ANNEX 3 TO SERVICE SPECIFICATION UNIFY PHONE
FOR OPENSCAPE
PRODUCT AND SERVICE DESCRIPTION

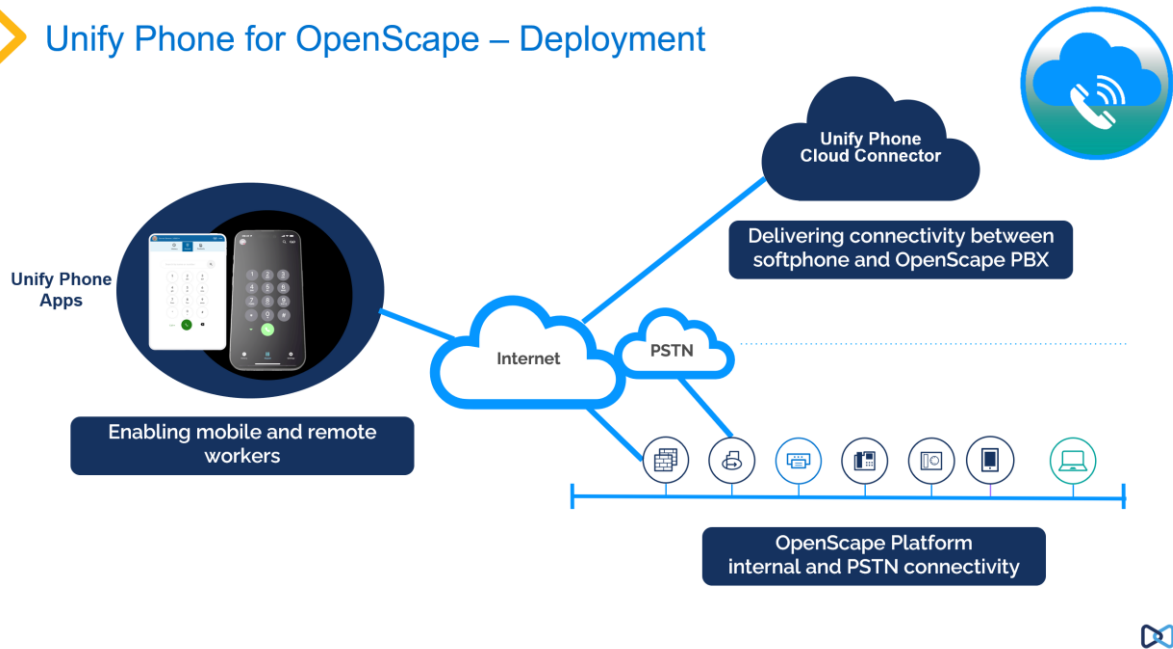# Table of Contents

1 Unify Phone for OpenScape Functionality Description

1.1 Overview

> ### Unify Phone for OpenScape – Deployment

Generic overview Unify Phone for OpenScape

Unify Phone is a cloud based WebRTC telephony connectivity solution between OpenScape voice platforms (OpenScape Voice, 4000 and Business).

Unify Phone is provided to the end user as a client which can be used with other applications as an embedded telephony client connected to their existing OpenScape platform.

Unify Phone for OpenScape allows Customers using OpenScape Voice, 4000 and OpenScape Business to provide mobile a web/desktop cloud telephony with their existing platform to provide a common enterprise-wide communications solution for both on premise, remote and mobile workers.

1.2 Subscription

Unify Phone is offered to Customers as a subscription-based service in general (a special Capex type licenses is offering for OpenScape Business, the UC Entry Package), it is offered to Customers to integrate with their existing OpenScape platform.

The subscription is a price per month charge for access to the Unify Phone service which is hosted in a cloud managed by Unify. The Customer (or Partner/Unify on behalf of the Customers) sets up their platform to provide telephony extensions to Unify Phone. The Customer (or Partner/Unify) then creates and manages Unify Phone users from the Unify Phone Administration tools within the OpenScape platform and also on the Unify Phone Tenant administration portal.

