - For Windows, select the **Show a system notification for a voicemail** option.
   - For macOS:
     1. Under **Incoming Voicemail**, click **Configure via macOS Notification Center...**
     2. In the Notification Center box, click the Connect Client icon.
     3. Click any of the following:
     - None
     - Banners
     - Alerts

Changing your Voicemail Password

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙.
3. Click **Voicemail > Setup**.
4. Enter:
   - Current password
   - New password
   - Confirm new password
5. Click **Set New Password**.

Recording Voicemail Greeting Name

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙.
3. Click **Voicemail > Setup**.
4. Click the **Record New Name**.

5. Click REC to start recording your name, and click ■ to stop the recording.
6. Click ▶ to listen to the recorded greeting.
7. Do one of the following:
   - To save the recording, click **Save Recording**.
   - To discard the recorded greeting, click **Discard Recording**, and repeat steps 4 to 7.

Setting Voicemail Escalation

Note

This feature is available only for MiVoice Connect users.

You can set Voicemail Escalation notification for each new message or the first unheard message, by selecting the appropriate option. You can create 9 Voicemail Escalation Profiles.

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙.
3. Click **Voicemail > Escalation**.
4. Select **Add New Profile** to create voicemail escalation profiles.
5. In the **Profile Name** field, enter a name.

Note

In the **Profile Name** field a default name appears. However, you can modify or update the field.

6. Set notification alert frequency using **Repeat Times** field.
7. In the **Add Step** section, you can enable the escalation routing notifications for all or urgent only voicemail.
   - Select **Send email notification** check box to set email notifications and enter the email address in the field, for text only notifications. Select **Attach Wave File** check box to include a .wav file.
   - Select **Send phone notifications** check box to set phone notifications, and enter the phone number in the field.

Note

If the **Send phone notifications** check box is selected and the user enters their own DID number, an error message “**Please do not enter your own office number**” is displayed when the user clicks the **Update/Add** button.

- Set the timeout period to end the notification.

To add additional steps, click **Add Step**.

To remove any additional step, click - next to the step.

Note

Once a voicemail is marked as **Heard** the escalation process will stop.

If a user sets the voicemail back to **Unheard**, the escalation process will continue to run until the voicemail again goes back to the unheard state.

Assign Voicemail Escalation Profile to Availability State

Note

This feature is available only for MiVoice Connect users.

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Call Routing > Availability Routing**.
4. In the **When** field, click the drop-down list, and select one of the availability states.
5. In the **Voicemail Escalation Profile field**, click the drop-down list, and select the required profile.

Note

You can assign a **Voicemail Escalation Profile** for your availability state except for **Do Not Disturb** state.

Editing a Voicemail Escalation Profile

You can edit a Voicemail Escalation Profile:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Voicemail > Escalation**.
4. Select the profile from the main list, click **Edit**.
5. Update the information and click **Update** to confirm the changes.

Deleting a Voicemail Escalation Profile

You can delete a Voicemail Escalation Profile to cancel the escalation route.

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Voicemail > Escalation**.
4. Select the profile from the main list, click **Delete**.
5. In the confirmation dialog box, click **Delete**.

Playing Envelope Information for Voicemail

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Voicemail > Playback**.
4. Select **Play envelope information when listening to messages** to hear the received date and time of the voicemail.

   The system will announce the date and time when the voicemail was received in the user's inbox before playing the message.

Routing Calls

Use the following methods to route incoming calls to your predefined external phones:

- Availability Routing—To assign call routing rules based on availability states
- Power Routing—To set customized rules

Availability Routing

Availability Routing allows you to route incoming calls according to your availability state.

You can configure Availability Routing with or without Mobility.

Configure Availability Routing with Mobility

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .

3. Click **Call Routing > Availability Routing**.
4. In the **When** field, click the drop-down list, and select one of the availability states.

Note

By default, incoming calls are routed to your extension and to your Mobility device.

5. Click the **Start Wizard** on the right.
6. To specify your Connect Mobility enabled device, do one of the following:
   - In the blank field, type your 10-digit mobile number.
   - If you do not have a mobility device, then click **My device with Mitel Mobility will not have a number associated with it**.
7. Click **Next**.

   The Simultaneous Ring page is displayed.

Note

By default, the Simultaneous Ring page displays an extension and a mobility device that are already included for simultaneous ring.

8. To enable an additional device, other than your extension and a mobility device, to ring simultaneously:
   a. Enable the **Also simultaneously ring these numbers** option.
   b. Click the **Select Number** drop-down list.
   c. Select the appropriate option, and click **Use Selected Number.**
9. Click **Next.**

   To configure call forwarding, select one of the following options:

Note

If you are not available on any of the devices configured for simultaneous ringing, then you can route the incoming calls either to your voicemail or to any other external number with appropriate permissions.

- Select **Keep ringing the numbers above**.
- Incoming calls will not be forwarded, and only the devices dedicated for simultaneous ringing are permitted to ring.
- If you want to forward incoming calls to your voicemail or to another contact, do the following:

1. Select **Forward the call to,** and click on the drop-down list, and either select **my voicemail** or type in the contact name or the external number, if you have appropriate permissions.
2. Click the drop-down list to select the number of rings before forwarding.
3. In the **if I have more than 16 active calls forward immediately to** field, click the drop-down list, and either select **my voicemail**, or type the contact name or the external number, if you have appropriate permissions.

- Select the **Always forward my calls to** option, and click the drop-down list, and either select **my voicemail** or type the contact name or the external number, if you have appropriate permissions.

10. Click **Next**.

    The Voicemail Greeting: Recording & Playback page is displayed.

11. To record the voicemail greeting:

    a. Click REC to start recording your message, and click ■ to stop the recording.

    b. Click ▶ to listen to the recorded greeting for any incoming voicemail messages.

    c. Do one of the following:

    1. To save the recorded greeting, click **Save Recording**.
    2. To discard the recorded greeting, click **Discard Recording**.

12. Click **Next**.

    The Interacting with Greeting page is displayed.

13. To enable interaction with the voicemail greeting:

    a. Under **Are callers allowed to leave a voicemail after hearing your greeting?,** select one of the following options:

    - Yes, callers can leave a voicemail.
    - No, callers will not be able to leave a voicemail.

    b. If you want to forward the incoming call to a particular extension, in the **If callers press '0' while listening to your greeting Forward calls to** field, type a contact name or an extension.

14. Click **Done**.

Configuring Availability Routing without Mobility

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙.

3. Click **Call Routing > Availability Routing**.
4. Click the **Start Wizard**.

   The Simultaneous Ring page is displayed.

Note

By default, the Simultaneous Ring page displays the device that is already configured for simultaneous ring.

5. To enable simultaneous ring for an additional device, do the following:
   a. Select the **Also simultaneously ring these numbers** option**.**
   b. Click the **Select Number** drop-down list.
   c. Select the additional number, and click **Use Selected Number.**
6. Click **Next**.
7. To configure call forwarding, select one of the following options:
   - If you do not want to forward incoming calls, select **Keep ringing the number above** so that the devices dedicated for simultaneous ringing are only permitted to ring.
   - If you want to forward incoming calls to your voicemail, do the following:
     1. Select **Forward the call to** and click on the down arrow icon, and select **my voicemail**.
     2. Click the drop-down list to select a number for the rings before forwarding.
     3. In the **if I have more than X active calls forward immediately to** field, click the down arrow icon, and select **my voicemail**.
   - Select the **Always forward my calls to** option, click the drop-down list, and select **my voicemail**.
8. Click **Next.**
9. To enable FindMe, do the following:

Note

If the FindMe option is not displayed, contact your Administrator to enable the “Allow external call forwarding and find me destination” option on the Connect Director.

   a. Select **Enabled: Use my FindMe settings to continue routing the call**.
   b. Select any one of the following options:
      - Select **Ring my FindMe numbers sequentially before playing my voicemail**, and optionally select **Prompt the caller to record their name**.

- Select **Play my voicemail first. If the caller presses 1 during the greeting then sequentially ring my FindMe numbers**, and check **Prompt the caller to record their name.**

c. To define FindMe numbers that will be used sequentially, click the **Select Number** drop-down list, select the appropriate option and click **Use Selected Number**.

d. To add another FindMe number, repeat step 8c.

10. Click **Next**.

The Voicemail Greeting: Recording & Playback page is displayed.

11. To enable voicemail greeting, see To record the voicemail greeting: on page 76.

12. Click **Next**.

The Interacting with Greeting page is displayed.

13. To enable interacting with the voicemail greeting, see To enable interaction with the voicemail greeting: on page 76.

Configuring Availability Routing Using Custom Settings

1. On the dashboard, click the **<username>** tab.

2. On the second pane, click .

3. Click **Call Routing > Availability Routing**.

4. To configure a mobility device for incoming calls, see To specify your Connect Mobility enabled device, do one of the following: on page 75.

5. Click **Change/Record** to configure the following options, as required:

- **Incoming calls are routed to your Deskphone**.
- **No phones selected to simultaneously ring**. To configure this option:
  - For simultaneous ring with mobility enabled, see step 8 in Configure Availability Routing with Mobility on page 74.
  - For simultaneous ring without mobility enabled, see step 5 in Configuring Availability Routing without Mobility on page 76.
- **Number of rings before incoming calls are routed to voicemail**. To configure this option:
  - For incoming call forwarding with mobility enabled, see step 9 in Configure Availability Routing with Mobility on page 74.
  - For incoming call forwarding without mobility enabled, see step 7 in Configuring Availability Routing without Mobility on page 76.

- **If callers press 1 while listening to my voicemail greeting, no phones are selected to sequentially ring**. To configure this option, see step 9 in Configuring Availability Routing without Mobility on page 76.
- **No voicemail greeting recorded**. To configure this option, see To record the voicemail greeting: on page 76.
- **Callers are allowed to leave a voicemail**. To configure this option, see To enable interaction with the voicemail greeting: on page 76.
- **Callers who press 0 during the voicemail greeting will be forwarded to the Auto- Attendant**. To configure this option, see To enable interaction with the voicemail greeting: on page 76.

