IPedge ®

IP Telephone, Messaging and Call Manager User Guide

Publication Information

Toshiba America Information Systems, Inc.
Telecommunication Systems Division

Publication Information

Toshiba America Information Systems, Inc., Telecommunication Systems Division, reserves the right, without prior notice, to revise this information publication for any reason, including, but not limited to, utilization of new advances in the state of technical arts or to simply change the design of this document.

Further, Toshiba America Information Systems, Inc., Telecommunication Systems Division, also reserves the right, without prior notice, to make such changes in equipment design or components as engineering or manufacturing methods may warrant.

IPedge-UG-VF

Version F.1, July 2014

Our mission to publish accurate, complete and user accessible documentation. At the time of printing the information in this document was as accurate and current as was reasonably possible. However, in the time required to print and distribute this manual additions, corrections or other changes may have been made. To view the latest version of this or other documents refer to the Toshiba FYI web site.

Toshiba America Information Systems shall not be liable for any commercial losses, loss of revenues or profits, loss of goodwill, inconvenience, or exemplary, special, incidental, indirect or consequential damages whatsoever, or claims of third parties, regardless of the form of any claim that may result from the use of this document.

THE SPECIFICATIONS AND INFORMATION PROVIDED HEREIN ARE FOR INFORMATIONAL PURPOSES ONLY AND ARE NOT A WARRANTY OF ACTUAL PERFORMANCE, WHETHER EXPRESSED OR IMPLIED. THE SPECIFICATIONS AND INFORMATION ARE SUBJECT TO CHANGE WITHOUT NOTICE. ACTUAL PERFORMANCE MAY VARY BASED ON INDIVIDUAL CONFIGURATIONS, USE OF COLLATERAL EQUIPMENT, OR OTHER FACTORS.

Trademarks

Toshiba, IPedge, CIX, SoftIPT and Strata are trademarks of Toshiba Corporation or Toshiba America Information Systems, Inc.
Appcritical is a registered trademark of Apparent Networks, Inc.
Android is a trademark of Google Inc.
AudioCodes is Registered trademark of AudioCodes Ltd.
Cisco is a registered trademark of Cisco Technology, Inc.
iPhone and iTunes are registered trademarks of Apple Inc
Linux is a registered trademark of Linus Torvalds
Mozilla and Firefox are registered trademarks of Mozilla Foundation Corp.
SonicWALL is a registered trademark of SonicWALL, Inc.
Windows, Outlook, and Microsoft are registered trademarks of Microsoft.
Trademarks, registered trademarks, and service marks are the property of their respective owners.

IPedge General End User Information

FCC Requirements
Means of Connection: The IPedge does not connect directly to the telephone network. All direct connections are made to a gateway. Please refer to the gateway manufacturer's documentation.

Radio Frequency Interference
Warning: This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer's instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

Underwriters Laboratory
This system is listed with Underwriters Laboratory (UL). Secondary protection is required, on any wiring from any telephone that exits the building or is subject to lightning or other electrical surges, and on DID, OPS, and Tie lines. (Additional information is provided in the IPedge Install Manual.)

CP01, Issue 8, Part I Section 14.1
Notice: The Industry Canada label identifies certified equipment. This certification means that the equipment meets certain telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The Department does not guarantee the Equipment will operate to the user's satisfaction.

Repairs to Certified Equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by the user to this equipment, or equipment malfunctions, may give the telecommunications company cause to request the user to disconnect the equipment.

Users should ensure for their own protection that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The equipment must also be installed using an acceptable method of connection. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

CAUTION!   Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

Important Notice — Music-On-Hold
In accordance with U.S. Copyright Law, a license may be required from the American Society of Composers, Authors and Publishers (ASCAP), or other similar organization, if radio or TV broadcasts are transmitted through the music-on-hold feature of this telecommunication system. Toshiba America Information Systems, Inc., strongly recommends not using radio or television broadcasts and hereby disclaims any liability arising out of the failure to obtain such a license.

Hearing Aid Compatibility Notice: The FCC has established rules that require all installed business telephones be hearing aid compatible. This rule applies to all telephones regardless of the date of manufacture or installation. There are severe financial penalties which may be levied on the end-user for non-compliance.

Toshiba Telecommunication Systems Warranty and License Agreements
For information relating to the End User Limited Warranty and License Agreements, please refer to http://www.telecom.toshiba.com/Telephone_Systems_Support/warranty.cfm

WARRANTIES FOR NON-TOSHIBA BRANDED THIRD PARTY PRODUCTS
A valuable element of Toshiba's product strategy is to offer our customers a complete product portfolio. To provide this value to our customers at the most optimal prices, we offer both Toshiba-branded and third-party manufactured products that support our Toshiba IPedge product portfolio. Similar to other resellers of software, hardware and peripherals, these third-party manufactured products carry warranties independent of our Toshiba limited warranty provided with our Toshiba-branded products. Customers should note that third-party manufacturer warranties vary from product to product and are covered by the warranties provided through the original manufacturer and passed on intact to the purchaser by Toshiba. Customers should consult their product documentation for third-party warranty information specific to third-party products. More information may also be available in some cases from the manufacturer's public website.

While Toshiba offers a wide selection of software, hardware and peripheral products, we do not specifically test or guarantee that the third-party products we offer work under every configuration with any or all of the various models of the Toshiba IPedge. Toshiba does not endorse, warrant nor assume any liability in connection with such third party products or services. If you have questions about compatibility, we recommend and encourage you to contact the third-party software, hardware and peripheral product manufacturer directly.

Contents

Chapter 3 – SoftIPT

Chapter 4 – Feature Operations

Chapter 5 – Messaging Features

Chapter 6 – Greetings

Chapter 7 – Other Messaging Applications

Chapter 8 – IPMobility Application

Chapter 9 – Fax Capabilities

Chapter 10 –Call Manager Basics

Chapter 11 –Using Call Manager Features

Chapter 12 –Preferences

Chapter 13 –Buttons

Chapter 18 –IPedge Enterprise Manager

Introduction

This guide describes the Toshiba IP5000-series telephones and various other user operations for applications that are integrated with the IPedge system.

Organization

This guide is divided as follows:

- **Chapter 1 – The Grand Tour** is an overview of the telephones supported by the IPedge system.
- **Chapter 2 – The Basics** covers the basic operations of the IP5000-series telephones
- **Chapter 3 – SoftIPT** describes the SoftIPT software client functions.
- **Chapter 4 – Feature Operations** covers the details about the IP5000-series telephone's advanced features.
- **Chapter 5 – Messaging Features** contains user instructions for the basic Messaging features.
- **Chapter 6 – Greetings** has procedures for the Message Greeting functions.
- **Chapter 7 – Other Messaging Applications** has instructions for advanced messaging functions, such as Group Distributions, Adding and deleting members of groups lists, Setting up personal options and message notifications, Changing mailbox passwords, Personal Assistant, Follow me, etc.
- **Chapter 8 – IPMobility Application** describes how a mobile device may act as an extension of an office desk phone by providing outgoing and incoming call functions.
- **Chapter 9 – Fax Capabilities** describes how to send faxes from your desktop, redirect fax messages and automatically send faxes to a printer.
- **Chapter 10 – Call Manager Basics** covers the basics of using Call Manager.
- **Chapter 11 – Using Call Manager Features** contains user instructions for call handling features for personal as well as ACD calls in Call Manager.
- **Chapter 12 – Preferences** covers the Preferences options in Call Manager.
- **Chapter 13 – Buttons** discusses the various buttons and options available in Call Manager and how to change, edit, etc.
- **Chapter 14 – Actions** defines the powerful actions that can used with Call Manager.
- **Chapter 15 – Personal Call Handler** covers the setting up of call handling rules and other personal call handling options.

- **Chapter 16 – Using Microsoft Outlook** provides user instructions for Microsoft Outlook integration using Call Manager.
- **Chapter 17 – Using Companion Applications** contains procedures for Companion applications available with Call Manager, such as, Contacts, History, ACD Viewer, Chat, Dialer, Buttons, and Web Browser.
- **Chapter 18 – IPedge Enterprise Manager** familiarizes you with the web-based Enterprise Manager personal administration tool.

Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items
Important!	Calls attention to important instructions or information
Extension Number	Press to answer a call to the Extension Number. Each station can have multiple extension buttons. Incoming calls ring the extension button(s) from the top down. For example, station 10's extensions ring 10-1 first, then 10-2, 10-3, and 10-4. A station is considered busy when all extensions are being used
Arial bold	Represents telephone buttons
`Courier`	Shows a computer keyboard entry or screen display
"Type"	Indicates entry of a string of text
"Press"	Indicates entry of a single key. For example: Type `prog` then press `Enter`
Plus (+)	Shows a multiple PC keyboard or phone button entry. Entries without spaces between them show a simultaneous entry. Example: **Esc + Enter**. Entries with spaces between them show a sequential entry. Example: `# + 5`
Tilde (~)	Means "through." Example: 350~640 Hz frequency range
1.	Denotes a procedure
•	Denotes the step in a one-step procedure
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM), cross-references appear in blue hypertext

Related Documents/Media

Some documents listed below may appear in different versions on the Toshiba FYI site or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page. The following are related documents for IPedge systems.

- IPedge General Description
- IPedge Installation Manual
- IPedge Feature Description and Implementation
- IPedge IP5000-Series Telephone Quick Reference Card

> **Important!** This document may contain references to features intended for future implementation.

The Grand Tour 1

The IP5000-series telephones connected to a Strata CIX telephone system, running Release 5.2 or higher software, include a selection of IP telephone models and matching IP add-on modules, as well as a 60 button DSS Console. See Table 1 for more details.

Some IP5000 telephones offer a built-in gigabit ethernet switch allowing the telephone to auto-sense the network speed, 10/100/1000Mbps. The IP5522-SD, IP5622-SD, IP5531-SDL, and IP5631-SDL telephone models do not support 1000Mbps.

Through dynamic soft key assignments, the LCD telephones provide easy access to frequently-used features by prompting specific tasks, providing Outside Line Identification, User Name/Number, Call Duration, Date/Time of Day displays, and Name and number displays of incoming callers.

The full-duplex speakerphone on these telephones enables you to place and receive calls without lifting the handset.

The LCD telephones with 10 and 20 buttons are available with LCD backlight. However, the IP5022-SD, IP5522-SD and IP5531-SDL telephones do not have the backlight. To change the backlight settings, refer to Chapter 4 – Feature Operations.

Table 1   IP5000 Series Telephones
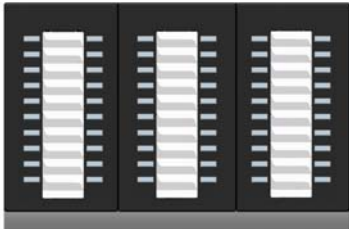
Description	Image
10 Button IP Telephone: • 4 line LCD with back light option • Full duplex Speakerphone • Headset I/F • Ringing LED	
20 Button IP Telephone: • 4 line LCD with back light option • Full duplex Speakerphone • Headset I/F • Ringing LED	

Table 1   IP5000 Series Telephones   (continued)

Description	Image
20 Button with Electronic LCD Labels: • 9 line LCD with back light • Full duplex Speakerphone • Headset I/F • Ringing LED	

The IP5000-series telephone upgrade options include:

Table 2   IP5000 Series Add-on Modules

Description	Image
10 Button ADM for IP5000-series • LCD programmable key strip with back light	
20 Button ADM for IP5000-series • Paper Key Strip	
60 Button DSS for IP5000-series • Paper Key Strip	

Note: IP5522-SD, IP5531-SDL and IP5622-SD can not connect ADM/DSS.

IP5000-series Telephone Overview

The illustration of the IP5000-series telephone shown below gives a general idea of the basic attributes found on most of these telephones. The positioning of the buttons varies per telephone model.

20 Programmable Feature Button 4-Line LCD Telephone

Legend

A	Status LED (message and ringing)
B	LCD Display
C	Softkeys
D	Programmable Feature Buttons
E	Message Waiting LED Button
F	Microphone LED Button
G	Speaker LED Button
H	Volume Button
I	Hold Button
J	Microphone
K	Tilt stand

Fixed Buttons   The fixed buttons on the dial pad help perform standard functions quickly and easily.

Layouts   Fixed buttons are laid out differently on the IP5000-series telephones.

<table>
<tr><td>
9-line LCD Telephone

</td></tr>
<tr><td>
10 and 20 Button 4-line LCD Telephones
Fixed buttons are located on either side of the dial pad.

</td></tr>
</table>
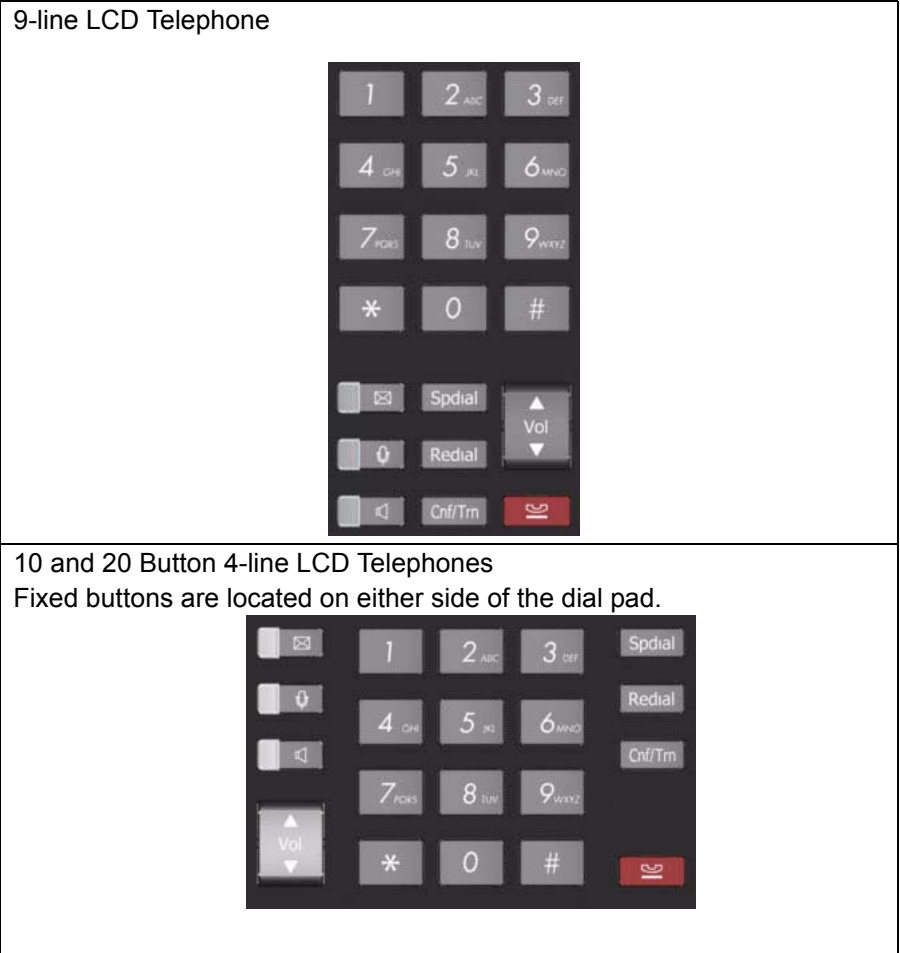
The Fixed buttons are described below.

Table 3   Fixed Button Definitions

Button	Definitions
	Message (Msg): When Msg LED flashes, press **Msg** to call back the station or voice mail device that activated the LED. This is the telephone's [PDN] message waiting button. Important! Red LED must be on in order for button to function.
	Microphone (Mic/Mute) button toggles between Mic and Mute. When Mic key is lit, Mute is disabled. When Mic is pressed again and light is off, Mute is enabled on the microphone in the telephone and the microphone in the handset.

Table 3   Fixed Button Definitions   (continued)

Button	Definitions
	Speaker: Press to toggle the speaker ON/OFF. When red Speaker LED is lit handsfree communications is supported. To start a handsfree conversation; press the Speaker button, this turns the red Speaker LED on. To terminate this call press the Speaker button again (Speaker LED off). During a handset conversation, press the Speaker button to start hands-free communications (red Speaker LED on). Press the Speaker button again to transfer the conversation back to the handset (Speaker LED off).
	Press and release the volume control bar to adjust volume levels.
	Shift Key: Purple button on the IP5131 telephone. Press Shift at any time to alternate between display of feature keys 1~10 and feature keys 11~20.
	Web Browser Key: Blue button on the IP5131 telephone. Press this key to access the web.
	Navigation Key: Round button on the IP5131 telephone is a navigation key used for moving the cursor on html pages and in the programming screens. Center of the button is the "select" function. The arrows are used to scroll up, down, left or right.
Spdial	Press **Spdial** and enter 3-digit Speed dial access code. Speed dial access codes must be setup before they can be accessed.
Redial	Press **Redial** to dial the last telephone number called (internal or external). If you have Automatic Line Selection, lift the handset first.
Cnf/Trn (Conference/Transfer)	Press **Cnf/Trn** to add internal or external parties to a conference call (up to 8 parties). Press **Cnf/Trn** and enter a number to transfer a call to another party (on the CIX system).
Hold	Press **Hold** to place an internal or external call on hold. Press **Hold + Hold** (twice) to place an internal or external call on Exclusive hold. If your telephone is programmed for Automatic Hold, existing calls are automatically placed on hold when you answer a call or make another call.

Programmable Feature Buttons

Programmable Feature Buttons are programmed by the System Administrator and can be customized on a per user basis.

Note: Programmable Feature Buttons are numbered bottom to top, left to right (shown right).
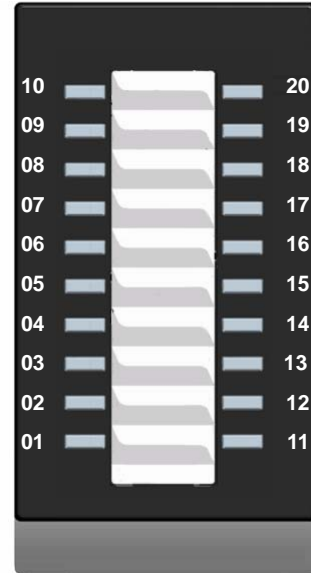
Programmable Feature Button Layout

Key Strip

The key strips on the IP5000-series telephones and add-on modules are either electronic (programmable) or paper (refer to Table 1 and Table 2).

LCD

9-Line LCD Display

The LCD on the 9-Line LCD telephone (shown below) in idle state shows:

- Top to Bottom
- Line 1 or the top line of the LCD will display your user name (if programmed) and your extension number.
- Line 2 will show the Date and time.
- Line 3 will show information related to your telephone set: VM New/Saved messages, Call Forward, or if a certain feature is enabled on your telephone set.
  A plus sign + on the LCD indicates there is more data to display. Press **NEXT** to advance through the information.
- Lines 4~8 will indicate Programmable Feature Button labels. **"Browser"** on Page -16
- Line 9 will display the Soft Keys (See "Soft Keys" on page 1-18).

Browser

Note: This feature applies to the IP5131-SDL telephone.

Toshiba's IP5131-SDL with it's large display screen also supports an HTML browser to allow navigation on the World Wide Web or a company's intranet. The phone can have a home page setup that allows navigation to begin just like a home page in your internet browser.

Web pages display basic HTML but do not support ASP or Flash. The 18 buttons that surround the screen can be used to highlight selections in the

Shift Button toggles between Programmable Feature Buttons 1~10 and 11~20.

Navigation Button - See "Browser" on Page 10

Blue Button – toggles in-between call processing screen and HTML browser or programming.
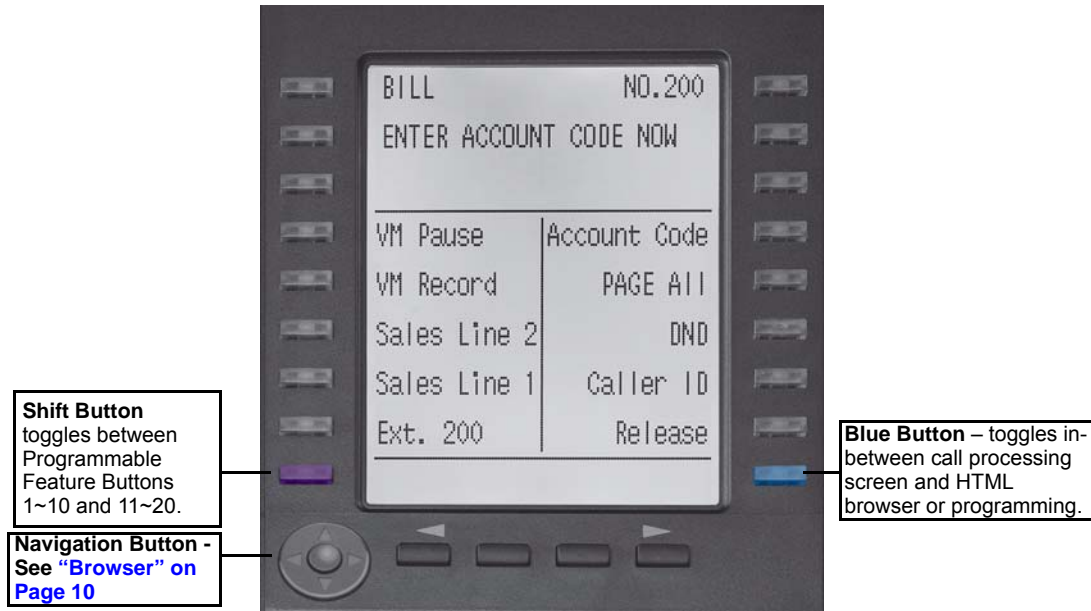
browser. The Navigation Button can be used to move the viewing window across the website; the center of the navigation button can be pressed to select a field that is highlighted.

The browser allows navigation through various pages of content and is not static to just one site. Navigation is as easy as highlighting a link and selecting it to move to the next web page. All IP5131-SDL telephones come with the browser enabled. In order to access the browser, press the blue button on the bottom right-hand side of the phone; this allows you to switch between your call processing screen and the browser window.

4-Line LCD Display

The LCD in it's idle state (shown right) displays:

Line 1 or the top line of the LCD will display your user name (if programmed) and your extension number.

Line 2 will show the Date and time.

Line 3 will show information related to your telephone set: VM New/Saved messages, Call Forward, or if a certain feature is enabled on your telephone set. A plus sign + on the LCD indicates there is more data to display. Press **NEXT** to advance through the information.

IP5000 4-line LCD display in Idle Mode

Line 4 will display the soft keys available in idle state. Press **DSPLY** to switch from the Call Forward display to the User Name display.

Soft Keys

Softkeys (SK1 - SK4) refer to the four buttons directly below the LCD screen (shown right). Soft Keys dynamically change their functions and label depending on the state of the telephone. The dynamic feature associated with the Soft Key is displayed on the bottom line of the LCD display directly above each Soft Key button.

The Basics

2
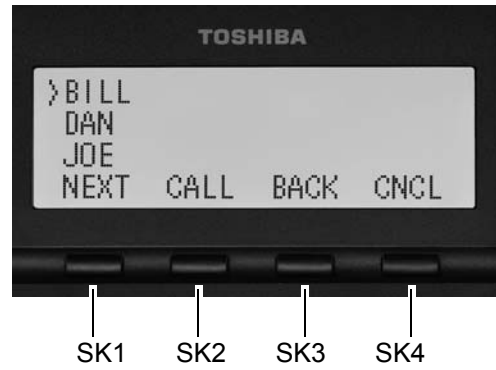
This chapter reviews the basic operations of the IP5000-series telephones. The instructions apply to all telephone models, except when noted otherwise.

Customizing Your Telephone

Volume Control

To adjust the Handset Volume

Press the **Vol up** to increase volume and **Vol dn** to decrease volume during the call. When you hang up, the volume returns to the default setting.

To adjust the speaker volume for internal/external calls and background music

1. Press **Spkr**
2. Press an extension button - you hear dial tone
3. Press **Vol up** to increase volume and **Vol dn** to decrease volume. This volume setting applies to all calls until changed

To adjust Ring Tone, Hands free Answerback and Speaker Off-hook Call Announce

Make sure the telephone is idle and the handset is on-hook. Press the **Vol up** to increase volume and **Vol dn** to decrease volume. This adjusts volume for your telephone's ring tone, Hands free Answerback and Speaker Off-hook Call Announce simultaneously.

To adjust handset Beep Tone

1. With the handset off-hook, dial the Beep Tone Adjustment Code **#6101** (default code). A beep will be heard
2. Press **Vol up** or **Vol dn** to reach the desired level

LCD Contrast

Available on backlit telephones and backlit add-on module.

To adjust the LCD contrast on the backlit telephones

1. Press and hold down the **Mic** button
2. Press and release **Vol** s or **Vol** t repeatedly

Note: Holding the Vol button does not continue to change the setting. The button must be pressed for each step of contrast change

To adjust the LCD contrast on the Add-on Module

1. Press **3**+**6**+**9**+**Hold** (simultaneously)
2. Press **Contrast +** button to increase contrast
3. Press **Contrast -** button to decrease contrast
4. Lift the handset off-hook / on-hook to save settings

Note: Holding the soft key does not continue to change the setting. The soft key must be pressed for each step of contrast change

Brightness Control

Available on backlit telephones with 4-line LCD's and backlit add-on module.

To change the LCD back light brightness

1. Press **3**+**6**+**9**+**Hold** (simultaneously)
2. Press **Bright** soft key to increase brightness
3. Press **Dim** soft key to decrease brightness
4. Lift the handset off-hook / on-hook to save the settings

Note: Use the **BL BRIGHT** and **BL DIM** buttons in steps 2 and 3 on the 10 button LCD Add-on Module

To change the LCD backlight brightness for IP5131-SDL or IP5631-SDL

1. Press **3**+**6**+**9**+**Hold** (simultaneously)
2. Press the **Others** soft key
3. Press the **BL Bright** soft key
4. Enter a value of 0~3 using the keypad. (0 = dim; 3 = brightest)
5. Press the **Set** soft key twice

Backlight On/Off Available on backlit telephones and backlit add-on module.

To change Backlight Settings

1. Press **3**+**6**+**9**+**Hold** (simultaneously)

2. Press the **Mic** button

3. Press **Hold**

4. Use table below to choose preferred settings

5. Press **Hold** + **Hold (twice)** to save settings

Table 4   Backlight Settings

Button	Input	Meaning
FB1	1	Always Off
	2	Always On
	3	On-demand
FB2	1~30	Backlight Timer [x10 seconds] Example: 1 = 10 seconds; 30 = 300 seconds.

Note: FB1 is the lower left key, FB2 in the next up, FB3 is above FB2, and FB4 is above FB3.

