

MITEL

Unified Communicator Express

Mitel Unified Communicator
Express User Guide
Release 3.1



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Mitel Unified Communicator Express User Guide
Release 3.1
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About Mitel Unified Communicator Express

Mitel Unified Communicator® (UC) Express (formerly Mitel 5300 Integrated Office Companion Enhanced) is a cost-effective desktop assistant that seamlessly combines telephony with integration to Microsoft Outlook and Microsoft Windows desktop search providing the user with a range of intelligent call handling facilities and productivity enhancements.

UC Express provides an innovative toolbar GUI that allows users to manage the functionality of their Mitel IP phone with speed and ease directly from the Windows taskbar on their desktop. With features such as click-to-dial, caller line ID pop-up, and single-click conference/transfer, UC Express simplifies routine communications and helps users maximize their efficiency. Designed for easy configuration and installation, UC Express provides IT personnel with a number of implementation options – from simple end-user downloads to larger-scale pull or pushed-based mass deployment.

Building on the integration with Outlook, UC Express allows users to access, search and dial corporate contacts from Microsoft Active Directory or LDAP directories. Additionally, users can perform a Windows desktop search to locate documents, e-mails, and corresponding records based on the incoming caller ID. By integrating widely-used applications with a single access point for all communications needs, UC Express helps drive productivity while enhancing responsiveness to customers, suppliers and partners.

Features

UC Express supports both the Mitel 3300 Communication Platform and the Mitel 5000 Communication Platform (Mitel 5000 CP).

 **Note:** UC Express will only connect to the Mitel 5300 Series IP Phone Sets, Mitel 8528, and Mitel 8568 phones. All other phones on a Mitel 5000 CP Communication Platform will not work.

For each of those platforms, UC Express works with the following Mitel phones :

- Mitel 5312 (MiNET / SIP) – Note: only certain features available in SIP mode
- Mitel 5324 (MiNET / SIP) – Note: only certain features available in SIP mode
- Mitel 5320 (MiNET)
- Mitel 5330 (MiNET / SIP) – Note: only certain features available in SIP mode
- Mitel 5340 (MiNET / SIP) – Note: only certain features available in SIP mode
- Mitel 5360 (MiNET)- Note: only available on the Mitel 3300
- Mitel Softphone
- Digital Phone – Mitel 8528 and Mitel 8568 (to work with the Mitel 5000 CP)

Please note that telephony commands and notifications are limited to the prime line of the phone.

- Toolbar and tray icon for non-intrusive desktop profile
- Multi-profile support - Each profile is mapped to a specific network connection which is used to automatically determine the network the user is logged into and to find the correct profile to use to connect to the user's phone
- Use either directory number (DN) or IP address of phone for setup
- Ability to use Windows telephony location
- Definable dialing rules
- Dial number from tray or toolbar
- Dial extensions
- Drag and dial a number from any application

- Type name into toolbar to automatically pull phone numbers out of Active Directory or Outlook
- Incoming call pop-up and answer by clicking
- Display caller ID in text entry field in toolbar
- Search Active Directory and Outlook contacts based on incoming call
- Open caller's contact record in Outlook
- Invoke Windows desktop search for emails and docs containing caller's name or number
- Single click to re-dial
- Missed call list
- Call transfer
- Call conference
- One-step conference/transfer
- Create a new Outlook task with caller ID, date and time of call automatically filled in
- Create a new Outlook contact based on caller ID
- Create a new Outlook email to caller with 'send to' address automatically filled in based on caller ID
- Create a new Lotus Notes contact based on caller ID
- Create a new Lotus Notes email to caller with 'send to' address automatically filled in based on caller ID
- International language support
- Softphone

Additional Features available with the Mitel 3300 only

- Automatically sets your instant messaging presence state based on your call state
- Voice mail
- Desktop speed dial programming
- Desktop access to speed dial entries
- Speed dial based on incoming call
- Program phone key to launch a PC application
- Dial Highlighted
- Press a button to dial highlighted number in any application

Mass Deployment Options

- Network-based installer
- Configuration by command line for deployment using scripting-enabled software deployment tools
- Domain-based registration



Note: For more details on the Mass Deployment Options, please see the Mitel Unified Communicator Express IT and Administrator Guide.

Application and Operating System Requirements

Supported Operating System Platforms

- Windows XP 32 bit SP3 Professional Edition
- Windows Vista 32 bit SP2 Business Edition
- Windows XP 64 bit SP2 Professional Edition
- Windows Vista 64 bit SP2 Business Edition
- Windows 7 32 bit Enterprise Edition
- Windows 7 64 bit Enterprise Edition

Supported LDAP Directories

- Microsoft Windows 2003 R2 SP2 Active Directory and 2008 R2 Active Directory
- Sun Java Communications Suite 6
- OpenLDAP 2.3.27

Third Party Requirements

- Microsoft Outlook
 - Microsoft Outlook 2003 SP3 on Windows XP Pro SP3 with Windows Desktop Search
 - Microsoft Outlook 2007 SP2 on Windows Vista Business SP1 with Windows Desktop Search
- Office Communicator 2007 client version 2.0 (with LCS server)
- Windows Live Messenger 8.5.1302.1018 or Windows Live Messenger 2009 14.0.8064.206
- Windows Desktop Search
- Windows Terminal Server 2003
- Lotus Notes 8.5

Hardware Requirements

Minimum requirements

- Pentium 3 (or equivalent)
- 1 GB RAM
- 40 MB free disk space for application install and data
- Microsoft .Net Framework 2.0

Recommended system

- Pentium 4 (or equivalent)
- Dual-core CPU
- 2 GB RAM
- 40 MB free disk space for application install and data
- Microsoft .Net Framework 2.0

Compatibility with Mitel Platforms, Phones and Applications


- 3300 ICP release 9.0.2.17
- Mitel 5000 Communication Platform release 4.0
- 5330 and 5340 IP Phone firmware Minet build 1.4.2.10 or greater
- 5312 and 5324 IP Phone firmware Minet build 2.0.1.10 or greater
- Mitel Border Gateway (for release 5.2 and higher)

Installing Mitel Unified Communicator Express

Use this procedure for the standard install of Mitel Unified Communicator Express.

 Note: There are mass deployment and configuration options for Mitel Unified Communicator Express. (Please see the Mitel Unified Communicator Express IT Guide)

1. To initiate the install of Mitel Unified Communicator Express, double click the appropriate install file **UnifiedCommunicatorExpress.msi**
2. Follow the onscreen instructions in the installation program:
 - a. If not already installed, Mitel Unified Communicator Express will initiate the install of Microsoft .NET Framework 2.0. (Microsoft .NET Framework 2.0 is required to run Mitel's Unified Communicator Express)
 - b. On the License Agreement dialog, read the agreement, select "I Agree" and click "Next".
 - c. Select a folder where Mitel Unified Communicator Express will be installed. By default, it will be installed to "C:\Program Files\Mitel\Unified Communicator Express"
3. The install will then be done. Once complete, you can then choose to "Run Mitel Unified Communicator Express now."
4. Alternatively, to run Mitel Unified Communicator Express, click Windows Start menu and navigate to Programs->**Mitel** -> **Unified Communicator Express**.

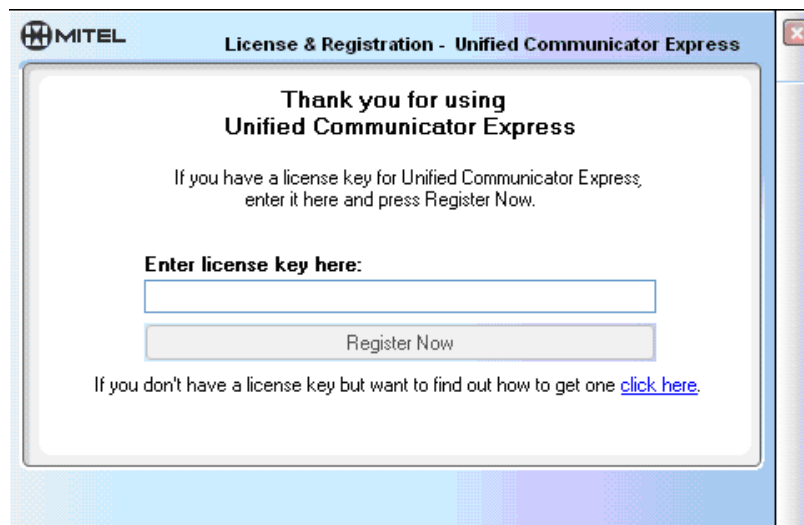
 Note : Installing Mitel Unified Communicator Express will uninstall any previous installation of Integrated Office Companion.


 Note : If you upgrade Mitel Unified Communicator Express from either Integrated Office Companion or a previous version of Mitel Unified Communicator Express, you will have to re-enable the toolbar.


Registering Mitel Unified Communicator Express


When you run Mitel Unified Communicator Express for the first time, you will encounter a registration dialog requiring you to enter your license key.

1. Enter your license key.
2. Click “Register Now”



 Note: Here you can also find out how to get a license key if you don't already have one.

 Note: Registering via this screen requires a connection to the Internet. If the PC is not connected, pressing the “Register Now” button will bring up a “Manual Registration” dialog with instructions on how to manually register the application.

 Note: Mitel Unified Communicator Express will need to be registered even if you have already registered Integrated Office Companion.

Associating Mitel Unified Communicator Express to Your 5300 Series IP Phone

Mitel Unified Communicator Express stores information about the phone set it connects to in a **Phone Profile**.

You create phone profiles in three ways:

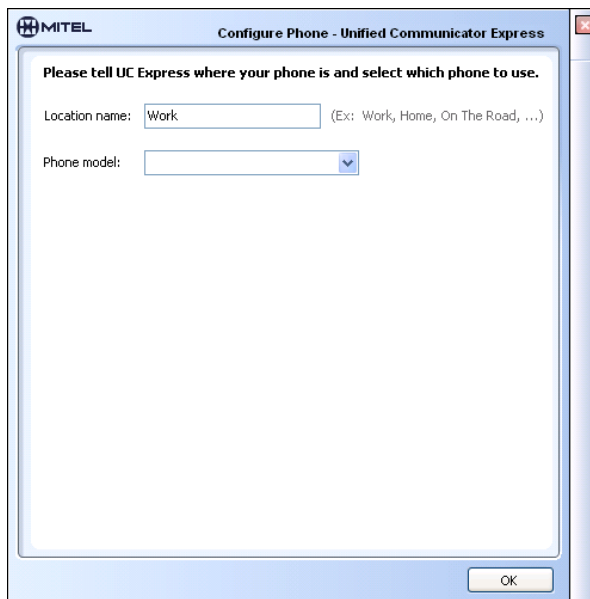
1. If you are upgrading from Mitel Integrated Office Companion (IOC) to Unified Communicator Express, the setup program automatically migrates your IOC phone to the Unified Communicator Express phone profile labeled "Work".
2. If you install Unified Communicator Express as a fresh install, Unified Communicator Express prompts you to create a new phone profile when it first runs. Based on your license you can have up to three profiles to choose from:
 - Mitel 5300 series IP desk phone (for use with a Mitel 3300 ICP)
 - Mitel UC Express Softphone (for use with Mitel 3300 ICP)
 - Desktop Phone (for use with a Mitel 5000 CP)



3. Or, you can manually add phone profiles as the need arises.

Configuring a Phone Profile on a Mitel 3300 ICP (Fresh Install)

After registering Mitel Unified Communicator Express, a "Configure Phone" dialog box appears. From the drop down menu, select **Mitel 5300 series IP desk phone**.



Mitel Unified Communicator Express must be configured to use a Mitel 5300 Series IP Phone Set. To do this, a phone model must be selected and then the PC Connectivity information must be filled in. (Consult the “Mitel Unified Communicator Express IT Guide” for more information on how to configure PC Connectivity on your phone set).



This information can be entered in 2 different ways:

1. **IP Address:** To configure a phone profile by IP Address:

On the “Configure Phone” Dialog, fill in the phone set’s **IP Address** in the “Desk Phone Connection” and **Phone PC Connectivity Password**.



2. **Directory Number (DN):** Alternatively, Mitel Unified Communicator Express phone profile can be configured by directory number (“DN”), provided your phone system administrator has configured your system so that you can do so. Consult the “Mitel Unified Communicator Express IT Guide” for more information on how to configure Unified Communicator Express to connect to your phone by DN.
 - a. On the “Configure Phone” Dialog, fill in the **Directory Number** in the “Desk Phone Connection” and **Phone PC Connectivity Password**.
 - b. Press the **DN to IP Lookup** button to expand the settings.
 - c. Fill in the **ICP IP Address, Account User Name, and Password**

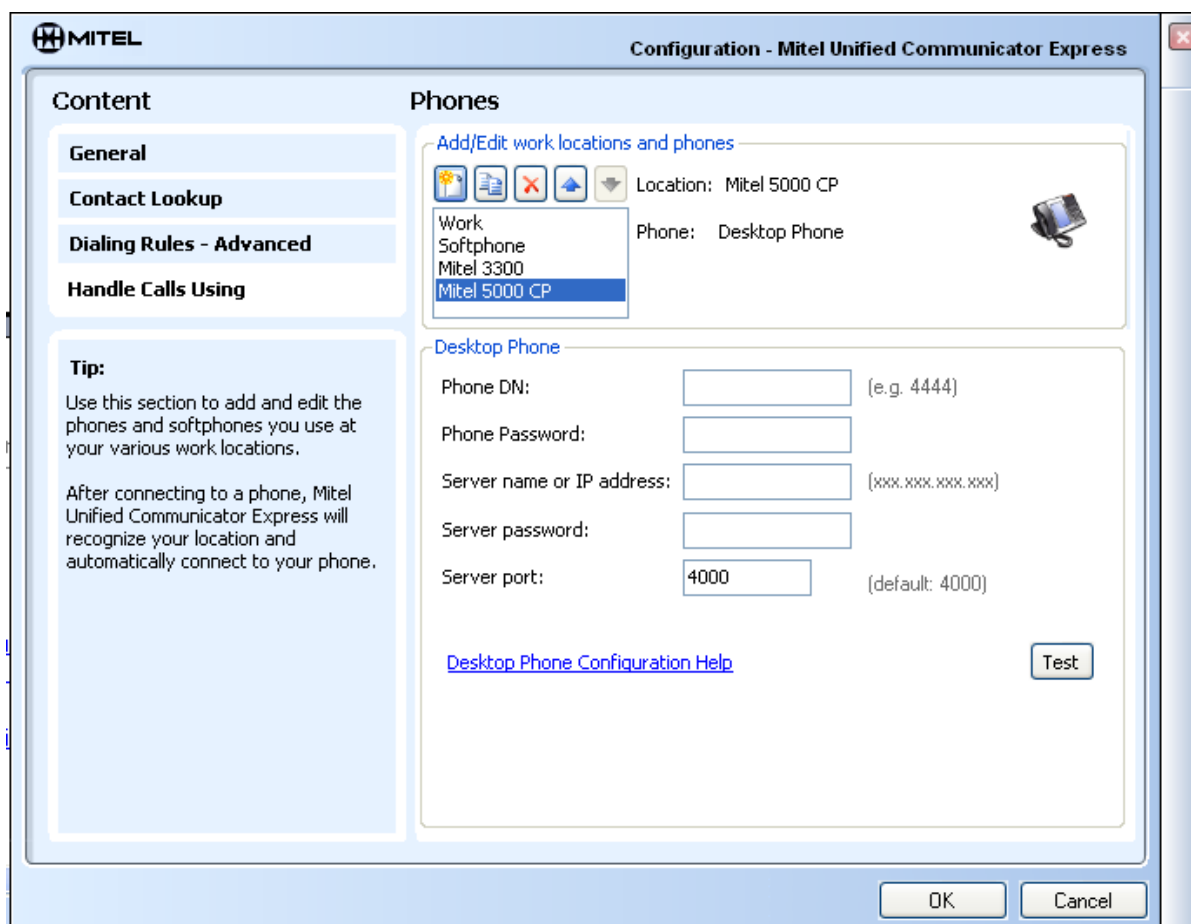
-  Note: If you have a secondary ICP, you can include that by putting a semi-colon “;” in the ICP IP Address between the primary and secondary IP addresses.
-  Note: “Direct Line” is used when the phone defined in the profile has direct access to an outside line – for example, you do not need to dial ‘9’ to make an outside call. Check the “Direct Line” check box if you are using a direct line. Having the direct line box checked will bypass the Windows Telephony Dialing Rule for access an outside line for this profile.

Configuring a Phone Profile on a Mitel 5000 CP

After registering Mitel Unified Communicator Express, a “Configure Phone” dialog box appears. From the drop down menu, select **Desktop Phone**.



Once the Desktop Phone profile has been selected, the configuration window appears.



To configure Mitel Unified Communicator Express to work with your Mitel 5300 series IP phone you will need to fill in the open fields with the following information provided to you by your phone system administrator:

- Phone DN: This is the extension of your phone set.

- **Phone Password:** The password is known as the “Station password”. By default the station password is the same as the DN. You can change the station password via the “Program Station Password” feature code, which is 392. For details on how to do this please see the “Mitel Unified Communicator Express IT Guide”.
- **Server name or IP address:** This is the network address of the Mitel 5000 CP. It can be entered as an IP address, host name or fully qualified domain name”. This should be obtained from the administrator.
- **Server Password:** This is set by and provided by the administrator. . Press **Test** to verify the connection to the account.

Creating a UC Express Softphone Profile

This UC Express Softphone allows you to make calls and make use of all the features of UC Express without requiring a standard phone set or hardware. The Softphone uses a speaker and microphone connected to your PC for its audio connection.

For more information on Softphone provisioning please see the IT guide.