Optional you can get Unify Phone on a one-time charge bundle with OpenScape Business. In these bundles one Unify Phone user license and one OpenScape Business user license including support in bundled and provides the rights to use Unify Phone for the respective period.

The subscription for Unify Phone is based on a price per user per month charge, the charging for the Unify Phone is the same regardless of the OpenScape platform but the license methods are different per platform as the license in general uses the existing licensing scheme on the platform.

The Customer to access Unify Phone needs the following elements:

- **Suitable Platform**
  An OpenScape Business, Voice or 4000 platform at the required level of software which supports Unify Phone, this is OpenScape Business v3, OpenScape Voice v10 and OpenScape 4000 v10 and V11 (a specific release of these platforms will be required to be installed which includes the functionality to support Unify phone) which is detailed in the Unify Phone release notes which are issued with each new release of Unify Phone. In the case of OpenScape Voice and OpenScape 4000 a suitable OpenScape SBC is required again at v10 latest release. IP licenses are required on each platform per user and in addition SBC channel licenses and capacity.

- Further information on requirements including firewall settings is detailed in the Unify Phone Administration guide

The subscriptions offered for the various platforms are described in the Annex 2 Licensing to the Service Specification Unify Phone for OpenScape.

1.3 Features and Functions

1.3.1 Supported Platforms

Unify Phone as a cloud based WebRTC telephony connectivity solution supports the following OpenScape platforms, check release notes for latest version information.
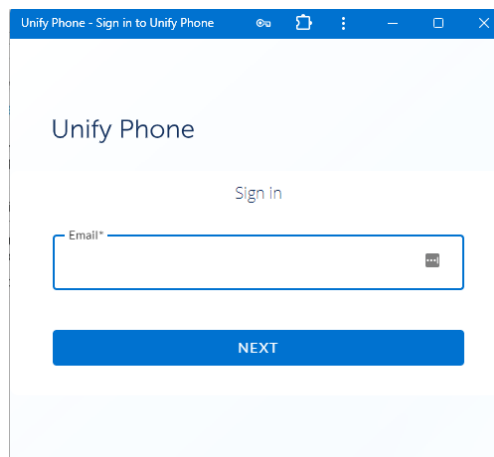
- OpenScape Business V3R2 or newer

- OpenScape Voice v10 and V11 (requires OpenScape SBC v10/v11)

- OpenScape 4000 v10 (requires OpenScape SBC v10)

1.3.2 User Management

User Management for Unify Phone is controlled via the Unify Phone Tenant Admin Portal in conjunction with the management portals of the used OpenScape Platform.

With Unify Phone for OpenScape the users are stored on the Unify Phone cloud service and can be uploaded in bulk into the Unify Phone database or can be created in the platform management platforms. Unify provides tools such as the FLIP tool to enable customers to bulk manage users (OpenScape Voice/4000) and for OpenScape Business there is an CSV Excel file import for bulk user creation in the Unify Phone Tenant Admin.

User authentication is handled by Unify Phone with username and password and in addition options for Single Sign On (SSO) are available.

Unify Phone User Login Screen

1.3.3 Presence

Unify Phone maintains a presence for the user based wholly on the presence of the user within Unify Phone and the extension status of the associated phone number on the OpenScape platform.

This presence changes depending on the user's status at any time e.g. when they are in a call.

This in some cases can be set manually e.g. Do Not Disturb, Appear Offline. Presence is synchronised between web and mobile clients and also where applicable to an associated desk phone.

More information on presence is detailed in the user guide for the associated platform.
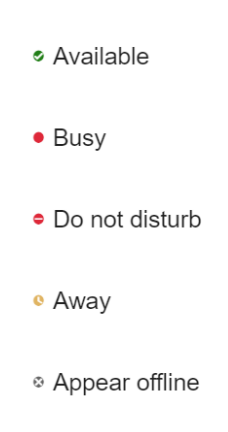
Presence Model in Unify Phone for OpenScape

1.3.4 Telephony Features

The following telephony functionality is supported on Unify Phone when connected to an OpenScape platform.