Dial Pad and Button Beeps IP telephones can emit a "beep" whenever a dial pad or feature button is pressed. The "beeps" are On by default. Follow these steps to turn the "beeps" On or Off.

1. Press **3**+**6**+**9**+**Hold** (simultaneously)

2. Press **0**

3. Press **Hold**

4. Press Programmable Feature Button 1 (FB1) to toggle On/Off

5. FB1, LED On: buttons beep

6. FB1, LED Off: buttons do not beep

7. Press **Hold** to set the option

8. You must also go off-hook, then on-hook to exit the program mode

Speakerphone/ Microphone Sensitivity Adjustment When you are using the speakerphone, high ambient noise levels may cause the party you are talking with to be to cut off frequently. If this happens, follow these steps to lower the sensitivity of the microphone on a IP5000-series telephone. The default is normal sensitivity.

1. Press **3**+**6**+**9**+**Hold** (simultaneously)

2. Press **0**

3. Press **Hold**

4. Press Programmable Feature Button 3 (FB3) to toggle On/Off

5. FB3, LED On: Lower sensitivity

6. FB3, LED Off: Normal sensitivity

7. Press **Hold** to set the option

8. Go off-hook, then on-hook to exit the program mode

Telephone Terminology

When making or receiving calls on your IP5000-series telephone you may experience one or more of the following call features depending on how your telephone is configured.

- **Line** – is synonymous with trunk which is the line that connects you to the PSTN (Public Switched Telephone Network). Line can be:
  - a button on your telephone set designated for outgoing calls
  - your DN button followed by dialing 9.

- **Automatic Line Selection (ALS) –** ALS is engaged on outgoing calls. Lift the handset or press **Spkr** to hear dial tone, the steady green Line LED indicates ALS in enabled. The second line of the LCD will display the method of dialing available, followed by the digits dialed.

- **Ringing Line Preference –** Answer any incoming call by lifting the handset or pressing **Spkr**. There is no need to press the ringing line button to answer the call when ringing line preference is enabled.

- **Tone First Signaling –** Internal incoming calls only: telephone rings in standard ring tone, lift handset or press **Spkr** to answer call.

- **Voice First Signaling –** Internal incoming calls only: a long tone is heard, followed by the caller's voice, this will automatically engage the **Spkr** to allow for hands free communications. Lift the handset if desired (for privacy). When Voice First Signaling is enabled the telephone does not ring on internal incoming calls.

- **Hot Dialing –** Dial a telephone number from the keypad, the telephone automatically selects a line, shown with a green LED, and turns on the Spkr and Mic LED's. When Hot Dialing is not turned on the handset should be lifted or Spkr should be pressed in order to make a call.

Making a Call

There are three ways to originate a call from the telephone:

Handset

1. To make a call, lift the handset, then dial the number.

A line may be automatically selected or choose a line manually. Dial tone is heard through the handset. The Speaker and Microphone LEDs do not light.

Digits display as they are dialed. Call progress tones (Ringback Tone, Busy Tone, etc.) are heard through the handset.

2. When connected, continue using the handset or switch to speakerphone by holding down **Spkr** and placing the handset in the cradle.

Spkr Button

1. To make a call, press **Spkr**.

A line may be selected automatically or choose a line manually. The extension or **Line** button lights (depending on system programming). Dial tone is heard through the speaker. The Speaker and Microphone LEDs light.

2. Dial the number.

Digits display as they are dialed. Call progress tones (Ringback Tone, Busy Tone, etc.) are heard through the speaker.

When connected, continue using the speakerphone or lift the handset to continue the conversation.

Hot Dialing

1. To make a call using Hot Dialing, start dialing the number.

The extension button, Spkr and Mic LEDs light. Digits display as they are dialed. Call progress tones (Ringback Tone, Busy Tone, etc.) are heard through the speaker.

2. When connected, continue using the speakerphone or lift the handset to continue the conversation.

Dial Directory

Calls can be made by selecting a name from the alphabetical telephone directory.

To access the Directory

1. Press **DIR** soft key (shown right).
   Select Directory menu appears.

The soft keys on the Select Directory are:
My = Personal Speed Dial Names
EXTR = System Speed Dial Names
INTR = Directory Number Names
Dial = Cancel directory, get dial tone.
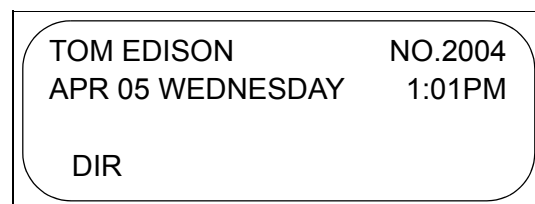
2. Choose the directory you wish to access and use the dial pad to enter the name.

```
TOM EDISON              NO.2004
APR 05 WEDNESDAY         1:01PM


  DIR
```

4 Line LCD Display

Notes:

- If a directory is not selected and a name is entered, all directories will be searched.

- To enter names from the dial pad, press the dial pad button associated with the letter to be entered. Press the button once for the first letter, twice for the second letter, etc. Left and Right Soft Keys are available to move the cursor.

1. Press **FIND** to start the directory search.

2. Press **NEXT** to move forward through the directory.

3. Press **BACK** to move backwards through the directory.

4. Press **Call** to connect to the directory entry selected.

5. On the 9-line LCD Display, press the button next to the displayed name. See figure on following page.

6. Press **CNCL** to quit the directory search.

Press the key next to the displayed name to call that person.

BOB L (PRI)	BRAD FERRIS	
BOB LAWVER	BRAD FISHER	
BILL THOMAS	BRIAN SMITH	
ONE TOUCH	ONE TOUCH	
PICKUP	ONE TOUCH	
CFAC	ONE TOUCH	
DND	ONE TOUCH	
Ext. 4227	ONE TOUCH	
NEXT	BACK CNCL	
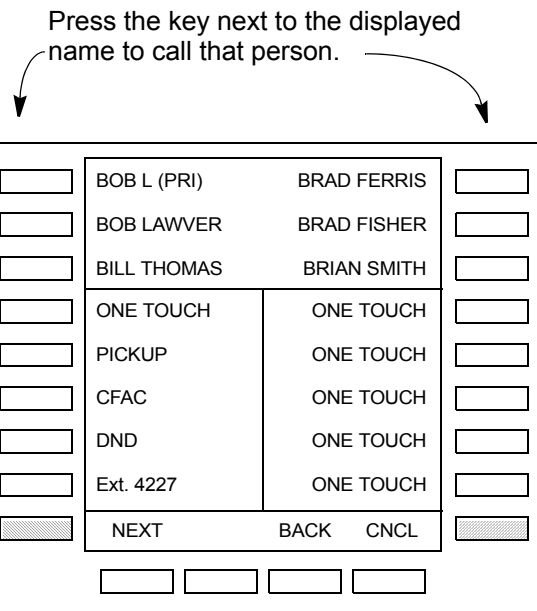
9 Line LCD Display - Dial by Name Screen

Answering a Call　　There are several ways to answer a call:

Handset　　When the telephone is programmed for Ringing Line Preference, pick up the handset and the telephone automatically answers the ringing line.

... or press the button associated with the ringing line (flashing green LED).

Speaker　　When the telephone is programmed for Ringing Line Preference, press **Spkr** and the ringing line is answered.

... or press the button associated with the ringing line (flashing green LED). Once connected, continue using the speakerphone or lift the handset.

Shift Button　　Available on a 9-line display telephone only.

If the LCD screen is set to view Buttons 11~20 and a call comes in on Button 1 the phone will ring and Caller ID information will display on the top of the screen, press the "Shift" Button to view Buttons 1~10 and answer the call.

Handsfree Answerback　　With speakerphone enabled, the telephone may be programmed for Handsfree Answerback. The called party hears a single long tone, followed by the caller's voice. Begin hands free conversation. If Handsfree Answerback were not programmed, the called party could hear the calling party speak but would not be able to answer them without answering the call manually.

Notes:
• The extension LED flashes green, the Microphone LED lights steady red and the Speaker LED flashes Red.
• In order to perform any additional functions with this call (like a transfer or hold) the call must be properly answered to gain full call control. Perform the same steps you normally would to answer a call: press the Spkr button, the flashing DN button or lift the handset.
• Handsfree MIC setting needs to be enabled by your System Administrator.

On a Call

While on a call you can perform the following:

Switching Between Handset and Speakerphone

Press **Spkr** and place the handset on-hook to switch from handset to speakerphone mode.

Take the handset off-hook to switch from speakerphone to handset mode.

Microphone (Mic/ Mute) Button

This button toggles between Mic and Mute. When Mic button is lit, handsfree communication is supported, when Mic is pressed again and light is off, Mute is enabled and mutes both the microphone and the handset.

Hold

To place a call on hold, press **Hold**. Your LCD shows the line on hold. The held Line's LED flashes green while appearances of the line at other stations flash red.

- To return to the held call, press the flashing held **Line** button.
- If you do not return to the held call within a specified time, it rings back to your telephone. The call remains camped-on to your station.
- If the held party hangs up, the call is released.
- See the Call Pickup section to pick up a call on hold from another extension.

Exclusive Hold

This feature enables you to place a call on hold so that only you can retrieve it.

While on a call, press **Hold** twice. That line's LED flashes green while appearances of the line at other stations are steady red (in use).

Automatic Hold

This features enables you to move from one Line button to another Line button without pressing Hold.

Check with your System Administrator to make sure this setting is turned on. If Automatic Hold is not enabled, calls will drop when moving from one line to another without pressing Hold.

While on a call, press another extension button to receive/originate a new call. The accessed line's LED flashes (in-use). The first call is put on hold and your extension's LED flashes.

Consultation Hold

1. While on a call, press **Cnf/Trn**. The call goes on hold.
2. Dial another line.
3. Transfer the call or return to the held call by pressing its **Line** button.

Message Waiting

Use your **Msg** LED/button and LCD to see/retrieve message(s).

An extension can receive up to four simultaneous Message Waiting indications and LCD messages. One message is reserved for the Message Center.

Your telephone can be programmed to have up to four additional (flexible) Message Waiting buttons/LEDs. Check with your System Administrator to see if these buttons have been programmed on your telephone. If so, substitute them when the **Msg** button/LED is mentioned in the following steps.

Responding to a Lit Msg LED

1. On an LCD telephone, if you see a "+," press **SK3** to display additional messages; otherwise, go to Step 2. The "+" indicates additional messages. The LCD can show up to three station messages for your extension and three for each additional (phantom) extension that you may have.

2. Press **Msg**, then lift the handset. Your telephone rings the extension or voice mail device that sent the indication. The LED continues to flash red.

3. After answering the message(s), place the handset back on-hook.

4. If the Msg LED continues to flash, you have more messages; repeat Steps 1~3 above to retrieve them. Voice mail devices turn off the LED/LCD indications after a short delay, after you checked all messages.

5. To manually turn off your Msg LED, press your extension button, then press **#409**. Do this step for each message received.

Turning On/Off MW LED on Another Extension

If you call an extension and it's busy or there is no answer, you may be able to light that extension's Message Waiting LED and enable that extension to call you back. The ability to perform this feature is set in system programming.

1. Dial an internal extension. You hear busy tone or there's no answer.

2. Press **Msg** or **7**. The Msg LED flashes red on the called telephone. At your telephone, the Msg LED lights steady red and the LCD shows the station number where you set a Message Waiting light. Example: "MW SET TO 3620."

3. If you decide to cancel the Message Waiting light at this point, press **Msg** or **7** again while ring-over tone is playing and the light will be cancelled.

4. Press **Spkr**. Your Msg LED turns Off. The Msg LED on the called telephone flashes until the called party presses the flashing **Msg** button which calls you back.

5. To turn Off a Message LED that you have set on another extension, press **#64** plus the extension number that has the message light set. Then press **Spkr** or hang up to release your telephone. Your LCD shows the extension and "MW CANCEL."

> ...or dial the extension that you set the Message LED on, then press **77**. Then press **Spkr** or hang up to release your telephone.

LED Indicator Details

Each line and Programmable Feature Button has a LED next to it which indicates the status of the line or feature associated with the button. Line LEDs light red or green and flash at varying rates to indicate call status (see table below).

Table 5   LED Indicators

Feature	LED	Interval Rates	
		Your Station (Green)	**Other Station (Red)**
Extension In-Use	access outside line	2 seconds On, 1/8 second Off — 1/8 second On/Off	steady
Incoming Call	while ringing	1 second on at 10 pulses/second —1 second Off	one second On/Off
Hold – outside line	if using Pooled Line Grp, the hold indication is only at the station that places the call on hold.	4 pulses/second for 1/8 second On/Off	1/2 second On/Off
Hold – Consultation	during consultation/transfer to another station	10 pulses/second	steady
Hold – Exclusive	outside line	10 pulses/second	steady
Hold – Recall	when held call recalls your idle station	1 second at 2 pulses/second, 1 second at 10 pulses/second	flashes
Hold – Exclusive Recall	Exclusive Recall	1 second at 2 pulses/second, 1 second at 10 pulses/second	steady
Internal Call	while station ringing	Your extension button flashes 10 pulses/second—1 second Off	[SDN] red flashing or green ringing
Busy Station Transfer	outside call transferred to your busy station from a designated station **or**:	4 pulses/second, 1/8 second On/Off	3/4 second on, 1/8 second Off
	After disconnecting first call	10 pulses/second	2 pulses/second
Conference	Conference call	10 pulses/second	steady

SoftIPT

3

The SoftIPT is a software phone client that runs on appropriately equipped wired or wireless laptops, tablets and desktop PCs with all versions of Microsoft® Windows 7, Windows Vista™ and Microsoft® Windows XP® operating software (OS).

SoftIPT on a PC integrates the power of the PC with most of the features available on an IP5000-series telephone. You can use most of the features described in this User Guide.

.
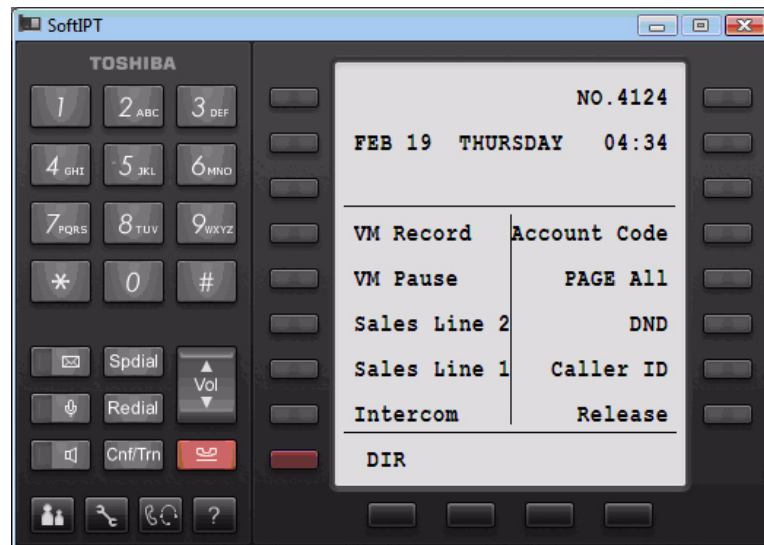
Important! The SoftIPT functions in the same manner as a desktop IP telephone. Use this manual as a guide to the SoftIPT functions.

SoftIPT Icons   The special buttons relating to the SoftIPT screen are described below.

Table 6: SoftIPT Button Definitions

Button	Definitions
	SoftIPT Directory – Clicking this icon enables you to access the directory you create using MS Outlook. Refer to "Using the Directory" on page 35.

Table 6: SoftIPT Button Definitions   (continued)

Button	Definitions
	SoftIPT Configurations – Double click this icon to open the Configuration window. This enables you to view and change SoftIPT settings.
	Audio Settings – Click this button to adjust the audio properties when connected to a USB handset.
	Help – Clicking this icon enables you to access Help as a user or find information on Setting Audio Properties, etc. Click Help to view all SoftIPT information.
	Shift Button (Purple) – Press Shift at any time to alternate between display of feature keys 1~10 and feature keys 11~20.

Fixed Buttons   The fixed buttons on your telephone enable you to perform standard functions quickly and easily. These buttons are described in Chapter 2 – The Basics.

Flexible Buttons   All Flexible Buttons must be programmed for your telephone in system programming and vary for individual telephones. If a button does not appear on your display or telephone keystrip label, see your System Administrator for button assignments.

Line Buttons   You may have buttons designated as **Line** and/or **Pooled Line Grp** which enable you to directly access outside lines. **Pooled Line Grp** enables you to access available CO Lines from a group of lines appearing under one button.

Liquid Crystal Display   The Liquid Crystal Display (LCD) on the SoftIPT will display information similar to the large 9-line IP telephone display:

- Desk Clock and Calendar in idle mode
- Call Duration during an outside call
- Operational, Advisory, and Notification messages

LCD Control Buttons   There are two types of LCD button functions: LCD Control Buttons and Soft Keys.

When the Soft Key prompts appear on the LCD, the LCD Control Button just below the prompt offers access to that feature.

Configuring SoftIPT

Configure the SoftIPT

1. After you have installed SoftIPT, double-click the SoftIPT icon on the desktop. The SoftIPT Configuration window opens.

   Important! See the illustration below. You will need to enter items A-E to configure SoftIPT. Check with your Telephone System Administrator to make sure that you have this information. After entering this information, print the screen for future reference.
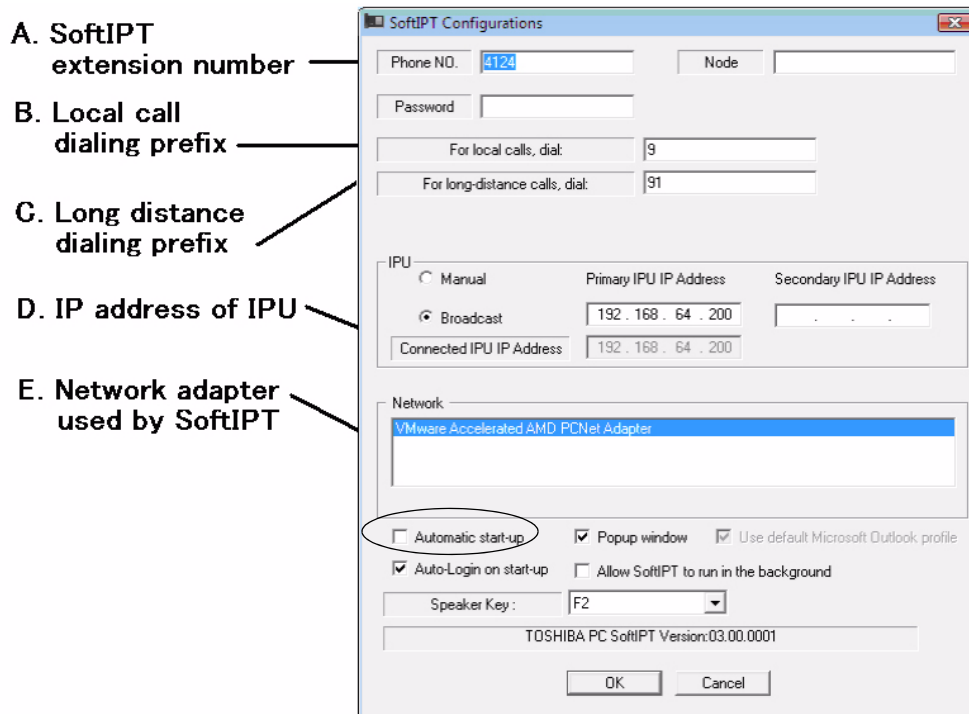
Figure 1   SoftIPT Configurations

2. In the SoftIPT Configuration window, enter the following:

Fields	Description
Phone No.	This is the SoftIPT extension.
Password	Password for IP user mobility
Node	By default, leave blank.
Outgoing prefix	When a call is made using the SoftIPT directory, SoftIPT automatically attaches the outgoing prefix for local calls, or long-distance prefix for long-distance calls, respectively. See "Using the Directory" on page 35 for details.
Long distance prefix	

Fields	Description
IP address	SoftIPT tries to connect to the IPedge using the following addresses: • Primary IPedge server IP address • Secondary IPedge server IP address. **Notes** If Broadcast is selected, SoftIPT tries to search for the IP address by sending broadcast messages. SoftIPT skips the Primary IP address or the Secondary one if it is not set. In either case, if SoftIPT successfully connects, the IP address is shown in the "Connected IP Address" field. See your System Administrator for IP address of the IPedge system. If Broadcast is selected, the broadcast message is sent on the same subnet, which means SoftIPT can connect to the IPedge on the same subnet using Broadcast mode without designating the IPedge IP address. However, in some PC environments, SoftIPT cannot complete this broadcast registration sequence because the lower network module does not notify SoftIPT, through Windows, of receiving a reply message after sending a broadcast message. Therefore, Toshiba recommends using Manual mode if SoftIPT cannot find the IPedge by Broadcast.
Network	If there are multiple network adapters, select the one for SoftIPT.
Automatic startup	Check this box to automatically startup SoftIPT after starting your PC. **Note** If Automatic startup is unchecked and SoftIPT continues to start up, use the MSCONFIG utility screen > Startup tab and uncheck Toshiba SoftIPT. Consult your System Administrator on using the MSCONFIG utility.
Popup window	The SoftIPT window pops up when receiving a call.
Use Default Microsoft Outlook Profile	As shown below in Using the Directory, SoftIPT can use MS Outlook (not Outlook Express) as its directory. If multiple Outlook profiles are set, you can select one of the profiles when launching SoftIPT if this box is unchecked. See "To check how many Outlook profiles are on your PC" on page 33. If you have only one profile, select "Always use this profile" and check the "Use Default Microsoft Outlook Profile" box. If you have several profiles and choose one of them, select "Prompt for a profile to be used" (see Figure on Page -34), and uncheck the "Use Default Microsoft Outlook Profile" box (see Figure on Page -31).
Auto-Login on start-up	If you uncheck this box, you can input an extension number every time you log in. See "IP User Mobility" in the CIX General Description and Programming Manual, Volume 1 for details.

Fields	Description
Allow SoftIPT to run in the background	This option dictates what happens when you press the close (X) button in the upper right corner of the SoftIPT main window. • Run in the background if this box is checked. • Exit SoftIPT software if this box is unchecked. **Note** If the SoftIPT icon is still on the system tray at the bottom right corner of the PC, then SoftIPT is still running in the background, even after pressing the Close (x) button.

    3.   Click OK.

To check how many Outlook profiles are on your PC

1. Go to Start > Control Panel > Mail

2. Double-click the Mail icon

3. Click the Show Profiles... button

4. Here are all the profiles setup on your PC (see Figure on Page -34)
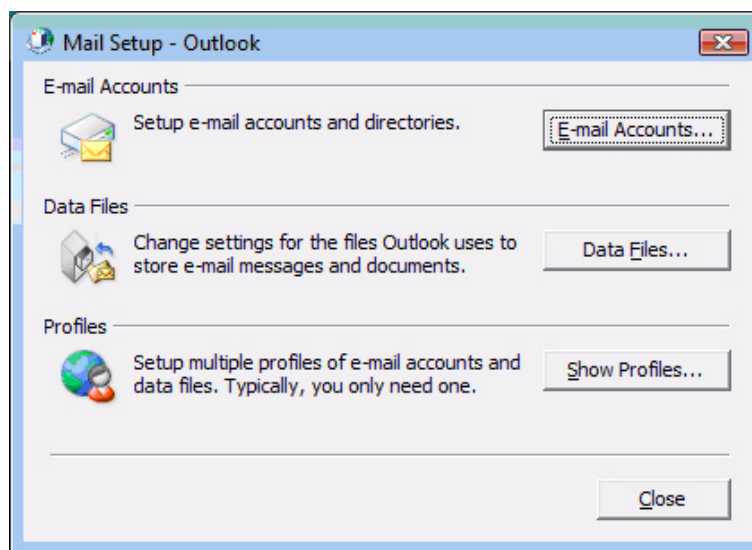
Figure 2   **Mail Setup - Outlook**
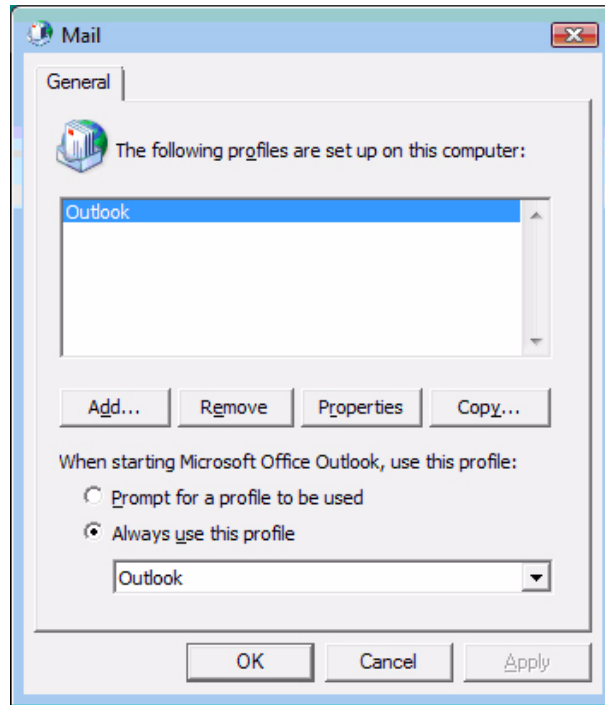
Figure 3   Mail Profiles

Basic SoftIPT Functions

Start the SoftIPT   • Double-click the SoftIPT icon on your desktop.

Making a Call   To make a call

1. Click **Speaker** then select the on-screen dial pad buttons to dial a call.

2. When connected to a call, you can select any of the call buttons, such as **Redial**, **Hold** or **Conf**.

3. Click **Speaker** to end the call.

Note: Do not use BGM (#490) on the SoftIPT. It conflicts with incoming calls.

To make a Call using a USB Handset

To install a USB handset, refer to the vendor's documentation and/or website.

1. Go off-hook (pick up the receiver or press the hook switch button on the USB Handset) to get dial tone.

2. Dial the phone number - click the on-screen dial pad buttons, input numbers (asterisk key, pound key) from PC keyboard, or use the key pad on the USB handset, if available.

3. To end the call, go on-hook (put down the receiver or press the hook switch button).

Answering a Call	**To answer a call using the Shift button**

- If the LCD screen is set to view keys 11~20 and a call comes in on key 1, the phone will ring and Caller ID information displays on the top of the screen - press the Shift key to view keys 1~10 and answer the call.

Switching a Call to Your Headset

You can switch a call from your IP telephone to the SoftIPT by placing the call on Hold and using the Call Pickup feature.