Softphone Requirements

Minimum requirements

- PC soundcard
- Speakers/headset
- Microphone
- Category F license (Required for the Mitel 5000 CP only)

Recommended system

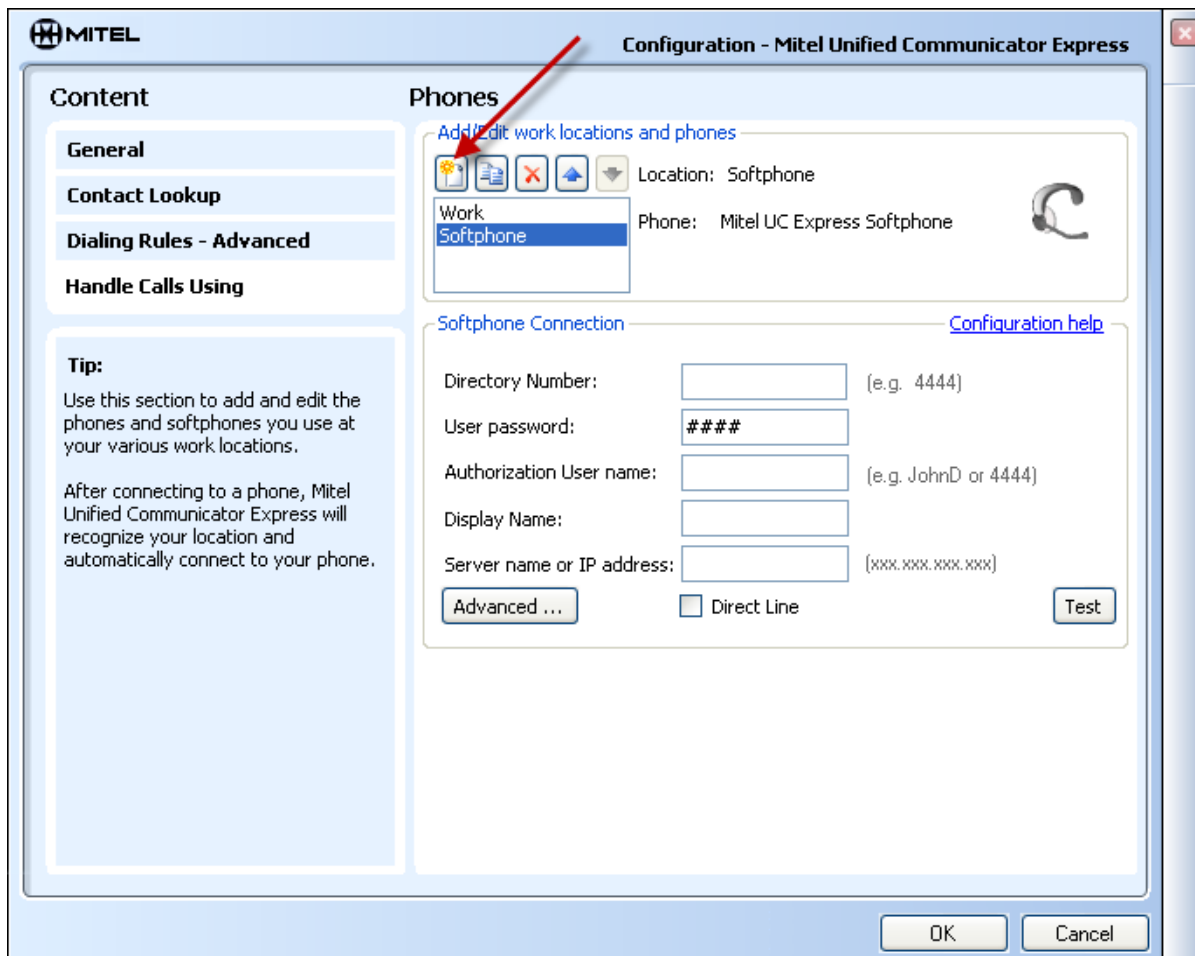
- USB headset and microphone with high audio quality



Note: If the Internet connection is slow, audio quality can be affected.

How to setup an UC Express Softphone

To setup an UC Express Softphone profile, enter into the “Configuration” page pictured here from the Settings menu in UC Express:

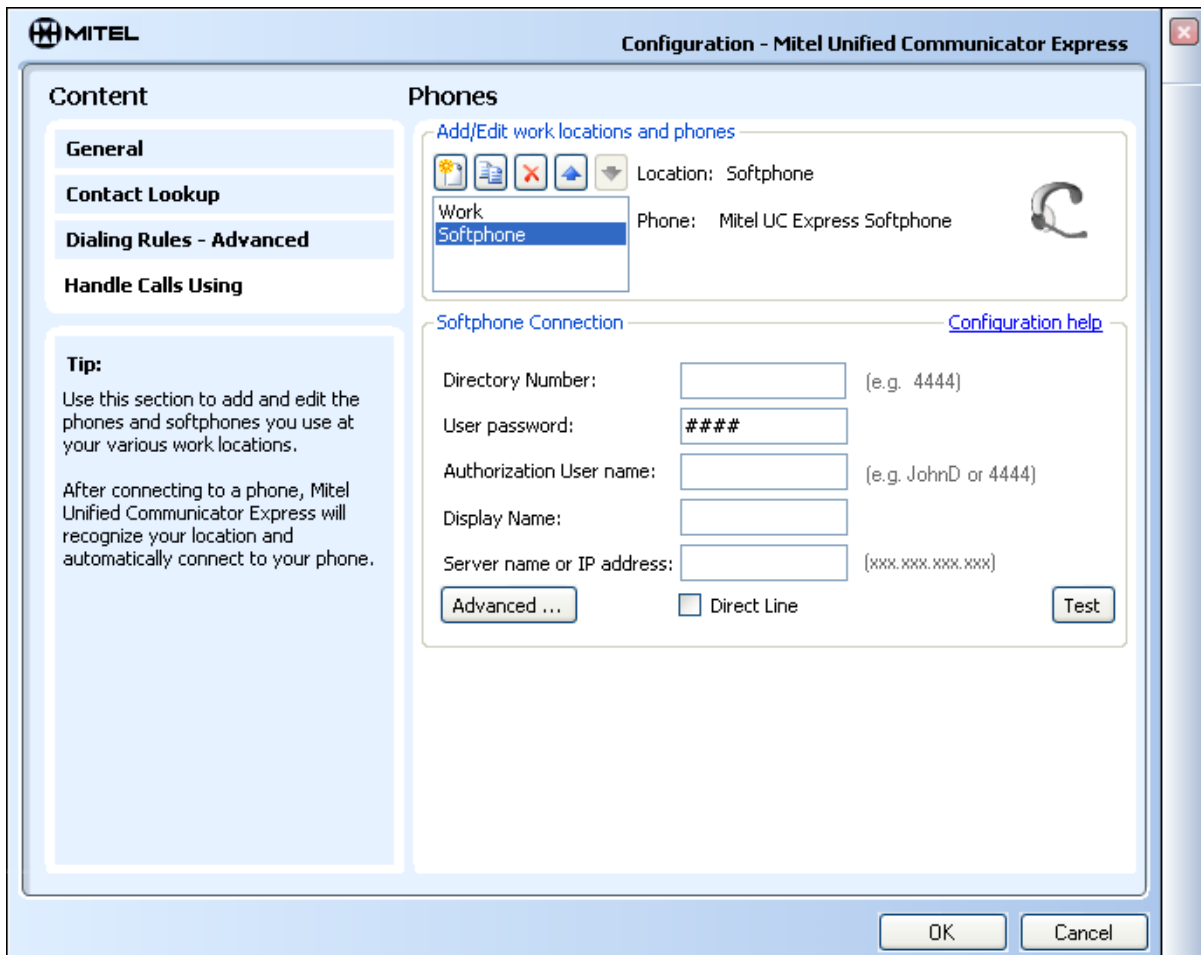


1. On the “Add/Edit Phones” tab, select the “New Profile” Button:




2. Enter a name for you new phone and select Mitel UC Express Softphone from the drop down list and press OK.

3. You will now see a configuration page like the one below:



4. All fields are required to setup the phone:

- **Username or DN:** This is the name that we will use to try to connect to.
- **User password:** Here you would enter the password that accompanies your username for the account that has already been created on the server.
- **Authorization User name:** This is the authorization name that is on the server. For most users this will be the same as the Username or DN.
- **Display Name:** This is the name that will show for your caller ID. For most users this will be the same as the Username or DN.
- **Server Name or IP:** Here you would enter the name of your SIP proxy server or its IP address.

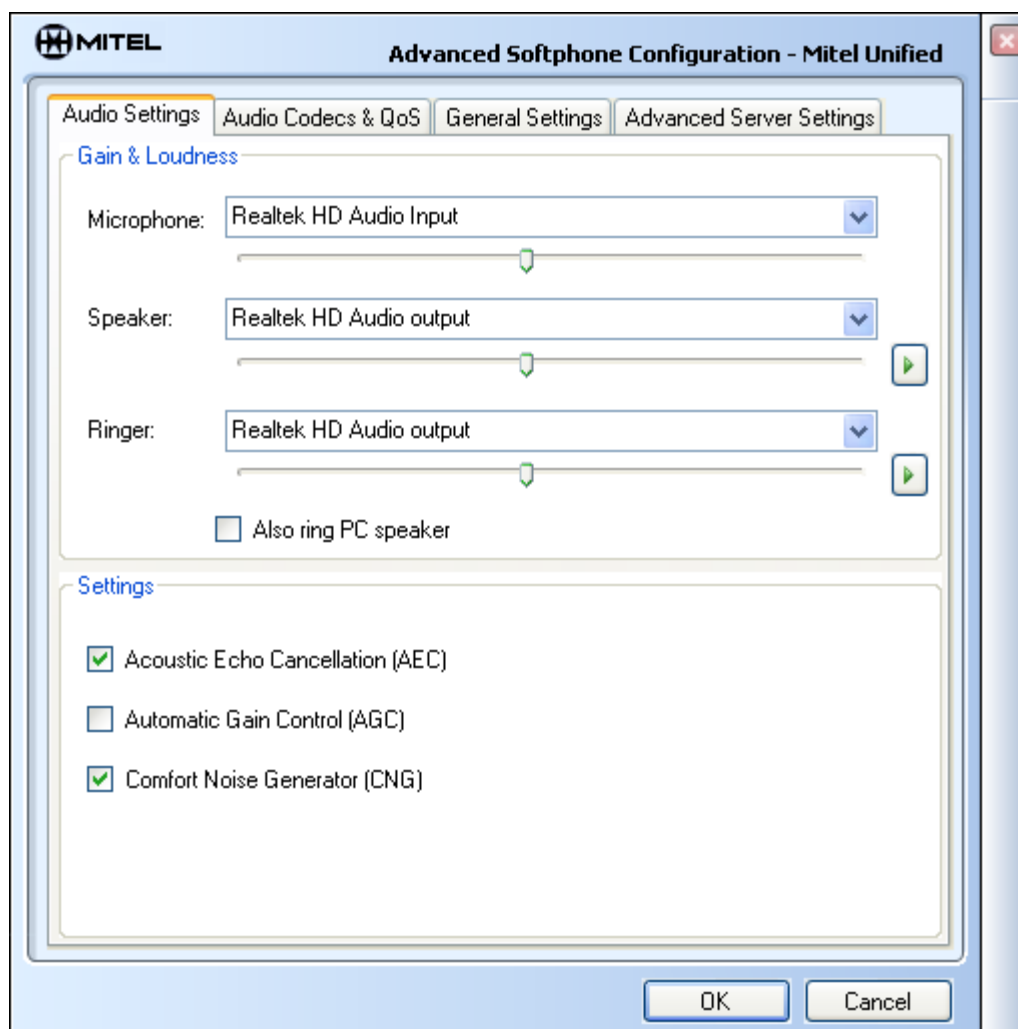
 **Note:** “Direct Line” is used when the phone defined in the profile has direct access to an outside line – for example, you do not need to dial ‘9’ to make an outside call. Check the “Direct Line” check box if you are using a direct line. Having the direct line box checked will bypass the Windows Telephony Dialing Rule for to access an outside line for this profile.

5. You can also configure advanced settings:
- **Audio Settings:** This gives you the ability to select or deselect particular audio settings. Gain & Loudness settings allow you to dynamically control the audio settings while on a call.

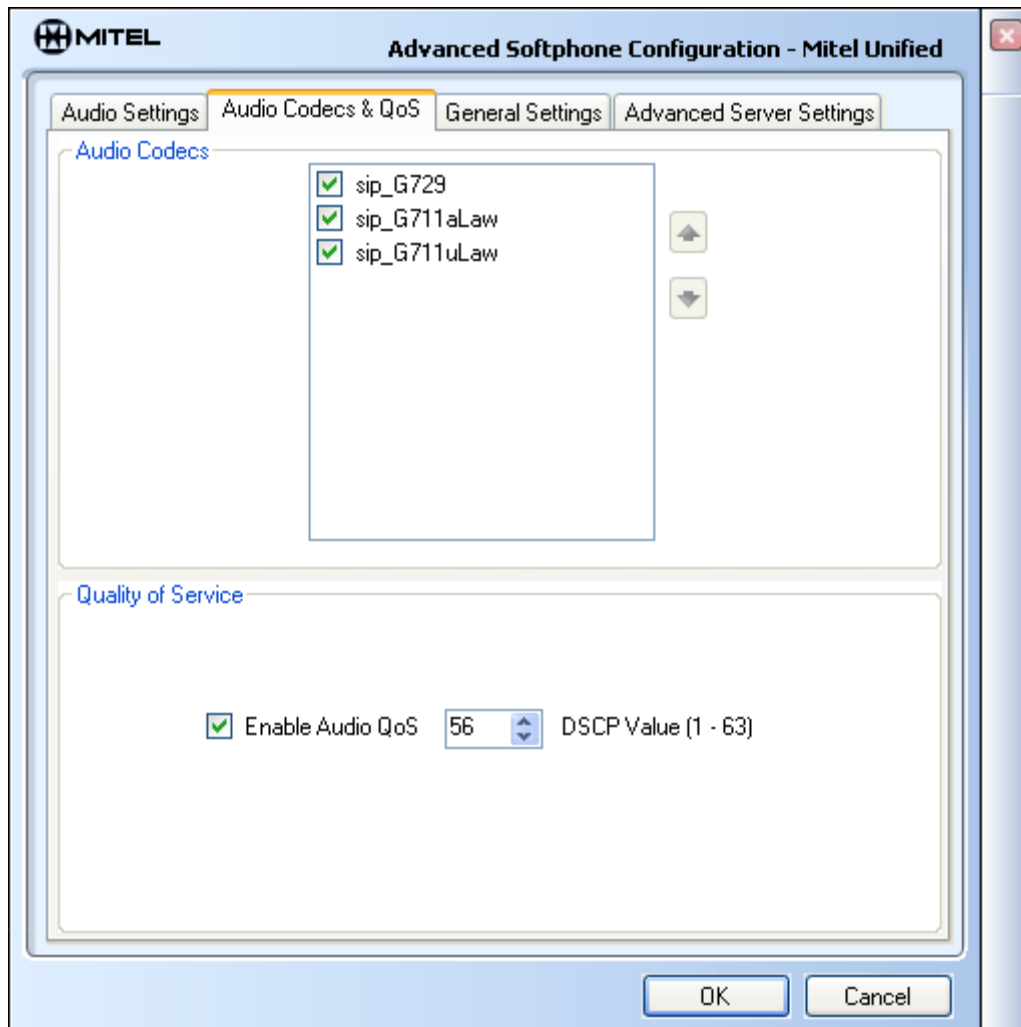
Microphone: The microphone device allows you to select the audio input device to use while on a call.

Speaker: The speaker device allows you to select which audio output device to use while on a call.

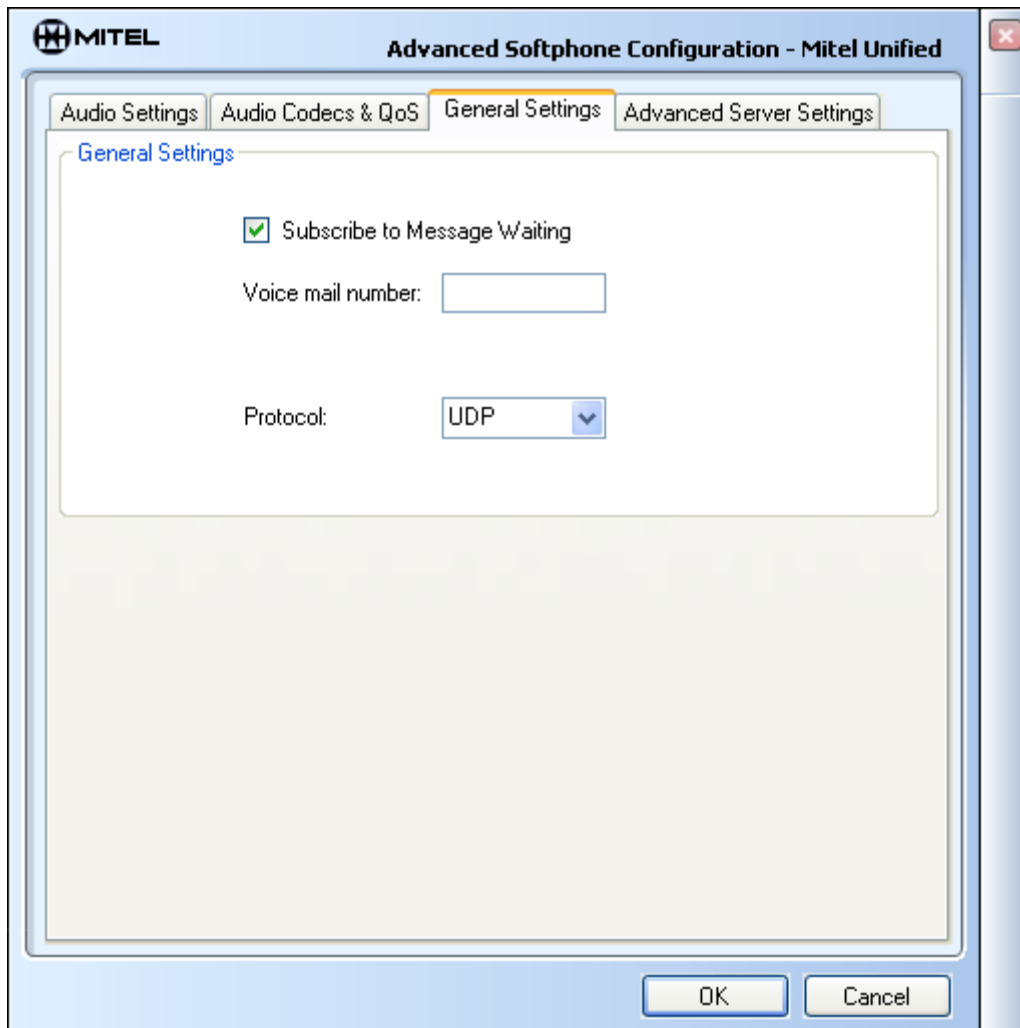
Ringer: The ringer device allows you to select which audio device the ringer should use during an incoming call. The ringer can also play sound through the computer's internal speaker if the option is enabled.