Features

Unify Phone supports the following features:
- Make call
- Answer, decline or drop a call
- Send DTMF commands in a call
- Hold and retrieve
- Mute/ Unmute
- Transfer call
- Pull call from other Unify Phone clients or desk phone
- Push call to desk phone
- Push call to alternative number
- Make or answer a second call
- Swap calls (alternate)
- Merge two calls into a conference
- Call forwarding
- Alternative number (One Number Service)
- Call routing
- Voicemail
- Hunt Groups/Pick-Up Group (OpenScape 4000 and OpenScape Voice)
- Remote call control of desk phone (Computer Telephony Integration - CTI): hold and retrieve, end call, swap calls, transfer, merge into conference

Specific features for each OpenScape platform are included in the user guides for each platform and for web and mobile clients.

There are differences between platforms as the telephony features of Unify Phone are fully based on the underlying platform and on the client type being used e.g. web or mobile.

1.3.5 Option – Unify Phone for Microsoft Teams

Unify Phone for Microsoft Teams provides a plug-in for Microsoft Teams which includes the Unify Phone client, this plug-in is installed in the customers Microsoft environment by this Microsoft Administrator, the plug-in is downloaded from the Microsoft Teams apps store.
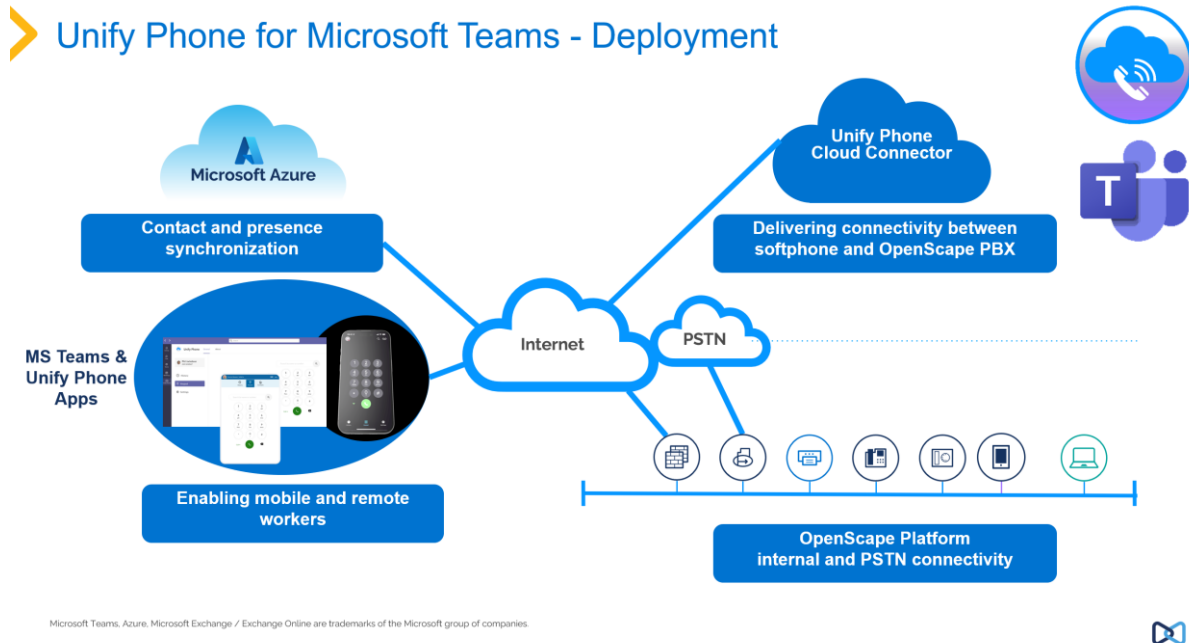
Generic overview Unify Phone for Microsoft Teams

The customers end users can then add Unify Phone to their Microsoft Teams client, this inserts the application into their desktop, web and mobile MS Teams clients. Unify Phone can then be used within these clients, to initiate calls, search contacts etc.

Included in the Unify Phone for Microsoft Teams solution is the presence integration between Microsoft Teams and Unify Phone which is a bi-directional synchronisation.

To deploy Unify Phone for Microsoft then Unify Phone for OpenScape is first deployed. With Unify Phone for OpenScape deployed, then the Unify Phone plug-in for MS Teams is deployed to the Microsoft Teams tenant by the customers Microsoft administrator.