Using Power Routing

Power Routing allows you to create customized personal rules for call routing. You can also edit and delete your power routing rules.

Power Routing overrides Availability Routing.

Creating a Power Routing Rule

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Call Routing > Power Routing**.
4. Click **Create New Power Rule**.
5. In the **Rule Name** field, enter a <**name**> for the new power rule.
6. In the **When** field, choose a combination of the following conditions to build a custom file for when to forward a call:
   - + number matches
   - + dialed number
   - + my availability
   - + on the phone
   - + time is
7. To add a rule by matching a number:
   a. Click **+ number matches**.
   b. Click the **The number is** drop-down list, and select a suitable option. (For a few of these options, you might have to enter an associated number in the corresponding field.)
   c. To create another rule, repeat steps 7a to 7b.
8. To add a rule based on the known dialed number:

a. Click **+ dialed number**.

b. Click inside the **Number caller dialed to reach me is** field, and type in the known number.

9. To add a rule based on your availability:

   a. Click **+ my availability**.

   b. Select one of the availability states:

      - Available
      - In a Meeting
      - Out of Office
      - Vacation
      - Custom
      - DND

10. To add a rule if you are already on a phone, click **+ on the phone**.

11. To add a rule based on the time or on the day:

    a. Click **+ time is**.

    b. Select either of the following:

       - If **Time is** selected, enter the **From** and **To** fields for the power rule.
       - If **Day** is selected, select the days for the power rule.

12. Under **Then**, click **Forward call to** and select any of the following options:

    - To forward the call to voicemail, select the **my voicemail** option.
    - To play a ring tone:
      - Click the **my voicemail** drop-down list and select **play ringtone**. An additional Standard Ring option is displayed.
      - Click on the drop-down list and select a ring tone option.
    - To forward the call to specific number, select the **Select Number** option and click in the **Select Number** field and type the desired number.

13. Click **Create Rule**.

Modifying a Power Routing Rule

1. On the dashboard, click the **<username>** tab.

2. On the second pane, click .

3. Click **Call Routing > Power Routing**.

4. For the power rule you want to edit, click **Edit**.

5. Edit the steps as required. (For more information, see steps 6 to 12 of Creating a Power Routing Rule on page 79.)
6. Click **Save Rule**.

Deleting a Power Routing Rule

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Call Routing > Power Routing**.
4. Click **Delete** for the power rule you want to delete.

Routing Calls to Mobile

You can route all your incoming calls to your Mobility device. You can select or enter the mobile number on which you have installed the Connect Mobility.

To enable this feature, your Connect administrator must configure the Enable Enhanced Mobility with Extension feature in the Connect Director.

Customizing your Call Option Settings

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Telephony**.
4. Click the **Maximum number of concurrent calls** drop-down list, and select a number in the range configured by your Connect administrator.
5. If you want to suppress call waiting tone, select **Suppress call waiting tone when I'm on a call**.
6. If you want to suppress dial tone, select **Suppress dial tone when I'm off-hook in headset mode on an analog phone**.
7. If you want to close contact card, select **Close contact card after call ends** option to close the contact card soon after you end the call.

CHAPTER

7

Managing Messages

This chapter provides information about managing messages.

Sending a Message 84
Viewing Direct Conversation History with a Contact..... 86
Scheduling a Meeting with a Contact Group 87
Managing Message Notifications 87
Adding Canned Message Responses 89

Sending a Message

The Teamwork for Desktop application is packaged with the Connect Client application to provide Connect Client users a seamless cross-launching messaging experience between Connect Client and Teamwork for Desktop application.

MiCloud Connect and MiVoice Connect users can send messages to:

- Individuals
- Multiple users
- Groups

- **MiVoice Connect User:**

  Figure 6 describes the various ways to send messages to an individual, groups, and multiple users.

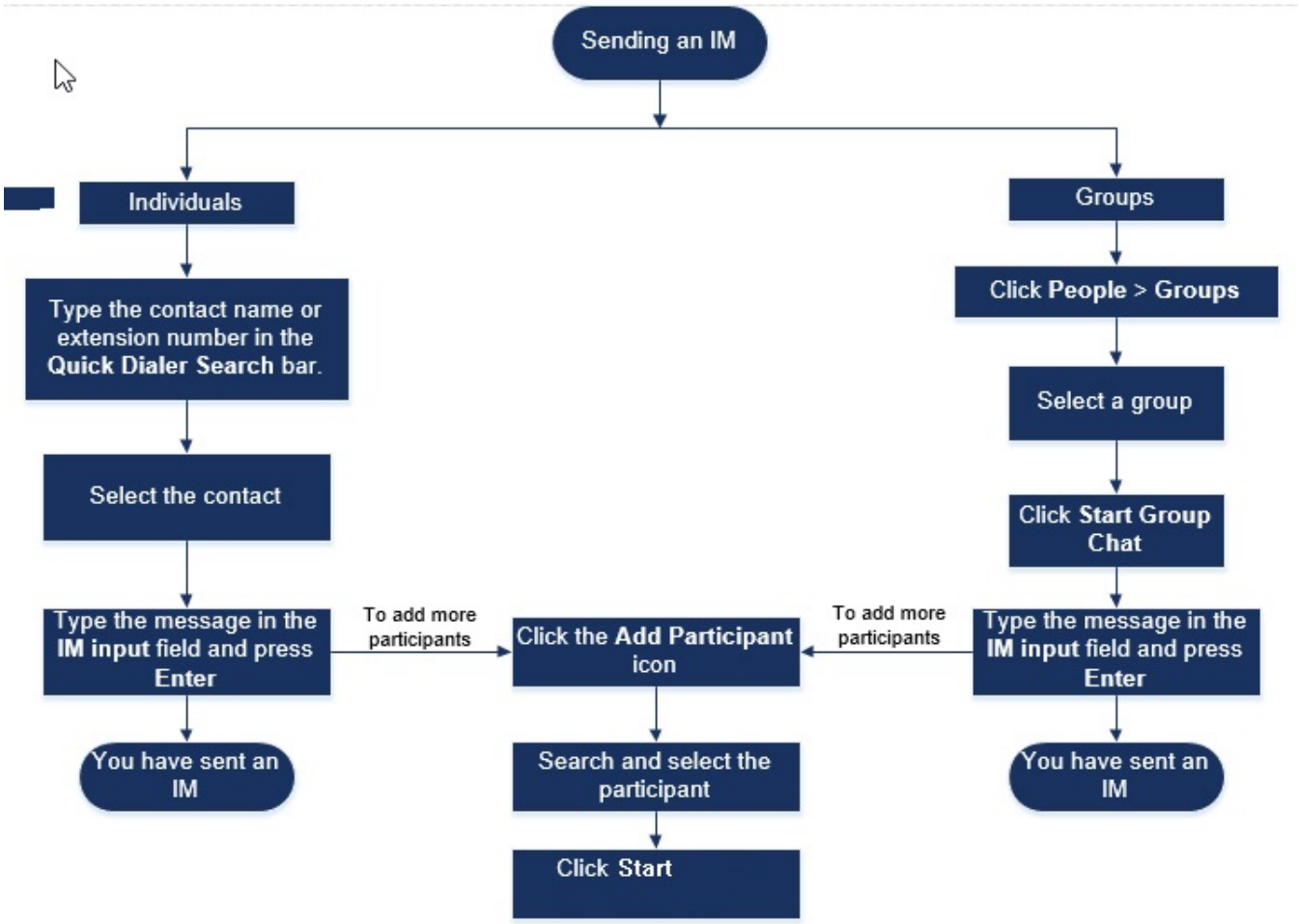


Figure 6: Sending a message

To send a message to an individual or multiple contacts:

1. Find the contact (For more information, see Managing Contacts on page 28). If the contact is available for messaging, you see the availability state icon beside the name in the second pane.
2. On the Contact card, click **Messages**. In the message input field type the message, and press **Enter**.

   Click the emoticon in the **IM input** field, and select the emoticon to add it to your message.
3. To add more participants, click on the Contact card.
4. In the **Search** bar, type the name or the extension number, and select the contact.
5. Click **Start**.

To send a message to a group:

1. On the dashboard, click **Contacts > Groups**, and select the group.
2. Click **Start Chat**.
3. In the **IM input** field type the message, and press **Enter**.

   Click the emoticon in the message input field, and select the emoticon to add it to your message.

You can also add more participants to the group chat after initiating the session.

Note

In a group chat, the messages are delivered only to the contacts who are available online.

- **MiCloud Connect Users:**

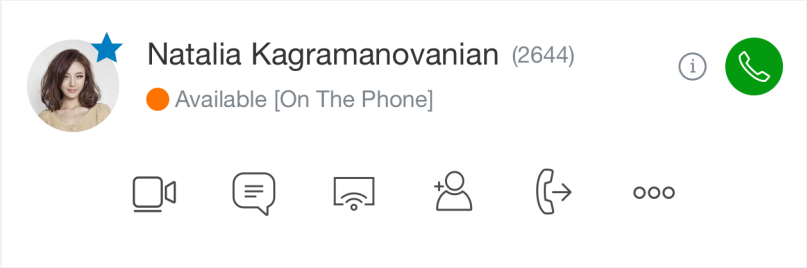


Figure 7: Contact Card with message icon

For MiCloud Connect user, the Connect Client sends messages through Teamwork for Desktop.

To send a message to an individual contact:

1. Do either of the following to find the contact:
   - Search for the contact by typing the name or the extension number and select the contact.
   - On the dashboard, click **Contacts** and select the contact from your **Favorites** list.
2. Do either of the following to send a message:
   - On the contact card, click .
   - From the **Search** results bar or from the **Favorites** list, right-click the contact, and select **Send IM**.

   The Conversation launches through the Teamwork for Desktop application. If you already have a conversation history with the contact, the Teamwork for Desktop opens the existing message conversation; otherwise, it starts a new conversation under the **Direct Message** tab.
3. In the message input box, type the message, and press Enter.