- **Audio Codes & Quality of Service:** This gives you the ability to turn particular codecs off or on and to enable Quality of Service.



- **General Settings-** This gives you the ability to access your voice mail account.



- **Advanced Server Settings:** Here you can extend SIP settings including STUN server and outbound proxy.

- **User domain:** This is usually the same as the server name or IP address.
- **Stun server:** If a stun server is not required simply enter a (-)dash into the field.
 **Note:** That many installations require the use of a STUN server for successful calls. You can use stun.ingenius.com as your stun server.
- **Server Port:** Here you would enter the port to connect to your SIP proxy server and must be opened through your firewall. This is usually 3478.
 **Note:** Some firewalls will only allow one local IP to use a port. Therefore, if UC Express is not the first IP to use port 3478, you may have to select an alternate port to connect to your SIP proxy server.
- **Outbound proxy:** This is usually the same as the server name or IP address.
- **Outbound proxy port:** This is where you enter the outbound proxy port. This is usually 5060.
- **Local Port:** Here you would enter the port to connect to your SIP proxy server and must be opened through your firewall. This is usually 5060.

6. Press the “Test” button to verify your settings.

7. Press "OK" to save your settings as a new profile.

Testing a Softphone

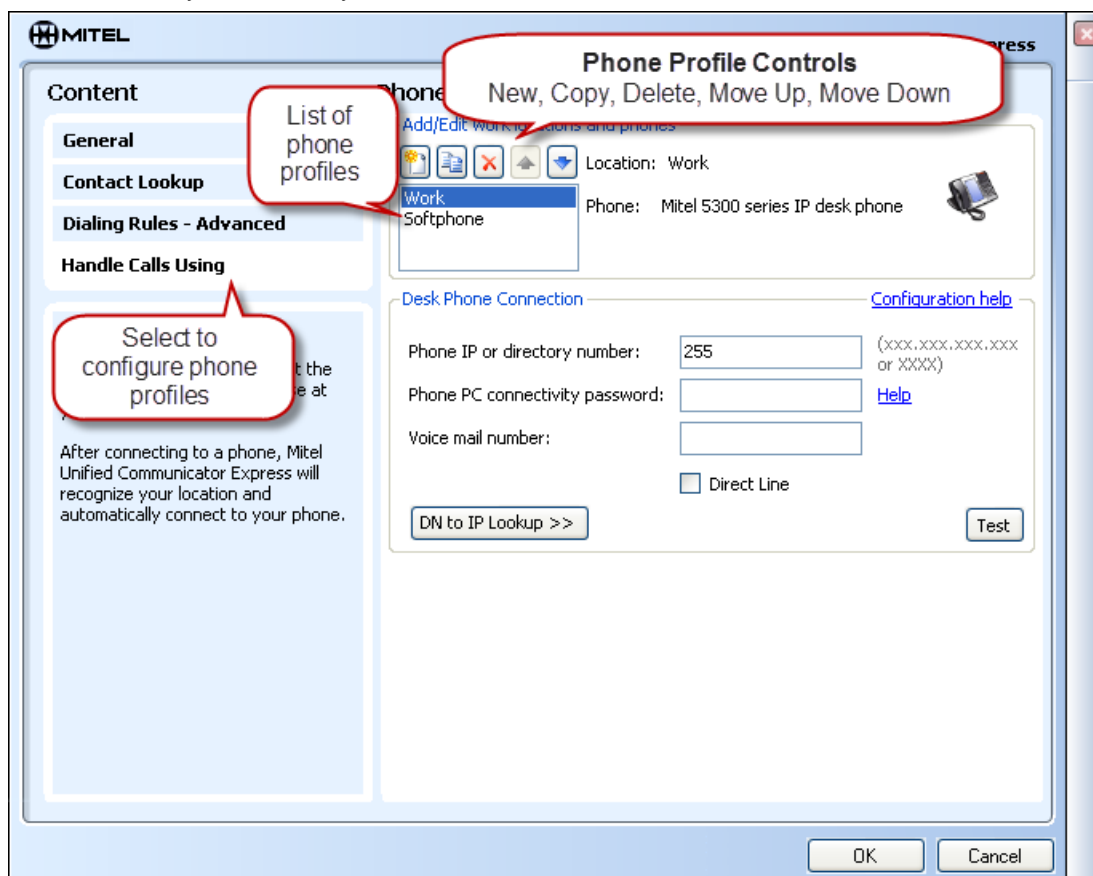
Once the Softphone has been configured you can press the "Test" button to verify the connection parameters. Once the "Test" button has been pressed, Mitel UC Express will attempt to connect to the SIP server you entered with the credentials you provided.

Multiple Phone Profiles

Mitel Unified Communicator Express can store connection information for more than one phone by using a different phone profile for each phone or DN. This enables you to create multiple phone profiles for different locations or purposes.

For instance you could have a profile for each of the following situations:

- Connecting to a Mitel 5330 at your work desk
 - Connecting to a Mitel 5312 at home as a Teleworker
1. To create/edit additional phone profiles, select **Settings** from the Toolbar Menu or Tray Icon Menu.
 2. This will bring up the “Configuration” dialog.
 3. Select **Handle Calls Using** on the left side of the dialog
 4. On the right side of the dialog, the **Phones** panel appears. Here you can add new phone profiles, edit or delete existing profiles, and order your profiles. Adding/editing profiles are done exactly as before by IP address or DN




Connecting Using Multiple Profiles

If Mitel Unified Communicator Express has more than one profile, when it starts up, it will:

1. Check what network it is on

2. It will try connecting to the top profile on the Phone Profiles list that is known to be on the same network
3. It will work its way through the list of profiles on the same network until it finds a phone it can connect to.
4. If it fails to find a profile it can connect to from this first pass, it will look through profiles that have on network associated yet.
5. It will not check profiles known to be on a different network.




 **Note:** The various settings of Mitel Unified Communicator Express are stored separately for each Directory Number. It is possible to have two phone profiles each pointing to the same DN in which case they would use the same settings. For Example: If you are connected to one phone and enable presence and pop-up windows, and then you connect to a different phone, presence and pop-up windows would not necessarily be enabled. Settings that are unique to a DN are:

- Use Windows Telephony Location
- Preview number before dialing
- Display pop-up window with caller ID
- Lookup caller I Outlook contacts
- Perform Windows Desktop Search using caller ID
- Change my IM status to “Busy” when I use my phone
- Change my IM status to “Busy” when I set “Do Not Disturb” on my phone

Mitel Unified Communicator Express Tray Icon

When Mitel Unified Communicator Express is running, an icon will appear in the system tray of the Windows Task Bar.

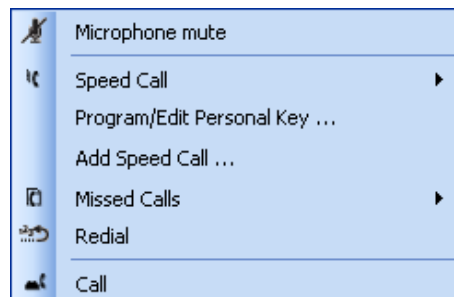
The appearance of this Tray Icon will change depending on the current connection state of Mitel Unified Communicator Express to the phone set:

-  - Mitel Unified Communicator Express is connected to a Mitel phone set.
-  - Mitel Unified Communicator Express is connecting to a Mitel phone set.
-  - Mitel Unified Communicator Express was unable to connect to a Mitel phone set.

If you mouse over the Tray Icon, a tool tip will appear displaying the connection status of Mitel Unified Communicator Express.

Mitel Unified Communicator Express Tray Icon – Call Menu

When Mitel Unified Communicator Express is connected to a Mitel phone set, left click the Tray Icon to bring up the Call Menu.

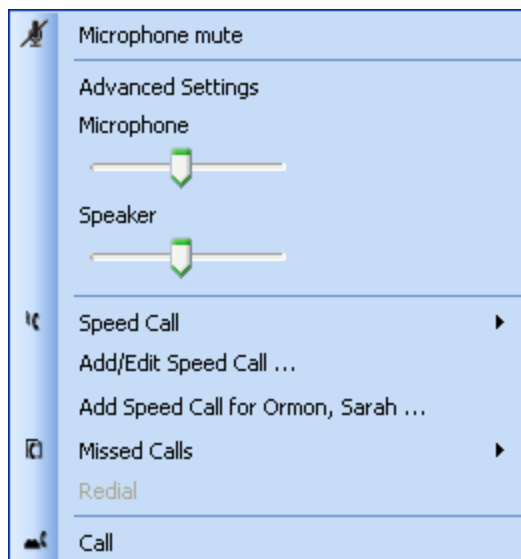


- **Microphone Mute** – Mutes the phone microphone while on a call
- **Speed Call** – Lists programmed Speed Call buttons (Programmed either via this menu or the phone set). Allows you to program Speed Dial buttons. Also allows you to add a speed call button for the current caller.
- **Program/Edit Personal Key** – Allows you to program the buttons on the phone set
- **Add Speed Call** – Allows you to program a speed call for the current caller
- **Missed Calls** – Lists missed calls. (up to 20)
- **Redial** – Redials current number
- **Call/Answer/Hold/Retrieve/Hang-up** – Dials an outgoing call, answers an incoming call or puts current call on hold. (Menu Item changes with phone state)
- **Transfer/Conference** – Allows for transferring the current call to a second call or conferencing two calls together
- **One Step Conference/Transfer** – Like the regular Transfer/Conference, but the operation will complete upon the second call being answered. If the call is not answered, the user cancels out of the call and the phone picks up the previous call that was in progress before the operation was initiated.


Note: This menu is call connect sensitive according to the phone state. The menu will appear differently if the phone is idle, on a call, on hold etc.

Mitel Unified Communicator Express Tray Icon – Softphone Call Menu

When UC Express is connected to a Softphone, left click the Tray Icon to bring up the Call Menu.

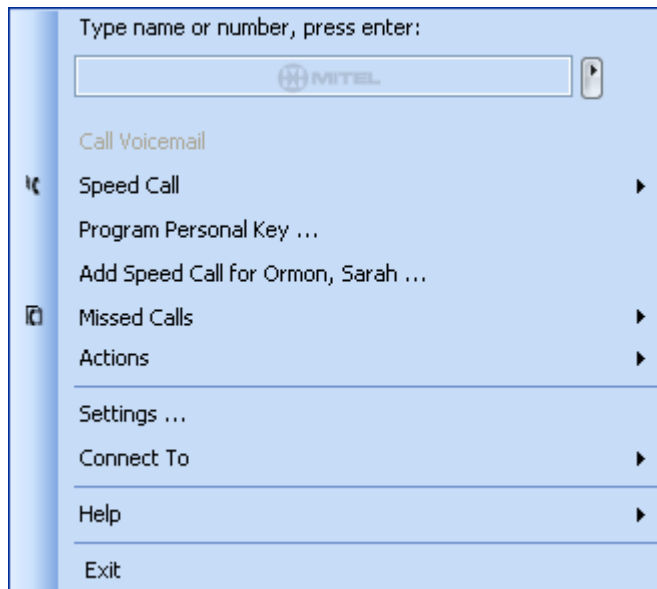


- **Microphone Mute** – Mutes the phone microphone while on a call
- **Advanced Settings** – Opens up the softphone advanced settings menu
- **Microphone** – Adjusts the volume of the microphone
- **Speaker** – Adjusts the volume of the speaker
- **Speed Call** – Allows you to access your speed call list
- **Add/Edit Speed Call** – Allows you to add or edit a speed call
- **Add/Edit Speed Call for Caller...** - Allows you to add or edit a speed call for a caller
- **Missed Calls** – Lists missed calls. (up to 20)
- **Redial** – Redials current number
- **Call/Answer/Hold/Retrieve/Hang-up** – Dials an outgoing call, answers an incoming call or puts current call on hold. (Menu Item changes with phone state)

 **Note:** This menu is call connect sensitive according to the phone state. The menu will appear differently if the phone is idle, on a call, on hold etc.

Mitel Unified Communicator Express Tray Icon – Main Tray Menu

When Mitel Unified Communicator Express is connected to a Mitel phone set, right click the Tray Icon to bring up the Main Tray Menu.



- **Number/Text Entry Field** – Type in a number (or name) to dial. When an incoming call occurs, the Caller Identification (CLID) is displayed in this field in two rows of text, with the name portion highlighted in bold.
- **Speed Call** – Lists programmed Speed Call buttons (Programmed either via this menu or the phone set). Allows you to program Speed Dial buttons. Also allows you to add a speed call button for the current caller.
- **Program/Edit Personal Key** – Allows you to program the buttons on the phone set
- **Add Speed Call** – Allows you to program a speed call for the current caller
- **Missed Calls** – Lists missed calls. (up to 20)
- **Actions** – Allows you to execute an Outlook operation based on the current caller:
 - **Create Task Associated with [Caller]...** - Creates a Microsoft Outlook or Lotus Notes task for the current caller
 - **Create Contact for [Caller]...** - Creates a Microsoft Outlook or Lotus Notes Contact for the current caller.
 - **Send Email to [Caller]...** - Creates a Microsoft Outlook or Lotus Notes Email to the current caller (If the current caller has an email address already in Outlook Contacts or Lotus Notes, the email is populated accordingly)
 - **Create Journal entry for [Caller]...** - Creates a Microsoft Outlook journal entry for the current caller.
 - **Set Default for Search Button** – Allows you set the default search button on the toolbar.
 - **Windows Desktop Search for [Caller]...** - Executes a Microsoft Desktop Search for the current caller.
 - **Search Corporate Directory for [Caller]...** - Executes a Corporate Directory Search for the current caller.
 - **Search Outlook Personal Contacts for [Caller]...** - Searches for a Microsoft Outlook Contact for the current caller.
 - **Search Lotus Notes Personal Contacts for [Caller]...** - Searches for a Lotus Notes

Contact for the current caller.



- **Settings...** - Brings up the Settings Dialog Window. Here you can configure a number of UC Express Toolbar settings.
- **Connect to** – Brings up a list of available phone profiles to use to reconnect to a phone set
- **Help...** - Brings up a list of help links.
 - **About...** - Brings up the About Dialog Window. From here, you can also upgrade your registration.
 - **Help...**- Brings up a help website
 - **More Products...**- Brings up a web page with complimentary products.
 - **Enter a license key...**- Brings up the Enter license key dialog box.
 - **Check for updates...**- This will check to see if there are any updated releases of UC Express.
 - **I Think I've found a bug...**- Brings up a "Send support information to Customer Support" dialog. From here you can details on an issue or bug and send it directly to customer support.
- **Exit** – Closes Mitel Unified Communicator Express including the toolbar and the Tray Icon).

Mitel Unified Communicator Express Toolbar

All Mitel Unified Communicator Express features are available from a convenient toolbar.

Display the Mitel Unified Communicator Express Application Toolbar

To display the UC Express Toolbar if it is hidden, do the following:

- Right-click the Task Bar and check **Mitel UC Express** in the **Toolbars** menu.
-  **Note:** The toolbar will only be displayed if the Windows Taskbar is set along the top or bottom of the Windows Desktop. It will not be displayed if the Windows Task bar is set vertically along the sides of the Desktop.
-  **Note:** If you upgrade Mitel Unified Communicator Express from either Integrated Office Companion or a previous version of Mitel Unified Communicator Express, you will have to re-enable the toolbar.

Hide the Mitel Unified Communicator Express Application Toolbar

To hide the UC Express Toolbar if it is displayed, do the following:

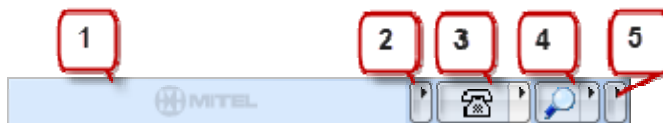
- Right-click the Task Bar and check **Mitel UC Express** in the **Toolbars** menu.

Resize the Mitel Unified Communicator Express Application Toolbar

To resize the toolbar:



- Right-click the Windows Taskbar and make sure “Lock the Taskbar” is Unchecked.
- Left-click and hold on the left edge of the toolbar.
- Drag the toolbar to the width you prefer.

Elements of the Mitel Unified Communicator Express Toolbar



The Mitel Unified Communicator Express Toolbar application runs as a toolbar in your Windows Task Bar. The toolbar allows enhanced integration between the Mitel 5300 Series IP Phone Set, your PC, and various Microsoft Office applications.

Element	Function
❶ Number/Text Entry Field	When an incoming call occurs, the Caller Identification (CLID) is displayed in this field in two rows of text, with the name portion highlighted in bold. The CLID is displayed until another call is received, an outgoing call occurs, or you edit the contents of the text box.
❷ Search Options	Click on this button to open a menu with directory search options. UC Express will remember your last searched contact and display it at the top of the list. Note: If Corporate Directory is not configured, the option is greyed out. If Microsoft Outlook is not running, the option is greyed out.