1. Press **Hold**.

2. On the SoftIPT, dial **#5#72** + the extension number of your telephone.

Note: You can also add this dialing string to a flexible button on your SoftIPT phone as a One-touch Speed Dial button for ease of call switching.

Labeling Feature Buttons

SoftIPT Version 3.0 provides soft labels preset by the Strata CIX system. If you wish to change them, contact your system administrator.

Using the Directory

You can create a directory with MS Outlook (not Outlook Express).

1. Close SoftIPT if you are using it.

2. Open MS Outlook.

3. Double click on the Contacts icon, click on the New contact icon.

4. Type in the contact information, click Save and Close. Add as many entries as desired. To edit an entry, double click on the name to open.

5. Start Soft Phone.

6. Click Directory icon. The directory displays (see below).
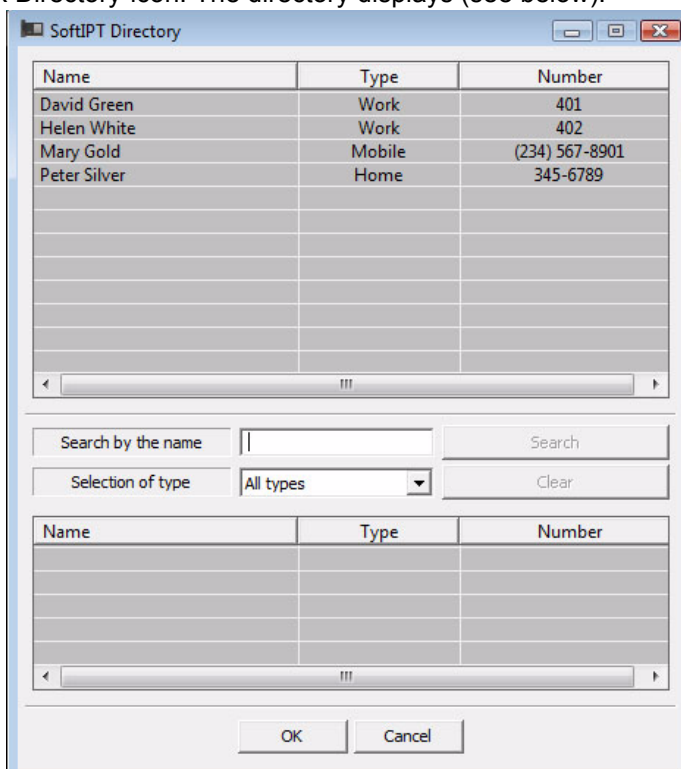
7. Click on the name. The SoftIPT calls the contact.

Using Echo Canceller

If you have a headset plugged into the microphone/speaker jack of the PC, you do not have to always enable echo canceller. We recommend you to enable echo canceller in the event you want to use the PC's embedded microphone/speaker as a speakerphone device and not attach a headset to the microphone/speaker jack of the PC. If the PC does not have an embedded microphone even if it has embedded speaker, you do not have to enable echo canceller because a headset would be plugged into the microphone/speaker jack, see figure below.

To use Echo Canceller, click the Audio Setting of SoftIPT and check the Using Echo Canceller box as shown below.
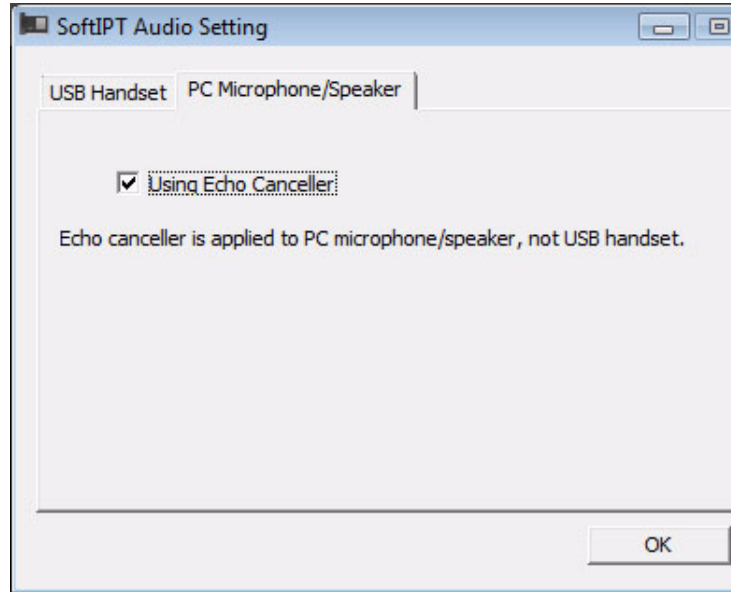
Enabling Echo Canceller

Feature Operations 4

This chapter gives you more details about your IP5000-series telephone's advanced functions. An alphabetical list of supported features has been compiled in this chapter for fast and easy reference.

Account Codes

Account Codes (Forced or Voluntary) can be used for a variety of reasons including billing, tracking, and line restriction applications. Account Codes are assigned in the system as a fixed length (default is six digits) and are recorded by the system, along with the details of the calls, which can be printed on a Station Message Detail Recording (SMDR) report.

Verified/Non-Verified Account Codes

Verified Account Codes ensure that the system checks the account code you entered against a list created by the System Administrator. If the code is not in the list, the call will not go through.

Non-Verified Account Codes must be a uniform length but any digits are accepted.

Account Codes and Lengths are set up and managed by the System Administrator.

Forced Account Codes

Some applications require you to enter an Account Code. These Forced Account Codes may be verified or non-verified, depending upon the application, but in either case the caller must enter a code before proceeding.

Dial using Forced Account Codes

1. Place a call using the normal method.

If the call requires an Account Code, a burst of tone (Entry Tone) is heard (after dialing the telephone number) alerting you to enter the Account Code.

2. Enter the account number.

When the number of digits designated for account codes has been entered, the number is checked against the verified list, if chosen, and the call continues normal. If the number of digits entered for the account code is not reached or the verified code does not match, then re-order tone is heard and the call is rejected.

You can bypass Forced Account Code requirements with three emergency numbers, including 911. See your System Administrator for these numbers:

1) 911   2) _____   3) _____

Voluntary Account Codes (Verified/Non-Verified)

Voluntary Account Codes are optional. They can be entered during a call and are used for tracking selected calls using Station Message Detail Report (SMDR) call detail recording option.

If the system is set for Verified Account Codes, station users must enter a specific code when entering the Voluntary Account Code(s) or the code is not validated for the SMDR call report. This does not affect the call.

Voluntary Account Codes

There are two ways to dial using a Voluntary Account Code:

Using the Account Code Button

Note: This requires a Programmable Feature Button to be programmed on your telephone set with the Account Code feature access code (#46).

1. After accessing a Group Central Office (GCO) line, press the **Account Code** button. LCD telephones prompt you to "ENTER ACCOUNT CODE NOW."

2. Enter the account code digits. The LCD prompt disappears upon entry of the first account code digit. After the account code is entered, the time indicator is restored to the LCD.

3. If your station is set for Verified Account Codes, you hear a confirmation tone when the code is valid. If the code is invalid, you hear two short tones.

4. Enter the Account Code. Your conversation is not interrupted.

Using Access Codes

Note: It's a good idea to warn the other party that you will be disconnected momentarily when you enter the access code. Once the code is entered, you will be connected again.

1. After accessing a GCO line, press **Cnf/Trn**. Once you press **Cnf/Trn**, your call is interrupted; you and the other party cannot hear each other. You will hear feature dial tone.

2. Dial **#46**. LCD telephones prompt you to "ENTER ACCOUNT CODE NOW."

3. Enter the account code digits. The prompt disappears upon entry of the first account code digit. After the account code is entered, the connection is restored and the LCD shows the time.

Advisory Message

Advisory messaging enables you to store a message for IP5000-series telephones with a display that call your telephone. The messages may be 16 characters maximum. The system provides a number of predefined messages, shown in the table below. Message numbers 5~9 can be defined by your System Administrator.

Table 3-1.

Advisory Message Default Code Table		
Msg No.	**Characters Displayed**	**Additional Digits**
0	OUT TO LUNCH	
1	IN A MEETING	
2	CALL _____	Directory Number (e.g. 220)
3	BACK AT _____	Time (e.g. 1030)

Table 3-1.

Advisory Message Default Code Table		
Msg No.	**Characters Displayed**	**Additional Digits**
4	RETURN ON_____	Date (e.g. 10 20)
5		
6		
7		
8		
9		

Advisory Messages may only be set using an IP5000-series telephone. The preset advisory messages can be displayed using the Enterprise Manager.

Set Advisory Message

1. Go off-hook or press your extension button to get a dial tone.
2. Press **#411**
3. Enter Message number (see table above)
4. Enter additional digits if required.
5. Go on-hook or press **Spkr** to release the line.

Clear Registered Message

1. Go off-hook or press your extension button to hear the dial tone.
2. Press **#412**.
3. Go on-hook or press **Spkr** to release the line.

Display Preset Advisory Messages

1. Login to Enterprise Manager.
2. Select **System Info then the Advisory Message tab.**

Alarm Notification

The Alarm Notification Button must be set up by your System Administrator on your station.

When the Alarm Notification button displays

• Call your System Administrator.

This button stops displaying when the alarm clears or when you press the flashing button. If the alarm has not been cleared the Alarm Notification Button flashes every 10 minutes.

Automatic Callback

When you reach a busy station, you can set Automatic Callback to have the system monitor the busy extension and notify you when it becomes idle.

Automatic Callback can place you in queue for an available outside line, if you reach a line group in which all lines are busy. When a station or line becomes available, the system rings your telephone; when you answer the system automatically rings the intended destination. The amount of time the system will wait for an idle destination is set in system programming. Automatic Callback is also known as "CO Line Queuing."

Set Automatic Callback

1. If you hear a busy tone after dialing an outside line access code or a station number, press **Auto Callback** or **4**. Busy tone stops, followed by success tone, then busy tone resumes.

2. Hang up. You can make other calls while waiting.

3. When the called station or outside line becomes idle, your telephone rings and you will see a fast flashing LED.

    •   If you called a busy station, the extension LED flashes green (incoming call) and the called number displays.

    •   If you called a busy outside line, the extension LED flashes green (incoming call rate). The seized line's number displays.

4. Answer within about three rings (can be programmed to ring up to three minutes) to prevent the callback from being cancelled. After you answer, you hear ring back tone, and the LED flashes green (in-use).

If you hear a busy tone after answering a callback, the called party is already on another call or the line has already been seized or has received an incoming call. Your request is not cancelled. You will be called again the next time a line becomes idle.

If you were attempting to make an outside call, the telephone number is automatically dialed, including the account code or override codes that were used.

Cancel Automatic Callback

Press **Auto Callback** or extension button + **#431**.

Deactivate Automatic Callback

To deactivate Automatic Callback, press the ACB button while its lamp is lit. When a predetermined time (overall timer) passes after Automatic Callback is activated, the system automatically cancels Automatic Callback. If the activator does not answer Automatic Callback for a predetermined time, Automatic Callback is automatically canceled. In either case, when Automatic Callback is completed or canceled, the ACB lamp button turns off.

Background Music (BGM)

Background music may be played over the telephone speaker. There are 15 different music sources (.WAV files) on the IPedge system. If media resources are exhausted, the user will temporarily be unable to hear BGM.

Enable Background Music on your Telephone Speaker

1. Press **BGM**; the LED turns on.

or

2. Press an extension button + **#490** + *n* + **#** (where *n* is the music source 1~15.)

Cancel Background Music on your Telephone Speaker

1. Press **BGM**. LED turns off.

or

2. Press an extension button + **#491**.

Adjust Volume

BGM volume may not be changed while BGM is playing. The station must have it's speaker volume changed while be under operation or in-state. The phone must be in idle state to listen to BGM.

To change the volume of the BGM, press the PDN key, which interrupts the BGM and initiate the 'in use' state. When you hear the dial tone, use the **Vol** key to adjust the tone up or down. Press the PDN key again to return to the BGM.

Note: Attempting to use the VOL key with the IPT in idle state (listening to BGM) will restart the BGM.

When using the BGM button, a BGM number already programmed for the button is used. "User Programming" is used to correlate BGM numbers to feature buttons. If the BGM button is set on an extension station, it will light red if the station is in an enable state to send BGM (even if BGM is actually not sent due to line busy or any other reason). The station must be in an allow state for "Class Of Service for BGM Listening Through station" to send BGM through a station.

Notation For Using Media Server

The sound source of BGM is provided by the Music On Hold (MOH) files. With the "random" feature for music sources, the music will start at a random point.

The BGM feature shares the media resource with MOH and the paging feature. BGM cannot be played if the media resource cannot be hunted.

BGM cannot be played and no tone will be heard - even if the user activates BGM when no Media Resources are available at the time the station goes idle. However, BGM can be played when the media resource can be hunted at the time the station is used to talk and goes idle again.

Call Forward
OPERATION

Two types of Call Forwarding may be set:

Call Forward Types

System Call Forward – automatically directs calls to a predefined location, such as Voice Mail or a DN. System Call forward is set via system programming; please see your system administrator to modify this feature.

Station Call Forward – is used to replace a System Call Forward destination with a custom Call Forward setting made from a station, however, voice-first calls may not be forwarded using this feature.

Important! Check with your System Administrator to determine if the system uses a feature called "Basic Survivability". If so, **DO NOT** make any changes to Station Call Forward settings.

System Call Forward

System Call Forward directs calls to a destination preset by an administrator for each telephone. This is normally set to send the call to voice mail.

- To turn on System Call Forward press **#620**. Three short tones emit and "DATA PROGRAMMED" is displayed confirming entry
- To turn off System Call Forward, press **#621**. Three short tones emit and "DATA PROGRAMMED" is displayed confirming entry

Station Call Forward

Station Call Forward allows the user to re-program a station to override the System Call Forward assignments. The direct extension buttons are programmed at the system level, however, they may be modified by the user for whatever Call Forward features they choose. These are normally the extensions dialed most frequently, or an external number.

Call Forward features may also be programmed using IPedge Enterprise Manager. Note that Call Forward settings must be assigned prior to receiving any call.

Important! Check with your System Administrator to determine if the system uses "Basic Survivability", if yes, do not change your station call forward settings.

The following calls may be forwarded from a station:

- Internal calls
- Auto-attendant calls
- Outside lines that ring one station only
- Transferred internal or incoming line calls

Station Call Forward Categories

Call Forward may be set for the following call categories, and there are five different Call Forward Settings that may be assigned. (See "Call Forward Settings" on Page -42). Call Forward destinations may be set to internal destinations or an outside telephone number.

- **Call Forward Any Call** – Forwards any call, internal or incoming line
- **Call Forward - Incoming Line** – Forward incoming line calls only
- **Call Forward Any Call - Set for Another Station** – Set forwarding of all calls for another telephone within the system
- **Call Forward - Incoming Line Set for Another Station** – Set forwarding of incoming line calls for another telephone within the system

Note: Call Forward Any Call and Call Forward - Incoming Line may be set simultaneously on a telephone. This allows incoming line calls to be forwarded to a different destination than other call types.

Note: Each Call Forward Setting has a different cancellation code.

Call Forward Settings

3. **Call Forward All Calls** – Forward all calls immediately
4. **Call Forward Busy/Do Not Disturb** – Forward calls immediately when extension is busy or set to Do Not Disturb (DND)

Note: In "tone-first" systems with multiple lines, Call Forward Busy forwards calls only when all lines are in use. In "voice-first" systems, Call Forward Busy forwards all calls whenever the telephone is in use

5. **Call Forward - No Answer** – Forward unanswered calls after a set number of rings (preset individually for each station)

6. **Call Forward Busy/Do Not Disturb/No Answer** – Forward all calls when Busy, DND, or when call is unanswered after a set number of rings

7. **Call Forward Cancel** – Cancels the currently set Call Forward feature

Station Call Forward Procedures

Call Forward functions are registered by entering the commands outlined below, or by programming a Programmable Feature Button (FB) on the station.

To use the Call Forward button sequence:

• Follow the instructions in "Example: Call Forward to extension" on Page -43. Some features may require additional input:

  • **Destination extension or telephone number** – Call Forward destination numbers may be internal extensions or external telephone numbers. If the destination is an external number, enter outside line access code (e.g. **9**) + **telephone number** + **#.** The system will allow a 32 digit maximum

  • **Timer** (Call Forward No Answer Timer) – Enter the number of seconds (08 - 60). The telephone should ring before forwarding the call.

  • **Call Forward Pass Code** – A four-digit Call Forward pass code may be preset by the System Administrator. This will allow one station to activate the call forward setting for another. Users must enter the Call Forward pass code for the station to be forwarded

Program Call Forward via Enterprise Manager

To program call forward button destination using Enterprise Manager:

1. Login to Enterprise Manager

8. Select Station > Station Assignment

9. Access the IPT to program by double clicking the station number or check the box to the left of the extension and click the **Edit** icon.

10. Select the Key tab.

11. Right click on the key to be programmed and select Pre-registered Call Forward from the resulting list.

12. Click on the desired Call forward type.

13. Fill in the Forward To destination, Move the desired DN to the Registered DN box, and assign the No Answer Time.

14. When all fields are assigned as desired, click on OK.

15. Click on the **Save** icon to save settings

Example: Call Forward to extension

To set Call Forward Busy/No Answer from a station:

Station extension button + **#6041** + **XXXX#** + **10**

1. Press your extension button

16. Enter access code **#6041**

17. Enter internal extension to forward to **XXXX#**

18. Enter ring time in seconds (e.g. **10**) before call forwards

Example: Call Forward to outside line

To set Call Forward Busy/No Answer for a different extension, and forward calls to an outside telephone number:

Extension button + **#6042** + **YYYY** + **1111** + **#** + **9** + **(1-949-555-0000)** + **#** + **08**

1. Press your extension button

19. Enter access code **#6042**

20. Other telephone's extension number **YYYY**

21. Call Forward Pass code for other telephone **1111**

22. Enter **#** for an outside destination number

23. Outside Line Access Code (e.g. **9**)

24. Enter outside telephone number **1-949-555-0000**

25. Enter ring time in seconds (e.g. **08**) before call forwards

Program System Call Forward via Enterprise Manager

To program system call forward destination using Enterprise Manager:

1. Login to Enterprise Manager

26. Select System > Call Forward

27. Click the check box for the SCF number

28. Select Call Type and click the **Edit** icon

29. In the "Call Forward" window, enter the first destination to which the call should forward (up to 32 digits, default is null)

30. Enter the number for Destination 2.

31. Click **OK Button**

32. Click **Save** icon to save settings

Default Call Forward Codes The table shown below lists the default call forward feature access codes and the the procedure for setting the feature.

Feature	Button Sequence
Call Forward Any Call - Internal and Incoming Line Calls: Forwards any call, whether an internal call or incoming line call.	
All Calls to an ext.	Press ext. button + **#6011** (tone) + dial the dest. ext. number (tone)
All Calls to outside telephone number	Press ext. button + **#6011** (tone) + outside line access code + dest. telephone number + **#** (tone)
Busy to an ext.	Press ext. button + **#6021** (tone) + dial the dest. ext. number (tone)
Busy to outside telephone number	Press ext. button + **#6021** (tone) + outside line access code + dest. telephone number + **#** (tone)
No Answer to an ext.	Press ext. button + **#6031** (tone) + dial the dest. ext. number + timer (**08~60**) (tone)
No Answer to outside telephone number	Press ext. button + **#6031** (tone) + outside line access code + dest. telephone number + **#** (tone) + timer (**08~60**) (tone)
Busy No Answer to an ext.	Press ext. button + **#6041** + dial the dest. ext. number **#** (tone) + timer (**08~60**) (tone)
Busy No Answer to outside telephone number	Press ext. button + **#6041** + outside line access code + dest. telephone number + **#** + timer (**08~60**) (tone)
Cancel	Press ext. button + **#6051** (tone)
Call Forward - Incoming Line Calls: Forward incoming line calls only.	
All Calls to an ext.	Press ext. button + **#6013** (tone) + dial the dest. ext. number (tone)
All Calls to outside telephone number	Press ext. button + **#6013** (tone) + outside line access code + dest. telephone number + **#** (tone)
Busy to an ext.	Press ext. button + **#6023** (tone) + dial the dest. ext. number (tone)
Busy to outside telephone number	Press ext. button + **#6023** (tone) + outside line access code + dest. telephone number + **#** (tone)
No Answer to an ext.	Press ext. button + **#6033** + dial the dest. ext. number (tone) + timer (**08~60**)
No Answer to outside telephone number	Press ext. button + **#6033** + outside line access code + dest. telephone number + **#** (tone) + timer (**08~60**)
Busy No Answer to an ext.	Press ext. button + **#6043** + dial the dest. ext. number (tone) + timer (**08~60**) (tone)
Busy No Answer to outside telephone number	Press ext. button + **#6043** + outside line access code + dest. telephone number + **#** (tone) + timer (**08~60**) (tone)

(Sheet 1 of 3)

Feature	Button Sequence (continued)
Cancel	Press ext. button + **#6053** (tone)
Call Forward Any Call - Set for Another Station: Enables you to set call forwarding for another telephone within your telephone system. You will need the other telephone's Call Forward pass code in order to do this. Call Forward Pass Codes are created in system programming.	
All Calls to an ext.	Press ext. button + **#6012** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** + dest. telephone number (tone)
All Calls to outside telephone number	Press ext. button + **#6012** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** + outside line access code + dest. telephone number + **#** (tone)
Busy to an ext.	Press ext. button + **#6022** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** + dest. telephone number (tone)
Busy to outside telephone number	Press ext. button + **#6022** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** + outside line access code + dest. telephone number + **#** (tone)
No Answer to an ext.	Press ext. button + **#6032** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code (tone) + **#** + dest. telephone number (tone) + timer (**08~60**) (tone)
No Answer to outside telephone number	Press ext. button + **#6032** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code (tone) + **#** + outside line access code + dest. telephone number + **#** (tone) + timer (**08~60**) (tone)
Busy No Answer to an ext.	Press ext. button + **#6042** + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + dest. telephone number (tone) + timer (**08~60**) (tone)
Busy No Answer to outside telephone number	Press ext. button + **#6042** + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + outside line access code + dest. telephone number + **# (tone)** + timer (**08~60**) (tone)
Cancel	Press ext. button + **#6052** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone)
(Sheet 2 of 3)	

Feature	Button Sequence (continued)
Call Forward - Incoming Line Call - Set for Another Station: Enables you to set forwarding of incoming line calls for another telephone within your telephone system	
All Calls to an ext.	Press ext. button + **#6014** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + dest. telephone number (tone)
All Calls to outside telephone number	Press ext. button + **#6014** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + outside line access code + dest. telephone number + **#** (tone)
Busy to an ext.	Press ext. button + **#6024** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + dest. telephone number (tone)
Busy to outside telephone number	Press ext. button + **#6024** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + outside line access code + dest. telephone number + **#** (tone)
No Answer to an ext.	Press ext. button + **#6034** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + dest. telephone number (tone) + timer (**08~60**)
No Answer to outside telephone number	Press ext. button + **#6034** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + outside line access code + dest. telephone number + **#** (tone) + timer (**08~60**) (tone)
Busy No Answer to an ext.	Press ext. button + **#6044** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + dest. telephone number (tone) + timer (**08~60**) (tone)
Busy No Answer to outside telephone number	Press ext. button + **#6044** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone) + outside line access code + dest. telephone number + **#** (tone) + timer (**08~60**) (tone)
Cancel	Press ext. button + **#6054** (tone) + dial the other telephone's ext. number + enter other telephone's Call Forward pass code + **#** (tone)
Change Call Forward Pass Code: Your telephone must be enabled in programming to have the ability to change pass codes.	
Change Pass Code	Press ext. button + **#670** (tone) + dial the dest. ext. number (tone) + old pass code + **#** (tone) + new pass code (tone) + **#**
(Sheet 3 of 3)	

Call History

Incoming calls with Caller ID or ANI information can be optionally recorded into a rolling list for the station where the call is ringing. The call is placed in the list along with the number, name (if provided), time and date of the call, and status of the call (answered, abandoned, or redirected). You can access this list from an LCD telephone with a flexible **Caller ID** button.

View Call History

• When your station is idle, press the **Caller ID** button. The Caller ID LED lights green and the latest record displays.

• Press **Vol** + ▲ for the next record; press **Vol** + ▼ for the previous record.

• To view the call date, time, and status, press **SK2** (press again to toggle to call name/number).

Call Park

The Call Park feature enables you to hold a call temporarily in a location other than your telephone. These areas are called orbits. You or another telephone user can retrieve a parked call from its orbit by specifying the orbit number. You can specify one of 20 General Park Orbits (7000~7019) or a valid extension number within the system.

Once you have parked a call in an orbit, you can:

• Hang up and retrieve the parked call at a later time.

• Originate another call.

• Access a voice paging device to announce the parked call for pickup from another station.

If you park a call and it is not retrieved, it will recall to the parking station and one of the following occurs:

• If your station is idle when the system Call Park recall timer expires, the parked call automatically recalls to your station.

• If your station is busy, the parked call camps on.

If you have an LCD telephone, you can let the system automatically select an available orbit number which displays on your LCD.

Park a Call

1. While on a call, press **Park in Orbit** or press **Cnf/Trn + #33**. The LED flashes green (consultation-hold). If you were on an extension during the call, and you have line button on your telephone, the line LED will flash until the call is picked up (depending on programming).

2. Specify the Park Orbit using one of the following:

    • Press **∗** and the system automatically selects a General Park Orbit between **7000~7019**. The chosen orbit appears on the LCD.

    • Enter a valid extension.

    • Press **#** and the system automatically selects your extension as the orbit.

3. Hang up. The caller's extension or line number and the orbit number are shown. If the parked call is not retrieved within a specified time, the call rings back to your telephone. When a parked call recalls your telephone, the LCD shows the line or extension that is recalling and the orbit number.

Retrieve a Parked Call

1. Press **Park in Orbit** or press your extension button + **#32**.

2. Enter the Orbit Number where the call is parked or **#** for the extension from which you are calling. You cannot use **∗** to retrieve a parked call.

    The extension LED flashes at the in-use rate when the call is retrieved.

Call Pickup

You can pick up a call that is ringing another station's extension, a call placed on hold at another station and other types of calls. When you pick up an internal call, the calling station and the called station display on your LCD.

Group Pickup

One or more stations can be assigned to a pickup group, there are a total of 48 pickup groups available. You can easily pick up ringing calls on other extensions. Ringing calls include: new, transferred, internal, or external calls. You will have the ability to pick up calls for other extensions in your group and other groups as well. See your System Administrator for group assignments.