   Click the emoticon in the message input box, and select the emoticon to add it to your message.

To send a message to a group:

1. On the dashboard, click **Contacts > Groups**, and select the group.
2. Click . The group contact card opens in the third pane.
3. Click **Start Chat**. The conversation launches on the Teamwork for Desktop application. The application opens the existing group-chat- if there is one, or else creates a new group chat under the **Direct Message** tab.
4. In the message input box, type the message, and press Enter.

Click the emoticon in the message input box, and select the emoticon to add it to your message.

For more details about using Teamwork for Web and Desktop, see https://oneview.mitel.com/s/article/Mitel-Teamwork-for-Web-and-Desktop.

Note

For MiCloud Connect users in Australia and the U.K., the messaging feature works the same as it does with MiVoice Connect users elsewhere.

Viewing Direct Conversation History with a Contact

- **For MiVoice Connect Users:**

1. In the **Quick Dialer Search** bar, type the contact name or extension number and select the contact.
2. In the third pane, click **Messages**.

Your message conversation history with the contact is displayed in the third pane. Optionally, you can also search for a particular conversation by using a keyword in the **Search** field.

- **For MiCloud Connect Users:**
  1. Search for the contact by typing the name or the extension number of the contact in the **Quick Dialer Search** bar, and select the contact.
  2. In the third pane, click . The message conversation history is displayed in the Teamwork for Desktop application.

The message conversation list appears on the left panel of the Teamwork for Desktop application after the first message is sent. To view the conversation history for a contact, click the contact under the **Direct Message** tab. The conversation history for that contact opens in the chat pane.

Scheduling a Meeting with a Contact Group

1. On the dashboard, click the **Contacts** tab.
2. Click the **Groups** tab, and select a group.
3. Click on the group header and click **Schedule Meeting**.
4. Specify the details of the meeting.
5. Click **Create**.

Managing Message Notifications

To receive a system notification for message:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Notifications > Popup**.
4. To enable messaging notification:
   - On Windows, select **Show a system notification for an incoming IM** option.

- Select **Show IM content in the notification** option to see the message in the system notification.
- Select **Keep notification on screen for** option, and click the drop-down list and select a number from the list to control the persistence of the notification on your system.

- On macOS:

  1. Click **Configure via macOS Notification Center...** in **Incoming IM.**
  2. In the Notification Center box, scroll down to select the **Connect client** icon and then click any of the following options:
     - None
     - Banners
     - Alerts

Note

For MiCloud Connect users, the **Incoming IM** option does not appear on both Windows and Mac system.

5. To disable messaging notification:
   - On Windows, disable the **Show a system notification for an incoming IM**.
   - On macOS:
     1. Click **Configure via manOS Notification Center...**
     2. Select **Do Not Disturb** on the left notification area.

Adding Canned Message Responses

Canned IM response allows you to respond to an incoming call with an IM message that is predefined in the Connect Client application. If you are unable to respond to an incoming call in person, you can send a Canned IM response to the contact.

To add a canned IM response:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **IM > Canned IM Responses**.
4. Type your custom canned message, and click **Add Canned Response**.
5. Select the required canned messages from the text box, and click **Delete** to delete the canned message.

Note

Canned messages sent by the MiCloud Connect users from Connect Client are received in the Teamwork for Desktop application.

CHAPTER

8

Integrating with Microsoft Exchange/Office 365

This chapter provides information about integrating the Connect client with Microsoft Exchange/Office 365:

Integrating the Connect client with Microsoft Exchange/Office 365 91

Synchronizing Events with Microsoft Outlook or Office 365 Calendar 93

Synchronizing the Connect client with Microsoft Outlook or Office 365 Contact Folders 94

Understanding the Presence Status in Microsoft Outlook 95

Integrating the Connect client with Microsoft Exchange/Office 365

The Connect client is now integrated with Microsoft Exchange.

Integrate the Connect client with Microsoft Exchange to use the following client features:

- Synchronize events and availability status with the Outlook or Office 365 calendar.
- Synchronize your Outlook or Office 365 contact folders with the Connect client for Windows. For macOS, the Connect client synchronizes with the Mac Address book. (For more information about synchronizing the Connect client with Mac Address book, refer to Importing the Contact Folders on page 32.

You can integrate Connect Client with Exchange/Office 365 in two ways:

1. From the **Events** tab
2. From the **Settings** tab

To integrate Connect Client with Exchange/Office 365 from the Events tab

1. On the dashboard, click the **Events** tab.
2. If you are an Office 365 user and using an Office 365 Authentication (Modern Auth) version of the Connect Client, a Microsoft OAuth page appears, which captures your credentials.

Note

If a sign in dialog appears, enter your Office 365 credentials.

Note

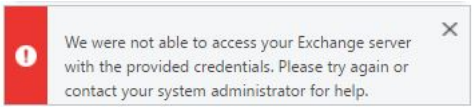
If you see an error message in the dashboard as shown, contact your IT Admin or Office 365 Admin to enable Modern Auth in Mitel admin portal.

3. If you are a non-Office 365 user or using a non- Modern Auth version of the Connect Client,
   a. An **Exchange Credentials** dialog appears.

b. Enter your user name and password, and then click **Submit**.

Note

If you enter an invalid credential, an error as shown is displayed.



To integrate Connect Client with Exchange/Office 365 from Settings tab:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click ⚙.
3. Click **Account > Exchange Account**.

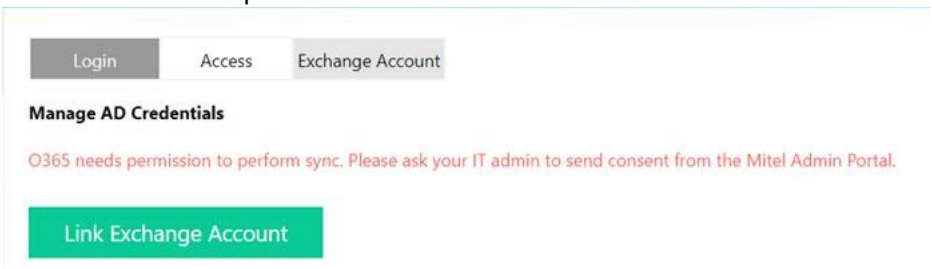
   The **Exchange Account** tab does not appear if your Connect Client user name and email address are the same (for premise customers). For more details about signing in to the Connect client, refer to Signing in to the Connect Client on page 14.
4. Click **Link Exchange Account**.
5. If you are an Office 365 user and using a Modern Auth version of the Connect Client, a Microsoft OAuth page appears, which captures your credentials.

Note

If a sign in dialog appears, enter your Office 365 credentials.

Note

If you see an error message as shown, contact your IT Admin or Office 365 Admin to enable Modern Auth in Mitel admin portal.



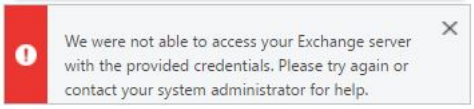
6. If you are a non-Office 365 user or using a non-Modern Auth version of the Connect Client,

   a. An **Exchange Credentials** dialog appears.

b. Enter your user name and password, and then click **Submit**.

Note

If you enter an invalid credential, an error as shown is displayed.



Upon successful credentials validation, the **Unlink Mitel Connect from Exchange** option is displayed.

To disable integration with Exchange server, click **Unlink Mitel Connect from Exchange**. Restart the Connect client for the changes to take effect.

Synchronizing Events with Microsoft Outlook or Office 365 Calendar

Note

Outlook for Mac versions 16.16 and prior work as expected, but newer version have these limitations.

1. After creating an event, it cannot be edited in the Connect client, but can be edited in Outlook.
2. When creating an event, because the date and time may be incorrect, you need to review the date and time in Outlook before sending the event.
3. When creating an event, because the attendee list is not transferred to Outlook, but is copied to the clipboard, you should paste the attendee list in Outlook.

After integrating the Connect client with Office 365:

- Your Outlook appointments and Connect client events are displayed on both the Outlook calendar and the Events tab.
- When you create an event on Connect client, a meeting invite with the conference details is displayed in Outlook which can be sent to the participants. For more information about creating an event on Connect client, refer to Creating a Conference on page 99.

Note

On a Windows machine, you can enable a delegate to access your Outlook calendar and perform the following actions on your calendar via Connect Outlook Add-In.

- Create new Connect conferences.
- Edit existing Connect conferences.
- Delete existing Connect conferences.

You can synchronize the availability state between the Connect client and the Outlook or Office 365 calendar. For example, if you have a meeting currently scheduled on Outlook calendar, your availability state on Connect client changes to “In a meeting”. However, you can also manually change your availability state on the Connect client.

To synchronize your availability state on the Connect client with the Outlook or Office 365 calendar:

1. On the dashboard, click the <**username**> tab.
2. On the second pane, click .
3. For macOS, click **Contacts/Outlook**.

   For Windows, click **Outlook**.

   Note

   For Windows, the “ConnectUCBAddIn” add-in should be enabled on your Outlook to complete this synchronization. For more information about enabling Add-ins in Outlook, refer to Microsoft Outlook documentation.

4. Select the **Sync my Exchange calendar with my Mitel Connect availability modes** check box.
   - Your availability state on the Connect client changes based on your schedule on the Outlook or Office 365 calendar.
   - The Do Not Disturb, the Vacation, and the Custom availability states always take precedence and do not get affected by this setting.
5. Select the **Use my Outlook Work Hours to switch my Mitel Connect availability to Out of Office** option to change your availability state to Out of Office based on your work hours and days specified on your Microsoft Outlook or Office 365 calendar.

You must restart the Connect client for any changes to take effect.

For information about setting the work hours and days on Outlook calendar, refer to the Microsoft Outlook documentation.

Synchronizing the Connect client with Microsoft Outlook or Office 365 Contact Folders

When you sign in to the Connect Client while Outlook is closed, you may see some type of Outlook prompt.