<p>3 Dial Button</p> 	<p>The button is divided into two areas:</p> <ul style="list-style-type: none"> • The larger portion will cause the default action to occur (which will change based on the telephony state). This is the same action as the bottom item on the popup menu. • The smaller portion will cause a pop-up call menu to appear showing all available options. <p>Right-click on either portion of the button to cause the pop-up call menu to appear. This menu is identical to the tray icon call menu and will include the various call menu options available for each phone.</p> <p>Note: This menu is call connect sensitive according to the phone state. The menu will appear differently if the phone is idle, on a call, on hold etc.</p>
<p>4 Desktop Search and Features Button</p> 	<p>The button is divided into two areas:</p> <ul style="list-style-type: none"> • The larger portion will cause the default action to occur. This is the same action as the bottom item on the pop-up menu. • The smaller portion will cause a pop-up menu to appear showing all options available. <p>Right-click on either portion of the button to cause the pop-up menu to appear.</p> <ul style="list-style-type: none"> • Create Task Associated with [Caller]... - Creates a Microsoft Outlook task for the current caller • Create Outlook Contact for [Caller]... - Creates a Microsoft Outlook Contact for the current caller. • Send Email to [Caller]... - Creates a Microsoft Email to the current caller (If the current caller has an email address already in Outlook Contacts, the email is populated accordingly) • Create Appointment with [Caller]...- Creates a Microsoft Outlook appointment with the current caller. • Create a journal entry for call with [Caller]...- Creates a Microsoft Outlook journal entry with the current caller. • Set Default Search – Allows you to set the default search to Windows Desktop Search, Google Maps Search, or Google Search. (The icon appearing on the toolbar will change accordingly.) • Search Outlook Contacts for [Caller]... - Searches for a Microsoft Outlook Contact for the current caller. • Desktop Search for [Caller]... - Executes a Microsoft Desktop Search for the current caller. • Search Google Maps for [caller]- Executes a Google Map Search for the current caller. • Search Google for [Caller]- Executes a Google Search for the current caller. <p>Note: Microsoft Outlook and Microsoft Desktop Search must be installed for these respective options to be available.</p> <p>Note: The options “Create Task”, “Create Outlook Contact”, “Send Email To”, “Search Outlook Contacts” “Create Appointment with”, and “Create a journal entry for call with” apply only to users in your personal Outlook contacts and not in the corporate directory.</p>

<p>5 Toolbar Menu</p>	<p>Click this button to bring up the Toolbar Menu.</p> <ul style="list-style-type: none">• Settings... - Brings up the Settings Dialog Window. Here you can configure a number of toolbar settings.• Connect to – Brings up a list of available phone profiles to use to reconnect to a phone set• Help... - Brings up a help menu.• Exit – Closes InGenius Connector including the toolbar and the Tray Icon).
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Using the Mitel UC Express Toolbar

By default, the Mitel UC Express Toolbar is not visible - only the Tray Icon will be visible when the application begins.

Outgoing Calls

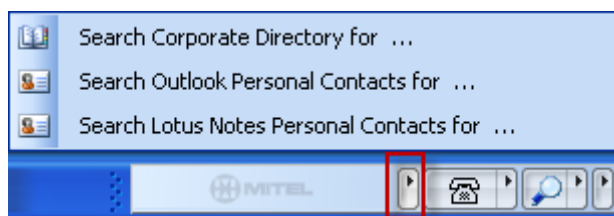
There are a number of ways to make an outgoing call via the toolbar:


- Search through your contacts
- Manually dial a number using the PC keyboard
- Dial via Speed Dials or the Missed Calls Menu
- Redial the last dialed number

Dialing by Search Contacts

Search Options Menu:

The toolbar has the ability to search your Microsoft Outlook Contacts, Lotus Notes Contacts or the Corporate Directory.



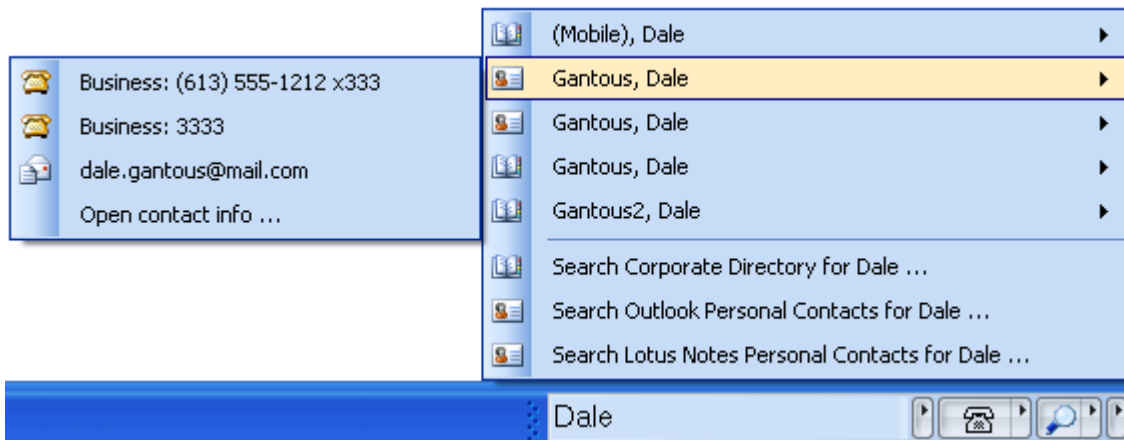
 Note: To enable “Search Outlook Personal Contacts” or “Search Lotus Notes Personal Contacts” you must have Outlook or Lotus Notes installed and, depending on the version, running. To enable “Search Corporate Directory” you need to configure and LDAP source in the Contact Lookup settings dialog. Contact administrator to install these products for you.


By default Contact Lookup is automatically configured with the computer’s logon server. In a Microsoft Active Directory domain environment this will work as-is.


Performing an Outlook and/or Corporate Directory Search:

To perform a search using the selected search options, do the following:

- Enter text characters such as a name, or portion of a name into the **Text Field**. The characters entered are matched against the First Name, Last Name and Company fields in the Microsoft Outlook Contact and Corporate Directory records and a search results menu will pop-up.
- Selecting a name from the **Search Results** will result in a menu showing all the numbers and their associated labels.
- You are then able to select a number by clicking with a mouse or by pressing the enter key.
- When a number is selected, it will either appear in the Text Field (If **Number Preview** is enabled) or dial the number.



 Note: If Mitel Unified Communicator Express has Dialing Rules configured, those will be applied when dialing this number.

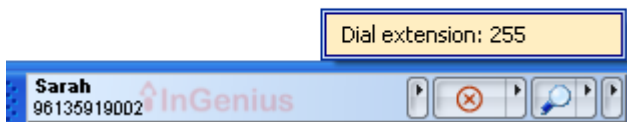
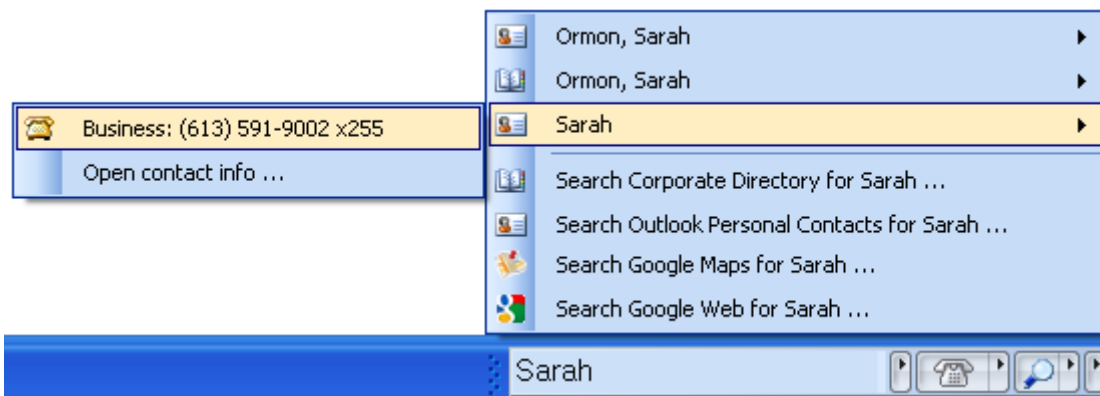
 Note: An audio sound will be heard when an Outlook search returns no results.

Dial extensions:

If a phone number dialed contains an extension then once the call is established a menu offers the user the option to dial the extension.

Acceptable extension formats are:

- x255
- x 255
- ext 255

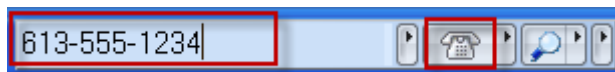



Dialing by Number

Unified Communicator Express offers a number of ways to dial...

Dialing by Typing in a Number:


- Enter the phone number into the **Text Field**
- Left-click the large portion of the **Dial Button** or hit Enter.



 Note: If Mitel Unified Communicator Express has Dialing Rules configured, those will be applied when dialing this number.


Dialing by Drag'n'Drop:

- Highlight a number in a Word document, email, etc and drag the number into the **Text Field**; or, you can use copy and paste into the Text Field.
- Press the **Dial Button**.


 Note: If Mitel Unified Communicator Express has Dialing Rules configured, those will be applied when dialing this number.

Dialing by Dial Highlighted:

1. Via the UC Express Toolbar **Program/Edit Personal Key** menu item, program a phone key to **Dial Highlighted Number**
2. In an email or document or whatever on the PC, highlight a phone number
3. Press the **Dial Highlighted Number** on the physical phone.

 Note: Unlike other phone buttons, you cannot press PC Companion equivalent button. The reason for this is because pressing the button on the PC would give the focus to the PC Companion window. This of course takes the focus away from your document and therefore the number technically isn't highlighted any more

Speed Calls

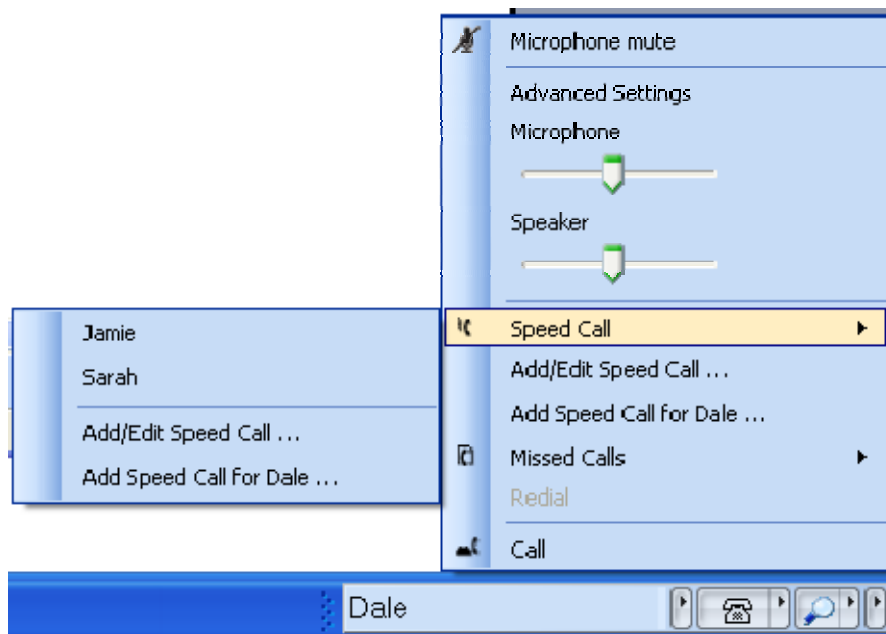
 Note: Speed call feature is only available on the Mitel 3300.

Speed Call Menu:

The Speed Call Menu displays a list of all Speed Call entries programmed on the phone. Selecting a name from the menu will dial the number on the phone.

You can quickly access your Speed Calls via the Toolbar or Tray Icon. To access the Speed Calls Menu do one of the following:


- Right-click the large portion of the **Dial Button**. Select **Speed Call** from the pop-up menu.
- Right or left-click the small portion of the **Dial Button**. Select **Speed Call** from the pop-up menu.
- Click on the Tray Icon. Select **Speed Call** from the pop-up menu.




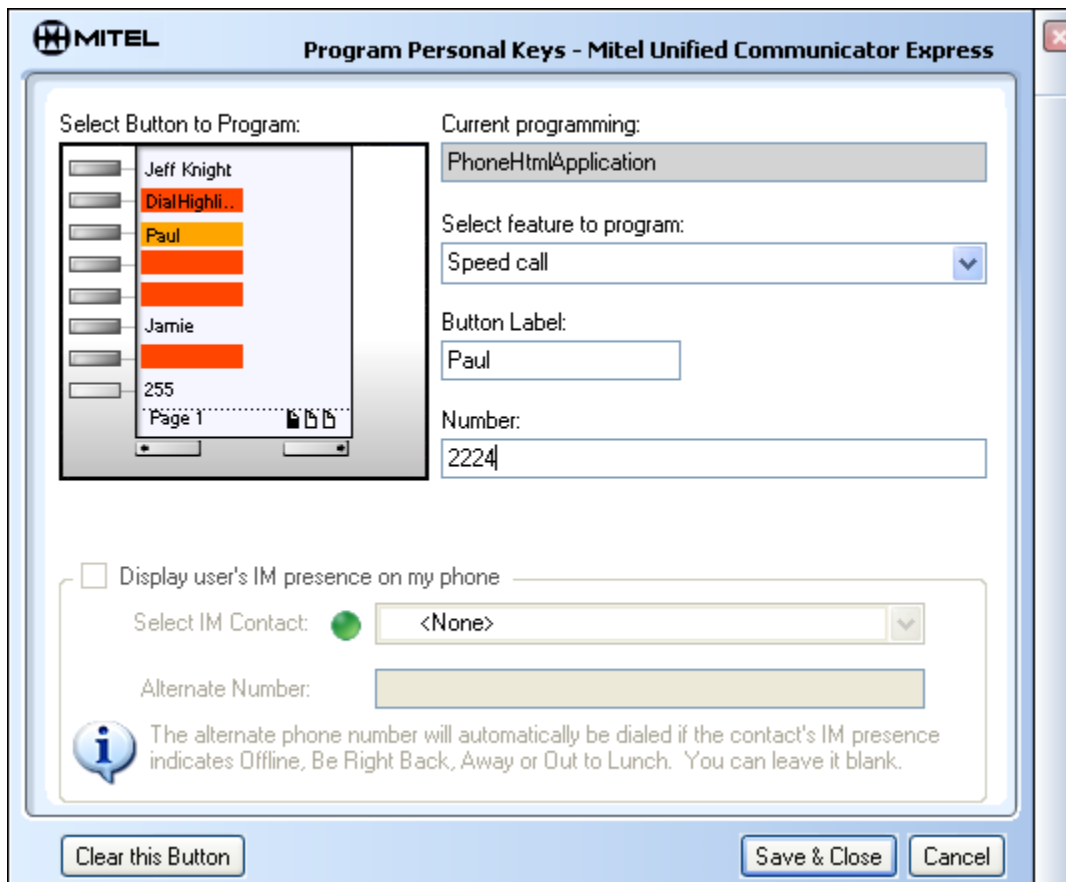
Add a new Speed Call/ Edit an existing Speed Call:

To add a new Speed Dial (or edit an existing one), do the following:


1. Select **Program/Edit Personal Key ...**
2. Select a phone button to program
3. Specify a label for the button
4. Specify a number to dial
5. Specify presence information (optional)
6. Specify an alternative number to dial (optional)

 Note: For Presence Information you need to have Windows Live Messenger 8.1 or later, or Office Communicator 2007 client version 2.0 running on your PC.

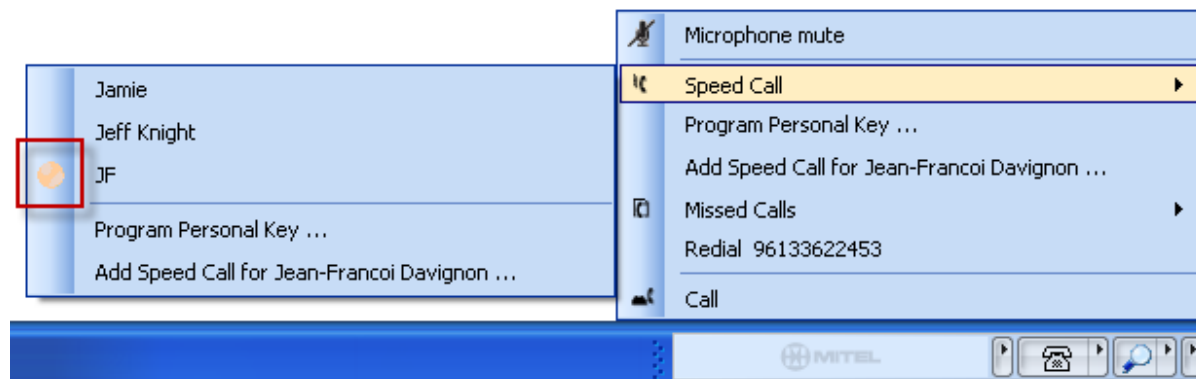
 Note: Any “User Defined Dialing Rules” will be applied to the Speed Call as the button is being programmed.




Presence

 Note: Presence is only available on the Mitel 3300.

Mitel Unified Communicator Express can read presence information from Windows Live Messenger and Microsoft Office Communicator. This enables you to associate a speed call number with an IM contact and present the user’s current presence (or IM status). Using the presence capabilities of Mitel Unified Communicator Express allows you to know whether or not a contact is available for a call.

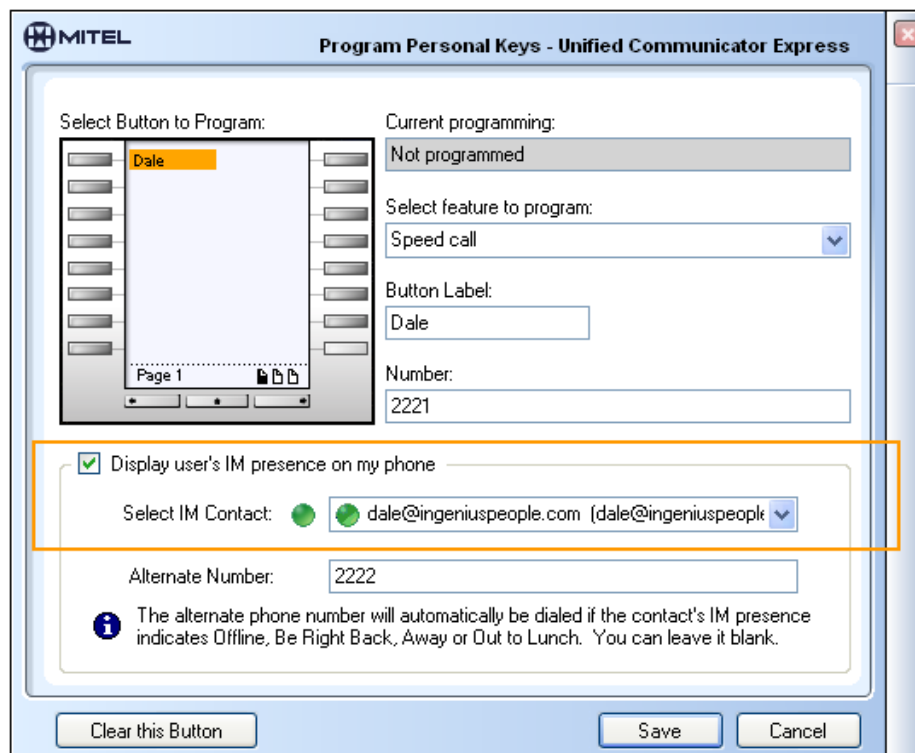


Adding Presence to an existing Speed Call:

 Note: For Presence Information you need to have Windows Live Messenger 8.1 or later, or Office Communicator 2007 client version 2.0 running on your PC.