If an end user uninstalls the Unify Phone for MS Teams plug-in, then this presence synchronisation ceases and can be disabled in the Unify Phone client, once disabled then this option is removed from the Unify Phone client.

It is also possible to mix Unify Phone for OpenScape users (not using the Unify Phone for MS Teams plug-in) and Unify Phone for MS Teams users on the same Unify Phone tenant. Both users are using Unify Phone for OpenScape to provide their telephony. Both can call and be called as they share the same underlying OpenScape platform.

Unify Phone for Microsoft Teams does not need a further license than the Unify Phone licenses for OpenScape. For interworking with Microsoft Teams the Microsoft graph API is required.

1.3.6 User Settings

It is possible to configure the following settings in all Unify Phone apps:

- **General Settings**
    - Language: Change the language of the app. Available options are English, German, French, Spanish, Italian, Dutch, Catalan, Portuguese (Brazil) and Basque
    - MS Exchange integration, Office 365, Google integration
    - Install Chrome Extension
- **Telephony Settings**
    - Call forwarding: Ability to forward incoming calls to given number or voicemail (when available)
    - Alternative number: It's possible to set the phone number of an alternative device, e.g. mobile, that can be used for making and receiving phone calls through the work number. The alternative number can also be used to control the routing of your calls between your devices.
    - Call routing: By default, incoming phone calls will ring on all of the Unify Phone clients and desk phone. On no answer they will be routed to the alternative device if it's specified. Users can change this default setting and have all incoming phone calls be routed directly to the desk phone or alternative device.
    - Call history: It's possible to download the complete call history as CSV file
- **Audio Settings**
    - Audio output
    - Ringing output
    - Microphone
    - Headset Integration: Jabra and Poly/Plantronics
- **Account**
    - Change User Password

1.3.7 Tenant Administration

The administration of Unify Phone is performed with the Unify Phone administration app. There is an invite sent to the customer's nominated administrator by Unify, which is then used to setup and activate the Unify Phone tenant. This administrator can also appoint co-administrators as appropriate.

This is a web-based application allowing administrators to easily:
- Connect Unify Phone to the required associated OpenScape platform
- Generate/regenerate/copy the API key needed to connect an OpenScape PBX to Unify Phone
- Check the status of the telephony connector.
- View the users of Unify Phone which have been setup
- For OpenScape Business import a CSV file of new users to be loaded to the Unify Phone tenant
- For OpenScape Voice/4000 using a JSON file generated by the FLIP migration tool.
- The tenant Administrator can also set an email address where user support emails will be sent.
- Download of Tenant Call Records (can be anonymised)

Signing in to Unify Phone administration app is only possible with the Tenant Admin credentials which are created on first registration of the Unify Phone tenant.

Details on how to enable Single Sign On (SSO) are in the Unify Phone Administration guide, and the customer is expected to provide their details of their SSO implementation requirements.

1.3.8 Contacts

Currently, the Unify Phone clients fetches the tenant users from Unify Phone user database and offer as contacts to call. In every step when user want to call a number (from dial pad, while transferring a call, while starting a new call while in an active call), searching such contacts is possible.

Additionally, through Exchange Online integration (Office 365), Exchange on-prem, Google and OpenScape Business, it will be possible to search both global and private contacts available in Exchange and call. In Unify Phone mobile clients access to local device contacts can be enabled. In addition access is provided to OpenScape Business contacts.

Additionally, when a call is received, the callee number will be resolved to a name, when there is matching Exchange Online or mobile contact private contact matching.

1.3.9 Applications

1.3.9.1 Desktop

For Desktop operating systems (Windows, MAC OS, Chrome OS), Unify Phone is offered as a web application. It can be used in Chrome, Edge, Safari or Firefox browsers and additionally when opened in Chrome or Edge can be installed as Progressive Web Application (PWA).