After integrating the Connect client with Office 365, Windows users only can do the following to import the contact folders from Microsoft Outlook into the Connect client to make calls or send messages:

1. On the dashboard, click the <**username**> tab.
2. On the second pane, click and then click **Outlook**.
3. Select the **Sync my Outlook contacts** option.

4. Click **+Show contact folders** and select the folders that you want to synchronize with the Connect client.

   You can also import the Outlook contact folders shared by other users into your Connect client. For the shared contact folders to appear in **+Show contact folders**, open the shared invitation email and click **Open this Contacts folder**. For more details about sharing a contact folder in Outlook, refer to Microsoft Outlook documentation.

For macOS, you can synchronize the Connect client with the Mac address book. For information about synchronizing the Connect client with Mac address book, refer to Importing the Contact Folders on page 32.

You can search for contacts from your Microsoft Outlook Public folders, but you cannot import contacts from Public folders to Connect client.

To enable searching for the contact from the Exchange Public Contact folders:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. For macOS, click **Contacts/Outlook**.

   For Windows, click **Outlook**.
4. Select the **Enable searching for contacts in my exchange public contact folders** check box.

   You can view the contacts from your Exchange Public folders in the Connect client directory.

Understanding the Presence Status in Microsoft Outlook

Microsoft Outlook displays the presence status of a contact beside the contact's name. For Mitel system users, the presence status indicates the availability status of a contact as configured by the user. (See Understanding Availability States on page 38.)

If Outlook is not synchronized, incorrect or no presence status information might be shown.

For any issues related to Outlook synchronization, contact your system administrator and ensure that in Mitel Connect Director or BOSS:

- The Outlook email address and the Mitel system email address are the same.
- The IM functionality is enabled for the user.

CHAPTER

9

Managing Conferences

This chapter provides information about how to create and manage Connect conferences.

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Creating a Conference

1. On the dashboard, click the **Events** tab.
2. Click ⊕ icon at the top right corner of the second pane.
3. In the **Name** field, enter a name for the conference. This name is used in email notifications about the conference.
4. In the **Starts** fields, enter the date, and the start time of the conference.
5. In the **Meeting Lasts** field, enter the duration of the meeting in hours and minutes.
6. From the **Occurs** drop-down list, select the recurring frequency of the conference.

Note

You see the **Occurs** field only if you have not integrated the Connect client with Microsoft Exchange.

7. In the **On Site Location** field, enter the venue for the conference.

   Alternatively, check the **Use my own bridge** option to use the reservation-less conference bridge. Select the conference bridge of your choice from the drop-down list. For more information, click ⊕ next to **Use my own bridge**.

Note

You see the **Use my own bridge** option only if you have reservation-less conference and integrated the Connect client with Microsoft Exchange.

8. In the **Organizers** field, enter the names of the people hosting the conference.
9. In the **Presenters** field, enter the names of people presenting during the conference.

   Check the option below the **Presenters** field, to add additional participants, external contacts who require approval from the meeting organizer to share their screen.

Note

You can drag and drop contacts to shift them between the **Organizers**, **Presenters**, and **Participants** fields.

   For more information, about adding **Presenters** and **Participants** click ⊕ respectively.

10. In the **Agenda** field, enter the name of the agenda and the duration of the agenda in minutes.
11. In the **Overview** field, enter a brief description of the purpose of the conference.
12. To attach any reference material for the participants, click **Choose from Dropbox** in the Files section. To attach files, you must sign in to Dropbox with your credentials.

Note

If the **Choose from Dropbox** tab is disabled for on-site users, you cannot add new files from the Dropbox.

To enable the Choose from Dropbox feature, contact the system administrator.

13. In the **More Settings** section:

    a. To set a customized access code, user can select **Custom Access Code** option.

    b. To set a password, select the **Protect Meeting with Password** option, and enter the password in the **Password** field.

Note

The Participant Code and the Organizer Code are automatically generated. Optionally, you can set the Participant and Organizer Code using settings in the D2 UCB.

    c. In the **Start the Meeting** section, choose one of the following options:

    - When anyone joins
    - When one of the organizers joins

    d. In the **Participants** section:

    - To announce the arrival of a participant on the conference call, select the **Announce when participants arrive** option, and select one of the following options:
      - Play a simple audio tone
      - Prompt participants to record their name, and announce when they try to join and leave the meeting
    - To mute all participants joining the conference call, select the **Mute participants on entry** option**.**
    - To display the names of all participants who have joined the conference, select the **Show everyone's name to all participants** option.
    - In the **When dialing out to participants** area, select one of the following options:
      - Must press one to enter audio portion of the meeting
      - Participants are automatically added to the audio portion of the meeting

14. Click **Create** to generate the invite.

15. Depending on your configuration, you see one of the following results:

    - If the Connect client is successfully integrated with Microsoft Exchange, you see a **Create Conference Success Opening Outlook Please Wait** message. An email invite draft is opened in Microsoft Outlook, where you can review the content, set reminders and recurrence,

and review the list of participants before sending the invite. If you do not see this invite, see Chapter 8, Integrating with Microsoft Exchange/Office 365 on page 90 for information about integration.

- If you have not integrated the Connect client with Microsoft Exchange, the new event is created and displayed with the Connect assigned details as described in Table 4 on page 101. When you click **Events** on the dashboard, the conference is listed on the **Upcoming** tab in the second pane.

Table 4: Connect Conference Details

Conference Detail	Description
ID	The meeting ID that is automatically generated by the Connect system when an event is created
Dial-in Info	The conference call dial-in info for host and participants
<Web Conference link for leader/host>	Connect Conference web page link for the host
Participant Code	The access code for participants to join the conference call
<Web Conference link for participants>	Connect Conference web page link for participants
Password (optional)	The password to join the secure conference call
Additional Calling Info	The dial-in info for different regions. This information is fetched from the Connect Director. To update this information, contact your Connect administrator.

Editing a Conference

As an organizer, you can edit a conference.

To edit a conference, do the following:

1. On the dashboard, click the **Events** tab.
2. Click the **Upcoming** tab to view all the upcoming conferences.
3. Select the conference.
4. Click .
5. Edit the conference details in the required fields, and click **Save**.

Creating a Conference from Microsoft Outlook

1. Launch Microsoft Outlook.
2. Click **New Items > Meeting**.
3. Click the conference icon at the top right corner of the Outlook ribbon.

   A Connect conference is automatically generated with the details listed in Table 4 on page 101 appended to the email invite.
4. In the **To** field, enter the list of participants to invite to the conference. Click **Address Book** or **Check Names** to select or identify directory contacts.
5. To assign participant's role:
   a. Click **Conference > Settings** to open the conference settings window.
   b. Un-check **Collaborative meeting - everyone can present** field.
   c. Click the drop-down next to the presenter's name and select the required role.
   d. Click **OK** to save.
6. In the **Subject** field, enter the purpose of the conference.
7. In the **Location** field, enter the venue of the conference.
8. In the **Start time** fields, enter the date and start time of the conference.
9. In the **End time** fields, enter the date and end time of the conference.
10. Click **Response Options** to configure the responses received from the participants.
11. Select the time slot from the **Reminder** drop-down list to set a reminder.
12. Click **Recurrence** if you want the conference to occur more than once.
13. Click the **Available Outlook** option to configure any other preferences.
14. Click **Send**.

Creating a Reservation-less Conference

Note

You must have Outlook configured with the Connect client before creating a reservation-less conference. The event invite can be shared only using Outlook.

You can start a conference directly from the second pane on the Connect client without scheduling the conference in advance. This is called a reservation-less conference.You can also invite other users to join these conferences.

To invite participants to a conference:

1. On the dashboard, click the **<username>** tab.
2. Click the arrow next to the conference bridge name and do one of the following:
   - To dial into the conference, click .
   - To share the screen or send an IM without joining the conference, click . You can also dial into the conference or configure a call back from here.
   - Open the Link provided in the conference bridge in a web browser.
   - Refer to **Additional Calling Info** to use the region specific toll free dial in info.
3. To invite participants to join your conference, do one of the following:
   - Click **Copy** to copy the conference information, and share the information with other users you want to invite.
   - After launching the conference, click and type the participant's name you want to invite and then click **Conference**.
4. To drop a participant, on the dashboard:
   a. Click icon below the participant name.
   b. In the confirmation dialog box, click **Yes**.

Adding a new Reservation-less Conference

You can use the My Conference section to add a reservation-less conference. To add a new conference bridge:

1. On the second pane, click **Add New Conference Bridge**.
2. In the **Add New Conference Bridge** pop-up window:
   - Enter the name of the conference in the **Name** field.

Note

The Participant Code and the Organizer Code are automatically generated. Optionally, you can set the Participant and Organizer Code using settings in the D2 UCB.

3. In the **More Settings** section:
   - Set a password for the conference, by enabling the **Protect Meeting with Password** option, and entering a password

- In the **Start the Meeting** section, you can only use the default “When anyone joins” setting. The “When one of the organizers joins” setting cannot be selected for a reservation-less conference.
- In the **Participants** section:
  - To announce the arrival of a participant on the conference call, select the **Announce when participants arrive** option, and select one of the following options:
    - Play a simple audio tone
    - Prompt participants to record their name and announce when they try to join and leave the meeting
  - To mute all participants joining the conference call, select the **Mute Participants on entry** option**.**
  - To display the names of all participants who have joined the conference, select the **Show everyone’s name to all participants** option.
- In the **When dialing out to participants** section, select one of the following options:
  - Must press one to enter audio portion of the meeting
  - Participants are automatically added to the audio portion of the meeting

4. Click **Add**.

Editing a Reservation-less Conference

From the Edit, a user can remove or update a reservation-less conference bridge. Click **Remove** to delete a conference bridge.

To update a reservation-less conference bridge:

1. On the second pane, click the drop down next to the selected conference bridge name and click **Edit**.
2. Edit the name of the conference bridge in the **Name** field, and you can do the following in the **More Settings** section:
   - Set a password for the conference, by enabling the **Protect Meeting with Password** option, and entering a password.
   - Select the required options from **Participants** section and the **When dialing out to participants** section respectively.
3. Click **Update** to save the changes.