To add presence to an existing the Speed Call, do the following:

- In the call menu select **Program/Edit Personal Key ...**
- Select a phone button to program
- The dialog will then populate with the Speed Call Button's current setting
- Make sure your IM Client is running and signed in.
- Check the "Display User's IM Presence on my phone" check box
- Select the contact from the drop down
- Click Save




Alternate Number

Mitel Unified Communicator Express has the ability to dial an alternate phone number based on the Presence of the Speed Call. This alternate number will be dialed if the Speed Call's presence indicates:

MSN/Windows Live IM Status	Number dialed
Online	Main number
Busy	Main number
Be Right Back	Alternate number
Away	Alternate number
Out to Lunch	Alternate number

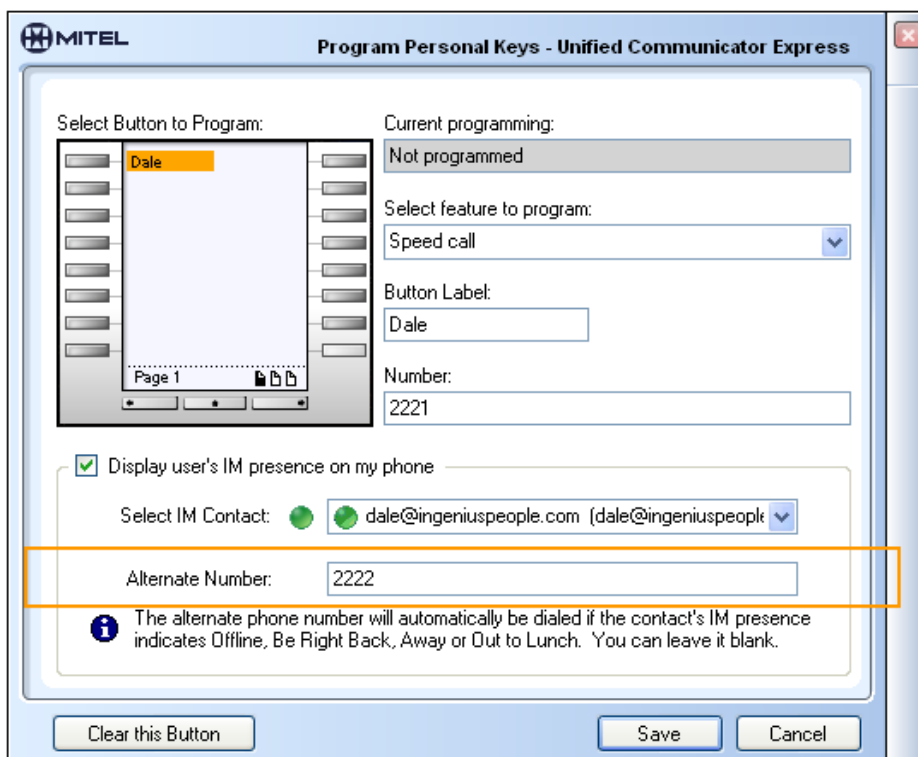
Offline	Alternate number
Office Communicator	
IM Status	Number dialed
Available	Main number
Busy	Main number
Be Right Back	Alternate number
Away	Alternate number
Do Not Disturb	Alternate number
Offline	Alternate number

 Note: Since Dialing rules are applied for Speed Calls, they will be applied to the alternate number as well.

Adding Alternate Number to an existing Speed Call:

To add alternate number to an existing the Speed Call, do the following:

- In the call menu select **Program/Edit Personal Key ...**
- Select a phone button to program
- The dialog will then populate with the Speed Call Button’s current setting
- Make sure your IM Client is running and signed in.
- Check the “Display User’s IM Presence on my phone” check box
- Select the contact from the drop down
- Enter an Alternate Number
- Click Save



Program Personal Keys



Note: Program/Edit Personal Keys is only available on the Mitel 3300.

Program Personal Keys Menu:

Mitel Unified Communicator Express has the ability to program the various personal keys of the phone set.

The various features that can be programmed are:

- Speed Call – Dials the programmed number
- Create Task for Caller - Creates a Microsoft Outlook task for the current caller
- Create Contact for Caller - Creates a Microsoft Outlook Contact for the current caller.
- Dial Highlighted Number – Dials the highlighted number
- Send Email to Caller - Creates a Microsoft Email to the current caller (If the current caller has an email address already in Outlook Contacts, the email is populated accordingly)
- Launch PC Application – Launches a PC application

Programming a Personal Key – Speed Call

To program a personal key for a Speed Call, please refer to the Speed Call section entitled “Add a new Speed Call/ Edit an existing Speed Call”

Programming a Personal Key – Create Task for Caller

To program a personal key for to create an Outlook task for a caller, do the following:

1. Select **Program/Edit Personal Key ...**
2. Select a phone button to program
3. Select the feature **Create task for caller**
4. Specify a label for the button

Programming a Personal Key – Create Contact for Caller

To program a personal key for to create an Outlook task for a caller, do the following:

1. Select **Program/Edit Personal Key ...**
2. Select a phone button to program
3. Select the feature **Create contact for caller**
4. Specify a label for the button

Programming a Personal Key – Dial Highlighted

To program a personal key for to create an Outlook task for a caller, do the following:

1. Select **Program/Edit Personal Key ...**
2. Select a phone button to program
3. Select the feature **Dial highlighted number**
4. Specify a label for the button

For details about Dial Highlighted, please refer to the section “Dialing by Dial Highlighted”.

Programming a Personal Key – Send Email to Caller

To program a personal key for to create an Outlook task for a caller, do the following:


1. Select **Program/Edit Personal Key ...**
2. Select a phone button to program
3. Select the feature **Send email to caller**

4. Specify a label for the button

Programming a Personal Key – Launch PC Application

To program a personal key for to create an Outlook task for a caller, do the following:

1. Select **Program/Edit Personal Key ...**
2. Select a phone button to program
3. Select the feature **Launch PC application**
4. Specify a label for the button
5. Specify the program to launch

 Note: For the Program you must specify the full path to the document or application to run:

- o A path to an executable;
- o A path to an executable + arguments;
- o A path to a document;
- o Browse to a program

Missed Calls

Mitel Unified Communicator Express has two ways to indicate missed calls.

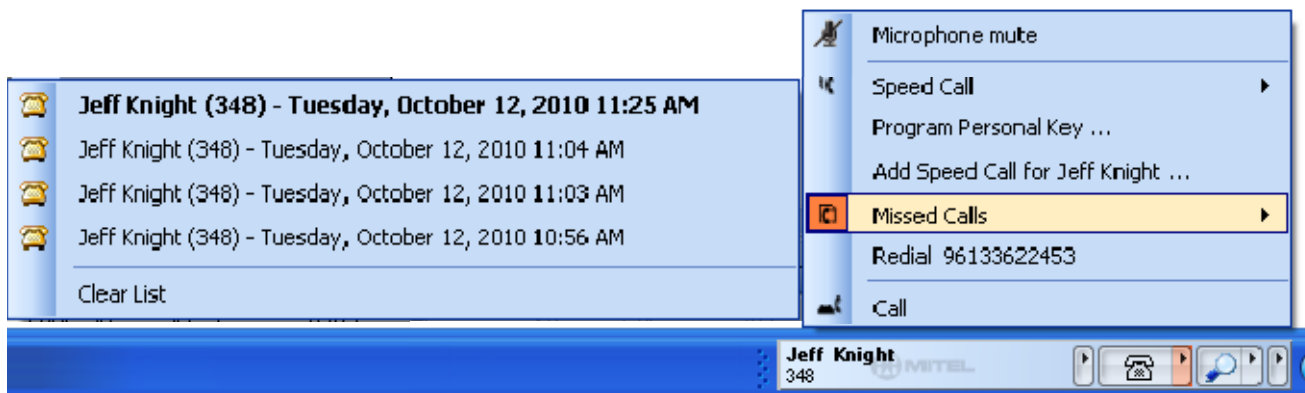
- The dial button on the Mitel UC Express toolbar flashes if a call has been missed.
- The Mitel UC Express tray icon flashes if a call has been missed and the Mitel UC Express toolbar is closed.



Missed Calls Menu:



To Display the Missed Calls Menu, do one of the following:

- Right-click the large portion of the **Dial Button**. Select **Missed Calls** from the pop-up menu
- Right or left-click the small portion of the **Dial Button**. Select **Missed Calls** from the pop-up menu.
- Left-click the Tray Icon. Select **Missed Calls** from the pop-up menu.



By default the Missed Calls Menu displays a list containing up to 20 of the last missed calls. The most recent calls will be listed in bold. Clicking a missed call dials the number of the caller.

The bottom of the list has Clear List, which will remove all missed calls, and **Show Animation**. If Show Animation is ON, when you have a new missed call, the **Dial Button** will blink.

-  Note: If you are on the phone and receive a second call that goes to voice mail, it will NOT be added to the missed call list.
If the phone is idle, an incoming call occurs and then goes to voice mail, the call is added to the missed call list.
If call forward is enabled, no calls will be added to the missed call list.
-  Note: If you answer an incoming call on a twinned phone (such as a cell phone), the phone does not inform UC Express that the call was answered. Because of this, calls answered on a twinned phone will be listed as missed calls in UC Express.

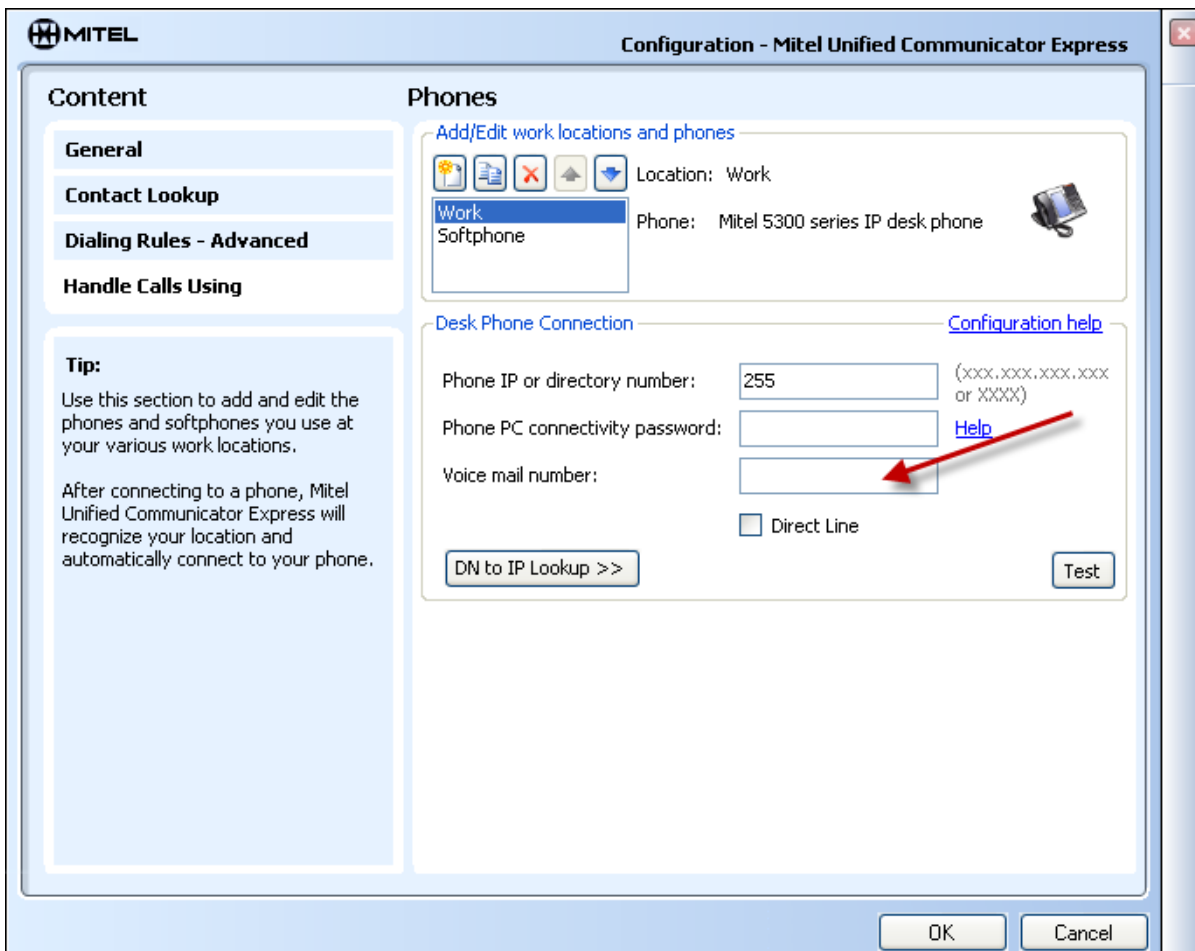
Voice mail

The Mitel Softphone and Mitel 5300 Series IP Phones can be configured to use various forms of voice mail.

-  Note: The Mitel 5000 CP is currently incapable of voice mail options.

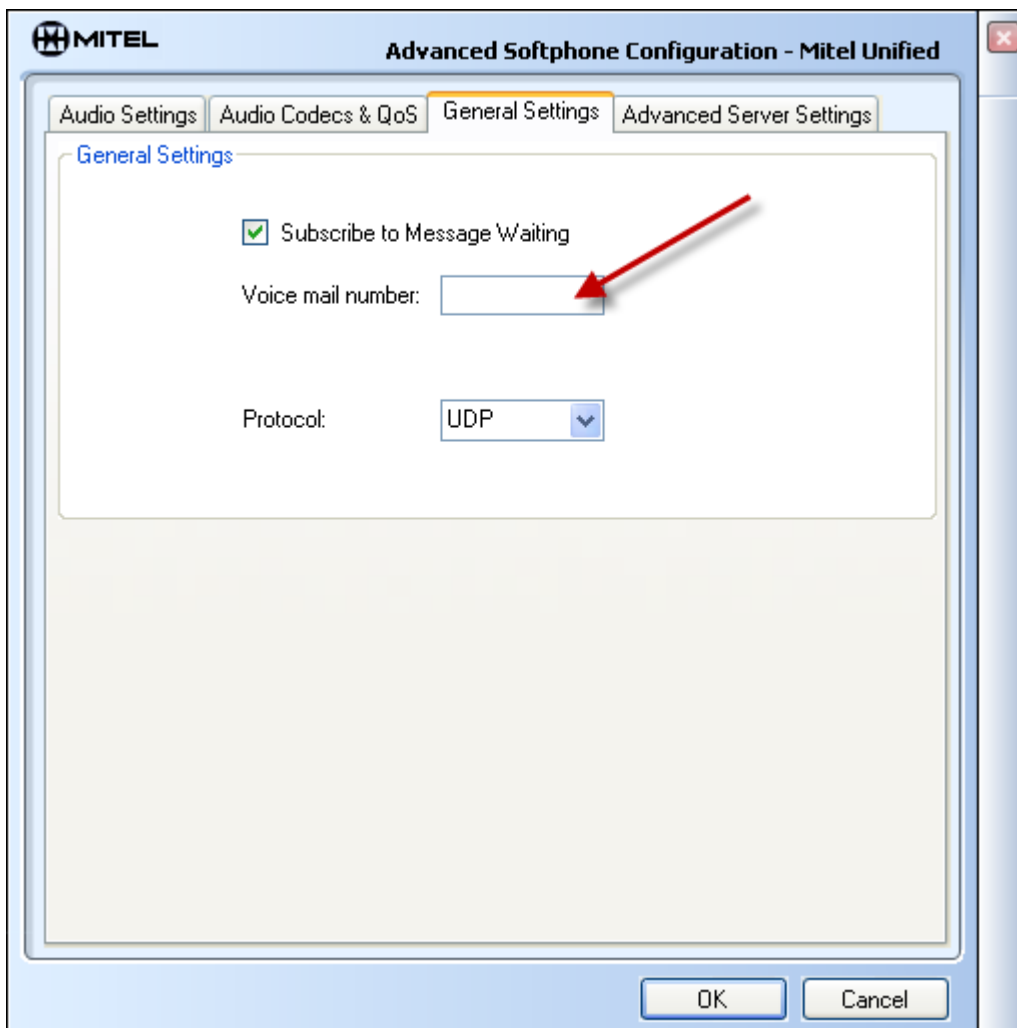
Configuring Voice mail- Mitel 5300 Series IP Phone

1. Select **Settings** from the Toolbar Menu or Tray Icon Menu.
2. This will bring up the "Configuration" dialog.
3. Select **Handle Calls Using** on the left hand side of the dialog.
4. On the right hand side of the dialog, the **Phones** panel appears. Select you **Mitel 5300 Series IP Phone**.
5. Here you can enter your voice mail retrieval number.



Configuring Voice mail- Softphone

1. Select **Settings** from the Toolbar Menu or Tray Icon Menu.
2. This will bring up the “Configuration” dialog.
3. Select **Handle Calls Using** on the left hand side of the dialog.
4. On the right hand side of the dialog, the **Phones** panel appears. Select **Softphone**.
5. Click the “**Advanced...**” button found on the right hand side.
6. This will bring up the “Advanced Softphone Configuration” dialog. Under the General Settings tab you can enter your voice mail retrieval number.