Ringing, Page or Held Call Pickup

This feature picks up ringing or held calls, including Group Page and All Call Page calls. If these types of calls occur at the same time, the pickup priority is station-to-station and then Page calls in the order of occurrence. In some systems, this feature can be applied to pick up All Call Page exclusively.

Perform Call Pickup

Press the buttons shown in the table below for the desired Pickup feature.

Table 4-1

Ringing or Page Calls	To Pick Up:	Press Ext. Button, then dial access sequence below:
Directed DN	A call ringing or held at the Extension Number.	**#5#6** + Ext. No.
	A call Ringing, held or parked at the Ext. No.	**#5#29** + Ext. No.
Group	A call ringing a member of your pickup group.	**#5#34**
Directed Ext.	A call ringing on any line of this Primary Ext. No.	**#5#5** + Primary Ext. No.
Directed Group	A call ringing an extension in this Pickup Group.	**#5#32** + Group No.
Ext. No.	A call ringing this Ext. No. only. Other lines ringing on the same phone are unaffected.	**#5#22** + Ext. No.
Outside Calls	Any incoming outside line call.	**#5#9**
Held Calls	**To Pick Up:**	**Press Ext. Button, then dial access sequence below:**
Local Retrieve	A call held on this telephone.	**#5#71**
Remote Retrieve	A call held on another Primary Ext. No.	**#5#72** + Primary Ext. No.
Directed Ext. Retrieve	A call held on for this Ext. No., regardless of where this Ext. No. appears.	**#5#74** + Ext. No.

Notes:

- The Primary extension number is the directory number by which the telephone set is defined. Other, non-primary extension numbers may also appear on the telephone. By convention, the Primary extension number is assigned to the first button (on the bottom left-hand side) of a multi-button telephone.

- If more than one call is on hold, the call on the telephone's lowest button number is picked up.
- Ringing calls are picked up over held calls as a priority.

Call Transfer

Call transfer allows a call to be directed from one telephone to another.

There are two types of call transfer:

- Blind transfer – The call is directly transferred to another extension without announcing the call or waiting to see if the caller is available.
- Supervised transfer – The call is "supervised" during the transfer process so the call can be announced to the receiving party before completing the transfer. A supervised transfer also allows the person originating the transfer to take back or cancel the transfer.

Perform Call Transfer Immediate

1. While on a call, press the **TRNS** Soft Key.
2. Dial the extension where you want to transfer the call.The call rings the destination station and your telephone returns to the idle state. If your telephone does not go idle, the destination may be located in a remote node, so you need to hang up to return to idle state.

Note: For DN in remote node, the user can transfer by entering # after DN is entered.

Transfer Using The Cnf/trn Button

1. While on a call, press **Cnf/Trn**. Your Line LED flashes green and you hear an internal dial tone.
2. Dial the extension where the call will be transferred. You can remain on the line and announce the call or hang up to complete a "blind transfer."

Note: If the privacy option has been disabled, then if you use a **Line** button when you transfer the call, the LED will flash red until the receiving party answers. While the LED is flashing, you can press the **Line** button to return to the call. If the receiving party answers the call, the LED turns solid red and you cannot reconnect to the original caller.

During call transfer, you can connect all three parties by pressing the **Cnf/Trn** button or by pressing the **JOIN** soft key. This allows the three parties to talk together.

3. Transfer with Camp On: If the station where you want to transfer the call is busy, you may hang up and the transferred trunk or station will be camped on to the busy destination.

Transfer A Call Directly To Voice Mail (Vm)

1. While on a call, press **Cnf/Trn**.
2. Enter **#407**.
3. Enter the VM mailbox number (usually the same as the extension number) + **#**.
4. Hang up and the caller is connected to the VM mailbox. This feature does a blind transfer to VM.

Transfer A Call Directly To Vm With A Dss Button

1. While on a call, press **Cnf/Trn**.
2. Press the DSS button programmed to the voice mail number.
3. Hang up and the caller is connected to the VM mailbox.

Call Waiting

You can answer a call that is transferred to your station, even when your station is busy. When another call is camped onto your station, you hear two Camp-on tone beeps and the extension or Line LED flashes red (on-hold).

If a call is sent to your station when busy, and your station does not have an extension button available to receive the call, two camp-on tone beeps are sent to your telephone. You must disconnect or transfer the existing call to answer the waiting call.

Place Current Call on Hold to Answer Waiting Call

Press **Hold**. The existing call is placed on hold. The camped-on line rings your station (the Line LED flashes green - incoming call) or, if your telephone has the Auto Hold feature, just press the flashing extension button.

You are connected to the transferred call. The extension or Line LED flashes green (in-use).

Note: See your System Administrator to find out if you have Auto Hold.

Using the Flashing Extension Call to Answer Waiting Call

Press the flashing extension or Line. The existing call is placed on hold. The camped-on line rings your station (the Line LED flashes green - incoming call). This disconnects the current call and connects you to the transferred call. The extension or Line LED flashes green (in-use).

Caller Identification

Incoming calls to your extension with Caller ID can be recorded into a rolling list that is saved on your telephone. The call information is placed in the list along with the number, name (if provided), time and date of the call, and status of the call (answered, abandoned, or redirected). You can access this list from an LCD telephone with a flexible **Caller ID** button.

Caller Information

The caller's number and name can be displayed on the IPT or attendant console's LCD. The caller information is stored in the system, retrieved at relevant extension stations, recorded on SMDR, and sent to an external server and client through CTI link, if necessary.

Caller information can also be sent to a voice mail device integrated into the system.

Display Caller Information

When the caller information is provided from a station, it is indicated at a destination station (IPT or attendant console).

The caller information displays at the relevant station even when the destination differs from the original destination due to transfer or Call Forward.

On the line where the caller information is not provided temporarily or it is not provided originally, "LN xxx" will display.

Notification of Caller Information

Automatic Number Identification (ANI), CLASS, Calling Line Identification Presentation (CLIP) and Calling Name Identification (CNIP) are the services used to send the caller number from a public telephone network.

View Saved Caller ID Information

1. When your station is idle, press the **Caller ID** button. The Caller ID LED lights green and the latest record displays.

2. Use the soft keys (Next, Prev, Call or Exit).

Note: Caller ID is displayed when a call is first answered and displays for the first 15 seconds of the telephone call.

Conference Call

Conference calling using an IP5000 Series telephone allows up to eight parties to join together on a conference call. The party initiating the conference call is known as the "conference master". If the conference master exits the conference, the first station added to the conference becomes the master.

The maximum number of participants on a conference call is eight (including the conference master.) The actual number of conference parties with acceptable volume levels depends on local and distant telephone line conditions.

Some models of SIP telephones also have their own built-in conference feature. Please refer to the device documentation for description and programming instructions.

Toshiba IP4100 and PolyCom Series 8440 | 550 | 321 SIP

stations may be used as a conference master for a conference

call. When this occurs, the **Conf** button is used in place of the

Cnf/Trn button referenced here.

Set up a Conference Call

To initiate a conference call on IP Telephones:

1. While on a call, press **Cnf/Trn** - dial tone is heard and the line LED will flash green.
2. Dial a station or outside telephone number.
3. When called party answers, press **Cnf/Trn.** If busy/no answer, press **Cnf/Trn** again to return to the original connection.
4. If the second call was placed on a programmed **Line extension** button on the telephone, that LED also flashes green.
5. Repeat steps 1-3 until all parties are added (up to eight.)
6. When the conference master hangs up, control is automatically transferred to the first internal station added to the conference call. If no internal IPedge stations were included in the conference call, the call is disconnected.

Transfer Conference Control

1. Complete steps 1 and 2 above to add the to transfer conference master status (see previous note.)
2. Announce the call and hang up to transfer.
3. This station now becomes the conference master and may add/delete parties.

Set up a Conference Call (SIP only)

To initiate a conference call on SIP Station telephones:

1. While on a call press the **Conf** key. The held party will hear system music on hold.
2. Dial a station or make an outgoing call (press the Swap soft key to alternate between the two parties.)

3. While talking to one party, press the Conf key to join the calls.

Hold a Conference Call	Only the conference master may place a conference call on hold by pressing **Hold** once (or twice for Executive Hold). The other parties may continue with the conference. Music-on-Hold is disabled and the line extension LED flashes green. Rejoin the conference at any time by pressing the extension button. Conference master status is retained through this process.

Consultation Hold (SIP only)

This feature allows you to place a call on hold then dial another station or outgoing line to consult.

1. While on a call press the **Conf** soft key. The held party will hear system music on hold.

2. Dial a station or make an outgoing call.

3. Press the Swap soft key to alternate between the two parties.

While talking to any party, press the **End** key to disconnect the call.

Adding Voice Mail to a Conference

The conference master may add voice mail to a conference. This feature enables participants in a conference to listen to or leave a voice mail message during a conference call.

Add Voice Mail to a Conference Call (conference master only)

1. Press **Cnf/Trn** to place the current call on Consultation Hold.

2. Dial the voice mail (VM) extension number, then enter the VM mailbox and security code. This adds the voice mailbox to the conference.

3. Press **Cnf/Trn** to reconnect to the original party. (You may continue to add conference members by pressing **Cnf/Trn** and dialing another extension.)

   Now, all parties in the conference may listen to or record a message to this voice mailbox. Only the Master may control the VM with Soft Keys.

Supervising a Tandem Call

1. While on an outside call, press **Cnf/Trn**. A dial tone is heard and the extension LED flashes (conference rate.)

2. Dial an outside telephone number.

3. After party answers, press **Cnf/Trn**. Extension LED flashes (in-use rate) and all parties are conferenced.

4. If busy/no answer, press the flashing extension button to return to the original connection.

5. Press **Cnf/Trn** and hang up. The extension LED flashes (exclusive-hold rate) and the two lines are connected. The LED turns off when the parties hang-up.

6. To supervise a tandem call, press the extension button. If the parties have finished, hang up. If the parties are still talking, press **Cnf/Trn** and hang-up. Both Line LEDs turn off and the connection is released.

Note: If your telephone service provider offers automatic disconnect supervision, the connection will release automatically when the parties hang up. If not, the lines must be supervised and manually disconnected.

Conference Add, Split, Join, and Drop	If a conference is initiated with two or more parties, outside callers may be added to conference, **or** you and another member of the conference may leave (Split) the conference for a private conversation. All conference members remain connected during a split call.
	Conference master may "join" both "split" parties back into the conference, or disconnect (Drop) the connected party. This feature is performed with Soft Keys if you have a LCD phone or with a Split button programmed on one of the Programmable Feature Buttons.

	Important!	Only the conference master may perform Add, Split, Join, and Drop features. The conference master is the person that initiates the conference call. If that person drops from the conference, the first person added to the conference becomes the conference master.

Add an Incoming call to the Conference

1. Place the first caller/conference on hold.
2. Answer the incoming ringing call.
3. When incoming caller is on the line, press **Cnf/Trn** button.
4. Press the blinking DN button where the first caller/Conference was placed on hold.
5. Press **Cnf/Trn** twice to join all parties together.

Split from a conference

1. While in a conference call on an IP5000-series phone, press the SPLT (Split) soft key or Split button.
2. Press the NEXT soft key until you see the extension number for the party that you want to Split out of the conference.
3. Return your extension and the other Split party back into the conference by pressing JOIN.

Note: RTRN terminates a feature operation and returns to the previously displayed state.

Drop the Split party from a conference	Press the DROP Soft Key. The party which was Split from the conference is disconnected (Dropped) and you will rejoin the conference.
	If in a 3-way conference and you Split with one of the parties, the remaining party will remain "on hold" indefinitely or until you return to the conference.

Direct Station Selection (DSS)	This optional feature enables you to use a **DSS** button to connect directly to another station's line extension. The DSS LED shows the status (idle/busy) of the station and/or the station's primary extension. For example, a station's DSS button LED shows busy (light steady red) when the station is:

*   Busy on a call on any button.
*   Idle but all appearances of the station's extension are in use by other stations.
*   When the station is in DND, the LED flashes red.

Connect Directly to Another Station's Extension	1. When connected to a line or another station, press **DSS**. The original party is put on hold. You can call a station even if the DSS LED shows busy (steady red). 2. Announce the call or transfer the call by hanging up or pressing **Release**. **Note:** You can transfer the call to an idle or busy station.

Do Not Disturb	If your station is in Do Not Disturb (DND) mode, internal, external and transferred calls do not ring your station and Off-hook Call Announce calls are denied. You can continue to make calls while in the DND mode. When originating a call in DND mode, you will hear a short burst of interrupted dial tone followed by a continuous dial tone. You can start dialing at any time during either tone. If you put your Primary extension into DND mode, all calls to that telephone are rejected. If your extension is set for Call Forward-Busy or Call Forward-Busy/No Answer, the call is redirected to the forwarding destination immediately. If you put an extension other than the Primary extension into DND, only calls to that extension on your telephone will be blocked. Appearances of that extension on other telephones continue to ring.
Activate DND on your Primary extension	• Press **Do Not Disturb** or **#6091** (hear Success Tone). The LED lights steady red and DND mode is activated for the entire station.
Activate DND on a non-Primary extension	• Press the desired extension appearance and **Do Not Disturb** or **#6091** (hear Success Tone). The LED lights steady red and DND mode is activated for that extension on your telephone.
Deactivate DND	• Press **Do Not Disturb** or **#6092** (hear Success Tone). The LED light goes out and DND mode is de-activated.
Setting DND for Another Extension	To activate DND for another extension: • Enter **#6191** (hear Entry Tone) + the Primary extension of the remote extension + the pass code + **#** (hear Success Tone). This sets DND as if activated by the Primary extension on the target telephone. **Note:** There is no entry tone available for single line telephones or SIP stations. To deactivate DND for another extension • Enter **#6192** (hear Entry Tone) + the Primary extension of the remote extension + the pass code + **#** (hear Success Tone). This removes DND from the target telephone.
Change DND Pass Code	• Enter **#670** (hear Entry Tone) + ext. no. (hear Entry Tone) + old pass code + **#** (hear Entry Tone) + new pass code + **#** (hear Success Tone). If you activate DND while a call is ringing, the ringing stops. The LED continues to flash on your telephone and ring on other appearances.

Emergency Call

To make an emergency call, dial **911** or **Access Code** + **911**. This depends on off-hook preference set up for your telephone.

> **Important!** If you place an emergency call from a remote location, the address the Emergency service gets is that of the location of the telephone system and not of the remote location.

Note: Check with your System Administrator for the Access Code because this code may be different from the one used to get an outside line.

Emergency Monitoring Station

Your system may have one IP telephone assigned as an emergency monitoring station. If your telephone has this assignment, your line LED will flash green when someone makes a **911** call. When you answer the call, you can listen in and participate in the conversation. See your System Administrator for more information on this feature.

Emergency Ringdown

If a station remains off-hook for a programmable period, it can be automatically treated as an Emergency Call and directed to an emergency destination. The station may have partially dialed a number or have dialed no digits at all. Each station is programmed with its specific emergency ringdown destination.

A station number or a group pilot number can be specified as an emergency ringdown destination. In a private network, the station or pilot number must be in the same network node.

Message Waiting

Message Waiting is shown on the **Msg** button which flashes red when there are messages waiting. The waiting message indicators can come from the voice mail system or they can be internal messages sent from other extensions.

The messages from other extensions are notifications that someone has called your extension and wants you to call them back.

An extension can receive up to three Message Waiting indications, one additional indicator will always be reserved for the voice mail system.

Note: If there are Phantom DNs (PhDNs) programmed on an extension, each PhDN can receive up to three message waiting indicators.

Responding to a Lit Msg LED

1. Press the Red flashing **Msg** button. The telephone will dial the message source (the voice mail or another extension). See Note below.

2. When the call is finished, hang up and the message waiting indicator will clear.

3. If the Msg LED continues to flash, there are additional messages to check, repeat steps 1-2.
   Voice mail devices have a short delay in turning off the message waiting indicators.

4. To manually turn off the Msg LED, press your extension button, then enter #409. Repeat this sequence until all the messages are cleared.

Notes:

- If there is a + on the LCD, press the **Next** Soft Key to scroll through the messages sent to that extension.
- To see who has sent you messages, or to retrieve the messages, press the flashing **Msg** button.

Turning On/Off MW LED on Another Extension

When an extension is called, the calling party can choose to send a message to the called party. This is a notification to say that a call has been missed and the calling party would like to be called back.

By sending a message to another extension you turn on their Msg LED.

1. Dial an internal extension. You may hear ringing or busy tone.

2. Press **Msg** or **7**. The Msg LED flashes red on the called telephone. At your telephone, the Msg LED lights steady red and the LCD shows the station number where the Message Waiting light was sent.

3. If you decide to cancel the Message Waiting light at this point, press **Msg** or **7** again while ring-over tone is playing and the light will cancel. If you want to cancel the message later, call the telephone where you set the message and press **7** twice.

4. Press **Spkr**. Your Msg LED turns Off. The Msg LED on the called telephone flashes until the called party presses the flashing **Msg** button which calls you back.

5. Turn off the Message LED.

The two ways to turn Off a Message LED are:

Method 1

1. Press **#64** plus the extension number that has the message light set.

2. Press **Spkr** or hang up to end the call.

Method 2

1. Dial the extension that has the Message LED.

2. Press **77**.

3. Press **Spkr** or hang up to release your telephone.

Microphone Cut-Off

This feature prevents callers from monitoring the sounds near your telephone when your telephone receives a Handsfree Call or cuts-off the telephone microphone while on a speakerphone call. When the feature is ON, the **Microphn Cut-off** LED lights steady red and the Mic and Spkr LEDs do not light when your telephone is called. When the feature is OFF, the **Microphn Cut-off** LED is not lit and your microphone works. The **Microphn Cut-off** functions on Handsfree Answerback and speaker OCA calls for privacy.

To turn the microphone ON/OFF

- Press **Microphn Cut-off** to toggle between ON/OFF.

Off-Hook Call Announce (OCA)

Off-hook Call Announce (OCA) enables you to complete a call to a busy telephone. Your telephone must be programmed to either announce automatically or to announce after you press a button on your dial pad. The destination telephone must be programmed to accept an OCA. The announcement may be delivered over the speaker.

Make an OCA Call

- **Manual** – Dial an extension. When you hear a busy tone press **5** and, after one long tone, you can talk through the speaker of the destination telephone. The person you are calling has answering options as described below.

- **Automatic** – If your telephone and the extension you are calling have been programmed for Automatic OCA, you can talk through the speaker of the destination telephone without hearing the busy tone and without dialing **5**.

Answer a Speaker OCA Call

1. If you have a handset call in progress and you hear one tone, this indicates that a second station is calling. The second caller connects to the speaker in your telephone. The Spkr LED flashes and the Mic LED lights. You will be speaking to the first caller through your handset and the second caller through the microphone.

2. To turn off your microphone speaker to the second party, you can press **Mic** or **Microphn Cut-off**; the Mic LED turns Off. You will no longer be talking to the second caller, although the caller can still speak through your speaker.

3. Press **Mic** or **Microphn Cut-off** again to reconnect to the second caller. You can toggle as often as you choose. If you do not want the first caller to hear your conversation with the second caller, cover the mouthpiece of your handset.

Speaker Off-hook Call Announce

IP5000-series telephones can receive Speaker OCA which enables stations to receive internal calls over their speaker while on another call using the handset.

Override

Override Calls

The available override features are:

- Busy Override
- Do Not Disturb Override
- Executive Override
- Destination Restriction/Traveling Class Override
- Class of Service Override
- Privacy Override

Busy Override

Ring Over Busy Override enables you to send a muted ring tone to a busy station to indicate a call is waiting. The Busy Override (BOV) muted ring can be programmed for each station to be two muted rings only or continued

muted rings until the call is answered. This option applies to the station receiving the muted ring. The muted ring can be sent to the telephone speaker or to the telephone handset/headset and speaker.

To use Busy Override

- After reaching a busy station, press **2**. A muted tone is heard at the busy station, indicating that a call is waiting. The station number displays.

Do Not Disturb Override

Do Not Disturb (DND) Override lets you send a call waiting tone or ringing to a station in DND mode to indicate that a call is coming in. Your telephone may be programmed to block DND Override from other telephones. Your station's LCD shows that the station you have called is in the DND mode.

OCA is possible to DND stations from stations that are programmed for DND Override.

To use DND Override

- After reaching a station in DND mode, press **2**. A tone signal is heard at the DND station, indicating a call is coming in. On your station, the LCD shows the station number you have overridden.

    Your LCD displays **DND OVR DENY** if the station you called denies DND Override.

Executive Override

Executive Override enables you to enter an established conversation. Your telephone can also be programmed to block Executive Override from other telephones.

To perform Executive Override

- After reaching a busy station, press **3**

    Or, if you have an LCD telephone, use the **OVRD** Soft Key. You enter a conference with the busy station and the party to whom he was talking. The called parties may hear an optional tone signal prior to your entering the conversation.

    Your LCD displays **EXEC OVR DENY** if the station you called denies Executive Override. If you do not have Override privileges, you will camp on.

Destination Restriction/Traveling Class Override

Enables a station user to override the Destination Restriction or Traveling Class of a particular telephone by entering a pre-determined account code.

To use Destination Restriction or Traveling Class Override

1. Press **#471**. A Confirmation tone plays and the LCD shows "Enter OVR Code."
2. Enter the trunk access code or LCR access code.
3. Dial the external telephone number.

Class of Service Override

By dialing a Class of Service (COS) Override code, a user can change a station's set of privileges to one associated with the override code. When the call is terminated and another is attempted from the same station, the original COS is

applied. This allows selected users to override restrictions that are placed on any telephone in the system.

To perform Class of Service Override

1. Access a Primary or Phantom DN. You hear a dial tone and the LED flashes at the in-use rate.

2. Press **#471**. Dial tone stops. Your LCD prompts you to enter a code.

3. Enter the COS Override Code (four digits). You hear a dial tone.

4. Dial a telephone number.

Note: For security reasons, the override codes are only available on a selected basis. See your System Administrator.

Privacy Override This feature enables you to enter an established call on a line you share with another telephone. Up to two station users can enter an existing Central Office (CO) line-to-station call (i.e., up to three stations can be connected to a CO line). You can also use this feature if the station that is already connected to the CO line is in the Privacy Release mode.

Station users with **Privacy Release** can allow stations with the shared button appearance to enter their conversations, even if the station entering the conversation is not programmed for Privacy Override.

Paging

Station users may make page announcements to telephones. Check with your system administrator to find out the zone numbers for various paging groups. Verify with your system administrator if there are sufficient vacant media resources for successful paging.

To make a Page announcement to telephones:

1. Lift the handset, press your extension button and enter a paging access code.

2. Make your announcement, then hang up.

To make a Group Page

- Press **Group Page** and enter the Group number (01~24)
  — or —
- Press extension + **#31** and enter the zone number.

Answering a Page To answer a page from the paged station, press the page button - do not lift the handset or press the speaker button. To answer a page from other stations perform a Directed Terminal Pick up (See Call Pick up). The call must be picked up before paging ends. When the page is answered, the device being used at that time will be released.

If a paged station is a member of two paging groups, and is being paged as a member of one group, and a page is attempted for the second group, that telephone attempting the page on the second group will receive a busy signal. The original paging is maintained, except in the case where the second page

is Emergency Paging.

Group Page	To answer a Group Page, lift the handset off-hook, dial **#5#36** and enter the Page Zone number (01~08, depending on your telephone system).

All Call Page   You can make an All Call Page to telephones assigned to the "All Call Page Group." Stations are assigned to the "All Call Page Group" in system programming.

To make an All Call Page:

1. With the handset off-hook, press **All Call Page**
   — or —

   Dial **#30**. This pages all telephones in the All Call Page Group, not the external speakers. Paging external speakers requires a separate action.

2. Announce the page and hang up the handset.

SIP terminals as paged device   SIP stations may be set as a paged device, provided they support this feature. IPedge will disconnect the terminating call and drop SIP terminal from the list of paging group if SIP terminal returns busy or busy no answer at terminating.

To answer the paged call, the user will seize a different line and enter the feature access code. To originate a page, enter the paging access code.

Set SIP Station for Paging   Certain SIP terminals may accept a paged call if the phone supports paging, and the feature is enabled. IPTs belonging to the same group will also hear the paging call.

If the SIP phone does not support paging, IPedge will disconnect the call on that SIP terminal. However, members of the same paging group will continue to hear the paging call.

Answer All Call Page   1. Lift the handset off-hook, dial **#5#36**.

2. Enter the Page Zone Number (01~08, depending on your telephone system).

Emergency Page   An Emergency Page overrides Group Pages or All Call Pages to telephones only.

- To make an Emergency Page, lift the handset off-hook, dial **#37**.
- To make an Emergency Page to a group, lift the handset off-hook, dial **#38** and enter the Group number.

Privacy

Privacy controls the ability of more than one person to use the same extension at the same time. Privacy applies to multiple appearances of extensions, Phantom extensions, outside Lines, and outside Line Group buttons. The application of Privacy to individual telephones is controlled in system programming.

By default, the system is private. If you are in a conversation, another telephone with an appearance of the line on which you are talking cannot intrude unless that telephone has been programmed for Privacy Override. In that event, the other

telephone may enter and leave the conversation at will. If all users are provided with Privacy Release in Class of Service, the system will function as non-private.

Your telephone may be equipped with a **Privacy Release** and/or a **Privacy on Line** button. On a normally private telephone, **Privacy Release** allows other appearances of your line to join the conversation. On a normally non-private telephone, **Privacy on Line** allows you to exclude others. The Privacy condition may be toggled at any time during a conversation. At the end of the conversation, the line's privacy condition returns to its original state.

Use Privacy Release

- While on a CO line call, press **Privacy Release**. The LED lights red. The outside line flashes at all appearances. When another station user enters the outside line call by pressing a common outside **Line**, the Privacy Release LED turns Off.

- To add a third station, press **Privacy Release** again; the process repeats.

Set/Cancel Privacy

- Press **Privacy on Line** to set privacy. The LED lights steady red. Others are blocked from entering your outside line calls when they press a common **Line.**

- Press **Privacy on Line** again to cancel the feature. The LED turns Off.

Redial

Use this button to redial the last number dialed from your telephone.

- To redial the last number, press **Redial** or **∗0**.

Speed Dial

Speed Dial (SD) enables you to dial a sequence of up to 32 digits with a shorter code. Dial sequences can include telephone numbers, authorization codes, passwords feature activation codes, and pauses. Speed Dial may be used to originate a call or invoked after a call is established. There are two types of Speed Dial:

- **System SD** – All telephones in your system can share a list of up to 800 System Speed Dial numbers under the exclusive control of the System Administrator. In some cases, System Speed Dial enables you to reach numbers that you would not be allowed to dial directly from your telephone.