Migrating Reservation-less Conferences from ST Communicator

Reservation-less conferences migrate from ST Communicator to the Connect client as follows:

- Users who have a reservation-less conference that was previously configured in ST Communicator and who are unassigned to a service appliance will get an error message when trying to create a new event or if they try to join to an existing conference in the Connect client. To remove these conferences from the Connect client, users should manually delete the old conferences from Outlook Calendar.
- Users who have a reservation-less conference that was previously configured in ST Communicator and who are assigned to a service appliance will have a reservation-less conference created during migration, and the settings defined previously remain valid.

  While participant codes on a migrated reservation-less conference remain valid, the **When dialing out to participants** parameter in the event screen is always set to **Must press one to enter audio portion of the meeting** regardless of whether the conference was previously configured with **Participants are automatically added to the audio portion of the meeting**.

  Note

  - If users have multiple reservation-less conferences configured in ST Communicator, all the reservation-less conferences are migrated.
  - Reservation-less conferences can be edited or changed after migration.

- Users who do not have a reservation-less conference previously configured in ST Communicator and who are not assigned to a service appliance will not have a reservation-less conference created during migration.

Accessing Recordings Made with ST Communicator

Prior to migrating from ST Communicator to the Connect client, download any recordings made with ST Communicator and save them to your local system. While the downloaded recordings cannot be played in the Connect client, you can use a Flash player to play them.

Viewing Conferences

1. On the dashboard, click the **Events** tab.
2. Click **Upcoming** to view the list of future conference, and click **Past** to the list of conference in the past.

   The list is sorted by date, from the most recent to the oldest.

   You can filter past events to display only the Recorded events. To filter, click in the Past tab and select Recorded Only.

To view the events of a specific date, click on the second pane and select the date. The events for the selected date will display at the top of the second pane.

Note

If you have integrated the Connect client with Microsoft Exchange, you see all your conferences in your Outlook calendar.

Downloading the iCalendar Data (ICS) File for a Conference

The Connect client generates an ICS file for every event. The Connect client uses the generated ICS file to send a meeting invite if Microsoft Exchange is not deployed. All participants can use this ICS file to populate their calendars with the meeting invite.

To download the Conference iCalendar data file:

1. On the dashboard, click the **Events** tab.
2. Click the **Upcoming** tab to view all upcoming conferences.
3. Select the conference in the second pane to download the ICS file.
4. Click .

   The **Save As** dialog box is displayed. The default file name is `shoretel.ics`, and the default path for saving the file is `C:\Users\<user>\AppData\Local\ShoreTel\Meetings`.
5. Enter the file name and select the location or accept the default, and click **Save**.
6. Locate the file on your computer, and double-click to open the iCalendar file.
7. Review all the information about the conference, and save to your calendar.

Joining a Conference

You can join a conference from the Connect client in the following ways:

- Joining a Conference from the Dashboard: Use this procedure if you see a notification for the upcoming conference in the notification area on the dashboard. The notification is usually sent 5 minutes prior to a conference.
- Joining a Conference from the Events Tab: Use this procedure to join the conference from the Events tab.

- Joining a Conference from Your Calendar: Use this procedure to join the conference from your calendar.
- Joining a Conference from an iOS Device: Use this procedure to join the conference from your iOS device.

Figure 8 describes the different ways to join a conference.

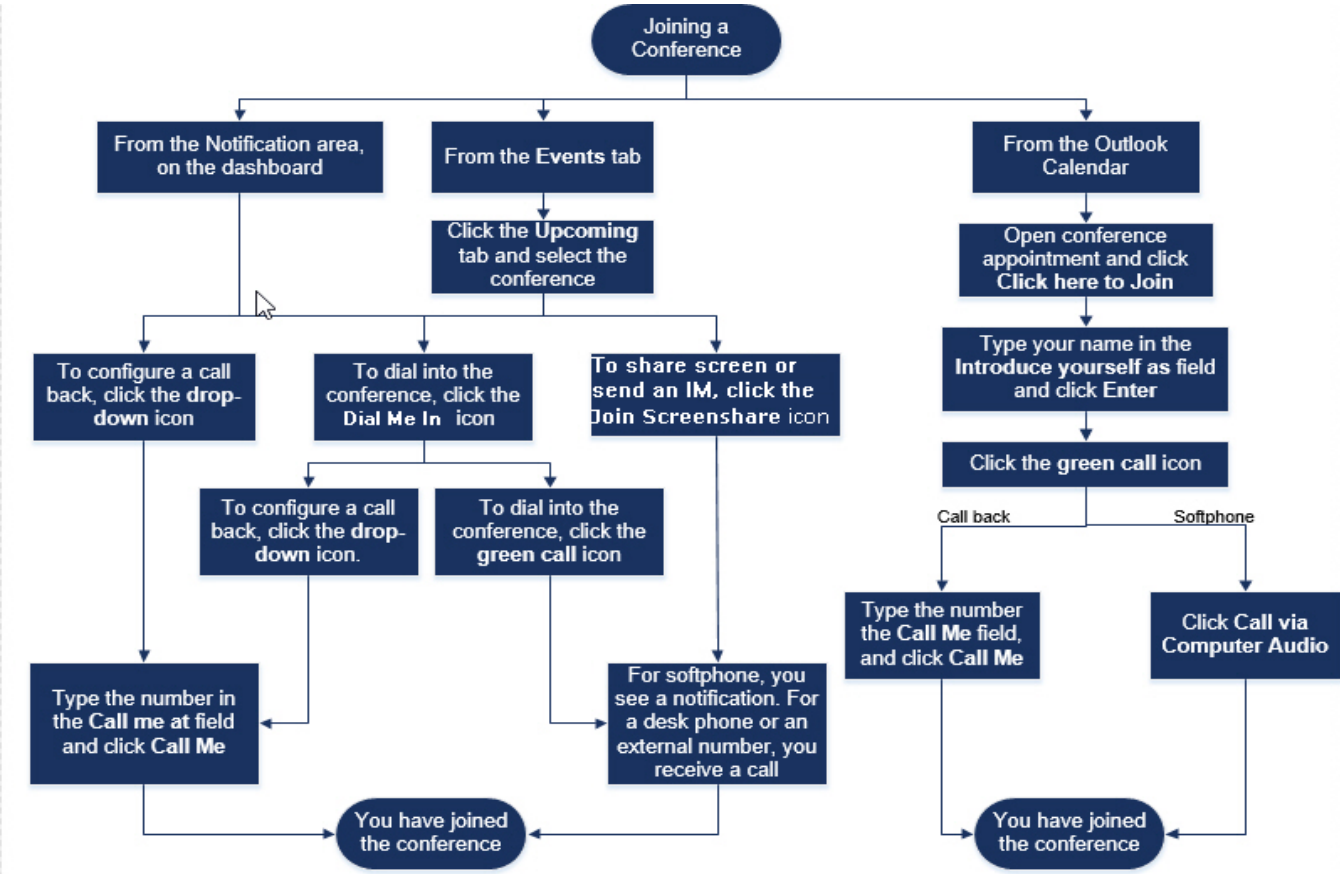


Figure 8: Joining a Conference

Joining a Conference from the Dashboard

When you see an event notification on the dashboard, do one of the following to join:

- To configure a call back:

  a. Click the drop-down icon in beside the event name.

  b. In the **Call me at** field, enter your phone number. Optionally, you can skip this step if you have configured a call back in the previous conference and you want to use the same number (the previous number is saved in the **Call Me** field).

  c. Click **Call Me**.

- To dial into the conference, click the call icon in beside the event name.
  - If you have assigned a softphone to the Connect client, you see a notification on the dashboard when you are connected.
  - If you have assigned a desk phone or an external number to the Connect client, the assigned phone rings.

  If you are unable to dial into the conference through the assigned phone, see Chapter 5, Managing Phones on page 43.

- To share the screen or send an IM without joining the conference, click . You can also dial into the conference or configure a call back from here.

  If you have joined the screen share, click on the task bar at the bottom of the second pane and do one of the following to dial into the conference:

  - To join the conference through the assigned phone (softphone or desk phone), click **Call via <assigned phone>**. If you have assigned any external number, click **Call External Assignment**.
  - To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.

To end the conference, click .

Joining a Conference from the Events Tab

1. On the dashboard, click the **Events** tab.
2. To view all upcoming conferences, click the **Upcoming** tab.
3. Select the conference that you want to join and do one of the following:
   - To configure a call back:
     1. Click the drop-down icon in beside the event name.
     2. In the **Call me at** field, enter your phone number. Optionally, you can skip this step if you have configured a call back in the previous conference and you want to use the same number (the previous number is saved in the **Call Me** field).
     3. Click **Call Me**.
   - To dial into the conference, click beside the event name.
     - If you have assigned a softphone to the Connect client, you see a notification on the dashboard when you are connected.

- If you have assigned a desk phone or an external number to the Connect client, the assigned phone rings.

  If you are unable to dial into the conference through the assigned phone, see Chapter 5, Managing Phones on page 43.

- To share the screen or send an IM without joining the conference, click . You can also dial into the conference or configure a call back from here.

If you have joined the screen share, click on the task bar at the bottom of the second pane and do one of the following to dial into the conference:

- To join the conference through the assigned phone (softphone or desk phone), click **Call via <assigned phone>**. If you have assigned any external number, click **Call External Assignment**.
- To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.

To end the conference, click .

Joining a Conference from Your Calendar

If you have successfully integrated the Connect client with Microsoft Exchange or have downloaded and added the iCalendar data file to your personal calendar, you can join a conference by opening the appointment on your calendar.

1. Open your calendar.
2. Open the conference invitation.

   The invitation contains the details of the conference, as described in Table 4 on page 101.
3. Do one of the following:
   - Click the **Click Here to Join** link.
   - Open the URL provided in the conference invitation on a web browser.
4. In the **Introduce yourself as** field, enter your name and press **Enter**.
5. Click on the task bar at the bottom of the page, and do one of the following:
   - To join the conference through the computer audio, click **Call via Computer Audio**.