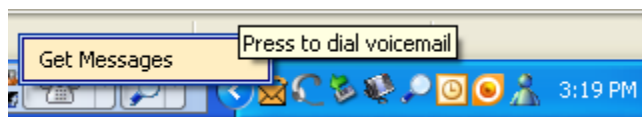



Retrieving Voice mail

When the phone gets notification that a voice mail message has been left, an icon will appear in the system tray of the Windows Task Bar.




Right clicking on the icon will bring up a “Get Messages” menu that when clicked will dial into your voice mail and allow you to retrieve your messages.



 Note: If you have personal ring groups configured, you will be able to retrieve your voice mail messages with UC Express.

Incoming Calls


When an incoming call occurs, the CLID is displayed in the text field of the toolbar in two rows of text, with the name portion highlighted in bold. The **Dial Button** also flashes.

 Note: The CLID is displayed until the user clicks in this field, or another call is received.

Once an incoming call has occurred, there are a number of functions available:

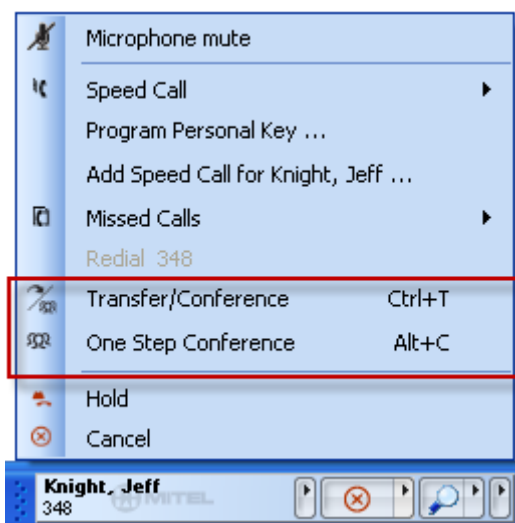
- **Answer** – Left-click the large portion of the **Dial Button** to answer the incoming call
- **Call** – Left-click the large portion of the **Dial Button** to call back the last caller
- **Create a Speed Dial for Caller** –
 - Right-click the small portion of the **Dial Button**
 - Select **Speed Dial**
 - Select **Add Speed Dial for Caller**
- **Lookup Outlook Contacts for Caller** –
 - Right-click the small portion of the **Desktop Actions Button**
 - Select **Lookup Outlook Contacts for Caller**
- **Create Outlook Contact for Caller** –
 - Right-click the small portion of the **Desktop Actions Button**
 - Select **Create Outlook Contact for Caller**
- **Create Task Associated with Caller** –
 - Right-click the small portion of the **Desktop Actions Button**
 - Select **Create Task Associated with Caller**
- **Send Email to Caller** –
 - Right-click the small portion of the **Desktop Actions Button**
 - Select **Send Email to Caller**
- **Windows Desktop Search for Caller** –


- Right-click the small portion of the **Desktop Actions Button**
- Select **Windows Desktop Search for Caller**

 Note: For the respective Outlook options to function you must have Microsoft Outlook running and Microsoft Windows Desktop Search installed. Contact your system administrator to install these products for you.

Transfer/Conference Calls

When a call is in progress up to 3 menu items are added to the Phone Menu (Right click the button with phone or left click tray icon)



 Note: Trans/Conf/Hold are not supported for the SIP Phones on Mitel Unified Communicator Express.

- **Transfer/Conference Ctrl+T**
- **One Step Transfer Alt+T**
(Note: This feature is only available if **Release** function is programmed on a Phone Key)

When pressing any of these menu items when the toolbar is displayed, the text in the edit box will be changed to **Place Second Call**, and the edit box will have focus so the user can just start typing the name or number of the person to call.

If either of the **One Step** operations was selected, the operation will complete upon the second call being answered. If the call is not answered, the user cancels out of the call and the phone picks up the previous call that was in progress before the operation was initiated.

If the **Transfer/Conference** item was selected then when the second call is picked up a menu with up to 3 options is presented to the user:

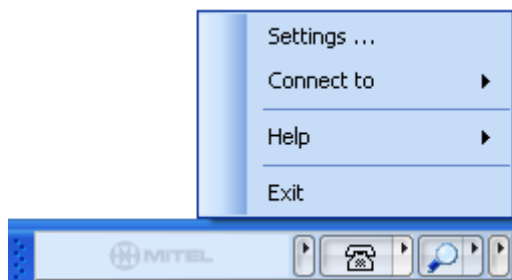
- **Conference Ctrl+C**
- **Trade Calls Ctrl+S**
(Note: This feature is only available if **Swap** function is programmed on a Phone Key)
- **Release Me Ctrl+R** (Only available if **Release** function is programmed on a Phone Key)

Selecting **Conference** establishes the conference. Selecting **Trade Calls** swaps between the two calls currently in progress. Selecting **Release Me** completes a transfer operation.

 Note: When using the Mitel 5000 CP you cannot trade calls.

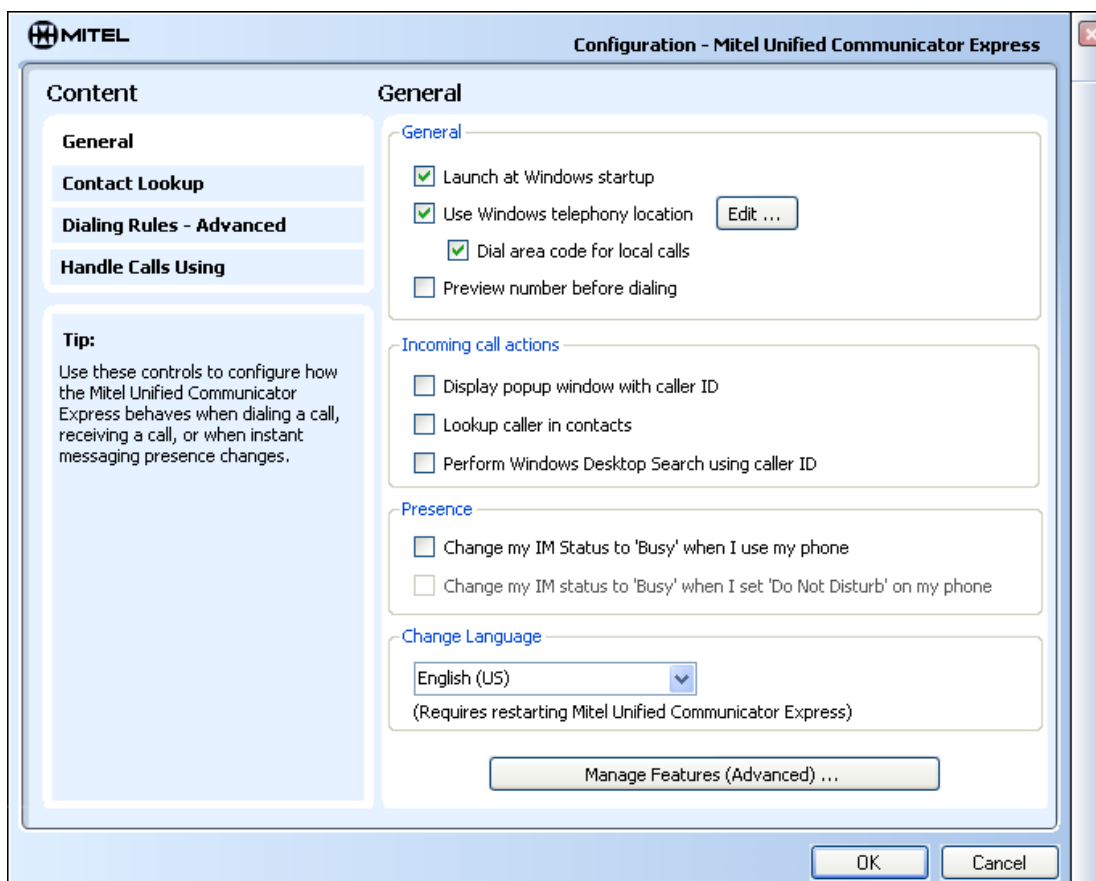
Toolbar Menu


Clicking on the small button at the right of the toolbar causes the Toolbar menu to appear, with the following menu choices:



Settings Dialog

To open the **Settings Dialog** window, select **Settings** from the **Toolbar Menu** or the **Tray Icon**.



 **Note:** Because the toolbar is a Windows Taskbar application, then so is the settings dialog. Because of this it needs to stay on top of the desktop in order for the taskbar to function correctly. (i.e.: The settings dialog will always appear over any other application and will remain so until closed.)

General

Launch at Windows startup – With this setting enabled, Mitel Unified Communicator Express will start up when the user logs into Windows.

Use Windows Telephony Location – If the feature is turned on the toolbar will apply Windows Telephony dialing rules as specified in the telephony location information.

 **Note:** The toolbar applies the Windows Telephony Location to a dialed number based on TAPI rules. You can configure additional rules on the “Dialing Rules” tab

Dial Area Code for Local Calls – Allows you to define if a phone number’s area code will be dialed along with the number. This checkbox turns into a link if the user privileges are less than administrator because it then Windows prevents Mitel Unified Communicator Express from modifying the Telephony Location information. In this case the user must modify the Windows Telephony location information by directly using the Phone and Modem options in the Windows Control Panel.

Preview number before dialing – If enabled, and you select a number from Corporate Directory or Outlook search, the number will be displayed in the **Text Field**. You will have a chance to edit the number before it is dialed.

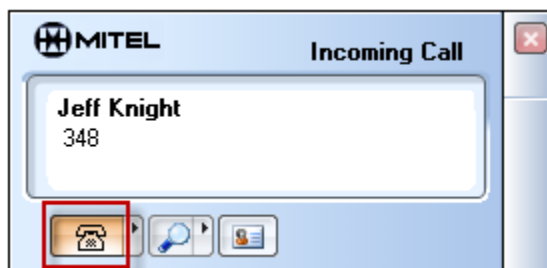
Manage Features – This allows you to disable Microsoft Outlook, Windows Live Messenger/ Office Communicator features that you may not have available.

Microsoft Outlook – If enabled, UC Express will start and connect with your Outlook folder.

Windows Live Messenger/Office Communicator – If enabled, UC Express will start and connect with your Windows Live Messenger/ Office Communicator.

Incoming Call Actions

Display Pop-up Window With Caller ID – This setting controls whether the window will pop-up on an incoming call.



Lookup Caller in Outlook Contacts – If this setting is on, toolbar will automatically do a lookup in Outlook Contacts of the Caller ID of an incoming call.





Perform Windows Desktop Search with Caller ID – If this setting is on, the toolbar will automatically do a Desktop Search of the Caller ID of an incoming call.

Presence


Change my IM status to “Busy” when I use my phone – This setting will cause your presence in IM to change to “Busy” if your phone is off the hook. The IM status will return to its appropriate state once the phone is hung up.

Presence Icons

Icon	Description
------	-------------

	Offline
	Online
	Busy, On The Phone
	Away, Be Right Back, Out to Lunch
No icon	Denotes no presence information reported

 Note: Your IM status will remain unchanged if it is set to anything but “Online”

 Note: This function is only supported by Windows Live Messenger. (This feature is not supported by Office Communicator.)

Change my IM status to “Busy” when I set ‘Do Not Disturb’ my phone – This setting will cause your presence in IM to change to “Busy” if your phone is set to do not disturb. The IM status will return to its appropriate state once the phone is hung up.

 Note: Your IM status will remain unchanged if it is set to anything but “Online”

Change Language

Change Language – This setting allows you to change the display language of Mitel Unified Communicator Express.


 Note: This feature requires you to shut down Mitel Unified Communicator Express and restart it.


Mitel Unified Communicator Express supports the following languages:

- English
- Dutch (Netherlands)
- French (Canada)
- French (France)
- German
- Italian
- Portuguese (Brazil)
- Portuguese (Portugal)
- Spanish (Spain)
- Spanish (US)
- Swedish (Sweden)


Contact Lookup

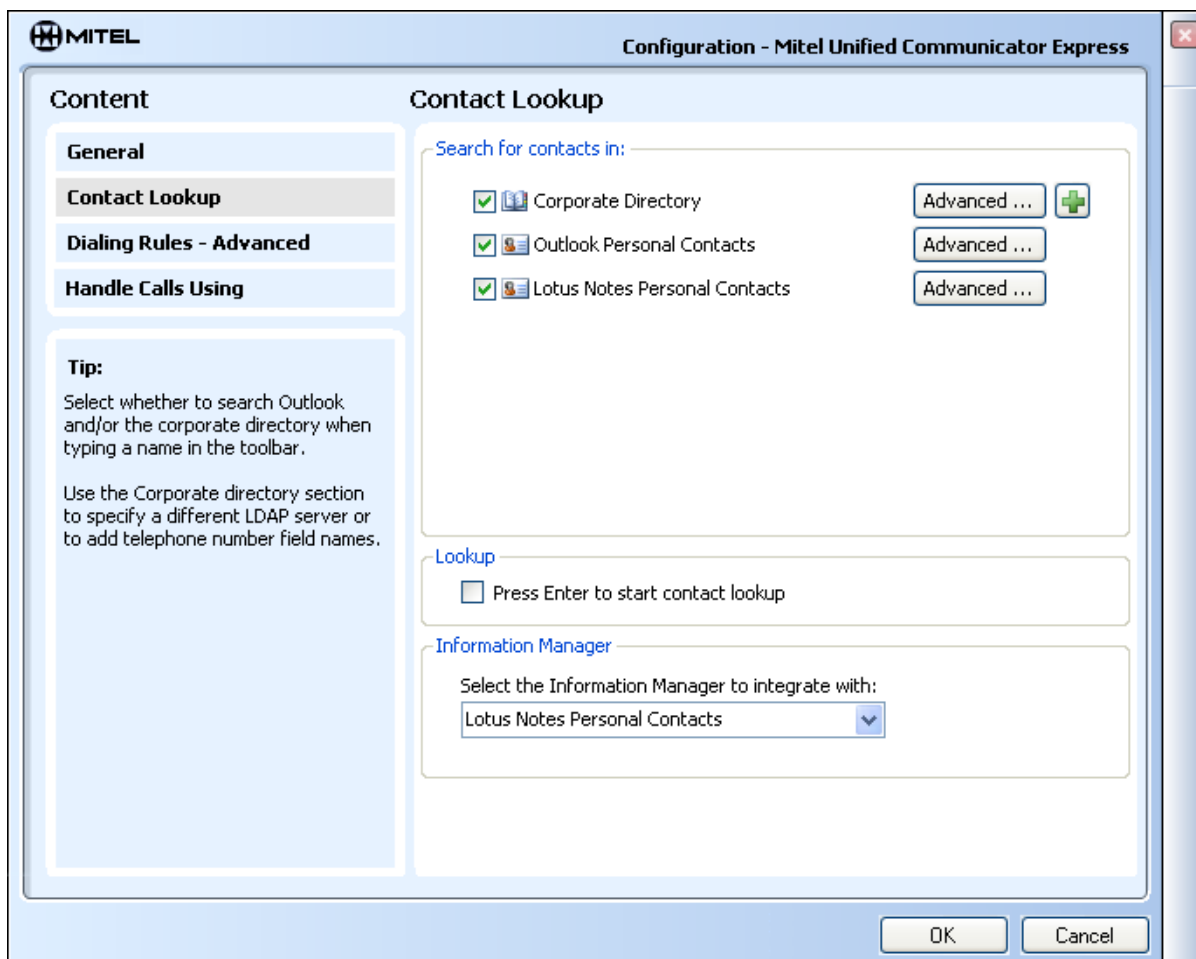
Search for contacts in – This setting allows you to set the search options for Mitel Unified Communicator Express. This determines where Mitel Unified Communicator Express searches for contacts when you type a name in the Toolbar Text Box or the Tray Icon Menu Text Box.

 Note: For these search options to be available, you must have Microsoft Outlook and/or an LDAP source needs to be configured for use as the Corporate Directory. Contact your system administrator to install these products for you.

 Note: These two checkboxes are also controlled by the telephony search option menu. Changes made in either location are reflected in the other

Corporate Directory – This section enables you to specify and add an LDAP source for use as the Corporate Directory

 Note: For information about the advanced settings of the Corporate Directory, please see the Mitel Unified Communicator Express IT and Administrator Guide.