- **Station SD** – Your System Administrator allocates a block of up to 100 personal SD numbers (10 per telephone). You have exclusive use of them and you can create and change them from your own telephone. If you have a 9-Line LCD telephone, you can assign names to your station SD numbers to appear on the Personal SD Directory display.

Personal Speed Dial

1. See your System Administrator to check how many personal Speed Dial numbers are allocated to your telephone and if you have Speed Dial capabilities enabled on your telephone.

2. Set up / Store your personal Speed Dial numbers.

3. Assign names to personal Speed Dial numbers (on supported models).

Making a Call Using Speed Dial

There are two ways to begin a Speed Dial Call.

1. Press **Spdial** on an IP5000-series digital telephone or press the ＊ button on any telephone.

2. Dial the Station or System Speed Dial Number. Station Speed Dial numbers occupy numbers 100~199. System Speed Dial numbers occupy numbers 200~999.

Table 7:

Feature	Feature Access Code Sequences
Speed Dial (Dialing an SD number)	
Station[a]	**Spdial[b] + nnn** nnn = 100~199 Station SD numbers
System[1]	**Spdial[2] + nnn** nnn = 200~999 System SD numbers

a. Stations must be assigned/enabled Speed Dial capabilities in system programming.

b. If your telephone does not have a Spdial button, press the * button, then dial the three digit Speed Dial bin number (nnn).

Speed Dial Capabilities

Go to Enterprise Manager.

1. Click on **Station > Station Assignment**.

2. Click on the **Basic tab**.

3. Enter the desired number of SpDial Bins.

4. Set System Speed Dial to enable/disable. Default is Disable.

5. Click on the **Save** icon.

Long SD Numbers

Up to 32 digits can be stored in one SD location. If you exceed 32 digits, the excess digits are automatically stored in the next sequential SD location. If SD 100 contains 40 digits, then 8 of those digits would be stored in SD 101. If you save other digits to SD101 they will over-write the eight digits automatically stored there.

Storing Personal Speed Dial Names

You can store names with Personal Speed Dial numbers. These names will display as Soft Keys which can be used for dialing from the telephone LCD directories.

Notes:

• Speed Dial locations must be assigned to your telephone by your System Administrator before you can store names. Your System Administrator can also associate names with Station Speed Dial numbers.

• Only the Administrator telephone can store System Speed Dial numbers.

Assign Station Speed Dial Names	Web-based User Administration

1. Login and select Speed Dial, then select or enter the desired Speed Dial Index and set the number and name.

2. Enter a Speed Dial location number (100~199 for personal speed dial or 200~999 for System speed dial, depending on system programming).

3. Enter the telephone number to be stored. If you normally dial a line access code (such as **9**) and/or an area code, enter the codes before the telephone number.

4. Input the name you want to appear in the Personal SD directory (nine characters max).

5. Click on **Save** icon to register the information.

Time and Date Setting (Local)

IP telephones will display the time, day and date of the time zone of the telephone system location it is connected to. If the IP telephone is not located in the same time zone as the telephone system, the IP telephone can be used to change the time, day and date of the IP Telephone to the local time zone in which the telephone is located.

To change the Date

- From the IP telephone, dial #653 and enter YYMMDD#

    Example: To set the date to March 12, 2008.
    YY = Year, example 08
    MM = Month, example 03
    DD = Day, example 12

Note: The IP telephone date can only be changed one day before or after the telephone system date. The day will change automatically when the date is changed.

To change the time

- From the IP telephone, dial #654 and enter HHMMSS#

    Example: To change the time to 01:30 PM
    HH = Hour, example 13 (range is 00~23, 24 hour clock must be entered)
    MM = Minutes 30 (range is 00~60. It must be within 15 minutes of system time.)
    SS = Seconds (range is 00~60).

Note: The time set must be within 15 minutes of system time.

Tone First / Voice First Signalling

To determine the signalling on the telephone circuit.

Tone First Signalling

When the telephone rings and the called party must press Spkr or lift the handset in order to receive the call.

Voice First Signalling

The telephone does not ring when it is being called, rather a long tone is heard, followed by the caller's voice coming through the speaker. This method automatically starts in a hands free mode and allows both parties to speak with each other.

Note: The calling party has control over whether Tone First or Voice First Signaling is being used. The ability to switch between the two is setup by the System Administrator.

To change the signalling method while placing the call

1. Enter the extension number
2. Press **1** to turn on Tone First Signaling.
3. Press **2** to turn on Voice First Signaling.

Uniform Call Distribution

Uniform Call Distribution (UCD) provides a simplified ACD service based on the Distributed Hunt feature. Incoming calls are answered by the voice mail Auto Attendant function or they can be directly routed to the UCD (Distributed Hunt) Pilot number. The call will go to the next agent or, if all agents are busy, the call will camp-on to the Distributed Hunt pilot and ring-back tone or Music-on-Hold (MOH) will be sent.

This feature distributes incoming calls to available agents. Agents must be logged into the group to receive UCD calls. The following illustration shows the typical call flow for this service.

1. Agent logs into the UCD group.

   The call is received from PSTN or extension.

2. The call is routed to voice mail which provides the initial greeting using the Auto Attendant service.

3. The voice mail can be configured to prompt callers to enter the destination number or to route the call to the pre-determined destination.

4. The voice mail transfers the call to the UCD group pilot.

5. The call is delivered to an idle agent who is logged-in to this group.

6. If no agent is available in the hunt group, the call is queued to the UCD pilot.

   - The caller may hear the MOH source assigned to this group or Ring Back Tone (RBT) depending on the configuration.

   - The call will be delivered to the first agent that becomes igle.

   - If the call cannot be answered within the preconfigured time, the call is routed to an overflow destination.

   - If no overflow destination is programmed the call will remain in queue.

Login/Logout

Login and Logout is controlled by the Login key assigned to the agent phone. The Log status is displayed on the Login key as shown below

- **Login** - Key is On Steady

- **Logout** - Key is Off

The Login/Logout feature is applied to the call which terminates to UCD pilot only. Therefore, the call can terminate to agent Prime or Phantom PDN directly even if the agent is in Logout state. Also, Login/Logout can be activated by an access code. The default numbering plan is shown below.

Access Code	Feature
#6061	Login - from Agent Station
#6062	Logout - from Agent Station
#6161 + **DN** + **#**	Login - Agent Station (DN) from another station
#6162 + **DN** + **#**	Logout – Agent Station (DN) from another station
where DN = the Directory number of the agent station.	

Messaging Features 5

Access your Mailbox by Phone

The following information is required:

- Phone number to call the voice messaging system (this may be different from inside and outside of the organization)
- Your mailbox number
- Your security code (password)

Many organizations allow you to access your mailbox directly from your office phone by pressing the "Message" button. When using this button, you are prompted for your password. If you don't see this button on your phone, contact your system administrator to see if it is available.

Set up Your Mailbox for the First Time

The first time you access your mailbox, the system asks you a few questions to set up your mailbox.

1. Enter your initial default password.

   If you do not have this, it can be obtained from your system administrator. Once you enter your default password you are prompted to change it for security purposes.

2. Record your first and last name.

   This identifies your mailbox when you log in, as well as identifies your mailbox to other internal subscribers.

3. Record your personal greeting.

   This is the greeting callers hear when directed to your mailbox. You can change your personal greeting at any time in the future, or set up a temporary (extended absence) greeting.

If your mailbox is enabled with voice commands, the first time you access your mailbox you also hear a short tutorial that guides you on using spoken commands to navigate your mailbox.

Once you have completed this set up process, the system notifies you there are any new messages in your mailbox.

To access the New User Setup at any time in the future, press **7** from the main system options menu.

Check New Messages

Most organizations have a message indicator light on office phones. By default the message indicator will light up when you have a new voice message, but some system administrators will also set it up to indicate when you have a new fax message.

To check new messages and access your voicemail box:

1. You will need the following information:

    • Phone number to call the voice messaging system (this may be different from inside and outside of the organization)

    • Your mailbox number

    • Your security code (password)

2. From the Subscriber's menu, press **1** to review new messages. The system will play any priority stamped messages first.

You can also receive a text message to your cell phone or pager when a new message arrives, or set up a "call-out" where the system will call any designated phone number (e.g. a cell phone or home phone) when a message has been left in your voicemail box.

Review saved messages

Saved messages are messages you have already heard and saved. A message is moved to your saved messages when you press 1 during or after message playback. The length of time a saved message is kept before being permanently deleted (for example, 30 days) is set by your system administrator. Your system administrator will also designate if you receive notification that a saved message is about to be permanently deleted, providing you with the opportunity to save it again if you wish to keep it for a longer period of time.

To review saved messages:

1. Call the voice messaging system

2. Press **1 2** from the subscriber's menu to review saved messages.

Envelope Information

Press **8** while listening or after listening to the message to find out who sent the message as well as the date and time sent.

While listening to a message, you can press **4** to rewind or **6** to fast forward (in increments of five seconds or as programmed by the system administrator). You can also press **5** to pause the message and **5** again to resume it (it automatically resumes after 60 seconds or as programmed by the administrator).

Volume /Speed Control

You can use the following keys at any time during message playback to change message volume or message speed.

Press **9** then one of the following keys:

> **1** Low Volume
>
> **2** Normal Volume
>
> **3** High Volume
>
> **4** Low speed
>
> **5** Normal speed
>
> **6** High speed

Reply to a Message

During message playback or after the message has finished playing, you can reply to the sender of the message. The message will be delivered directly to the sender's voicemail box.

1. Press **7 1** while listening to a message or after the message has finished playing.

    You can use the following keys at any time during message playback:

    > **1** Save the message
    >
    > **2** Listen to next message
    >
    > **3** Erase the message
    >
    > **#** Repeat the message
    >
    > **7** Reply / Redirect the message
    >
    > **8** Envelope information
    >
    > **9** Speed or volume control

2. The system will prompt you to record a message. Use the following options to send the message.

    > **1** Delivery message
    >
    > **2** Review message
    >
    > **3** Rerecord message
    >
    > **0** Delivery options
    >
    > **∗** Cancel and exit

Call Back Directly

In addition to replying directly to a mailbox, you can also call back the sender of a message. This option will ring their phone rather than send a message to their mailbox.

1. Press **7** while listening to a message or after the message has finished playing.

2. You now have a few options:

    - To call the number and delete the message, press **3**

- To call the number and save the message, press **4**
- To call the number and keep the message as new, press **5**

3. The system will place you on hold while it transfers your call.

Redirect a Message

During message playback or after the message has finished playing, you can redirect (forward) a message to another subscriber's voicemail box.

1. Press **7 2** while listening to a message or after the message has finished playing.

2. The system will prompt you to enter the mailbox to which you wish to forward the message. You can also use a private or public group distribution list at this time.

3. After you have made your selection, press **1** to confirm or **2** to change.

4. Press **1** to send without a comment, or **2** to attach a comment to the beginning of the message. You can send the message with normal delivery, return receipt and/or priority.

5. The message is now sent. Press **∗** to continue, **2** to send to additional destinations, or **7** to additional destinations with the same comment.

Erase / Delete and Retrieve a Deleted Message

While you are listening to a message, or after a message has finished playing, you can delete the message from your inbox or saved box.

Delete a Message

Press **3** during or after message playback. The message will be moved to a deleted folder.

Note: You will have a minimum of one day to recover this deleted message; some system administrators may extend this recovery period.

Retrieve a Deleted Message

You may also retrieve a deleted message and move it back into your saved messages folder.

1. Press **6** from the main subscriber's menu. If you are currently reviewing messages press *** 6**.

2. You now have three options:

    - To listen to your deleted messages, press **1**
    - To move the message back to your saved messages, press **2**
    - To delete the message, press **3**

Note: Erasing a message permanently deletes your message from the system and you will no longer be able to recover it.

Number of Messages

To check how many messages you haves:

The system can tell you how many new and saved voicemail messages you have. If you have fax and email capabilities, the system will also inform you how many fax and email messages you have.

From the Subscriber's menu, press **1 4** to hear your message count.

Send A Message Directly To A Subscriber's Mailbox

You can send a message directly to another subscriber's mailbox from your voicemail.

To record and send a message:

1. Access your voicemail box.
   You will need the following information:

    - Phone number to call the voice messaging system (this may be different from inside and outside of the organization)
    - Your mailbox number
    - Your security code (password)

2. From the subscriber's menu, press **2** to record a message.

3. Press any key when you are done recording.

    - Press **2** to review your message before sending
    - Press **3** to Re-record your message
    - Press **✷** to cancel without sending
    - Press **1** to send.

- Press **0** for delivery options such as confidential, urgent or message confirmation.

4. The system will prompt you to enter the mailbox to which you wish to send the message. You can also use a private or public group distribution list at this time; see "Using Group Distributions" for more information on setting up and using group distribution lists.

5. Press **1** to confirm or **2** to change your entry.

When sending a message, the system will also provide you with the option to send the message with return receipt and/or schedule it for future delivery. See this chapter for more information on these options and follow the prompts in the system to use these features.

Note: You can press any key to interrupt the system voice prompt explaining how to leave a message.

To Mark a Message as Confidential

When you mark a message as confidential, you inform the recipient that it is confidential before the message plays.

1. Call the voice messaging system, then press **2** from the subscriber's menu to record a message. Press any key when you are done recording.

2. Press **0 3 1** to mark your message as confidential.

3. The system will then ask you to address your message.

When sending a message as confidential, the system will also provide you with the option to send the message with return receipt and/or schedule it for future delivery. This chapter contains more information on these options and follow the prompts in the system to use the features.

To Mark a Message as Priority

When you mark a message as priority, it will be sent to the front of the subscriber's message inbox.

1. Call the voice messaging system and select 2 from the subscriber's menu to record a message. Press any key when you are done recording.

2. Press **0 3 2** to send your message as priority.

3. Address your message.

When you send a message as priority, you will also be provided with the option to send the message with return receipt and/or schedule it for future delivery. See this chapter for more information on these options and follow the prompts in the system to use these features.

To Mark a Message as Priority and Confidential

1. Call the voice messaging system and press **2** from the subscriber's menu to record a message. Press any key after recording.

2. Press **0 3 4** to send the message as priority and confidential.

3. Address your message.

When you send a message as priority and confidential, the system will also provide you with the option to send the message with return receipt and/or schedule it for future delivery. See this chapter for more information on these options and follow the prompts in the system to use these features.

To Request a Return Receipt for a Message

When sending a message to a subscriber's inbox you can request a confirmation that the recipient received and listened to the message. A notification will be delivered to your inbox after the message has been listened to.

1. Call the voice messaging system and press **2** from the subscriber's menu to record a message. Press any key when you are done recording.

2. Press **0 5** to send your message with return receipt.

3. Address your message.

To Request Notification of Non-receipt

You can request that the system notify you if a message you send to a subscriber is not heard. A notification will be delivered to your inbox if the message is not listened to by a date and time that you designate.

1. Call the voice messaging system and press **2** from the subscriber's menu to record a message. Press any key when you are done recording.

2. Press **0 6** to send your message with return receipt.

3. The system will ask you to use your keypad to input a 2-digit month, 2-digit date and 4-digit time. The system will confirm the date and time you specify.

4. To confirm and continue sending press **1**.

5. Select the mailbox destination and press **1** to confirm and send.

To Schedule a Message for Future Delivery

You can schedule a message for future delivery with any delivery option (normal, priority, confidential, receipt and non-receipt). After you select your delivery options and address the message you can send the message immediately or mark it for future delivery.

1. Call the voice messaging system and select **2** from the subscriber's menu to record a message. Press any key when you are done recording.

2. Select your delivery option.

3. Select the mailbox destination and confirm.

4. Press **2** for future delivery.

5. The system will ask you to use your keypad to input a 2-digit month, 2-digit date and 4-digit time. The system will confirm the date and time you specify.

6. Press **1** to confirm and send, or **2** to change your delivery time.

To Send a Message Using Directory Assistance

If you do not know a subscriber's mailbox number you can use directory assistance to find it.

1. From the subscriber's menu, press **2** to record a message.

2. Press any key when you are done recording and press **1** to continue.

3. Follow the voice prompts to select directory assistance. Many organizations use **9** but some system administrators change this key press.

To Send a Message to a Group Distribution

You can send a message to a group distribution list. This option allows you to send a message to multiple individuals without having to enter in individual mailbox numbers. For example, if you are a manager, you may wish to set up a distribution list that includes your team members.

You can set up private (personal) group lists while a system manager will set up global (public) group lists.

1. From the subscriber's menu press **2** to record a message. Press any key when you are done recording and press **1** to continue.

2. Press **#** to send to a Private Distribution list or **# #** to send to a global Distribution list.

3. Enter the group number.

4. Press **1** to confirm or **2** to change your destination.

5. Press **1** to send.

Delete a Message after Sending

You have the option of deleting a message from a subscriber's mailbox if a message you sent to the subscriber has not yet been listened to.

1. Call the voice messaging system and select **5** from the subscriber's menu.

2. Enter in the mailbox number you wish to check and the system will play the first unheard message you left for the recipient.

3. To delete the message press **3**, to replay the message press **1**, to hear the next message press **2**.

Greetings 6

Messaging offers a variety of greeting options for your mailbox. Below is a list of the different greeting options and their intended purpose.

- **Default Greeting** – The default greeting is the principal greeting for your mailbox. Once recorded, it is played each time a call is sent to your mailbox.

- **Extended Absence Greeting** – The extended absence greeting is used when you are away from the office for an extended period of time; for instance a business trip or vacation. Because it is separate from your Default Greeting, you can simply deactivate it and reactivate your Default greeting without re-recording.

- **Out of Office Greeting** – The out of office greeting is used when you are away from the office for a short period of time. Because it is separate from your Default Greeting, you can simply deactivate it and reactivate your Default greeting without re-recording.

- **Busy Greeting** – Depending on how your telephone extension is configured, the busy greeting can be used for when calls arrive at your mailbox, either because the auto attendant dialed your extension and received a busy signal, or if your extension is programmed with a busy forward to voice mail. You can record a custom greeting advising callers that you are on the phone and you will return their call promptly. If you are not busy on the phone, callers will receive your Default Greeting.

- **Custom Greetings** – Each mailbox can have up to nine custom greetings. Custom greetings can be used for special advisements to callers for which you don't want to rerecord your default greeting or use an extended absence greeting. For example, you may use a custom greeting to advise callers that you are not in the office due to weather conditions, or to give callers other special instructions.

Manage your Default Greeting

When you access your mailbox for the first time you will be asked to record a personal greeting. You have the option of changing this greeting at any time.

1. Call the voice messaging system and select **3 2 1** from the subscriber's menu to change your default greeting. Press any key when you are done recording.

2. To listen to the greeting you have recorded press **2**, to record the greeting press **3**.

Activate your Extended Absence Greeting

You can set up your extended absence greeting which will replace your default greeting when activated.

1. Call the voice messaging system and select **3 2 2** from the subscriber's menu to access your extended absence greeting. The system will advise you whether your Extended Absence Greeting is activated or deactivated.

2. If an Extended Absence greeting has already been recorded, you can press **1** to activate the greeting.

3. To listen to the greeting you have recorded press **2**, to record the greeting press **3**.

Deactivate your Extended Absence Greeting

Call the voice messaging system and select **3 2 2** from the subscriber's menu. The system will advise you whether your Extended Absence Greeting is activated. To deactivate your Extended Absence Greeting, press **1**. This will restore your Default Greeting.

Manage your Busy Greeting

To manage your Busy Greeting:

1. Call the voice messaging system and select **3 2 3** from the subscriber's menu to access your Busy Greeting.

2. To listen to the greeting you have recorded press **2**, to record the greeting press **3**.

Manage your Out of Office Greeting

To manage your Out of Office Greeting:

1. Call the voice messaging system and select **3 2 4** from the subscriber's menu to access your Out of Office Greeting.

2. To listen to the greeting you have recorded press **2**, to record the greeting press **3**.

Manage your Custom Greetings

To manage your Custom Greetings:

1. Call the voice messaging system and select **3 2 5** from the subscriber's menu to access your Custom Greetings.

2. Press **1**~ **9** to select the Custom Greeting you wish to manage.

3. To listen to the greeting you have recorded press **2**, to record the greeting press **3**.

Change your Recorded Name

When you access your mailbox for the first time you will be asked to record your name. This will identify your mailbox to you when you log in, as well as identify your mailbox to other internal subscribers. You can re-record your name at any time.

1. Call the voice messaging system and press **3 3 2** from the subscriber's menu to change your recorded name. Press any key when you are done recording.

2. To listen to your name before saving, press **1**.

3. To record your name, press **2**.

4. To delete your name, press **3**.

5. To save your recorded name simply hang up or press ＊ to exit.

Msync

Please check with your System Administrator if this feature is available. If available, then your voice mail greetings can be synchronized with your MS Outlook calendar. Appropriate greetings play based on your Presence status in Outlook. This is an optional feature and requires an additional license.

This page is intentionally left blank.

Other Messaging Applications 7

Group Distributions

You can send a new message or redirect a message to a group distribution list. This option allows you to send a message to multiple individuals without having to enter in individual mailbox numbers. For example, if you are a manager you may wish to set up a distribution list that includes all members of your team, especially if you send them frequent voice messages.

There are two options for distribution lists: private and global (public). When you set up a private group distribution list, only you can access and manage this list. A global group distribution list is set up by a system administrator for everyone to use, but only the system administrator may add or delete members, delete the list, or listen to members of the list.

Set up a Private Group Distribution List

1. From the Subscriber's menu, enter **3 6 1** to create a new group.
2. Select a number to save the list under, followed by **#**. You can select any number from 1 to 5 digits.
3. The system will prompt you to record a list name. The list name will help you identify the list in the future. To save the name and continue, press ∗. To listen to your recorded name, press **1**, to re-record press **2**, to delete press **3**.
4. After you save the recording you will add members to the list you just created. Select prompt **4** and the list number, followed by **#**.
5. To add members, press **2**
6. Enter the first mailbox of the person you wish to add. The system will confirm the addition.
7. Continue entering any additional members. Press ∗ when finished.

Add Members to a Private Group Distribution List

You can add members to a pre-existing distribution list at any time.

1. From the Subscriber's menu, enter **3 6 4**.
2. Enter the list number you wish to make changes to, followed by **#**
3. To add a new member, press **2** and the new mailbox number. The system will confirm the addition.
4. Continue entering any additional members. Press ∗ when finished.

Delete Members from a Private Group Distribution List

You can delete members from a pre-existing distribution list at any time.

1. From the Subscriber's menu, enter **3 6 4**.

2. Enter the list number you wish to make changes to, followed by **#**

3. To delete a member, press **3** and then the mailbox number followed by **#**. The system will confirm the deletion.

4. Continue entering any additional mailbox numbers you wish to delete. Press ∗ when finished.

Delete a Private Group Distribution List

In addition to deleting individual members from a private group distribution list, you can also delete an entire distribution list.

1. From the Subscriber's menu, enter **3 6 3**.

2. Enter the list number you wish to delete, followed by **#**

3. The system will play the name of the list and prompt you to press **#** to confirm the deletion.

Listen to Members in a Private Group Distribution List

You can listen to a list of members in a distribution list at any time.

1. From the Subscriber's menu, enter **3 6 4**.

2. Enter the group list number you wish to listen to, followed by **#**

3. Press **1** to listen to a list of the members of the group.

Using a Private Group Distribution List

You can use a private group distribution list when sending a new message or redirecting a received message.

1. Call the voice messaging system and record a new message or forward a received message.

2. When you address the message for delivery, you have the option of inputting a mailbox number or selecting **#** for a private group distribution list.

3. Enter the group number you wish to use followed by a **#**

4. Press **1** to confirm, or **2** to change your entry.

Using a Global Group Distribution List

You can use a global group distribution list when sending a new message or redirecting a received message.

1. Call the voice messaging system and record a new message or forward a received message.

2. When you address the message for delivery, you have the option of inputting a mailbox number or selecting **# #** for a public distribution list.

3. Enter the group number you wish to use followed by a **#**

4. Press **1** to confirm, or **2** to change your entry.

Personal Options

Some Personal Options are optional features which may or may not be available to your organization. Check with your System Administrator if any of these features are available to you.

- Send notification to additional devices when a message is left in your mailbox
- Set a wake-up call
- Change your mailbox password
- Set up your personal assistant
- Forward a call to another phone number using follow-me
- Set up call screening
- Set up do not disturb
- Set up a personal schedule

Message Notification

Message notification allows you to set up a schedule where you are notified through additional devices when new messages are received to your mailbox. Examples of message notification include:

- Receiving a text message to your cell phone
- A notification to a pager
- A call-out to another phone number (e.g., home phone)

Message notification enables you to set a day/time schedule whereby these notifications are sent. For example, if you work from home one day a week, you may wish to be notified at your home number if a message is left in your office mailbox. On the weekends you may still want to know when a new message arrives, but only wish to be notified by a text message to your cell phone. Each separate notification is set up through a separate "notification Line."

Depending on your organization, you may have access to set up message notification directly, or your system administrator may need to set up message notification for you. Once message notification is set up, you can activate and deactivate this feature through your mailbox.

To Activate or Deactivate Message Notification

You can use your phone to activate or deactivate message notification once the schedule has been set up.

1. Call the voice messaging system and select **3 1 1**. The system will tell you whether or not your message notification is activated.

2. If it is not already activated, press **1**.

You may also activate or deactivate individual schedule lines. You will need to know the notification schedule each schedule line refers to.

1. Call the voice messaging system and select **3 1 1**. The system will tell you whether or not your entire message notification is activated.

2. To activate or deactivate a specific schedule line, press **2**.

3. Enter the schedule line number

4. The system informs you if this schedule line is activated or deactivated. To change, press **1**.

Set a Wake up Call

You can set a wake up call to ring a phone (for example, your cell phone) at a specific time during the day. The wake-up ring will repeat everyday until you turn it off.

1. Call the voice messaging system and select **3 1 3**

2. To set a weekday wake-up call, press **1**; to set a weekend wake-up call press **2**

3. The system will tell you whether wake up call is activated or deactivated. To change, press **1**.

4. Once the wake-up call is activated, select **2 1** to enter in a time when you would like to receive the call.

5. Enter in a 4-digit time followed by a **∗** for AM or **#** for PM.

6. The system will confirm the wake up time.

7. Set up the call-out number. This is the number the system will ring at your scheduled time. Press **3** and the system will inform you if there is already a call-out number saved (this allows you to reuse a number without having to enter it every time you set up a wake up call). To change the call-out number press **1**.