- To configure a call back, in the **Call me at** field enter your phone number, and click **Call Me**.

Note

- You can configure a call back only after the organizer joins the conference. If the organizer has not joined the conference, the **Call Me** option is disabled, and you see the message, **Available after an organizer joins** below the **Call Me** field.
- **Call via Computer Audio** is not supported in the Safari 12.0 browser.

6. You can perform the following actions during the conference using the icons on the task bar at the bottom of the page:
   - To leave the call during the conference, click .
   - To mute and unmute your audio during the call, click .
   - To share your screen, a portion of the screen, or an application window, click .
   - To view and copy the meeting information, click .
   - To ask a question during the conference, click .
7. After the conference ends, close the browser to leave the conference.

Optionally, you can use the dial-in info and the participant code given in the conference invitation to join the conference through your cell phone.

Joining a Conference from an iOS Device

To join a web conference from an iOS device, do either of the following:

- If the Mitel Connect application is installed on your iOS device, all the Outlook meetings are displayed.
  1. Open **Mitel Connect**.
  2. Open the Conference invitation to display details of the conference.
  3. Tap **Join Audio** to join the audio bridge or **Join Web Bridge** to open the conference in a web browser.
  4. In the **Introduce yourself as** field, enter your name.
  5. In the **Call me at (optional)** field, enter your number.
  6. Tap **Join** to join the conference.
- If the Mitel Connect application is not installed on your iOS device.
  1. Do one of the following on your iOS device:

- Open your calendar and tap the meeting URL you want to join. The web portion of the conference opens in the Connect web collaboration client launched through the Safari browser.
- Open the Safari browser and enter the meeting URL. The web portion of the conference opens in the Connect web collaboration client launched through the browser.

2. In the **Introduce yourself as** field, enter your name.
3. In the **Call me at (optional)** field, enter your number.
4. Tap **Join** to join the conference.

Note

- If you have not entered your call back number at the beginning, you can refresh the browser to navigate to the starting page and enter the number.
- Softphone, Agenda, screen sharing and individual chat are not supported for conferences on an iOS device.

After the conference ends, close the browser to leave the conference.

Placing a Participant on Mute

If you are an organizer of the conference, you can mute and unmute all participants or an individual participant.

- To mute all participants, click icon on the conference task bar.
- To unmute all participants, click icon on the conference task bar.
- To mute a participant, click icon beside the participant name on the dashboard.
- To unmute a participant, click icon beside the participant name on the dashboard.

Note

If you enable the **Mute participants on entry** option while creating the conference, the **Mute-all** option is automatically enabled and all the participants will be on mute when they join the conference. For more information about creating a conference, refer to Creating a Conference on page 99.

Dropping a Participant from Conference

Organizer can drop a participant from the conference.

To drop a participant, do one of the following on the dashboard:

- Click icon below the participant name. In the confirmation dialog box, click **Yes**.
- Right-click the contact and select **Remove <user name>**.

Recording a Conference

1. Dial in to join a conference.
2. Click REC on the conference task bar to start recording the conference.

   The **REC** icon turns red to indicate that recording is in progress.

3. When you want to stop recording, click REC .

   You can stop a recording while a conference is in progress. To leave the conference, you must click the red call end icon as explained in Joining a Conference on page 106.

You can download, play or copy the recording URL.

1. On the dashboard, click **Events > Past**.

   The conference with recordings are indicated with REC .

2. In the second pane, select the conference.
3. In the third pane, click and select the required option.

Note

You can play the conference recordings on the Connect client and all web browsers except the Microsoft Internet Explorer 11.

Canceling a Conference

You can cancel a Connect conference any time through either the Connect client or Microsoft Outlook.

Canceling a Conference from the Connect client

1. Click the **Events** tab on the dashboard.
2. Click the **Upcoming** tab to view the list of future conferences.

   The list is sorted by date, from the current event to future events.
3. Click the conference that you want to cancel.
4. Click **Cancel Event** at the bottom of the third pane.
5. Click **Cancel** in the confirmation dialog box.

   The **Canceling Event** message is displayed at the bottom of the third pane. This message is followed by **Opening Outlook Please Wait** message, and the Outlook invite is launched (if you have integrated with Microsoft Exchange).
6. Click **Send Cancellation** in the Outlook invite cancellation window to notify participants of the cancellation.

Canceling a Conference from Microsoft Outlook

If you have integrated the Connect client with Microsoft Outlook, you can cancel a conference from the Outlook client.

1. Launch Microsoft Outlook.
2. Open the conference appointment in the Outlook calendar.
3. Click **Cancel Meeting** at the top left corner of the Outlook ribbon.
4. Click **Send Cancellation** to notify participants of the cancellation.

Conferencing using Connect client for Web

You can use the Connect client for Web to launch Connect conferencing without the Connect client. This feature is useful for remote users who have not installed the client on their systems.

By using the Connect client for Web, you can join a Connect conference from any non-Mitel network without entering any authentication details. Organizers joining the conference through the Connect client for Web can only serve as participants, not presenters or organizers in the meeting.

Using the Connect client for Web

1. Do one of the following in the meeting invite sent by the conference host:
   - Open the Link in a web browser.
   - Click the **Click here to join** link.
2. In the **Introduce yourself as** field, enter your name, and press **Enter**.

   The navigation pane on the left displays:
   - **Meeting Title**—the conference name
   - **Now Sharing**—the contact currently sharing the screen
   - **Now Speaking**—the contact currently speaking in the conference
   - **Group Chat**—public chat window for all conference participants
   - **Attendees**—list of participants in the conference
3. Click on the task bar at the bottom of the page, and do one of the following:
   - To join the conference through the computer audio, click **Call via Computer Audio**.
   - To configure a call back, enter the number in the **Call Me** field, and click **Call Me**.

Note

You can configure a call back only after the organizer joins the conference. If the organizer has not joined the conference, the **Call Me** option is disabled, and you see the message, **Available after an organizer joins** below the **Call Me** field.

4. You can perform the following actions during the conference using the icons on the task bar at the bottom of the page:
   - To leave the call during the conference, click .
   - To mute and unmute your audio during the call, click .
   - To share your screen, a portion of the screen, or an application window, click .
   - To view and copy the meeting information, click .
   - To ask a question during the conference, click .
5. After the conference ends, close the browser to leave the conference.

Optionally, you can use the dial-in info and the participant code given in the conference invitation to join the conference through your cell phone.

Using Group Chat

Messages from other users are indicated with a red pop-up. Click the group chat window or a participant's name to view the message.

To send a message to the conference participants:

1. Click the **Group Chat** icon on the left navigation pane.
2. Enter your message in the IM input field at the bottom of the IM chat window, and click **Enter**.

   You will receive IM message notifications with a red pop-out. Click the group chat window or participant's name to view the message.

Using Screen Sharing

You can use the screen sharing feature to present your screen to the conference participants. You can share the entire screen, a portion of the screen, or an application window. The area being shared is outlined by a green rectangular border.

Note

If the share icon is grayed out, your configuration might not support screen sharing. For more information, contact your Connect administrator.

Figure 9 describes the various ways to share the screen.

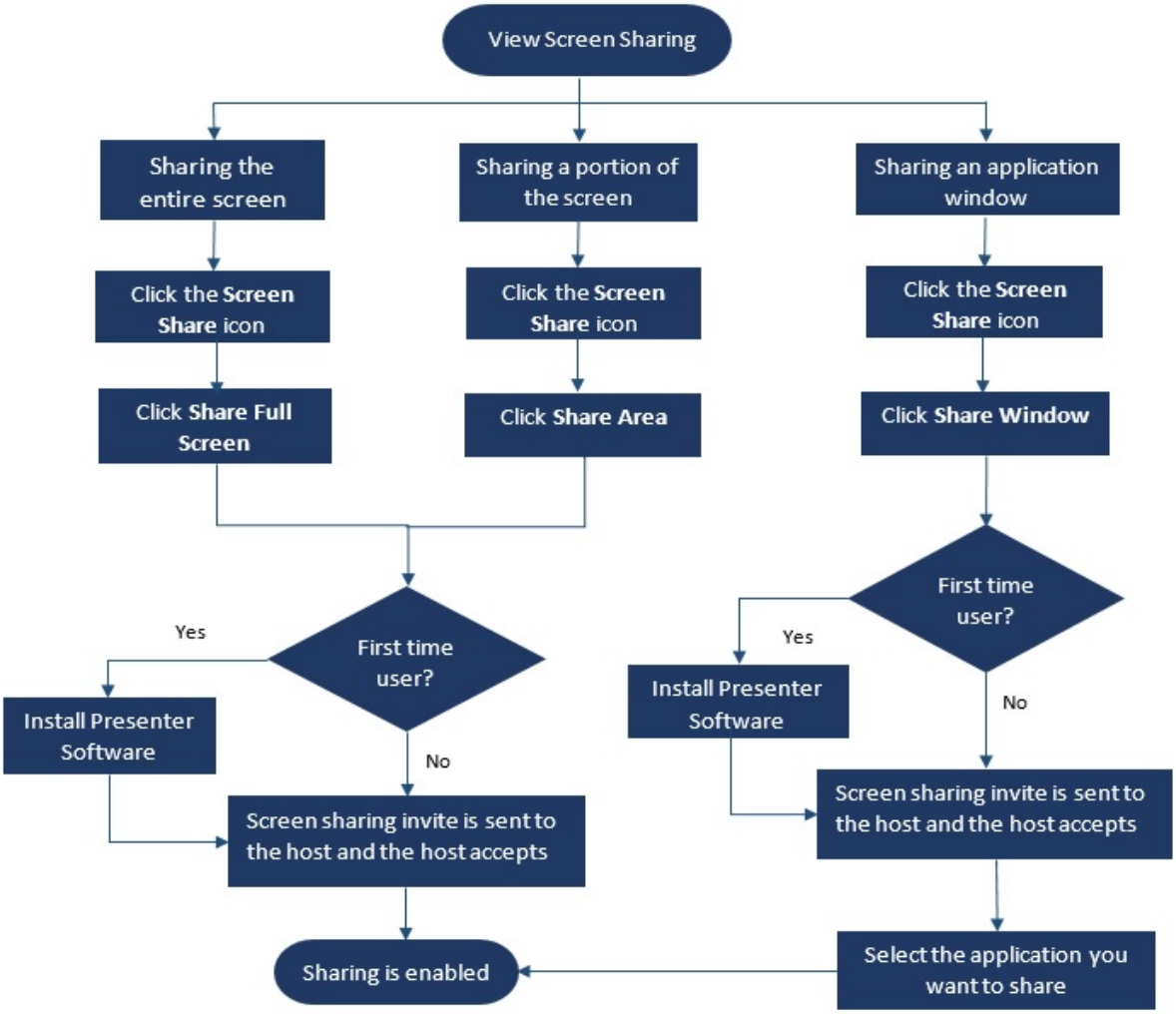


Figure 9: Screen Sharing Methods

To share your screen with the conference participants:

1. On the Conference task bar, click .
2. To share the full screen, select **Share Full Screen**.

   To share a portion of the screen, select **Share Area**.