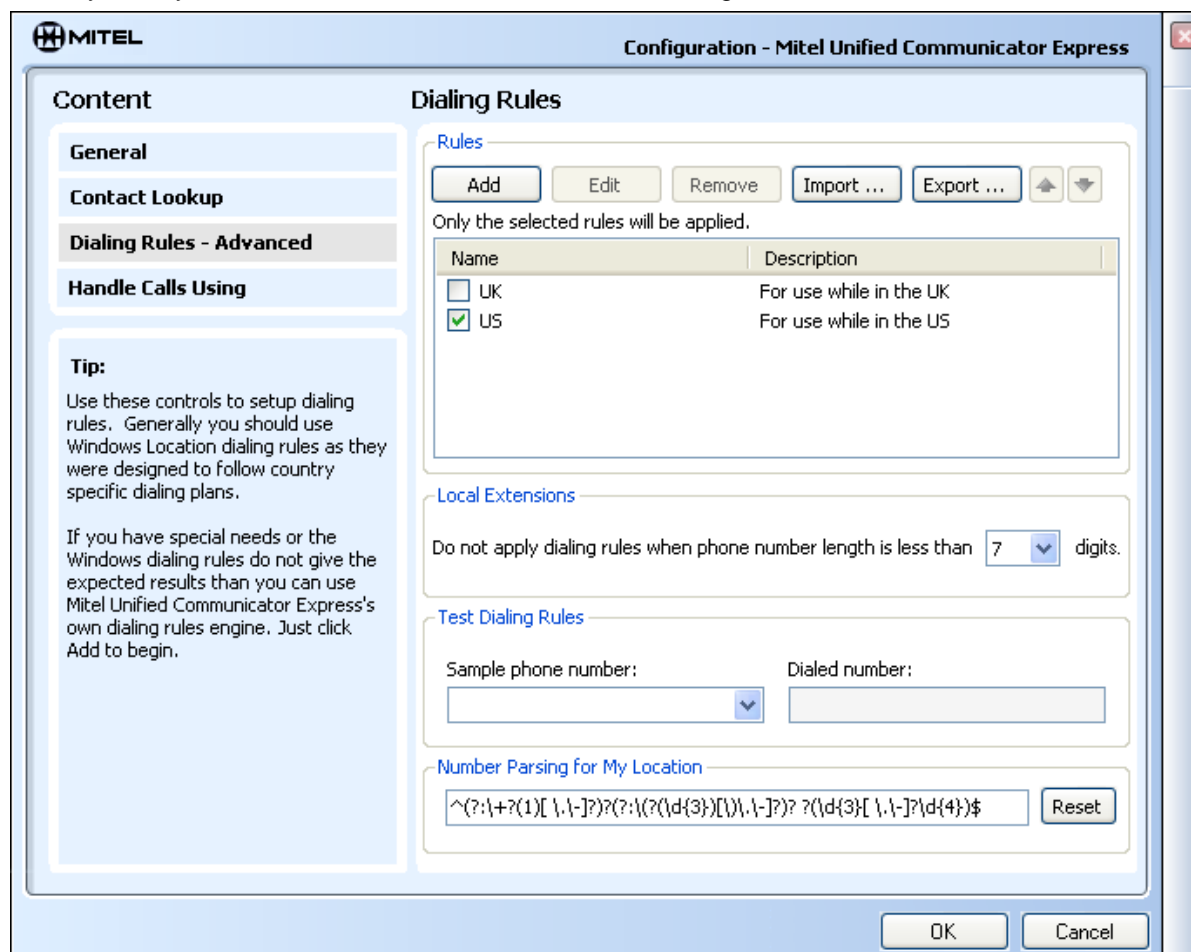


Lookup – Checking this box will require you to press “Enter” to start the contact lookup.

Information Manager- This section enables you to select if you would prefer to have Outlook or Lotus Notes as your default email client integration.

Dialing Rules


Mitel Unified Communicator Express has the ability to have advanced dialing rules for special needs cases you may have outside of the Windows Location Dialing Rules.



Here, Mitel Unified Communicator Express displays a list of dialing rules and controls to add to, edit, and delete them. You can also reorder them (since rules higher up the list are run first).

Check boxes located beside the dialing rules enable you to enable/disable a dialing rule.

Here Mitel Unified Communicator Express also has the ability to import already defined rules.

 Note: If new rules are available the import process gives you the ability to merge with the existing rules or allows you to discard any existing rules.

For help with Dialing Rules, see the section “User Defined Dialing Rules”

MITEL Edit Phone Number Dialing Rule - Unified Communicator Express

Name:

Description:

Translation

Phone pattern regular expression:

Translation pattern regular expression:

Test translation

To test translation, enter or select a sample number from the drop down. If it matches the phone pattern, the translation will be displayed.

Sample phone number:

Translated number:

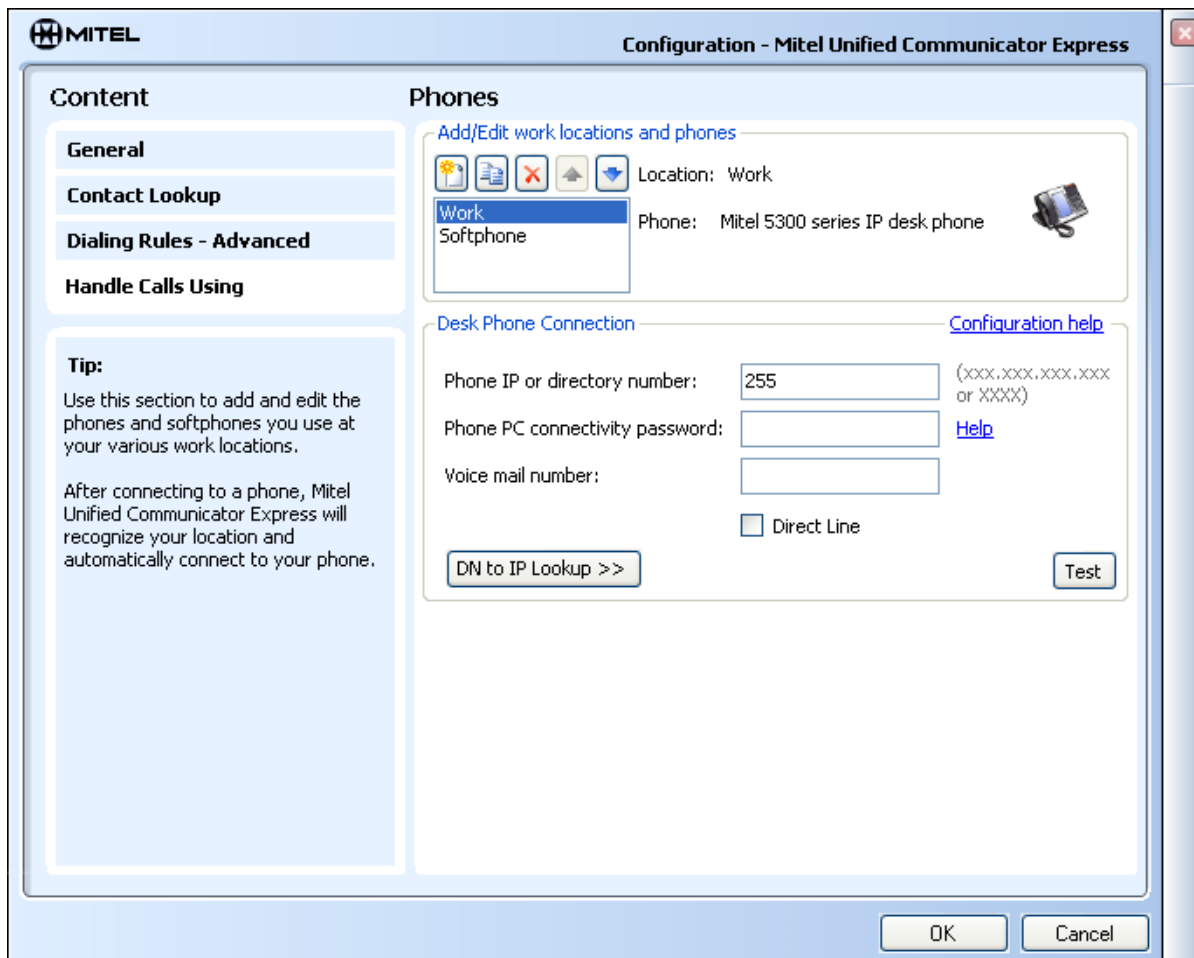
Handle Calls Using

This settings tab allows you to define one or more Phone Profiles.

Mitel Unified Communicator Express can store connection information for more than one phone through multiple phone profiles. This enables you to create multiple phone profiles for different locations or purposes.

For instance you could have a profile for each of the following situations:

- Connecting to a Mitel 5330 at your work desk
 - Connecting to a Mitel 5312 at home as a Teleworker
1. To create/edit additional phone profiles, select **Settings** from the Toolbar Menu or Tray Icon Menu.
 2. This will bring up the "Configuration" dialog.
 3. Select **Handle Calls Using** on the left side of the dialog
 4. On the right side of the dialog, **Phones** appears. Here you can add new phone profiles, edit or delete existing profiles, and order your profiles. Adding/editing profiles are done exactly as before by IP address or DN




If Mitel Unified Communicator Express has more than one profile, when it starts up, it will:

1. Check what network it is on
2. It will try connecting to the top profile on the Phone Profiles list that is known to be on the same network
3. It will work its way through the list of profiles on the same network until it finds a phone it can connect to.
4. If it fails to find a profile it can connect to from this first pass, it will look through profiles that have no network associated yet.
5. It will not check profiles known to be on a different network.

Performing a Desktop Search


To perform a desktop search, do the following:

- Enter text characters such as a name, or portion of a name into the Text Field.
- Left-click the large portion of the Desktop Search Button

 Note: For Desktop Search to be available, you must have Microsoft Windows Desktop Search installed. Contact your system administrator to install this product for you. Windows Desktop Search can be downloaded from the Microsoft website.

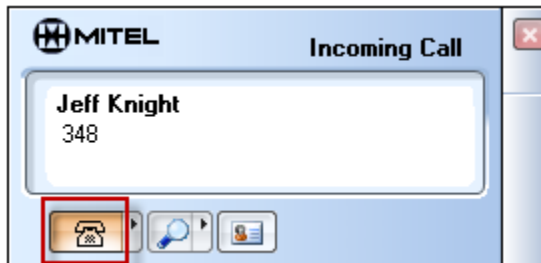
Pop-up Notification of Incoming Calls

When an incoming call occurs, a pop-up window is presented and displays the CLID.

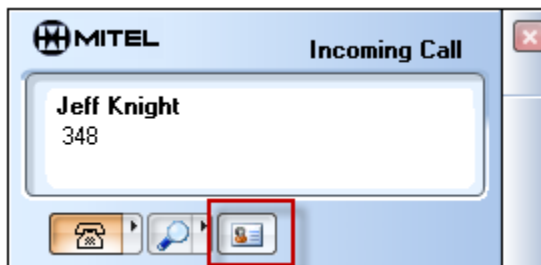
 Note: The pop-up window can be controlled via the settings menu. You can turn the pop-up window on or off. The default is off.


From the pop-up, you can:

- Answer the incoming call

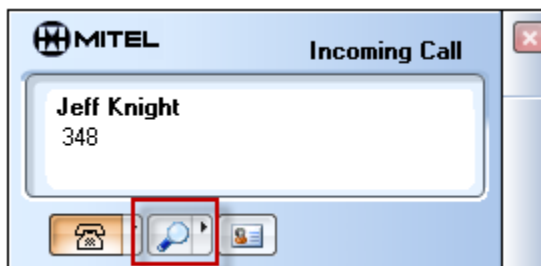


- Do an Outlook Contacts Search based on the CLID (Number and Name search). The Outlook Contact Search does the search base on:
 - Number
 - Full Name
 - Components of the name (IE: First, Last) – Note: this may result in a list for you to pick from



 Note: This search is only executed on Microsoft Outlook and does not include the corporate directory

- Do a Desktop Search based on the CLID



User Defined Dialing Rules


About Dialing Rules

Mitel Unified Communicator Express makes use of two different kinds of dialing rules, which can be used together or separately:

- Windows Telephony dialing rules
- User defined dialing rules

As a rule of thumb use Windows Telephony Dialing rules first as they follow dialing plans set forth by the International Telecommunications Union (ITU) and by the individual countries themselves.


Create your own dialing rules when you need to translate a number for a different reason or when the Windows Telephony Rules do not give the expected results.

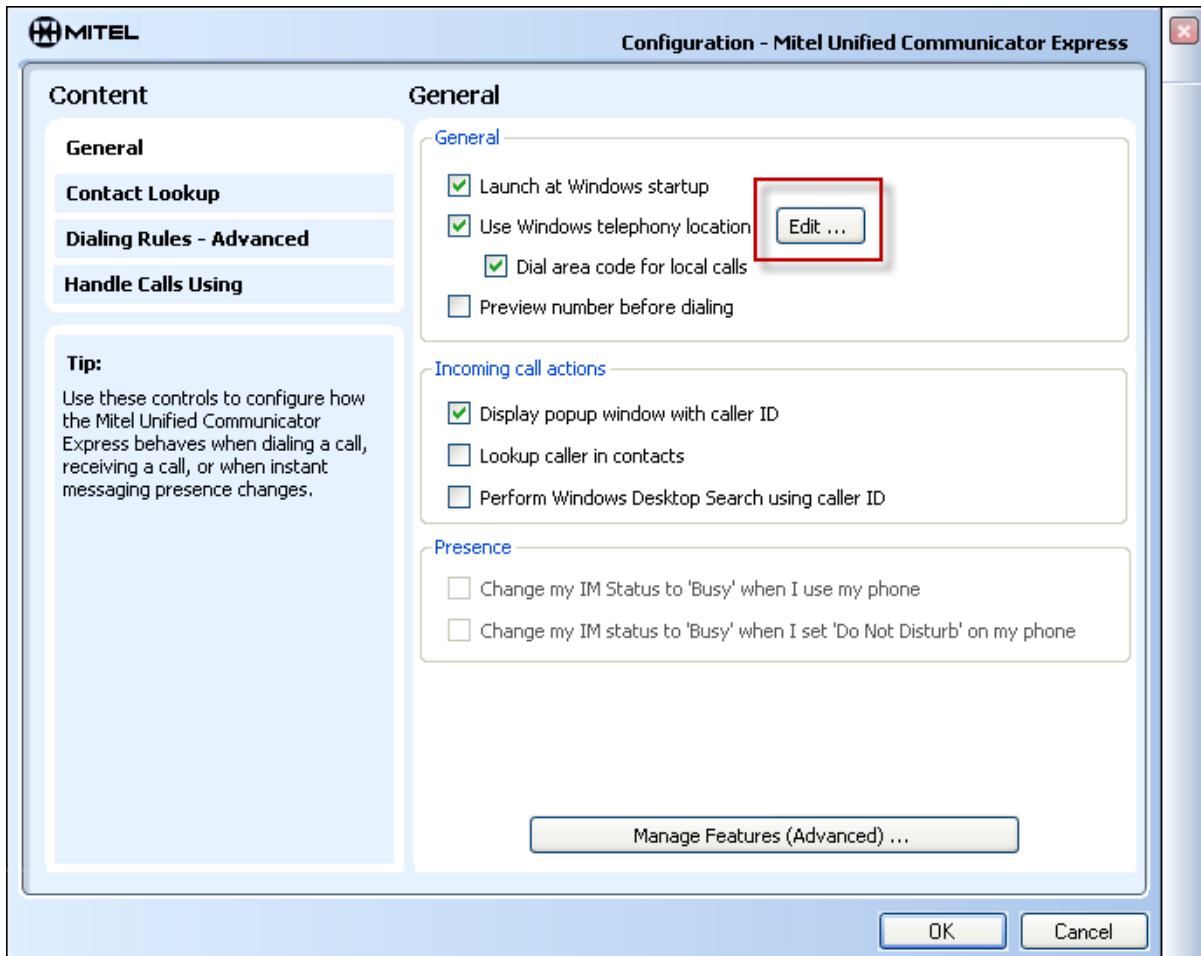
 Note: Any “User Defined Dialing Rules” will be applied to a Speed Call only as the Speed Call Button is being programmed. This is to allow Mitel Unified Communicator Express to pass the dialing rules on to the set. Later changes to “User Defined Dialing Rules” will not be reflected in already programmed “Speed Calls”

Windows Telephony Dialing Rules

Microsoft Windows Telephony offers dialing rules which correspond to international dialing rules and location rules the user can configure through **Phone and Modem Options** in the Control Panel. You can also access this dialog by pressing the **Edit** button for “Windows Telephony Location” in the Mitel Unified Communicator Express setting dialog

To use these rules in Mitel Unified Communicator Express enable them through the **Settings** dialog on the General tab.

 Note: If you have multiple local area codes, add all local area does to the main dialing rule to allow UCX to dial local numbers without appending a “1”.



User Defined Dialing Rules

In Mitel Unified Communicator Express dialing rules can be defined by the user to ensure certain phone numbers are dialed in a specific manner.

For example: the phone numbers of your office colleagues are stored in the corporate directory or Outlook Contacts using the full company phone number followed by a phone extension such as

+1 (222) 333-4444 x555.

By Default, when Mitel Unified Communicator Express encounters such a number it starts by dialing the main phone number and, once the call is established, offers the user to dial the extension.

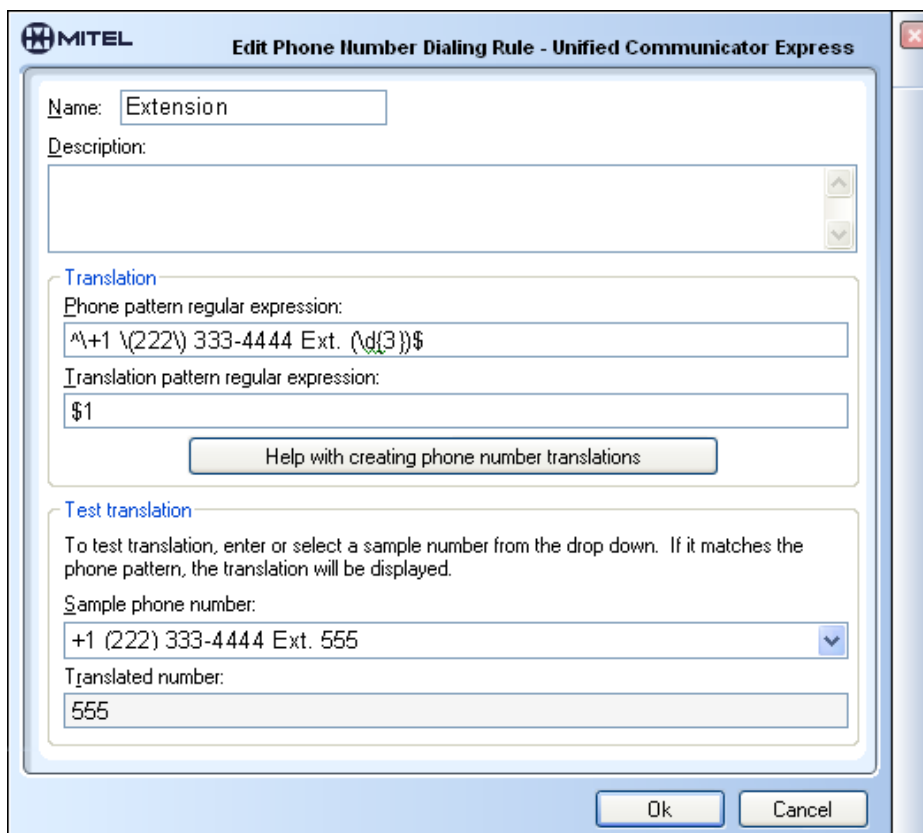
Obviously this will not work for calling colleagues on the same phone system. You can change this behavior by creating a dialing rule that forces Mitel Unified Communicator Express to just dial the phone extension.