8. Enter the phone number followed by **#**

9. The system will confirm the number.

Change your Mailbox Password

Your mailbox password is initially set when you access your mailbox for the first time and complete the mailbox setup process. However, you can change your mailbox password at any time.

To change your mailbox password:

1. Call the voice messaging system and select **3 4 1**
2. Enter a new password
3. The system will ask you to confirm the password.

You can also delete your mailbox password without entering a new one:

1. Call the voice messaging system and select **3 4 2**
2. The system will ask you to press **#** to confirm deletion

Important!   If you delete your mailbox password your mailbox will not be password-protected.

Personal Assistant

With Personal Assistant you can designate buttons that callers can press when listening to your voicemail message that will automatically transfer them to another extension. For example, you may wish to inform callers they can reach your assistant by pressing a number on their keypad.

A Personal Assistant must first be set up by your system administrator to define the key press. Once the key press is set up you can change the transfer extension through your phone. Check with your system administrator to see if any keys are pre-defined in your organization.

To change your Personal Assistant transfer extension:

1. Call the voice messaging system and select **3 7 2**

2. Enter the mailbox of the person you wish the call to be transferred to, followed by **#**.

3. Change your personal message greeting (see Greetings chapter) to indicate to the caller that they can use this key press. For example, "Press **1** to be transferred to my assistant."

Follow Me

Follow Me enables you to set up your mailbox to forward a call to another phone number before the call is transferred to your voicemail. For example, you may be out of the office but are expecting an important call and want all calls to be transferred to your cell phone.

Follow Me is an optional feature that may or may not be available in your organization. Depending on how it is set up can also allow you to:

- Accept a call or reject it and send it to voicemail

- Record the conversation once the call is accepted

- Conference in the operator and stay on the call or drop out

- Conference in another extension and stay on the call or drop out

- Follow Me DND (Do Not Disturb)

- Send a Call Alert to IP Mobility Application

Follow Me feature provides telephone operation integration with the following capabilities.

1. Follow Me feature control button on the phone:
User can assign the button for Follow Me feature and activate and deactivate the feature from the button on the IP telephone to easily change the operation when users are in the office or on the road.

2. Hand-off:
When the user is on the cell phone with the Follow Me call and returns to the office, the call can be easily handed off to the desktop phone by pressing the same button.

3. Status Indication:
The feature key LED indicates the status of the Follow Me feature as shown below.

Button LED	Description
Off	Follow Me feature is not activated. The call should ring the default station (usually the user's desktop phone).
Red	Follow Me feature is activated, and the call will follow the Follow Me personal schedule.
Flashing Red	No Transfer (DND)
Green	The call is being processed by the Follow Me application. When the call is answered by one of destinations defined in the Follow Me personal schedule, the call can be handed off to the desk phone by pressing the button with Green LED. Or it may also mean that the call is handed off to the desk phone if the incoming call is a consultation call in which case the system used extra voicemail resource.
Flashing Green	Follow Me is being handed off to the desk phone.

Note: Follow Me status indicator will be reset if the system restarts while the service may be still active. When the first call is processed, the LED will show the correct status. If necessary, press the button to force sync the status.

Follow Me Key on the Phone

1. Administrator must activate the Net Server.

2. Administrator must assign Net Server integration in the Messaging Registry settings.

3. "Follow Me" button should be assigned to users' IP telephone flexible button using Enterprise Manager or Personal Administration.

4. "Net Server monitor" checkbox in mailbox email setting must be checked. To use this feature, the PDN of the phone must match with the mailbox number.

Setting up Follow Me

From the phone, the user can setup the Follow Me destination (the call-out number) which is always used regardless of the calling party of the time of day.

5. Call the voice messaging system and select **3 1 2 2** from the subscriber's menu.

6. Enter a phone number (the call-out number), followed by **#**, the system will then repeat the number back for confirmation.

7. To activate this call-out number, press **1** or to enter a new call-out number, press **2**.
Once the call-out number is activated, all calls stop ringing at your office phone and will automatically be forwarded to your call-out number. The call-out number destination is also used when the call is forwarded from the desktop phone to the voice mail for the Follow Me Advanced routing.

Accepting or rejecting calls at a call-out

Once a call rings through to your call-out number you have the option of accepting or rejecting the call.

1. Once the Follow me has been set up and a call is redirected to your call-out number and you answer the phone, you will hear a message that indicates you are receiving a transferred call from the voicemail system.

2. Press **#** or **1** to accept the call or **∗** to reject the call and send it to voicemail.

Note: Requires the mailbox COS to be configured for "Follow me connect verification".

Transferring to an Operator or another Extension

If available in your organization, you can transfer to an operator or to another extension once you accept a transferred call.

1. Once the Follow me has been set up and a call is redirected to your call-out number and you answer the phone, you will hear a message that indicates you are receiving a forwarded call from the voicemail system.

2. Press **#** or **1** to accept the call (depending on software release).

3. At any time during the conversation, press **#** again to trigger the call options. You can press **0** for the operator or **#** and another extension number, then hang up.
   …or When using release (10.5.4.18), at any time during the conversation, press **#** again to trigger the call options. You can press **1** to transfer the caller to your Voice Mail, press **3** to record the conversation press **#** and extension to transfer to an internal station press **0** to dial the operator or press **∗** to return to the conversation.

Transfer Mode

Transfer Mode determines the general routing of the call:

- For Automated attendant calls:
    - DND – calls will not be transferred to any destination. They will go to the mailbox greeting.
    - Desk – calls will be transferred to the user's extension.
    - Advanced Routing – calls will be transferred to the destination specified by the advanced routing schedule. If there is no matching schedule, calls will be routed to the user's extension. If a schedule exist but without a destination, calls will be routed to the greeting specified in the schedule.

- For Busy, No Answer forwarded calls:
    - DND – calls will not be transferred to any destination. They will go to the mailbox greeting.
    - Desk – calls will not be transferred to any destination. They will go to the mailbox greeting.
    - Advanced Routing – calls will be transferred to the destination specified by the advanced routing schedule (schedule must include "Divert" in the "follow me active" field). If there is no matching schedule, calls will be routed to the user's greeting. If a schedule exist but without a destination, calls will be routed to the greeting specified in the schedule.

Setting up Call Screening

When call screening is set up, a caller is asked to state their name before the call is transferred to your extension. You then have the opportunity to accept the call or send it to voicemail. If call screening is available in your organization, you may activate or deactivate it through your phone.

1. Call the voice messaging system and select **3 5**.

2. The system informs you if call screening is activated or deactivated.

3. To change, press **1**.

Setting up "Do not Disturb"

You can have calls sent directly to your voicemail when you do not want your office phone to ring.

1. Call the voice messaging system and select **4   1**

2. To deactivate and have calls transferred back to your phone, press **1** again.

Setting up a Personal Schedule

The personal schedule allows you to manage calls according to a schedule you define. With the personal schedule you can:

- Route a call to one or multiple destinations based on caller ID, time, or a combination of the two.

- Play different greetings based on caller ID, time, or a combination of the two.

- Set up alternate dialing menus (allows callers to press digits on the keypad during your message to be transferred to a personal assistant or other extension/phone number, skip the greeting, replay the greeting or page you).

For example, when on a business trip you want your cell phone and a colleague's office phone to ring when a call comes into your extension. If voice mail picks up, you want an alternate greeting played that tells callers you are out of the office, but directs them to press **1** to reach an operator, **2** to leave a voicemail, and **3** to ring a different colleague's extension.

Recording a Scheduled Greeting

Your personal schedule is set up your system administrator, however your messages are recorded through your voicemail box.

1. Call the voice messaging system and select **3 8**

2. Select a greeting number on your keypad between **1** and **9**

3. To listen to the greeting select **2**; to record a greeting select **3**

Unified Messaging

If Unified Messaging is available in your organization, you will be able to access all of your voice and fax messages directly through your email inbox.

You can listen to your voice messages with any audio player and fax messages can be viewed with a standard image viewer. The subject line of voice and fax messages will include caller ID; voice messages will include the duration of voicemail (in seconds), while faxes will show fax sender and number of pages.

Access your Voicemails through Email

If Unified Messaging is available in your organization all of your voicemails will be accessible through your email inbox. Each time you receive a voicemail an email will be sent to your inbox with an attachment that includes a recording of the voicemail. You can open this attachment with any audio player installed on your computer to listen to the recording or on your telephone as shown below.
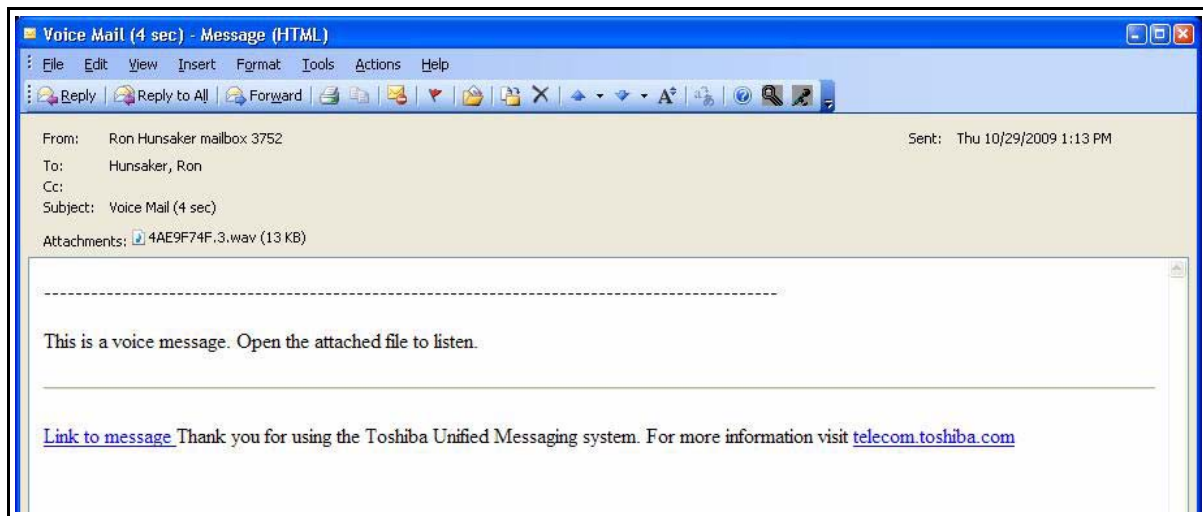
Click the "Link to message" to play your message using the telephone. The following options display. Click on the appropriate button.

Enhanced Presence

When a voice message has been left in the IPedge Messaging system, the enhanced presence feature will detect the contact information from the Personal Contact list from Microsoft Outlook and send an email with the relevant information to the voicemail recipient via email.

From the Personal Contacts list of Microsoft Outlook, it will take the Email, Business Telephone number, and Mobile Phone number and insert it into and email (shown in the following examples) that will arrive in your inbox. The Name of the Outlook Contact is automatically populated in the Subject field.

MS Outlook Contact Interaction

Examples:
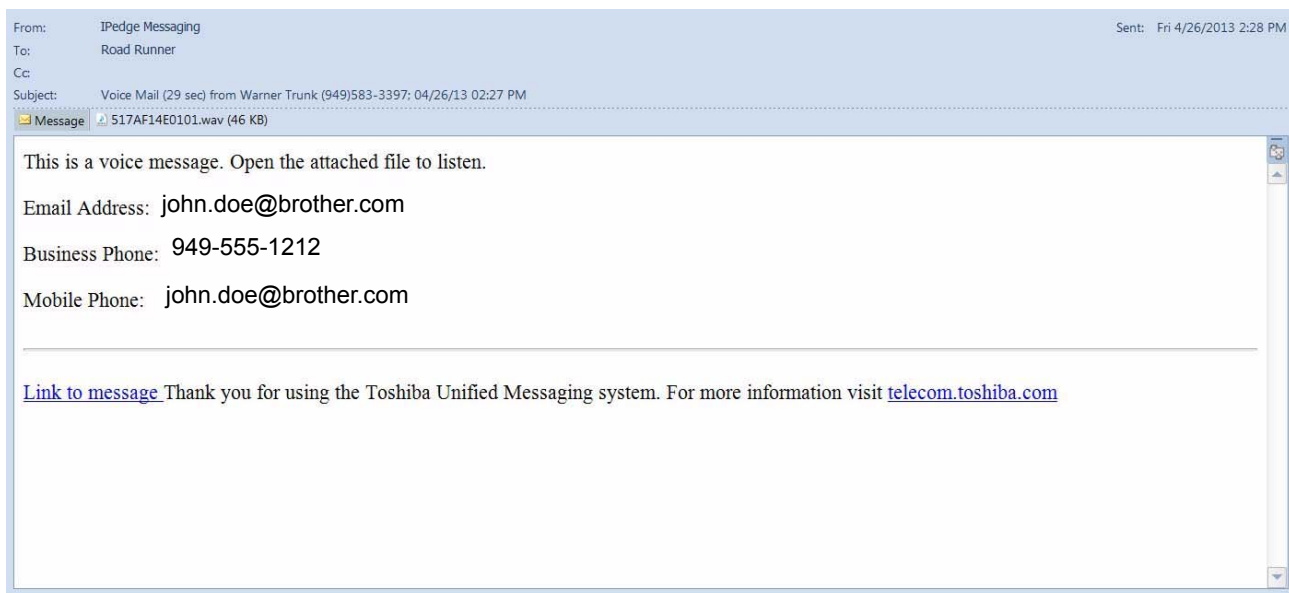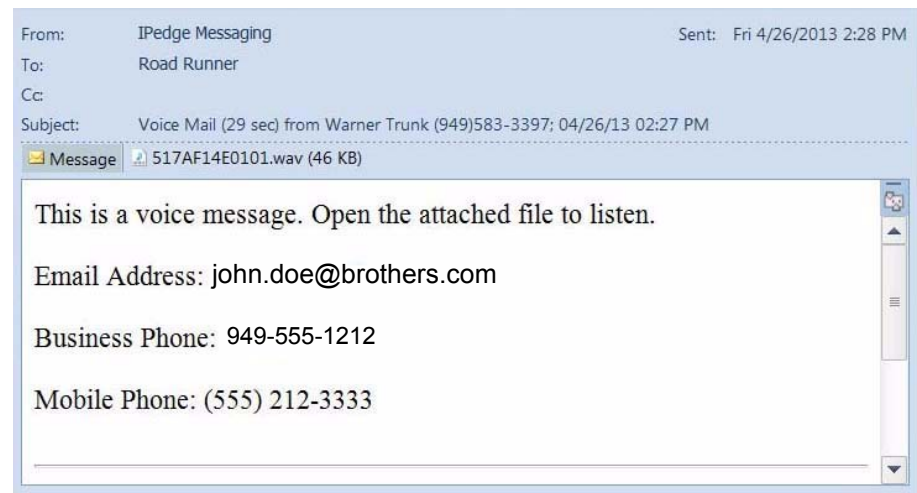
Msync

Based on the presence in MS Outlook, the voicemail will play out of office greeting or anyother appropriate greeting. Check with your System Administrator if this feature is available to you. The options below apply only to the enhanced version of Msysc.

No Answer:

- If Out Of Office Assistant (Automatic replies) is enabled in Microsoft Outlook and/or Extended Absence greeting is enabled: Extended Absence Greeting will be played.
- If Default Greeting is recorded: Default Greeting will be played.
- If Name is recorded: Name + "Is not available right now" will be played.
- Extension + Extension number + "Is not available right now" will be played.

Busy:

- If Out Of Office Assistant (Automatic replies) is enabled in Microsoft Outlook and/or Extended Absence greeting is enabled: Extended Absence Greeting will be played.
- If Busy Greeting is recorded: Busy Greeting will be played 81.
- If Default Greeting is recorded: Default Greeting will be played.
- If Name is recorded: Name + "Is busy right now" will be played.
- Extension + Extension number + "Is busy right now" will be played.

Follow Me / Call Screening rejected:

- If Out Of Office Assistant (Automatic replies) is enabled in Microsoft Outlook and/or Extended Absence greeting is enabled: Extended Absence Greeting will be played.
- If Default Greeting is recorded: Default Greeting will be played.
- If Name is recorded: Name + "Is not available right now" will be played.
- Extension + Extension number + "Is not available right now" will be played.
- During any of the above cases, if there is a match in the Personal Schedule table, the greeting defined for the Personal Schedule entry will be played.

This page is intentionally left blank.

IPMobility Application 8

IPMobility

The IPMobility Application for Android™ and Apple iPhone™ allows a mobile device to act as an extension of the IPedge system by providing incoming and outgoing call features.

Users may also easily access key voice messaging functionality and manage administration of their voice mailbox without dialing into the voice mail system. IPMobility does not interfere with the ability to make a phone call or access the voice mail of the mobile device itself.

The IPMobility Application is available for both Android and Apple mobile platforms. Most features are available on both device types, and any feature differences or exceptions are noted in this chapter.

The IPMobility Application does not conflict with the mobile device's ability to make a phone call or access the mobile carrier's voicemail service.

Key features of the IPMobility Application:

- Make outgoing calls using the IPedge telephone service where the dialed party receives the IPedge system telephone number on their Caller ID
- Accept incoming calls on a mobile device that were made to an IPedge office telephone number
- Transfer or record telephone calls
- One-touch access to voicemail, saved/deleted items, and incoming faxes
- Record and send voicemail to an internal extension, set special call flags including future delivery schedule, priority, confidential, and return receipt notification
- Voicemail administration - change recorded name, password, and new user voicemail setup
- Setup and record presence-based greetings including default, busy, and extended absence
- Establish individual forwarding (Follow Me) destinations for each greeting. Destinations reachable if mailbox is called from automated attendant, and forwarded calls
- Do-Not-Disturb (DND) feature will send Automated Attendant calls directly to voicemail when activated

How it Works

For outgoing calls, IPMobility uses either the Callback or Call-thru process.

Callback

After a destination number is dialed, IPMobility sends a data signal to the IPedge system over the Internet. IPedge then calls the mobile device and asks the user to

press 1 or # to accept the call. After confirmation the system will connect both calls.

Call-Thru

After a destination number is dialed, IPMobility sends a data signal to the IPedge system over the Internet. IPMobility then dials a specific number into IPedge. The system dials the destination number and connects both calls.
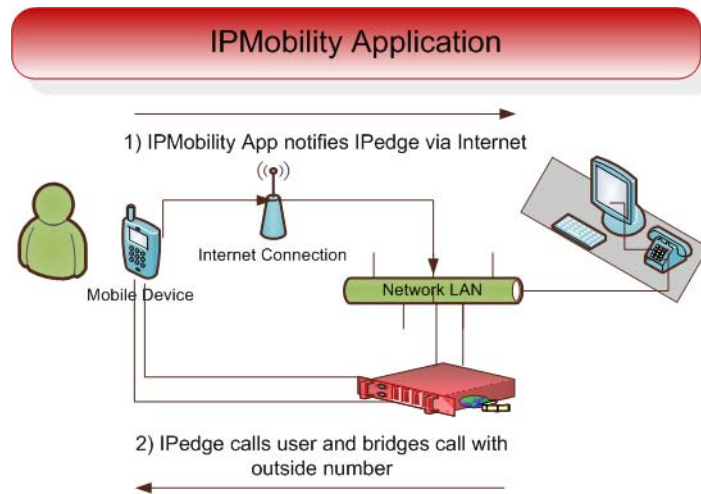
Figure 1 – IPMobility Application Workflow

Before You Begin   Users will need to obtain some information before using IPMobility:

- IP Address of Voicemail - IP address of the IPedge server
- Mailbox number - usually your extension
- Voicemail Password
- Direct Inward Dialing (DID) Number. This is the number for the IPedge system

Download IPMobility Application   The IPMobility app requires internet access to the host IPedge.

Note: Mobile devices require a data plan with an option to enable Wi-Fi access for locations with poor cell network service. The IPMobility App must be installed on the mobile device.

The IPMobility application may be downloaded from Google Play or the iTunes™ App Store.

For Android: https://play.google.com/store/apps

For iPhone: http://www.apple.com/itunes/

Android Users

1. From Google Play, search for IPMobility.
2. Install the App.

iPhone Users

1. From the iTunes App store, search for IPMobility.

2. Download the App.

3. Sync your iPhone with iTunes on your computer.

The app may also be downloaded from the device using the iPhone App Store app (follow steps 1-2 above.)

Launch IPMobility   When the app is opened for the first time, specific IPMobility information must be entered. User will first need to obtain the IP address for the voice mail system (see system administrator.)

First-Time Setup   The app will require some setup before you can make a call or access voice mail. For details see "Before You Begin" on Page 92. Follow the steps outlined below to set up your device for the first time:

Enter the following information on the login screen:

- Voicemail IP Address
- Mailbox Number (normally your extension number)
- Voicemail Password

1. Tap **Enter**.

2. If a warning dialog appears saying "Certificate not trusted", select "Allow/OK".

3. Once you are logged in to IPMobility, tap the **My Info** tab on the lower right.

4. Scroll down and tap **Settings**.

5. On the Settings screen, enter your mobile **Phone Number** and the Direct Inward Dialing (**DID**) number of the voicemail pilot in the fields highlighted in red.

Note: If not already provided to you, see your system administrator for the DID number.

6. Tap to select **Dial Using callback** or **Dial Using Call-thru**.

- **Dial Using callback** will require the user to confirm each incoming or outgoing call by pressing **1** or **#**
- **Dial Using Call-thru** will automatically make the call without any user confirmation (like a normal call)

Test the Application

1. After launching the app on your mobile device, make a call to a telephone with Caller ID capability.
2. Verify that the IPedge Caller ID or DID is displayed (not the mobile phone number.)

Mailbox Setup Wizard

The setup wizard will guide the user through the voice mailbox setup process.

1. Tap **My Info**.

2. Scroll down and tap **Setup Wizard**, then tap proceed to continue.
3. To create or change your voice mailbox password, enter in either field.
4. Tap **Save** when complete.

Note: If **Save** button is not visible, click anywhere on the screen background.
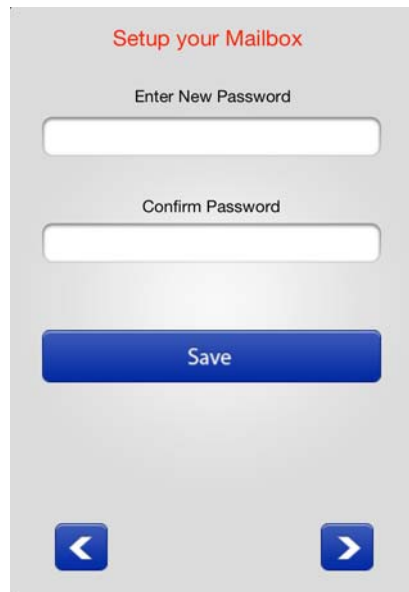
5. Tap the right arrow to advance.
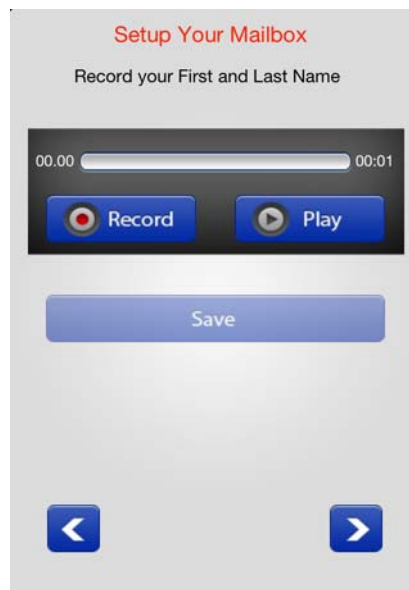
On the next screen, record your first and last name for the voice mail attendant to announce to callers.

6. Tap **Record**; press **Stop** when complete (The **Record** button will toggle between functions.)

7. Tap **Play** to preview the message; tap **Record** to re-record your full name.

8. When complete, tap the right arrow to advance.
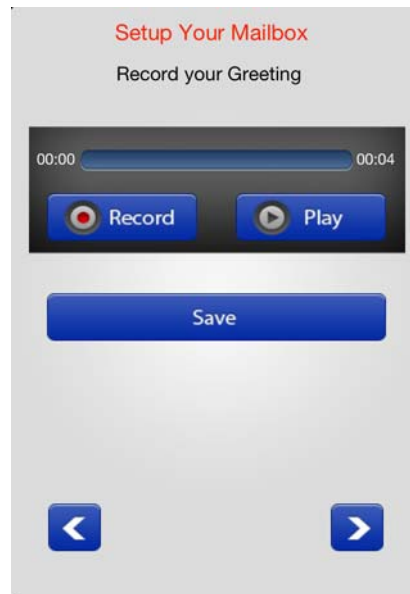
Record a personal greeting for your voice mailbox.

9. Tap **Record;** press **Stop** when complete. (The **Record** button will toggle between functions.)

10. Tap **Play** to preview the message. Tap Record to re-record your voice mail greeting.

Note: For detailed information on these features, see "Callback" on Page 115 and "Call-thru" on Page -116.

Call-thru Send Mailbox

If Caller ID is not being sent from the mobile phone or is unsupported by the IPedge system, or Caller ID is not received, the system will prompt the user to manually enter their mailbox number.

Select this option to avoid having to enter the mailbox number each time it is accessed.

Mailbox Setup Wizard

The setup wizard will guide the user through the voice mailbox setup process.

1. To change your voice mailbox password, enter in the field and confirm in the second field. Tap **Save** when complete.

Note: If **Save** button is not visible, click anywhere on the screen background.
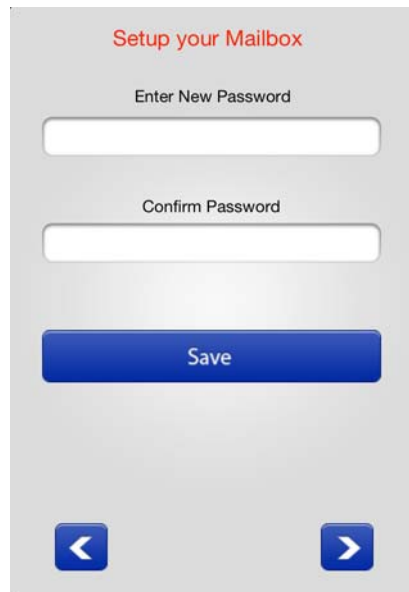
2. Tap the right arrow to advance.
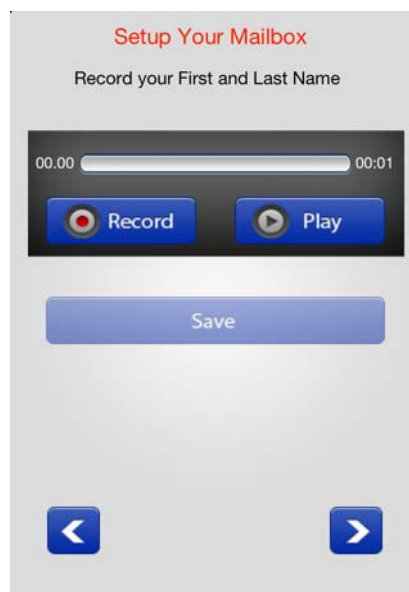
3. Record your first and last name for the voice mail attendant to announce to callers. Tap **Record.** When complete, press **Stop.** (The **Record** button will toggle between functions.)