When it's installed as PWA, then it will have additionally the following functionality
- Can be auto-started with device sign in
- Can be pinned to task bar
- Desktop shortcut can be created
- When "tel" links clicked, it's initialized automatically.
- Call alerts to the desktop which are configured via the browser setting

1.3.9.2 Mobile Clients

Unify Phone native applications are available in both Google Play Store for Android and Apple AppStore for iOS/iPadOS.

1.3.10 Voicemail

Unify Phone integrates with the OpenScape voicemail connected to the platform being used.. When user has voicemail license, they can click the voicemail icon in all Unify Phone apps and calls the voicemail number automatically. Then through standard DTMF functionality can perform voicemail operations (listen, delete etc.). Additionally, voicemail icon has a red indication on Unify Phone apps when user has a not listened/new voicemail.

1.3.11 VDI

As a web application on desktop systems, Unify Phone has a passive support for VMWare and Citrix VDI environments via the VMware Horizon HTML5 Redirection Extension and Citrix HTML5 multimedia redirection.

1.3.12 Headset-Integration

Unify Phone apps support any headset, speaker or microphone provided the operating system (Windows, MacOS, iOS, iPadOS, Android) can detect and work with such a device.

Additionally, Unify Phone web application (on Chrome and Edge) has headset integration with the Jabra and Poly/Plantronics devices. When the integration is activated for such a device, additionally, calls can be taken or hung up using the buttons on the device and mute/unmute through the buttons on the device is synchronized with the Unify Phone web app.

While Jabra integration can be enabled without any additional software installation, Poly/Plantronics integration requires installation of Plantronics Hub application.

2 Connecting to Unify Phone

2.1 Supported Devices & Software

2.1.1 Computer and Operation system

Operating system	Browser	Minimum system
Windows 10 and newer	Google Chrome – version 88 or newer Microsoft Edge – version 88 or newer Mozilla Firefox – version 78 or newer Safari version 16 or newer	Intel Core i3 CPU or equivalent
macOS 10.15 (Catalina) or newer	Google Chrome – version 88 or newer Microsoft Edge – version 88 or newer Mozilla Firefox – version 78 or newer Safari version 16 or newer	MacBook Air 2012
Chrome OS	na – Unify Phone runs on the Android App	Android 11

2.1.2 Streaming / VDI Support

Vendor	Product	Minimum Version	Technology
VMware	VMware Horizon	VMware Horizon 7.10	Unify Phone-Webanwendung mit VMware Horizon HTML5 Redirection Extension
Citrix	Citrix Virtual Apps	2012	Unify Phone web app with Citrix HTML5 multimedia redirection

Vendor	Product	Minimum Version	Technology
	and Desktops		

2.1.3 Mobile Devices

Product	SW Version
iPhone 6s or newer	iOS 15 or newer
iPad Air 2, iPad Air (3rd generation), iPad (5th generation or newer), iPad Mini 4, iPad Mini (5th Generation), All iPad Pro models	iPadOS 15 or newer
Android Phones	Android 10 or newer
Android Tablets	Android 10 or newer

2.2 Networking Requirements

Unify Phone for OpenScape is a Software-as-a-Service application deployed on public cloud. Your organization's network must satisfy some connectivity requirements to allow Unify Phone to work properly.

It is expected that your organization uses stateful firewall/NAT devices to protect its private networks. Unify Phone connections can traverse these devices using standard methods similar to Web Browser traffic. In particular, Unify Phone signalling, and media connections are always established in the outbound direction from the corporate network to the cloud. The firewall must allow connectivity as specified in the Unify Phone Administration, Administrator Documentation.

3   Account Management

The intitial setup of a Unify Phone tenant is managed via an invite to a nominated administation user for the new Unify Phone tenant. This invite is managed and sent by Unify to authorised persons. From the invite the adminstration user can login, accept the terms and conditions from Unify Software and Services and activate the Unify Phone tenant.

Unify Phone for OpenScape has inbuilt user management, users are created/added from the Unify Phone Tenant Adminstration web interface as part of the Unify Phone Cloud service. This is used for bulk addition of users. A tool called FLIP from Unify can also be used to enable bulk user migration and creation on Unify Phone. For OpenScape Business there is an import option for Microsoft Excel CSV files for bulk import.