   To share an application window, select **Share Window**.

   If you are a first-time user, select the appropriate option when you are prompted to install the presenter software.

   Note

   When you attempt to share the screen in the Microsoft Edge browser for the first-time, the Connect client for Web displays multiple pop-ups to install the Connect Presenter.

3. If you are the conference host, screen sharing is enabled immediately after the connect presenter is installed.

   If you are a participant, the screen sharing request is sent to the host. Connect client displays a notification on the conference task bar for all screen sharing requests. If the system notification for screen share is enabled, the Connect client also displays the system notification. Host must click **Accept** on the notification to view your screen, or click **Reject.**

   To receive a system notification for screen sharing requests, refer to Managing System Notification for Screen Sharing Request on page 118.

   After the host accepts your screen share invite, the screen share will start immediately.

   During screen share, the tool bar with the following options is displayed at the top of the screen:

   - Conference name
   - Screen share status
   - Pause sharing
   - End sharing

   To collapse or expand the tool bar, click the arrow next to the conference name.

4. Click to pause screen sharing.
5. Click to stop sharing.

If another user starts to share the screen while you are sharing, your Connect presenter will exit and stop your screen sharing.

Managing System Notification for Screen Sharing Request

Note

By default, the system notification for screen sharing requests is enabled.

To disable the system notification for an incoming screen sharing request:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Notifications > Popup**.

   For Windows users:

4. Uncheck the **Show a system notification for incoming Screen Share** option.

   For macOS users:

5. Click **Configure via OS X Notification Center…**".
6. In the **Notifications** center scroll down, and then click **Mitel Connect**.
7. Click **None**.

Note

Clicking **None** disables notifications for screen sharing, incoming calls and voicemails.

Using Video Conferencing

MiCloud Connect users can create video conferences for multiple participants from the Connect client.

Note

This feature is available for US customers only.

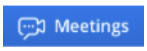
Creating a Video Conference

You can schedule a video conference by creating a new event in the Connect client.

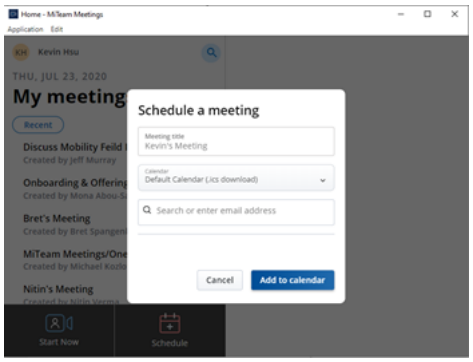
To create a video conference invite:

1. Click the **Events** tab on the dashboard.
2. Click in the second pane.

3. In the **New Event** dialog, select **Meetings**.

4. Click 

to launch MiTeam Meeting.
The Miteam meeting's **Schedule a meeting** panel opens.



5. Specify a **Meeting title** for the meeting.

Note

It is recommended to give a identifiable name that is easy to remember for the participants.

6. Click **Calendar** and from the drop-down list, choose the calendar to which you want to add the meeting invite.

7. In Search or enter Email address bar add participants for the meeting. You can add a maximum of 100 participants with up to 16 video tiles.

   a. To add a registered user, type the name of the user you are searching for. From the list, click the name to add the user as a participant to the meeting.

   b. To add a guest user to a meeting, type the email address of the participant you want to add to the meeting.

8. Click **Add to Calendar.** The Scheduling proceeds based on the calendar type you selected from the Calendar drop-down list.

   a. Default Calendar (.ics download) – downloads an ICS file with meeting join details, title, and participants. Open it in your default calendar app (such as Outlook desktop) and schedule the meeting.

   b. Google Calendar – opens a new tab in Gmail with a prepopulated calendar invite with meeting join details, title, and participants.

   c. Exchange / Office 365 – opens a new tab in Office 365 with a prepopulated calendar invite with meeting join details and title; but does not carry over the participants. You must add the participants directly in the open calendar in Office 365.

For more information, See MiTeam Meetings

Editing a Video Conference Invite

You can edit an existing video conference invite from Microsoft Outlook.

1. Click the **Calender** tab on the **Shortcuts** pane.
2. Open the video conference meeting invite.

   If you open an invite that is part of a recurring series in the **Open Recurring Item** dialog box, select **Just this one**, and then click **OK**.
3. Make the required changes in the **Item Occurrence** Window, and click **Send Update**.

   When you edit the video conference invite in Microsoft Outlook, the video conference invite in the Connect client is automatically updated.

To cancel a video conference, open the conference invite, click **Meetings** tab > **Cancel Meeting** and then click **Send Cancellation** in the Item Occurrence window.

Canceling a Video Conference

If the meeting is no longer required, you can cancel a meeting from Microsoft Outlook. Canceling a meeting removes the invite from your Outlook calendar and sends a notification to all the meeting attendees.

To cancel from Microsoft Outlook, open the meeting invite and click **Cancel Meeting**.

Viewing Video Conferences

If you have integrated the Connect client with Microsoft Exchange, you can see your conferences in the Connect client.

1. In the Connect client, click the **Events** tab on the dashboard.
2. Click the **Upcoming** tab to view scheduled conferences or the **Past** tab to view past conferences.

   The list is sorted by date, from the most recent to oldest events. Video conferences display a (MiTeam icon) next to the meeting description.

Joining a Video Conference

You can join a conference in the following ways:

- Joining a Video Conference from the Notification Area: You can join a conference from the notification area on the dashboard of the Connect client. The notification is usually sent five minutes prior to the conference.

- Joining a Video Conference from the Events Tab: You can join a conference before you receive a notification from the Connect client by clicking the Events tab.
- Joining a Video Conference from Outlook: You can join a conference from your Microsoft Outlook calendar.

Note

Guest (personal and external contacts) users will receive a meeting invite in their e-mail inbox. Click the join meeting link to join the meeting.

Joining a Video Conference from the Notification Area

1. Click the event in the notification area, and then click the icon next to the conference.
2. Enter the required details, and then click **Enter now**.

   You can mute the audio and disable the video during the call.
3. Click the red **Leave** icon to end the video conference.

Joining a Video Conference from the Events Tab

1. Click the **Events** tab on the dashboard.
2. In the **Upcoming** Tab, click the icon next to the conference you want to join.
3. Enter the required details, and then click **Enter now**.

   You can mute the audio and disable the video during the call.
4. Click the red **Leave** icon to end the video conference.

Joining a Video Conference from Outlook

If you have successfully integrated the Connect client with Microsoft Exchange, you can join a conference by opening the meeting invite in your Outlook calendar.

1. Launch your Outlook calendar and open the conference appointment.
2. Click the link to Join the meeting. Enter the required details, and then click **Enter now**.

   You can mute the audio and disable the video during the call.
3. Click the red **Leave** icon to end the video conference.

Sharing the Screen

You can share your screen with the video conference participants. While you are sharing, participants can view your entire computer screen and all your actions on the computer, until you stop the sharing.

To share the screen, click

and select the screen that you want to share. To end the screen sharing session, click

.

CHAPTER

10

Sharing Screen

This chapter provides information about sharing screens.

Sharing Screens with a Contact 124

Sharing Screens with a Contact

The Connect client enables easy sharing of screens with a contact.

1. Click the **Contacts** tab or enter the contact name/number in the **Quick Dialer Search** bar on the dashboard.
2. From the search results, select the contact.
3. On the Contact card to the left of the Avatar, click to share your screen.

Note

- If you want to call your contact, before sharing your screen, see step 6.
- For MiCloud Connect users, the sharing of screen with a contact option is enabled only if the contact is on an audio call: otherwise, the sharing screen option does not appear for the contact.

4. Click:
   - **Share Full Screen:** To share your entire computer screen with your contact. The information displayed on your screen is visible to your contact.
   - **Share Area**: To share a movable rectangular area that you can use to share specific portions of your screen.
   - **Share Window:** To share any of the client application windows you have open on your computer. For example, you can choose to share only the Microsoft Outlook Email application window with your contact.

   A screen sharing invite is sent to your contact as a notification. The contact must click ✓ to accept viewing your screen, or click ✕ to reject the screen sharing invite.

   Optionally, if the contact card is open, click **View Screen Share** in the **Actively Sharing...** pop-up notification to accept the screen share.
5. After the contact accepts your screen sharing, the screen share will start immediately. The screen area being shared is highlighted with a green rectangular border.

   To pause screen share, click . The rectangular border marking the area being shared becomes orange.
6. To call or have a conference with your contact, click in the third pane (For information about using this feature, see Joining a Conference on page 106).
7. To end the screen sharing session, click the at the top of the screen.

A notification is displayed in your contact's third pane that indicates that you are no longer sharing your screen.

If your contact starts to share the screen while you are sharing, your Connect presenter will exit and stop your screen sharing.

CHAPTER

11

Managing Workgroups

This chapter provides information about managing workgroups using the Connect client.