4. Tap **Play** to preview the message; tap **Record** to re-record your full name.

5. When complete, tap the right arrow to advance.
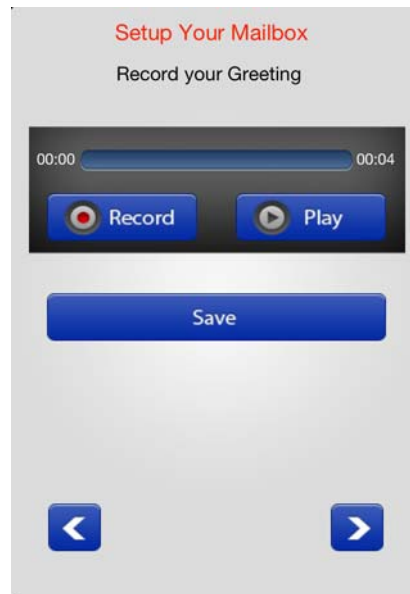
Record a personal greeting for your voice mailbox.

6. Tap **Record;** press **Stop** when complete. (The **Record** button will toggle between functions.)

7. Tap **Play** to preview the message; tap **Record** to re-record your voice mail greeting.

Using IPMobility

Navigating IPMobility is simple. There is a main toolbar at the bottom of the screen with three tabs: Messages, Call, and My Info. Use these tabs to access the various features of the Application.

Messages Tab

When logged in to IPMobility, the Messages screen will automatically displays your Inbox, Fax, Saved and Deleted voice mail Items.

From this screen, you may also record a new message and send it to another mailbox, as well as view any future delivery messages.

Inbox If a new message is waiting, the app displays a message notification. Tap **Inbox** to view messages.
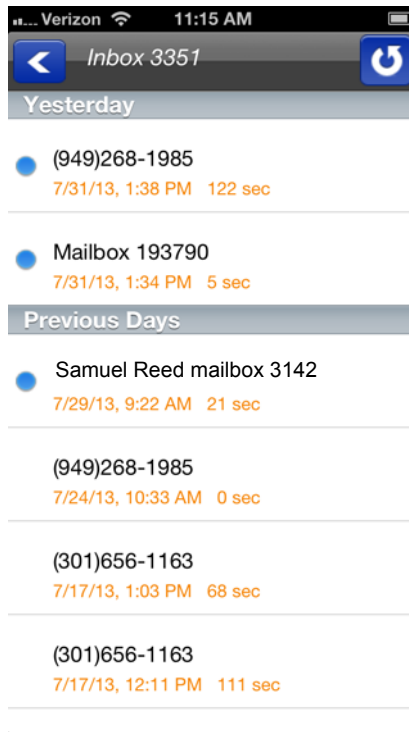
Select the message to listen to it, or **press and hold** on any message in the inbox to delete, save, forward, or reply.

Fax A fax may be viewed, deleted or forwarded via email. Deleted faxes will be moved to the Deleted Items folder.

Saved Items   Saved messages - delete, forward, or reply to saved messages.

Deleted Items   Deleted messages may be accessed from this folder. Messages may be deleted then undeleted (moved back to the inbox), forwarded, replied to, or permanently deleted.

Record New Voicemail   A message may be recorded and sent directly to a mailbox as a voice mail.

1. Enter the recipient mailbox or select it from the address book

2. When the message is recorded, several message options are available:

   - Priority
   - Confidential
   - Return receipt
   - *No receipt notification
   - *Future delivery

For no receipt notification and future delivery you will be asked to input a date and time.

View Future Delivery Messages   This feature allows the user to view all messages that are flagged for delivery at a future date. To send a message using Future Delivery, see "Future Delivery" on Page -104

Message Menu   A message may be deleted, saved, replied to, or forwarded by either voice mail or email from any of the four mailbox screens. Tap and hold the message to access this menu.
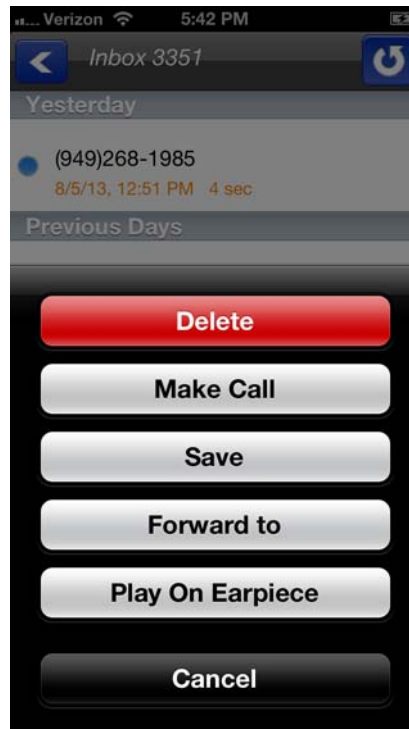
Delete

Deletes the currently selected message.

Make Call

Makes a call back to the caller.

Save

Save the currently selected message to the **Saved Messages** folder.

Forward To

This will forward the currently selected message via email or voice mail.

A message may be forwarded by either voice mail or email from any of the four mailbox screens.

1. If forwarding via email, enter the email address of the recipient. Change the subject header, or the email client will send the message with the subject heading "FW: Voicemail". The user will receive the file in WAV format.
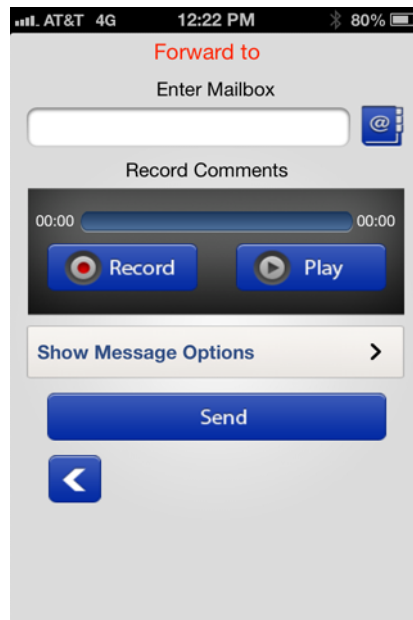
2. If forwarding via voice mail, enter in the mailbox number of the recipient, or select the address book icon to find the mailbox number.

3. Tap **Message Options**.
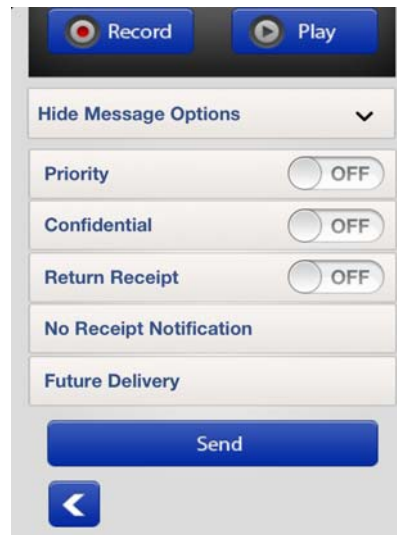
4. A forwarded message may be tagged as priority, confidential, return receipt, no receipt notification, or future delivery.

For no receipt notification and future delivery, users are asked to input a date and time.

Reply

The allows the user to reply to the currently selected message via email or voice mail.

A message from a voice mail user may be replied to via voice mail or email. For voice mail, enter the mailbox number of the recipient, or select the address book icon to find the mailbox number. If replying by email, enter the email address of the recipient.

Users may record comments to be added to the beginning of the message intended for the recipient.

The message may be tagged as priority, confidential, return receipt, no receipt notification, or future delivery. For receipt notification and future delivery you will be asked to input a date and time.

Play on Earpiece

This button toggles the sound output from the earpiece to the Speaker. Tap the button to select the option displayed e.g. if the button reads "Play on Speaker", then it is currently set to play on earpiece. Tap the button to hear the message played through the phone's speaker.

Future Delivery

When replying to or forwarding a message using voice mail, **Future Delivery** is an option that allows the user to send the message on a future date.

1. Tap and hold the message to display the message delivery options window.

2. Select **Future Delivery** from the menu.

3. Select a date from the calendar wheel.
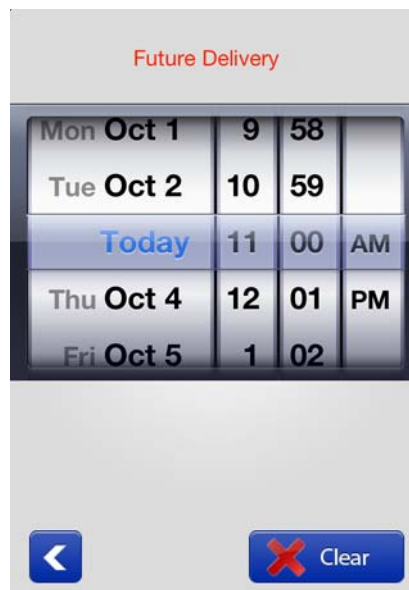
Call Tab The dialpad icon is used for making calls or looking up contact information.

Dial Pad Icon
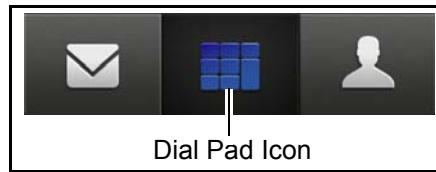
To make a call, enter the number and tap the green Call icon, or press the Address book icon to select from the contacts list.

Active Call icon is to show the call handled by Call Screening, Follow Me, or Callback/Callthru to allow the user to control the recording and/or transfer the call.

My Info Tab

The My Info tab is used to access IPMobility settings for voice mail, greeting management, passwords, default location and settings. There are three functions:

Greeting Management, Logout, and Settings.

My Info Icon

Greeting Management

Change Name

Change Password

Call Settings

Do Not Disturb

Desk

Advanced

Logout

Setup Wizard

About IPMobility

My Info Menu
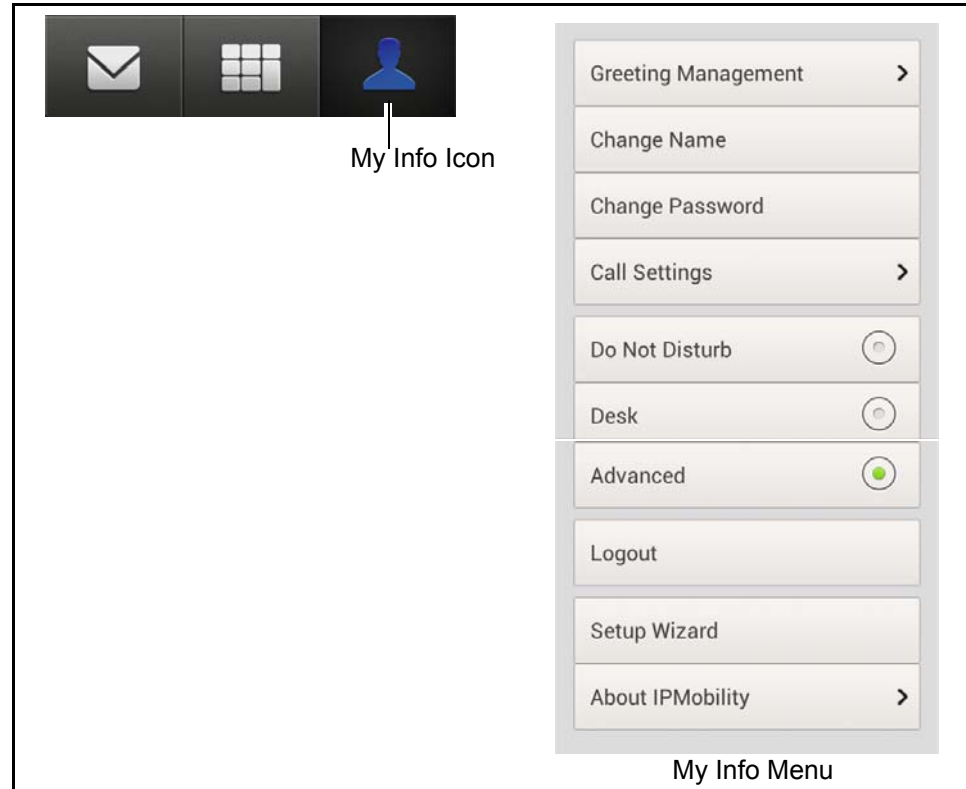
Greeting Management

IPMobility supports mailbox greeting management allowing users to review and record multiple voice mail greetings for different presence states:

- Default
- Extended Absence (EA)
- Busy

Acknowledgement – Announcement played to the caller when IPMobility user selects Announce option in the IPMobility Call Screening.

Custom – Custom greeting can be used to override other greetings.

The system will also allow users to record, playback, and save these state-based greetings. Additionally, users will have the option to select settings for each of these features. Click on the links above for Greeting Management feature descriptions.

Record Greetings

1. Tap **Greeting Management** to access the various system state settings based on your availability.

2. To record a default greeting, tap **Default**.

From the recording screen, follow the steps below
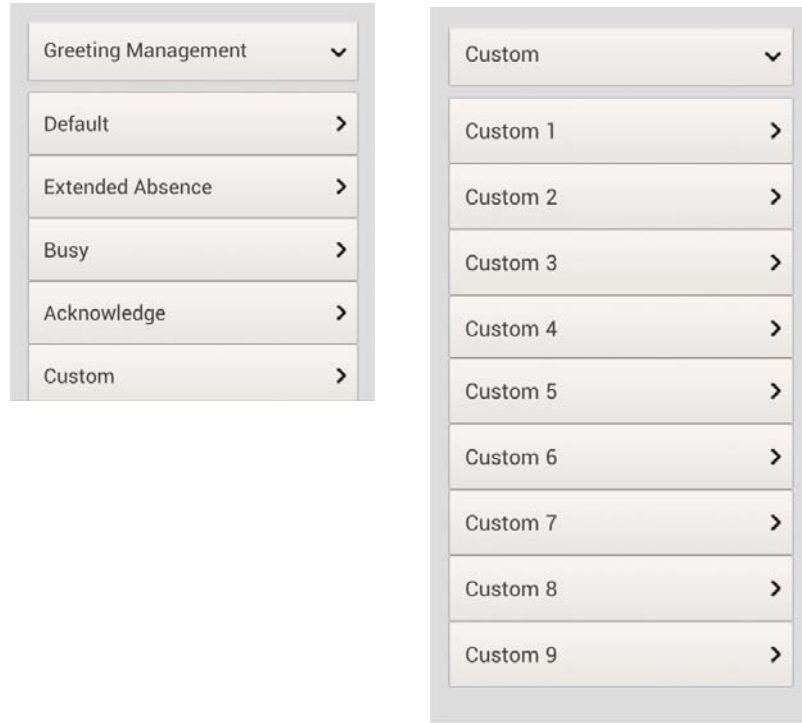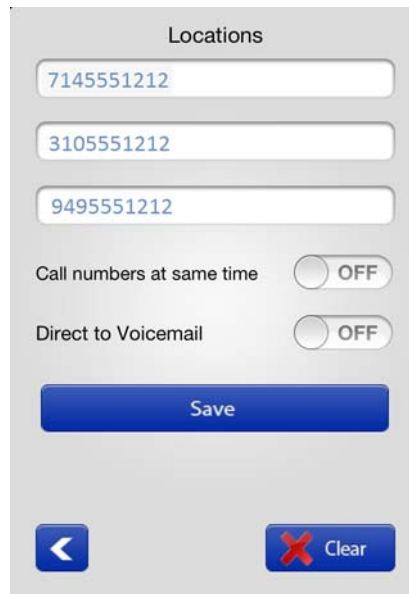
3. Tap **Record;** press **Stop** when complete. (The **Record** button will toggle between functions.)

4. Tap **Play** to preview the message. Tap **Record** to re-record your voice mail greeting.

5. Repeat this process to record **Extended Absence** and **Busy** outgoing greetings.

Note: A Personal Schedule is created automatically for each type of greeting: Default, Extended Absence, and Busy.

Default   Default is the generic greeting which plays unless another has been assigned.

To enable this feature: record and save a new voice mail greeting, and enter destination numbers for follow-me. Follow-me allows users to setup their voice mailbox to automatically forward a call to a different number prior to sending call to voice mail. These may be internal extensions or external phone numbers and may be entered on the **Default Locations** screen.

These follow-me numbers will ring sequentially by default. To have all numbers ring simultaneously, enable **"Call numbers at same time"**.

Extended Absence (EA)
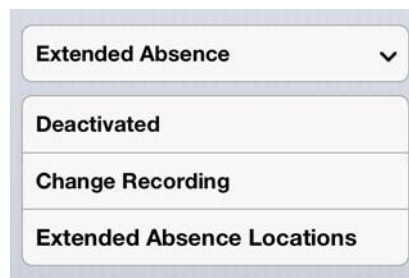
An extended absence greeting is used when you plan to be away from the office for an extended period of time, such as on vacation or business travel.

EA Activated/Deactivated

Change EA Recording

Extended Absence Locations

Click on any of the links above to jump to that feature.

EA Activated/ Deactivated

The Activated/Deactivated button will show the current state of the Extended Absence greeting - tap the button to activate/deactivate. Once enabled, users are notified that the extended absence greeting is playing every time they log into their mailbox. This serves as an ongoing reminder to change the outgoing message to return to default.
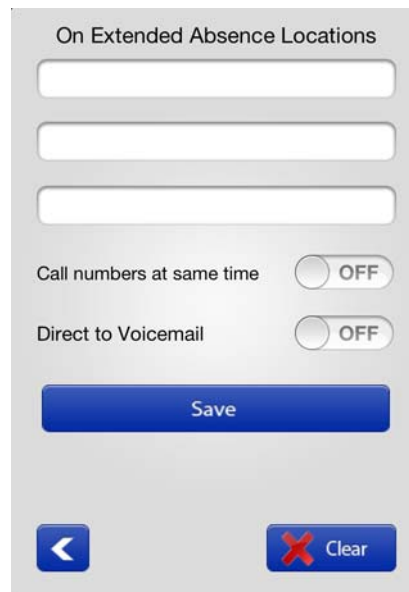
Change EA Recording   To enable this feature:

1. Tap **Change Recording**.

2. Record and Save an extended absence greeting to notify callers that you will be out of the office, or possibly unavailable for a set period of time - use dates whenever appropriate.

Extended Absence   1. Enter the Extended Absence locations (destination telephone numbers.)
Locations
2. Set the switches to dial and ring all numbers simultaneously or direct the call immediately to voice mail.

It is also possible to call all destination (follow-me) numbers at the same time, or direct the call immediately to voice mail.

Extended Absence   To change the Extended Absence greeting, tap **Change Recording**. From the
Greeting   recording screen, follow the steps below

1. Tap **Record;** press **Stop** when complete. (The **Record** button will toggle between functions.)

2. Tap **Play** to preview the message. Tap **Record** to re-record your voice mail greeting.

3. Repeat this process to record **Extended Absence** and **Busy** outgoing greetings.

Busy   The Busy greeting will only play when callers attempt to reach you via automated attendant. Direct calls to an extension, and are forwarded to voice mail will require special programming in order to notify IPMobility why the call is being forwarded (user is busy). Busy destination numbers may be set to call all destination numbers (follow-me) at the same time, or to direct the call immediately to voice

mail.

Change Name   Users may record a name to identify their mailbox to internal subscribers.

Change Password   Allows user to change mailbox password.

Default Location (desktop extension number recommended)   The default location is the default extension number.

Note: This setting is only used when the mailbox is dialed from the automated attendant.

If the number entered in "Default Location" is within the digit length parameters of an extension number, the extension value of the mailbox is updated and all auto attendant calls will be transferred to this number.

If the number entered exceeds extension number digit length, the system assumes the entry to be an outside number. When this occurs, the "Follow Me" destination of that mailbox is set to active and the destination number is updated.

Note: If a Personal Schedule has been enabled for your mailbox, calls that are forwarded to voice mail from your extension are not affected by this parameter.
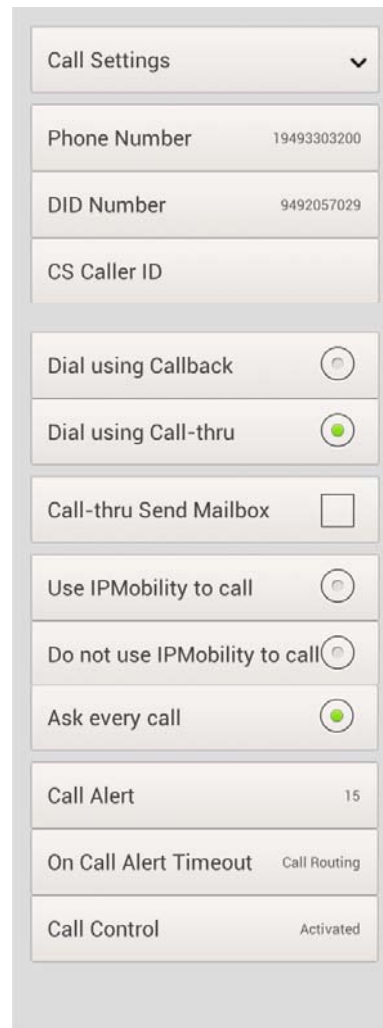
Do Not Disturb (DND)   You may select/deselect the DND check-box to activate/deactivate Do-Not-Disturb for the mailbox. When enabled, all automated attendant calls to that mailbox will go directly to the selected voice mail greeting, and the extension is not dialed.

Greeting Management	>
Change Name	
Change Password	
Default Location	3895
Do Not Disturb	
Logout	
Setup Wizard	
Settings	>
About IPMobility	>

Logout   Logout of the IPMobility Application.

Setup Wizard   This allows first-time system users to establish a new mailbox via IPMobility. Follow the system prompts to setup password, recorded name, and default greeting. (See "Mailbox Setup Wizard" on Page -95)

Call Settings

Phone Number	This is the telephone number of the mobile device. This is also the number that is used when using the "Make Call" feature.
Direct Inward Dialing Number (DID)	This is a specially assigned Direct Inward Dialing number of the voicemail pilot so that the Call-thru feature uses to access IPedge phone services. See your system administrator for this telephone number.
Dial using Callback	Select this option to have the IPedge system call the mobile device first, ask for confirmation by pressing **1** or **#,** then dial the destination number.
Dial using Call-thru	Select this option to have the mobile device call the destination number using the IPedge system without user confirmation.
	Call-thru Send Mailbox

> **Note:** Use this function with the Call-thru feature, only if Calling Party Identification is NOT being sent from your mobile device or is unsupported by the service provider for the IPedge.

Use IPMobility to call (Android ONLY)   Select this option if you want IPMobility to always intercept outbound dialing and route through IPedge.

Do not use IPMobility to call (Android ONLY)   Select this option if you never want IPMobility to be used exclusively for outbound dialing.

Ask Every Call (Android ONLY)   Select this option if you wish to have the IPMobility Application display a notification that it should be used for every call.

Call Screening   Select the time in seconds to wait for Call Screening operation. If 0 is specified, Call Screening is deactivated. Please see Incoming Calls.

Call Control   Tap it to toggle Activate and Deactivate the Net Server Call Control. It can be activated when using Follow Me, and all calls to the desktop phone will be immediately forwarded to the voice mail so that Follow Me operations starts immediately. It is strongly recommended to ring the desk phone in Follow Me setting. Otherwise, the call may not be taken from the desk phone. To use this feature, the PDN of the telephone and the mailbox number must be the same.

New Message Notification

Table 8: Notifications

Android	iPhone
This will enable the automatic message notification in the notification bar on the Android phone. If disabled, the "New Message" indicator will display on the "Messages" page. **Note:** Enabling "Message Notification" (push notification) will set the IPMobility Application to periodically poll the IPedge for new messages, which may decrease the battery standby time.	When the IPMobility App is installed these options can be found under Settings > Notifications > IPMobility > Badges, Sounds, Banners.

Incoming Calls   IPMobility has two options for handling incoming calls.

When Call Alert is activated, the smartphone is notified when the call is routed to the mailbox. The following options are presented to the user, and the user can select the action. Call Alert has the precedence over Follow Me operation which may be activated after Call Screening times out.
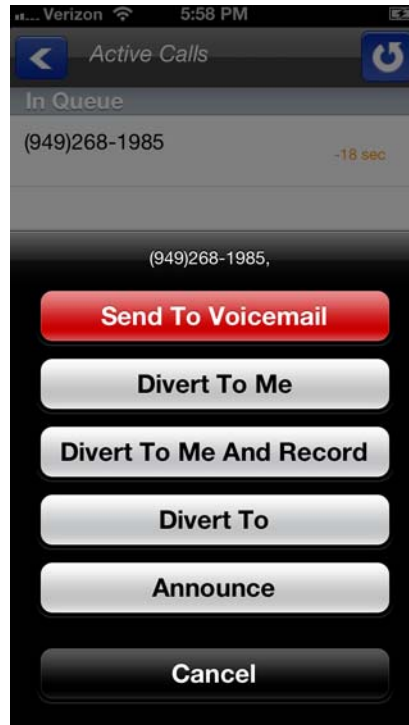
Send to Voicemail   The call is immediately sent to the mailbox so that the caller can leave a message.

Divert to Me   The call is routed to the smart phone to take the call.

Divert to Me and Record   The call is routed to the smart phone to take the call and start recording the conversation.

Divert To   Route the call to the specified destination.

Announce   Play the announcement "Please Hold" to the caller. The announcement can be changed by recording Acknowledge announcement.

The other option is the Follow Me.

If it is active in the mailbox, when a caller dials the office extension from an automated attendant, or the extension timed-out and the caller was sent to voice mail, the call will immediately ring on your mobile device, and the DID if the IPedge system will be displayed. The call may be answered or ignored.

The Caller ID notification may display one or two seconds after the initial ring[1].