User identify is held and managed on the Unify Phone Cloud database, user login is also controlled on the Unify Phone Tenant management interface. Login can be simple username and password or linked to Single Sign On (SSO), the SSO is configured within the Unify Phone Tenant Adminstration web interface.

Users can also be added or created on the associated OpenScape platform, within the adminstration of the assocated platforms for OpenScape Voice and OpenScape 4000 Unify Phone users can be created, these are then written to the Unify Phone database in the Unify Phone cloud service.

In each case an invite email is sent by Unify Phone to the newly created user to allow them a login to Unify Phone, the user can then reset their default password as appropriate (not in the case of Single Sign On).

In addition telephony resources for each user, their user main telephony number is also configured and setup on the associated OpenScape platform.

4 Help and Support

4.1 Overview

Unify Phone is supported via Unify Partners or Unify depending on the specific Customer contract in place.

The overall solution consists of the following elements:

1. Unify Phone Clients, Web Browser, Mobile Client
2. Unify Phone Cloud Connector (Unify Phone Service)
3. Plattform: OpenScape Business, OpenScape 4000, OpenScape Voice

Items 1 and 2 are part of Unify Phone support process and covered within the Unify Phone subscription charges, item 3 is subject to a specific contract for the support of the associated platform.

4.2 Help and Documentation

Administration and User Guides for Unify Phone are provided to support Unify Phone in addition to information within the OpenScape Business administration and product information. These will be provided by the Unify Partner or Unify during the deployment of Unify Phone or can be requested from your Unify Partner or Unify Contact.

In addition, online guides as a HTML or PDF version are available in the help section of the web and mobile clients.

Unify Phone is provided with documentation for the following languages:

- English
- German
- Italian
- French
- Spanish
- Dutch
- Portuguese

4.3 Shared support responsibilities

4.3.1 User support by the Customer or a Partner

The Customer or where delegated the Partner on behalf of the Customer can configure their OpenScape Platform for Unify Phone (this is documented in the administration guide for the related platform).

The Customer or delegated Partner can administer the Unify Phone Tenant on the cloud platform for Unify Phone.

Diagnostic logs can be obtained from the Unify Phone Client itself to support Customers and Partners and then provide to Unify Support when requested.

Where a Partner is involved in the support to the End-Customer we expect that the Partner has completed basic triage of the customer problem. That means that the OpenScape Platform has been checked that is it setup and connected to the Unify Phone cloud service and issues with end user clients checked for problems and verified before escalating a ticket to Unify.

14.3.2 Technical support (Level 1) by Unify or Partner

Depending on the service contract, the Customer contacts their Partner or Unify directly to receive Level 1 Technical Support.

5 Software Updates

5.1 Overview

Unify Phone Service receives regular Software Updates introducing new features, fixing bugs to improve overall end user experience.

Software Updates will be implemented by Scheduled Maintenance activities and are usually done at times with typically low usage of the service. These Scheduled Maintenance activities will be announced on the Support Portal (see Link below) and will be communicated to Customer Tenant Administrators. These Updates are mandatory for all customers.

Unify Phone Support Portal

Before Unify releases an Update to the Unify Phone Service, it is thoroughly tested and evaluated for performance and scalability.

5.2 Notification sent for major Software Updates

For major Updates, all Unify Phone users will be informed about the upcoming service upgrade and the main enhancements for user's experience by an announcement on the Support Portal and a Product Change Release Note will be issued. This Change Release Note also contains the compatibility between Unify Phone and the Customers' OpenScape Platform.

When testing is complete, the Update and the anticipated public rollout date are announced on the Support Portal for the Scheduled Maintenance time frame, within which the availability of Unify Phone Service may be affected by that maintenance activity.

6   Service Continuity

Unify Phone Service is delivered by highly resilient systems that help to ensure high levels of service. Technical and organizational measures to provide for service continuity are an integral part of the system design for Unify Phone. These measures enable Unify Phone Service to recover quickly from unexpected events such as hardware or application failure, or other incidents that affect users.

Multiple levels of data redundancy are implemented, ranging from redundant disks to guards against local disk failure to continuous, full data replication to a multi zonal data center.