Example Number: +1 (222) 333-4444 Ext. 555

Phone Pattern Regular Expression: `^\+1 \ (222\) 333-4444 Ext. (\d{3})$`

Translation Regular Expression: `$1`

Translation Result: 555



Translating Phone Numbers

Translating a phone number requires 2 regular expressions:

The first one, called **the phone pattern regular expression**, is used to match the phone number.

The second, called **the translation pattern regular expression**, is used to substitute part or all of the matched phone number with the dialing rule requirements.

The following table shows a couple of sample translations:


Example phone number(s)	Phone pattern regular expression	Translation regular expression	Translation result
555-6666	<code>^(\d{3})-(\d{4})\$</code>	<code>\$1\$2</code>	5556666
444-555-6666 333-555-6666	<code>^(444 333)-(\d{3})-(\d{4})\$</code>	<code>8 1\$1\$2\$3</code>	8 14445556666 8 13335556666

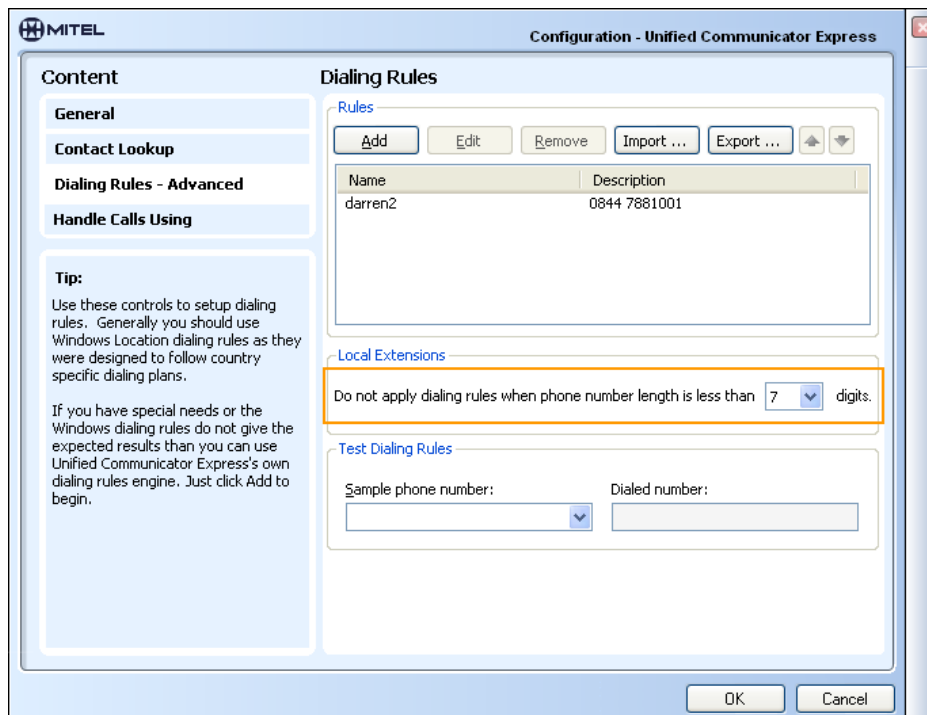
How Dialing Rules Are Applied

When rules are applied:

- Mitel Unified Communicator Express searches for the first user defined rule that matches the number.
 - If match is not found:
 - If Windows Telephony Rules are not selected:
 - Number is dialed as is.

- If match is found:
 - Rule is applied and translated number is dialed.
- Otherwise number is converted to canonical format, asking user for input if necessary.
 - Mitel Unified Communicator Express searches for user rule that matches canonical form
 - If match is found:
 - Rule is applied and translated number is dialed.
 - Otherwise Windows Telephony Rules are applied and translated number is dialed.

 Note: There is a Local Extensions option to not apply dialing rules based on the length of the phone number. For Example, you may need to have a rule that adds a “9” to the beginning of a number to dial an outside line, but you don’t want it to add the 9 for a local extension.



Help with Regular Expressions

Regular expressions are a rather complex concept. For the purpose of dialing rules in Mitel Unified Communicator Express they are used to match phone numbers and modify them. Mitel Unified Communicator Express uses the Microsoft .NET regular expression engine.

The following sections provide just a simplified reference of regular expression syntax. What is provided is the strict minimum needed for the purpose of matching phone numbers and translating them into a specific dial-able form. For further understanding of regular expressions, please refer to:

- http://en.wikipedia.org/wiki/Regular_expression
- [http://msdn.microsoft.com/en-us/library/az24scfc\(VS.71\).aspx](http://msdn.microsoft.com/en-us/library/az24scfc(VS.71).aspx)

Special Characters

Regular expressions use a number of characters as matching instructions (., '-', '+', '*', '?', '(', ')', '[', ']', '{', '}', '|', '\$'). If you need to match one of these characters you need to prefix (escape) them with a backslash ('\).

The expression **\(444) 555-6666** matches the string **(444) 555-6666**

Qualifiers

Quantifier	Description
*	Match preceding character zero or more times. (35* matches 3, 35, 355, 3555, ...)
+	Match preceding character one or more times. (35+ matches 35, 355, 3555, ...)
?	Match preceding character zero or one times. (35? matches 3 and 35)
{n}	Specifies exactly n matches; for example, (pizza){2}.
{n,}	Specifies at least n matches; for example, (abc){2,}.
{n,m}	Specifies at least n, but no more than m, matches.

Character Classes

Character class	Description
.	Matches any character
[aeiou]	Matches any single character included in the specified set of characters.
[^aeiou]	Matches any single character not in the specified set of characters.
[0-9a-fA-F]	Use of a hyphen "-" allows specification of contiguous character ranges.
\w	Matches any word character. \w is equivalent to [a-zA-Z_0-9].
\W	Matches any non word character. \W is equivalent to [^a-zA-Z_0-9].
\s	Matches any white-space character.
\S	Matches any non-white-space character.
\d	Matches any decimal digit. Equivalent to [0-9]
\D	Matches any non digit. Equivalent to [^0-9]

Grouping

Grouping construct	Description
()	Captures the matched substring
(?:)	Non-capturing group.

Alternating

Alternation construct	Definition
	Matches any one of the terms separated by the " " (vertical bar) character; for example, cat dog tiger. The leftmost successful match wins.


Substitution


Character	Description
\$number	Substitutes the last substring matched by group number (decimal)(e.g. \$1).

Find vs. Match

Regular expressions can be used to find certain patterns within a string or they can be used to validate that a whole string conforms to a specific pattern. Mitel Unified Communicator Express performs a match instead of a find. In this context, it is much easier to write and test dialing rules if the phone pattern starts with the '^' character, which indicates that the following characters must match the beginning of the string, and ends with '\$', which indicates that the preceding characters must match the end of the string. As you will see in the examples, all phone pattern regular expressions will follow this design.


Appendix 1: Feature Differences between Mitel Unified Communicator Express and Integrated Office Companion

 Note: Installing Mitel Unified Communicator Express will uninstall any previous installation of Integrated Office Companion.

 Note: Mitel Unified Communicator Express will need to be registered even if you have already registered Integrated Office Companion.


Users familiar with the Integrated Office Companion Application will find it to be similar to Mitel Unified Communicator Express. There are, however a few exceptions:

Support for the 5312 and 5324 Mitel phone models- Mitel Unified Communicator Express now supports Mitel's new 5312 and 5324 IP phone models. This release will only officially support these phones in Minet mode.

 Note: If a 5312/24 is pinned on a switch that does not support the 5312/24 set loads, the sets will automatically revert to acting as a 5212/24 which does not support Mitel Unified Communicator Express.

New phone programming capabilities- The new "Program Personal Key" dialog now permanently displays the UI of the phone to program and updates itself dynamically. The UI's match the personal key (PK) area of the phone and behaves like the corresponding phone UI. Phone UIs supported are the 5312, 5324, 5330, and 5340. Programming capabilities include:

- Speed Call;
- Create Outlook task for caller;
- Create Outlook contact for caller;
- Send email via Outlook to contact;
- Dial highlighted;
- Launch PC application.

 Note: For the **Program** you must specify the full path to the document or application to run:

- A path to an executable;
 - A path to an executable + arguments;
 - A path to a document;
 - Browse to a program
- Mitel Unified Communicator Express can also print phone labels for the 5312/24 sets

Multiple phone profiles- Users can now define multiple phone profiles and Mitel Unified Communicator Express stores network information so it can directly find what profile to use to connect to the user's phone.

Mass Deployment improved- Support for Terminal services contributed to make mass deployment work better. We also have a tool that will be available on demand that makes configuration of mass deployment options.

Removed – “Set my phone to “Do Not Disturb” when my IM status is ‘Busy’” – Setting the phone to DND was a user selectable feature in IOC which was removed when support for 5312/24 was introduced because the hard set provides no visual clues of being in DND unless a personal key is programmed for DND. Also this behavior was considered unfriendly in general so it was pulled from Mitel Unified Communicator Express.

Removed – Application configuration during startup - All configuration options have been removed out of Installer and put into the settings in order to simplify the installer.

To now configure Mitel Unified Communicator Express to “Launch on Windows Startup”, open the Mitel Unified Communicator Express settings and it is the top check box of the “general” tab.

Removed – Pause music when phone is in use – In IOC, this feature would broadcast a PAUSE message across Windows to pause various media players. With the increasing variety of media players, a number of which do not conform to the Microsoft Programming Interface, the usefulness of this feature became to limited in scope.

Changed - Change my IM status to “Busy” when I use my phone – In IOC, this feature used to set the IM status to “On the Phone” however changes in Microsoft Presence control removed the possibility to set state to On The Phone (In a call). To still allow this feature, Mitel Unified Communicator Express uses “Busy” instead.

Changed - Presence: IOC would allow presence connection to both Office Communicator and MSN Messenger simultaneously but it was discovered that there could be some odd behavior happening where status may change for one but not the other based on context. For this reason, by default Mitel Unified Communicator defaults to only allowing presence connection with Windows Live Messenger.



Note: Office Communicator presence options are available through mass deployment or command line option. (Please see the Mitel Unified Communicator Express IT and Administrator Guide)

Appendix 2: Additional Notes about Mitel Unified Communicator Express

Mitel Unified Communicator Express and Microsoft Framework 2.0

In order to run Mitel Unified Communicator Express, your PC will also need to have the Microsoft .NET Framework 2.0 installed.

- If the Microsoft .NET Framework 2.0 is not installed when you install Mitel Unified Communicator Express, Mitel Unified Communicator Express install will download and install the Framework at that time.
- The Microsoft .NET Framework 2.0 must also be present if you uninstall the Integrated Office Companion.

Mitel Unified Communicator Express and the Mitel 5300 Series IP Phone Set

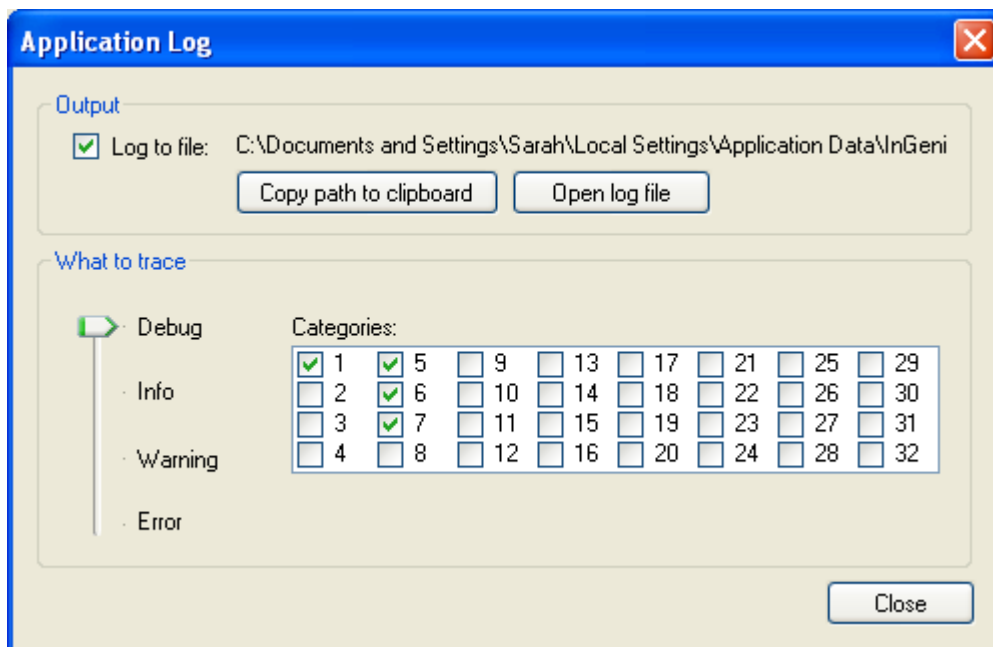
UCX connects to the phone on port 5060 so any intervening firewalls must allow that port to pass.

Trace Logging

For debugging purposes, Mitel Unified Communicator Express has built in trace logging capabilities. By default the logging is turned OFF.

Turning ON Trace Logging

1. Open the UC Express “About box”
2. Select “Configure Logs” from the drop down and press “OK”.
3. This will bring up the “TraceFlags” dialog window:



4. To turn tracing ON, check the “Log to file”
5. For general logging, **No Categories** need to be checked (just have “Show Info”, “show Warnings” and “Show Errors” checked)

To Log communication between the phone set and UC Express, check **Category 1**.

6. **TURN OFF WHEN NOT IN USE.** Turn the tracing off when not in use to keep from creating large files on your PC.

Presence: Supported versions of Windows Live Messenger and Office Communicator

Mitel Unified Communicator Express “Presence” Feature: Supports Windows Live Messenger version 8.1 or Higher and Office Communicator 2007 client version 2.0.

Appendix 3: Example User Defined Dialing Rules

In the examples below copy the **Phone pattern regular expression** and **Translation regular expression** to the corresponding fields of the **Edit Phone Number Dialing Rule** dialog in UCX and replace the phone numbers in the patterns with your own.

Name	Description	Example phone number(s)	Phone pattern regular expression	Translation regular expression	Translation result
Extension Only	Keeps only the extension in the given phone number.	+1 (222) 333-4444 Ext. 555	^\+1 \ (222\) 333-4444 Ext. (\d{3})\$	\$1	555
		+1 (222) 333-4444 Ext. 55555	^\+1 \ (222\) 333-4444 \w+\.? ?(\d{3,5})\$	\$1	55555
SIP trunk	Assumes long distance dialing for non 613 area codes but does not add 1 to satisfy SIP trunk provider.	+1 (222) 333-4444	^\+1 \ (?(!613)(\d{3}))? ?(\d{3})\-(\d{4})\$	9\$1\$2\$3	92223334444
		+1 (613) 333-4444			No match, Windows dialing rules, if any, apply.
Calling France from Canada 1	For numbers that start with the France Country Code, prefix with 011	+33 57 123345	^\+?33 (\d{2}) ?(\d{6})\$	01133\$1\$2	0113357123345
Calling France from Canada 2	For numbers that start with the France Country Code, prefix with 9 011	+33 57 123345	^\+?33 (\d{2}) ?(\d{6})\$	901133\$1\$2	90113357123345
Local Dial Out	Adds the dial out prefix 9.	+1 (222) 333-4444	^(?:\+?1)?(?(\d{3})?[\]\.-]? ?(\d{3})[\.\]-]?(\d{4})\$	9\$1\$2\$3	92223334444 92223334444

		222.333.4444 222-333-4444			92223334444
No area/city code for local calls	Microsoft's telephony services fails to apply dialing rules for local UK calls. This rule removes the area code and prefixes the number with 9 to dial out local calls. Replace the leading 9 with your dial out code and 01899 with your area code.	01234 123 456 01234012345 6 01899 012341 23456	^(?:\+?\d{1,3})?(?:01899)?(\d{5})[\- \.]?(\d{3})[\- \.]?(\d{3})\$	9\$1\$2\$3	901234123456
Long Distance Dial Out	Adding "9 1" as a prefix for phone numbers in area codes 222, 777, and 888.	222.333.4444 (777) 333-4444 +1 (888) 333-4444	^(?:\+?1)?(?(222 777 888)[\] \. \-]+(\d{3})[\- \.](\d{4})\$	91\$1\$2\$3	912223334444 917773334444 918883334444
Feature Access Codes	Stopping UC Express from adding 9+ area code if dialing a feature access code	*69 5555 #79 55555	^([*#])\s?(\d{2})\s?(\d{4,5})\$	\$1\$2\$3	*695555 #7955555

Appendix 4: Mitel Unified Communicator Express Limitations


Mitel Unified Communicator Express is designed to tie together functionality from various other applications. There are some cases of incompatible versions of these other applications that may result in limitations to certain Mitel Unified Communicator Express features.

Microsoft Windows Messenger and Office Communicator

Mitel Unified Communicator Express “Presence” Feature: Supports Windows Live Messenger version 8.1 or Higher and Office Communicator 2007 client version 2.0.

Mitel Unified Communicator Express “Busy” Feature: While it would be preferable to have it set the presence status to “On the Phone”, changes in Microsoft Presence control removed the possibility to set state to On The Phone (In a call). To still allow this feature, Mitel Unified Communicator Express uses “Busy” instead.

Presence: Mitel Unified Communicator Express would allow presence connection to both Office Communicator and MSN Messenger simultaneously but it was discovered that there could be some odd behavior happening where status may change for one but not the other based on context. For this reason, by default Mitel Unified Communicator defaults to only allowing presence connection with Windows Live Messenger.

 Note: Office Communicator presence options are available through mass deployment or command line option. (Please see the Mitel Unified Communicator Express IT and Administrator Guide)

Taskbar

Auto-hide - If you configure the Windows toolbar to auto-hide, the UC Express Toolbar displays by itself whenever the Windows toolbar hides. If you do wish to have your taskbar auto-hide, it would be better to turn off the toolbar, and just use the tray icon.



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