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Workgroups Overview

Note

Workgroup feature is available only for MiVoice Connect users.

Agents and supervisors can see the Workgroups tab on the Connect client dashboard if they belong to any workgroup. The Workgroups tab displays the active workgroup calls for a user, and the current workgroup state.

Table 5. lists the workgroups states of agents and supervisors.

Table 5: Workgroups States of Agents and Supervisors

Color	State	Description
Green	Logged In	Logged into the workgroups
Grey	Logged Out	Logged out of the workgroups
Orange	Wrap Up	Agent or Supervisor is performing wrap-up work for a workgroup call.

Workgroups Access Types

You must be a member of a workgroup and have necessary license type to view information about workgroups. Your license type determines what type of member you are.

Types of workgroup members are:

- **Agent**: These users have the Workgroup Agent license type and access to workgroup information, but not agent information.
- **Supervisor**: These users have the Workgroup Supervisor or Operator license type and access to all workgroup and agent information. They must also be members of a workgroup.

Identify Call by Workgroup Name

When a supervisor or an agent receives a call for a workgroup, the call notification on the dashboard displays the name of the workgroup. This helps users who are members of multiple workgroups to identify which workgroup is receiving a call.

Managing Workgroups

Viewing Workgroups Information

Click the **Workgroups** tab on the dashboard to view the following workgroup information in the second pane:

- Call Handling Mode icon—Shows the Call Handling Mode status
- Workgroup name—Name of the workgroup
- Queued Calls—Number of calls queued for the workgroup
- Longest Queued—Call that has been on hold for the longest period in the queue
- Longest Call—Call that has the longest call duration

To see the workgroup details, select a workgroup, and click **Show Workgroup Details**. For all the workgroups selected in the second pane, supervisor can view queued calls, agents and voicemail messages in the third pane. You can also select the workgroups by clicking **Settings** option at the bottom of the second pane.

Assigning Call Handling Mode Status

A supervisor can assign the Call Handling Mode status to the workgroup.

To assign the Call Handling Mode status:

1. On the dashboard, click the **Workgroups** tab.
2. In the second pane, click the **Call Handling Mode** icon beside the Workgroup name and select one of the following:
   - On-Hours
   - Off-Hours
   - Holiday
   - Custom

     The Workgroup Call Handling Mode status can be customized using the Custom mode.The Custom mode can be configured only from the Connect Director.

Filtering Queued Calls

Select **Queues** tab in the third pane for queued calls details. When you filter the workgroup information by queued calls, you can see name of the caller or telephone number. If caller name is not associated with the call, the following information is displayed:

- Duration that the queued call has been in the workgroup
- Duration of the call in the system

- Dialed number
- Caller ID

Note

To pick calls from the queued calls list, agents and supervisors must select **Allow agents to pickup from queue** option in Connect Director.

Managing Agents

A Supervisor can manage the Workgroup agents from the **Agents** tab on the third pane. The Agents tab is visible only to the supervisors and they can perform all actions without logging in to the Workgroups.

- To search for an agent, select the **Agents** tab on the third pane, and type the agent name or extension number in the **Search** field.
- To change the status of the agents of all Workgroups:
  - **a.** On the dashboard, click the **Workgroups** tab.
  - **b.** On the second pane, click **Show Workgroup Details**.
  - **c.** On the third pane, select the **Agents** tab. By default, in the drop-down list on the left, **All** is selected. If another Workgroup is selected, click the drop-down icon and select **All**.
  - **d.** Click **Set As**.
  - **e.** From the drop-down list, select the required status:
    - Logged In
    - Logged Out
    - Wrap-Up (this option is available only when the agents are logged in to the Workgroup)
    - End Wrap-Up
- To change the status of the agents of a single Workgroup:
  - **a.** On the dashboard, click the **Workgroups** tab.
  - **b.** On the second pane, click **Show Workgroup Details**.
  - **c.** On the third pane, select the **Agents** tab. Click the drop-down icon on the left, and select the Workgroup.
  - **d.** To change the status of all agents in the selected Workgroup, click **Set As** and select the required status.

    To change the status of a single agent in the selected Workgroup:

    - Click the availability state icon below the agent name and select the required status.

- In the **Search** field, type the name or extension number of the agent, and click **Set As** and select the required status.

  If the search result displays more than one agent, using the **Set As** option changes the status of all the agents in the search result.

Note

When the Supervisor changes the status of all agents, the status of the Supervisor remains unchanged.

Supervisors can control the following actions for a single agent without logging in to the Workgroup:

- Call an agent
- Check voicemail
- Log in an agent
- Log off an agent
- Put the agent in Wrap Up state (this option is available only when the agent is logged in to the Workgroup)
- Change the Availability state of an agent

With the proper permissions configured by the Connect administrator, supervisors can also perform the following actions on agents:

- Pick up a call
- Add and manage call notes
- View routing slips
- Unpark call
- Intercom
- Whisper page the agent
- Silent coach the agent
- Barge in on the agent
- Silent monitor the agent
- Setting a Sound Notification
- Enable picking up calls and parking calls

Accessing Workgroups Voicemails

Supervisors and agents can view and listen to the workgroup voicemails without logging into the workgroup.

1. On the dashboard, click the **Workgroups** tab.
2. In the second pane, click **Show Workgroup Details**.
3. In the third pane, click the **Voicemails** tab to view workgroup voicemails.

   The unheard voicemails appear in bold font with an orange dot indicator.

4. Select a voicemail and click to play the voicemail through the computer speaker or to play through the desk phone, and click .

Note

If you have assigned your Connect client to Softphone, desk phone option will not be displayed.

By default, the Voicemail tab displays the voicemails of all the workgroups you belong to. You can filter the voicemails list to view voicemails by workgroup.

To view voicemails by workgroup, click the drop-down list on the **Voicemail** tab in the third pane and select the workgroup.

Note

After you exit and reopen the workgroup, the drop-down selection changes to the default value, “All”.

The Deleted Voicemails tab is displayed only if there are any deleted voicemails. By default, this tab is in collapsed view. Click on the **Deleted Voicemails** header to view the deleted voicemails.

To restore a deleted voicemail of the workgroup, locate the voicemail in the Deleted Voicemails list of the workgroup and click **Restore**.

Configuring Workgroup Notifications

To configure the workgroup notifications:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Workgroups**.
4. Check **Show me notifications when calls arrive in queue** to view the notifications for the queued calls.

   Enter the time duration in **Keep the notification on screen for** field to set the time for displaying the notifications on the screen.
5. Check **Continue to show notification while logged out of workgroups** to view the workgroup notifications after you log out.

Setting Queue Monitor Alert Threshold

To specify the queue monitor alert thresholds and call arrive in queue notification, click **Settings** at the bottom of the second pane. You can also access Workgroup settings by:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Workgroups**.

Supervisor can view all workgroups configured and edit Alert Thresholds for each workgroup. However, agents can view only Alert Thresholds. Closing the preferences window or switching to another tab saves your threshold settings.

When the specified workgroup queue thresholds are exceeded, the queued calls number and/or call duration label color changes to red in the second pane. After the parameter drops below the threshold, the label color changes back to default gray.When the queue threshold exceeds the specified time and number, a sound is played. You can turn the sound on or off using the **Bell** icon at the bottom of the second pane.

To configure Queue Monitor Alert Threshold:

1. On the dashboard, click the **<username>** tab.
2. On the second pane, click .
3. Click **Workgroups**.
4. Select the **Enable Workgroup** option for the required workgroup to configure queue monitor alert threshold.
5. In the **Turn ON Threshold Alert** field, select the required workgroup to enable the threshold alert.
6. In the **Alert When Queue Reaches or Exceeds** field, increase or decrease the call queue number for the required workgroup.

   This number determines the number of calls that can be queued before sending an alert to the user.
7. If required, in the **Alert When Queued Time Exceeds** field, enter the time duration to set the queue monitor alert threshold for the workgroup.

APPENDIX A

Operator Features

This chapter provides information on how to enable, and access operator specific features.

Operator Features 136

Operator Features

Connect Operator license provides the operators with additional features and functionalities within the Connect client that makes easier to manage large volume of calls within the application.

You must have operator license to access operator features and functionalities. Refer *Connect System Administration Guide* to enable operator license for MiVoice Connect and *Support site* for MiCloud.

Connect client provides special features for operators as listed in the Table 6

Table 6: Operator Features Overview

Features	Description
Drag and drop	Operators can left-click and drag an object in both the directions; from call stack to a contact and vice versa.
Drag and hover	Operators can left-click and hover an object in both the directions; from call stack to a contact and vice versa to access more telephony functions. The advanced telephony functions are: ■ Blind Transfer ■ Consultative Transfer ■ Intercom Transfer ■ Transfer to Mailbox ■ Park ■ Park and Page ■ Park and Intercom ■ Blind Conference ■ Consultative Conference ■ Intercom Conference For more information, refer to Transferring a Call on page 55.
Call stack orientation	Operators can view the oldest call at the top of the call stack and the most recent call at the bottom.
Double click to answer	To answer an incoming call, operators can: ■ Double-click anywhere in the incoming call notification area. ■ Click the green call icon as other users.

Table 6: Operator Features Overview

Features	Description
Routing slip	Operators can view or hide the routing slip for each call by toggling the routing slip icon in the incoming call notification area. **Note:** Routing slip is disabled by default. To enable routing slip, refer to Managing Call Notes and Viewing Routing Slips on page 63.
Changing availability state of a contact	Operators can change a contact's availability state if: ■ Contact belongs to the contact group created by operator. ■ Contact has added operator on his access list. To add a contact to access list, refer Allowing a Contact to Manage your Availability State on page 42. To change a contact's availability state, do one of the following: ■ Right-click a contact, and select **Change Availability** <availability state>. ■ Open the contact card by selecting a contact, click on the arrow next to contact's availability state, and select the state.
Identifying the call by workgroup name	When an operator receives a call for a workgroup, the call notification on the dashboard displays the name of the workgroup. This helps users who are members of multiple workgroups to identify which workgroup is receiving a call.