Table 9: Answering Incoming Calls

Android	iPhone
1. Answer the incoming call 2. Tap the IPMobility icon in the notification bar, *or* 3. Select **Home** button and select IPMobility, or press and hold the home button	1. Answer the incoming call or tap the banner 2. To open the app, tap the notification or swipe down to open the notification screen 3. Alternately, if the app is already running, double-tap the Home button and switch to IPMobility *Notification settings may be changed in Settings > Notifications > IPMobility*

In Call menu the following screen will display when a call is answered, or when the app is opened after call is answered.
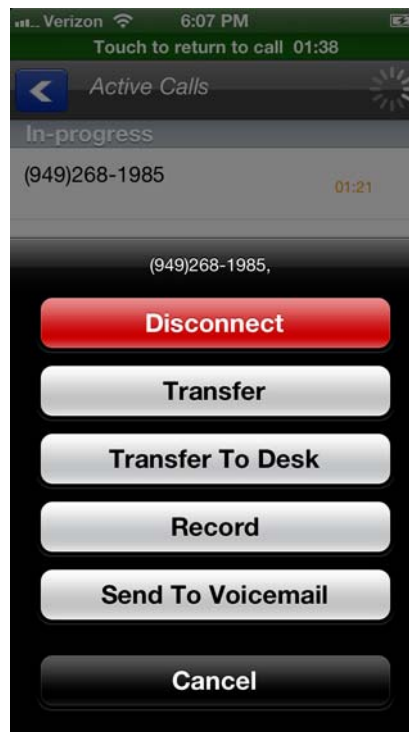
Transfer

1. This function requires simultaneous voice and data capability from the mobile carrier. "Simultaneous voice and data" refers to the ability to access the internet while talking on the mobile device. Some carriers do not support this service; contact your system administrator to confirm if your phone supports notification or pop-up notification.

Transfer the call to another phone number.

Note: Some CDMA-based carrier plans may not support the **Call Transfer feature**

Transfer to Desk

Transfer the call to your office desk. (See Transfer)

Record/Stop Record

Start/stop recording of the conversation.

Send to Voicemail

Send the call directly to your voice mailbox.

Disconnect

This will disconnect the current call.

Callback   To use the Callback feature:

1. Select the [Call] tab.

Note: Android handsets may use the default dialer Application and choose to complete the action using IPMobility; Apple iOS phones do not support this feature.

2. When Call screen opens, enter destination number or select a number from the address book and press dial.

The following call flow example assumes that "Ask Every Call" was set

1. A popup screen will display the option to use IPMobility or the phone for dialing.

2. Select IPMobility.

3. After a few seconds the mobile device will receive a call back from the host IPedge system.

4. When the incoming call is answered, IPedge will automatically dial the destination number.

5. Once the call is connected the same options are available as "Call Screening" (press the IPMobility notification in the notification bar to access if not displayed.)

Call-thru To use the Call-thru feature:

1. Select the [Call] tab

Note: Android handsets may use the default dialer Application and choose to complete the action using IPMobility; Apple iOS phones do not support this feature.

2. Enter a destination number on the call screen or select a number from your address book and press dial.

The following call flow example assumes that "Ask Every Call" was set.

1. A popup screen is presented asking whether to use IPMobility or the phone for out dial

2. Select IPMobility

3. IPMobility will dial the specified number to reach the IPedge and then the destination number.

Once the call is connected you have the same menu options as described above.

Transfer Transfer the call to another extension of telephone number.

Note: CDMA carrier-based plans (such as Verizon and Sprint) may not support the **Call Transfer feature**

Android: While on a call, tap the status bar

iPhone: While on a call, switch to or open the IPMobility App and the screen will display automatically.

Fax Capabilities 9

This section describes how to:

- Send faxes from your desktop
- Redirect fax messages
- Automatically send faxes to a printer

Sending a Fax from your desktop

Fax allows you to send faxes directly from your desktop by using the "print" option from any Microsoft® Windows® program. This functionality is an optional service and you must have the Fax Driver installed. Contact your System Administrator to find out if you have this capability and whether the fax driver is installed.

Note: Fax is supported on Windows XP Professional, Vista Business and Windows 7 professional.

1. Launch the Fax application, accessible from your Start menu, under TAIS > Messaging Fax Driver. Once launched the icon will appear in your System Tray.

2. Navigate to the program your document is created in (for example MS Word) and open the document you wish to fax.

3. Select File > Print from the program's menu bar, and from the printer dialog box select the MessagingFax option from the Printer Name drop-down.

4. The Fax dialog screen (web-based) will open. Complete the following fax sending information.

Address Book icon

Note: To use the Address Book, Microsoft Outlook must be installed on the client PC. If you do not see the address book icon, you need to install the latest version of Java Virtual Machine from java.sun.com. Contact your system administrator.

Recipient   You can enter recipients in one of three ways:

- Manually enter name, fax number, and/or email in the available text boxes.
- Select from your Outlook contacts by clicking the address book icon and selecting Outlook Contacts from the drop down box.
- Select from the internal address book by clicking the address book icon and selecting internal contacts from the drop-down box (see "Setting up the Internal address book" on page 119 on how to add members to this list).

My Info
- This section asks you to input your name, company name, phone number, fax, email address, date, and number of pages of the fax. This information will be used in the fax cover letter if you choose to send one.
- This section will also show you the size (in kilobytes/KB) of your fax.

- Check "Keep user settings on this computer" if you wish to save this information for future faxes.

Options
- Check the "send cover page" check box to input content to be sent in a cover page.
- "Fax quality" allows you to select Standard or Fine resolution.
- If you have a long distance sending code, enter it in the account code field.
- "Billing code" allows you to track internal codes (e.g., codes assigned to different clients) which you can later view through the fax log for reporting purposes.
- "Request CSID" is an additional security feature which allows you to input the CSID you expect the receiving fax to send back. The fax will be transmitted only if this code is received back from the receiving fax.

Server Info
- Obtain the server address from your System Administrator.
- "Username" refers to your mailbox number.
- "Password" refers to your numeric mailbox password.
- Check "Keep user settings on this computer" if you wish to save this information for future faxes.

5. Once you complete the form, select the "Send fax" button and a confirmation page will display. From this page you can view the queue and the log.
- "Queue" allows you to view all faxes you have in the queue and their status (number of tries, any error messages). From this page you can resubmit a fax if an error was encountered as well as delete a fax from the queue.
- "Log" allows you to view details of past faxes you have sent. From this page you can also view a copy of your fax.

If you have access in your organization, you may also view queue and log information through Web Access.

Note: Faxes sent to an email address will be sent as a TIFF (image) file. Faxes sent only to an email address will not display in the Queue or Log files

Setting up the Internal address book
The internal address book allows you to store fax recipient information directly on the server. To set up the internal address book you must have access to Web Access.

1. Log into Web Access
2. Select Mailboxes > Fax > Fax Contacts from the drop down menu.
3. From this screen you can input new contacts

Fax options

1. Log into your Personal Administration page.
Contact your System Administrator for the IP address and log in instructions.

2. Select Mailboxes > Fax. The following options display:

   Fax Settings

   Fax Contacts

   Fax Log

   Fax Queue

   Cover Information

Fax Settings   The details for each of the settings is explained below.

- **Busy/Err Delay** – Number of minutes to wait between attempts when faxing out, if the previous attempt failed because of a busy signal or a transmission error.

- **No Answer Delay** – Number of minutes to wait between attempts when faxing out, if the previous attempt failed because of no answer.

- **Retries** – Total number of attempts to transmit a fax.

- **No. of rings before No Answer** – Number of rings before a fax call times out.

- **Incoming Format** – The format of the fax document that will be sent as an attachment to an email. Select between TIF or PDF. This field also applies to the format of the faxes sent as an attachment to the fax verification email when sending outbound faxes.

- **Personal CSID (Identification Phrase)** – The CSID, both for outgoing faxes and incoming faxes, transmitted for this mailbox.

Incoming Faxes   • **Accept Incoming Faxes Y/N** – This option allows you to select whether to receive or deny faxes. If you select not to receive faxes, this mailbox

will not receive any faxes unless there is a Fax DID defined in the mailbox properties. In this case the fax will only be accepted if the call was received on the Fax DID number of the mailbox. This is to minimize spam faxes to non fax users.

Fax Confirmation	**Outgoing faxes** – This field defines the type of confirmation the user will receive for outbound faxes. The confirmation will be sent as an email to the email address defined in Mailbox-Email Settings under the send mail frame.

• Deactivate: No email confirmation.

• Successful Only: Notification will be sent only if the fax transmission was successful.

• Failed Only: Notification will be sent only if the fax transmission failed.

• All: Notification will be sent for every fax attempt, both successful and failed. |
| **Auto Print** | **Active** – Select this box if you wish to have all faxes automatically sent to a printer. Requires that auto print service is running on a Windows machine on the local office network.

Printer Name – Select the printer name you wish the faxes to print to from the drop down list. |
Fax Contacts	This list is used by the Printer driver (clicking on the Phone Book Icon).
Fax Log	Record of past Faxes sent using the printer driver.
Fax Queue	Displays any faxes currently being processed.
Cover Information	Cover page Information (entered when printing a fax). You can use this page to maintain cover page information that is used when sending a fax from your desktop.

Redirect fax messages

Depending on your organization's licensed features, you can check if you have fax messages in your message box. The system will tell you how many faxes you have and will allow you to redirect all of them at once to a fax machine for printing, or review them one by one to redirect to a fax machine.

1. Call the voice messaging system and select **1 3** from the subscriber's menu.

2. Press **1** to redirect all faxes to a fax machine or press **2** to review each fax one by one and decide if you wish to redirect to a fax machine.

3. Once you make your selection of the faxes you wish to have redirected to a fax machine, the system will prompt you to enter in the phone number of the fax machine to which you wish to redirect the faxes to; then press **#**.

4. Press **1** to send to the fax machine; press **2** to enter a different number.

This page is intentionally left blank.

Call Manager Basics 10

The IPedge Call Manager works with Net Server to provide a powerful "PC-Phone" to enhance productivity for telephone users.

The Call Manager is designed to run on a PC with Microsoft® Windows XP, Windows Vista, Windows Server 2003, Windows Server 2008, or Windows 7 operating systems connected to a standard TCP/IP network with the Net Server. The Net Server must be installed with the proper software license(s) for Call Manager to operate correctly. Call Manager will operate in Demo Mode if the appropriate licenses are unavailable. Demo mode lets you use the software for Demonstration purposes only for a limited period of time.

There are two levels of IPedge Call Manager:

- Call Manager Standard version is free to all users of the IPedge system. The license (I-CM-STD1) for Call Manager Standard is included in the user license bundle at no additional charge.

- Call Manager Advanced version provides enhanced functionality, including full Unified Communications (UC). Purchase Call Manager Advanced license
(I-CM-1) when full UC capabilities are required.

Note: All Call Manager user features are described. They may or may not work depending on the license.

Call Manager provides the following major functions:

- It allows you to place, answer, handle, view, and manage phone calls using your computer screen, keyboard, and mouse.

- Using the VoIP Audio capabilities can provide a complete speech path when using a PC with the proper speech component support.

- Rules and actions can be set up to automatically activate when calls arrive even while you are away.

- It can easily interface with many popular programs (like Microsoft Outlook, Goldmine, ACT, etc.). This allows you to dial from and "screen-pop" into these programs or the Internet / Intranet.

The Main Screen

This section gives an overview of the main user interface of the Call Manager, including the buttons, displays, and indicators, which allow you to easily and efficiently operate your phone. Call Manager provides two views, Compact and Expanded, allowing you to operate using only the space on your screen that you want.

Note: You can easily change the color scheme of your Call Manager by clicking drop down next to the Set the color scheme icon. The color options are Blue, Silver or Black.

The Compact View

In "Compact" view Call Manager consumes minimal screen space but still provides the user with indictors, information, and buttons to effectively operate the phone. This view is most effective when users handle one call at a time, or have very little available screen space. Below is a sample view and information about the various parts of Call Manager.

Main Menu Button

Companion Application tabs
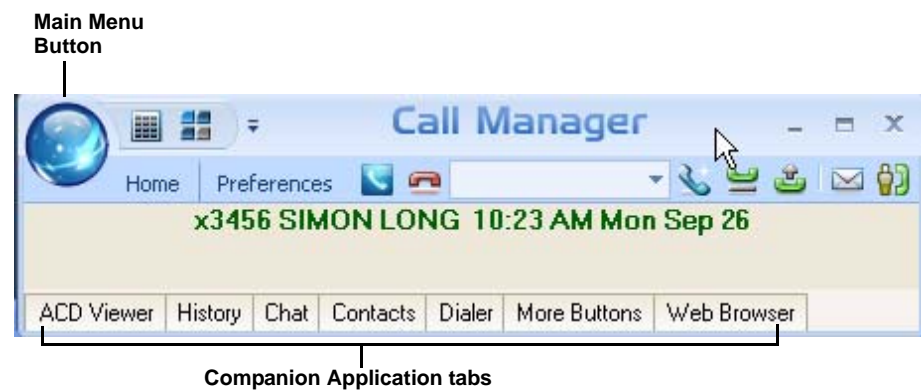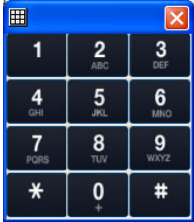
Note: The button information below is independent of the compact or expanded view. However, the buttons that are visible in the compact view are explained first and the additional buttons are explained in the Expanded view section.

Button / Icon	Description
Main Menu	Click this button to access Call Manager configuration menus and Help.
Close Button	Hides Call Manager into the system tray. Double-click on the Call Manager icon (shown right) in the system tray to return the Call Manager to the screen.
Minimize Button	Used to change the phone to/from its "Compact" view and its "Expanded" view.

Button / Icon	Description
Tabs – Home, Preferences	The tabs control various functions and settings. • Home – has some of the basic telephone functions, such as Make Call, Answer, Hold, Transfer, Hangup, Forward, DND On/Off. It also contains Personal Call Manager Action settings. • Preferences – contains General configuration, Hot Keys, Dialing, and Docking. It also has tab settings, such as Add, Update, Delete, and Revert. It also contains the skin preference and advanced menu such as call and event information.
Icons on the Right	(L to R): Toggles compact and expanded mode, color scheme, voice message indicator, open personal call handler. These functions are explained below or in other chapters.
Information LCD Display	This window simulates a phone LCD and provides different types of information depending on current status. If your phone is idle, it shows the date/time, Extension number, and current Name. While a call is active on your phone it shows information about the call – Duration, CallerID or Name (if present.) When a call is active in the window, right-click on the LCD to access to popup a menu of call control options.
Message Waiting Indicator	This indicator blinks a Red light above the envelop icon (shown left) when you have messages waiting.
Side Window Rollout Button	Press this button to show a side window that has additional programmable buttons.
Companion Application tabs	A number of optional companion programs can be configured to add significant functionality to the Call Manager. Each Companion Application is docked in the pane at the bottom of Call Manager to provide easy access to the features/functions of the application.
Home Phone tab	The first four keys allow you to (from left to right) Answer, Hold, Transfer, and Hang up a call. Should you forget, you can hover your mouse over a key to be reminded what function a key performs.
Do-Not-Disturb Key and Indicator	Displays the current Do Not Disturb status of your phone. Hover the mouse over this area to see the current DND status message. Click to change your DND status and message.
Call Forward Key and Indicator	Displays the current "PBX call forwarding" status for your phone. Hover the mouse over this area to see the entire FWD status. Click to change your PBX forwarding status and destination.

Button / Icon	Description
Dial Pad Button	Click the dial pad button to expose and hide the popup Dial Pad. Use the Dial Pad when you reach a recording that says "...Press 1 for sales, 2 for support,...". When this dial pad is displayed you can use your mouse to click the digits to dial or use the number keys or NumLock keypad on your computer keyboard to dial digits.
Make Call Button	Click the Make Call button to dial the number shown in the Dial Buffer.
Dial Buffer and Redial Selection	Type a number into this space and press Enter or click the "Dial" button to the left of the box. Click the drop-down arrow to view the last 10 outside phone numbers you dialed. Select a number from the drop-down and press Enter or click Dial to redial that number. You can even Copy/Paste phone numbers from other programs into this window to dial. You may also include letters in the dial number – Call Manager automatically converts the letters to the matching numbers on the telephone keypad (e.g. 1-800-IFLYSWA).
Volume Controls	These buttons control the volume when the VoIP audio interface is used.
Audio Control	The audio control is your line button with a status indicator for that line when using the VoIP audio interface. Right click the button to see the Audio Configuration menu.
Recording Button & Indicator	The indicator light works in conjunction with OAISYS Tracer and OAISYS Auto Call Record. Users with appropriate permissions will have this indicator on their Call Manager. If the light is red, this means the user's call is currently being recorded. If the light is gray, it is not being recorded. The user can click on this button and select 'Start Recording' to initiate recording of the call. If the call is being recorded the user can click on the button to terminate the recording.

A number of shortcut keys allow you to use the keyboard in place of the mouse to control Call Manager. The list of Shortcut keys can be found using the menu selection Setup>Shortcut Keys. Note: The F1 key is the HELP key a can be pressed at any time to access the Help document.

Expanded View   In "Expanded" view the Call Manager is enlarged beyond the compact view to provide the user with additional buttons, indictors, information to manage multiple simultaneous calls and to access many other features. The follow describes the additional items in the "Expanded" view.
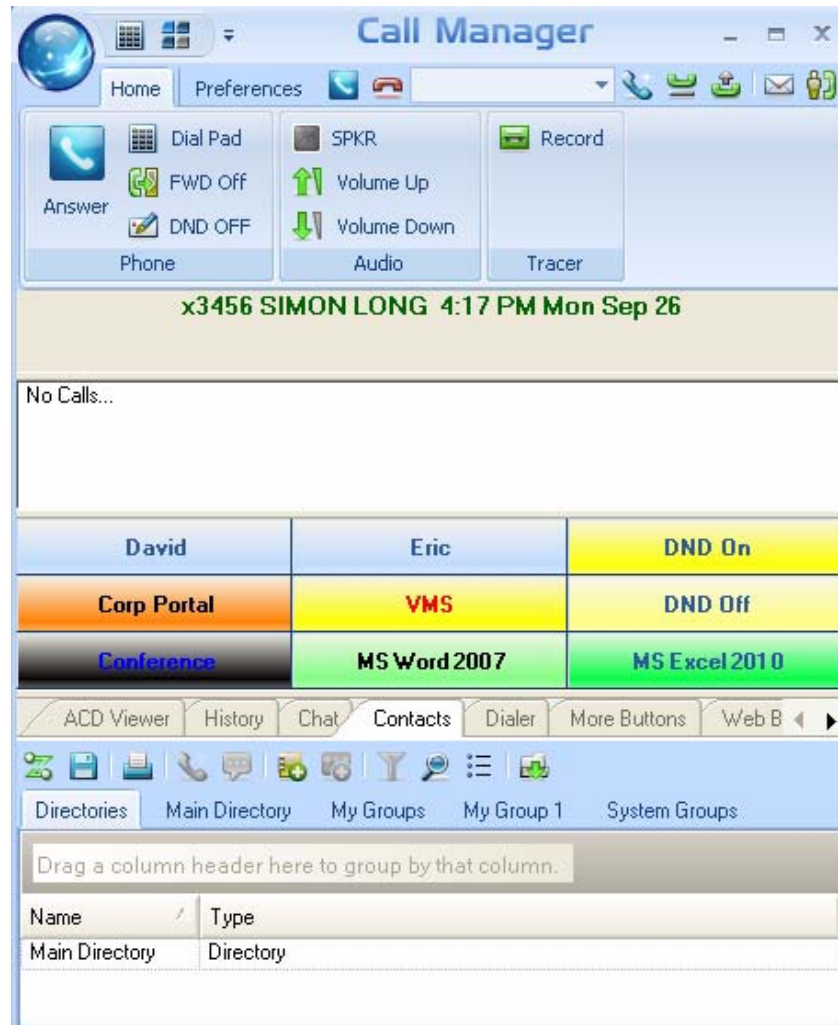
- **Calls Window** – This window displays that status and associated information for each active phone call on the phone. Thus you can easily view and manage multiple phone calls. Right click the mouse on any call to view a menu of options for handling the call (like Hold, Transfer to Voice Mail, Hang Up, etc.).

- **Call Info Indicators** – on the right side of the Call Window is a "Call Info Indicator" that indicates if Extra call information is attached to a call. A gray notebook icon means no information is attached, a blue notebook icon means standard information is attached, and a red notebook icon indicates priority information is attached to the call. Press the Call Notes icon to view or change Notes information on the call. Notes are retained with the call even when you transfer it to another person. You may use Call Notes with an IVR to attach a Customer Name, Credit Card Number, and Zip Code to the call before you answer, saving you from asking the caller for this information.

- **Programmable Buttons** – A number of keys can be easily configured by the user as "Feature" keys, "Speed Dial" keys, "Call" keys, "User Action" keys, etc.

To change one of these keys simply Right-click the mouse over the key and use the Setup Key window to configure the settings for the key.

- ACD Buttons – ACD keys are programmable buttons that would give ACD agents easy login/logout of ACD groups. These keys also display the current ACD agent status, and allow agents to control their Wrap-Up mode.

Screen Docked Views

Call Manager provides a screen-docking feature where the Call Manager can dock to the top or bottom of your PC screen. When screen docked the Call Manager takes on a very low profile using only a small portion of the screen, and stays accessible even when other applications are maximized.   This allows user's to access the features of Call Manager while consuming a minimal amount of PC screen space as shown below. This is not the default, the default docked profile is the regular expanded view.

Screen-docked profile

Most of the phone display, buttons, and controls that appear on each screen-docking profile can be chosen by the user from the "Docking Tab" in Call Manager Preferences.

Call Manager Main Menu

To reach Call Managers Main Menu, click on the CM icon/menu in the upper left-hand corner.   The Main Menu opens as shown below:

The Main menu screen menu item expands into an ability to Change the Login settings, an ability to reset the phone to its default settings, access help, and check the Call Manager version and serial number.

Shortcuts   You can use the KeyTips to execute various commands. The KeyTips available in
                     CM are explained below.

KeyTips   KeyTips allow for easier keyboard navigation. Each tool on the Ribbon has a
                     KeyTip assigned to it which you can navigate with using your keyboard. To begin,
                     press Alt. Small boxes with letters inside appear over various tools on the ribbon.
                     To use that tool, press the letter. For example, press 'Alt + C' to use the "Compact"
                     button.

                     If the tool is a container-type tool (such as a Ribbon Tab, Drop-down menu, or the
                     Application menu), pressing the associated KeyTip will show the KeyTips of tools
                     in that container. From there, you can press another KeyTip to use a tool in that
                     container, or press Escape to return "up" one level, showing the keytips from
                     before. For example, press 'Alt + A' to transfer to the Actions ribbon tab, then
                     press 'N' to launch the New Action dialog box.

                     Note: If you want a tool to be available without having to navigate the ribbon,
                     you can add it to the Quick Access Toolbar. Tools on the QAT respond to
                     Alt+1, Alt+2, etc.

Hot Keys   CM also has "Hot Keys" for dialing and popping up (to quickly answer calls), which
                     can be set in Preferences > Hot Keys.

Call Alert   When a call rings the phone, the alert window pops up, and the user can answer
                     the call from the pop up window or the open the Call Manager main window.

The Side Window Screen

Click the "Side Window" button on the main screen to cause the side window to appear just to the right side of the main window or below when the main window is docked. The side window provides access to the Personal Call Handler window and additional programmable buttons can also be reached.

This window is docked to the side of the main window. You can move the side window around the screen, but whenever the main window is moved the side window will move with it. And likewise whenever the main window is minimized (into the system tray) or restored, the side window will move with it.

Call Handler Mode
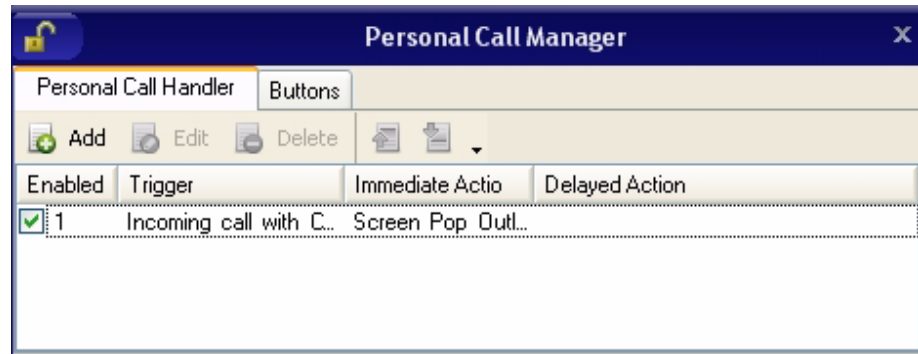
- Call Handler Management Buttons – Used to Add, Change, or Delete Personal Call Handler rules.

- Close Button – Use to close the Call Handler window.

- Call Handler Rules Window – Displays the current Call Handler rules along with an enabled (checked) and disabled (unchecked) box per rule. The triggering event is show in blue text while the action to take place is shown in red text for easier viewing.

- Buttons tab – Use to switch the window from the "Call Handler" mode to the "Buttons" mode.

Buttons Mode

Below is a sample view of the side window screen in Buttons mode, which provides 25 user-programmable buttons for the user.

- User Programmable Buttons – A number of keys can be easily configured by the user as Feature keys, Speed Dial keys, Call keys, User Action keys, ACD keys, etc.

Companion Application Windows

Companion Application tabs open as the result of clicking one of the Call Manager tabs. These windows open docked (connected) to the main window or can be undocked (moved away) from the main window. (Each side must be enabled in the "preferences/docking" drop down list). While a companion window is docked with the main window, whenever the main window is moved the companion window will move with it. And likewise whenever the main window is minimized (into the system tray) or restored, the companion window(s) moves with it.

When companion windows are undocked, they float separately from the main window and can be moved and resized separately. Use the Fly out / Fly in icon (shown right) to dock and undock companion applications.

All companion applications can dock to the top, bottom, left or right side of the desktop. When docked, the companion applications can be arranged in various configurations (vertically, horizontally, pinned, unpinned). To dock a Companion Application window to one of these edges, first undock the window from the main window. Then, drag the companion application window until one edge overlaps the screen's edge. When you release the mouse, the application will dock to that edge.

You can drag multiple application windows to the same edge to place them in a shared dock. This will allow you to resize each window by dragging the splitter bars, or move it to a different position in the dock by dragging the application titlebar to various interior edges of the dock. The More Buttons companion application changes configuration to show in a single vertical column when docked, to allow a thin docked area which preserves screen area.

Screen Colors

The Call Manager has three color schemes. To change the color of your display, click the Color drop down and select either Blue, Silver or Black.

Color icon

This page is intentionally left blank.
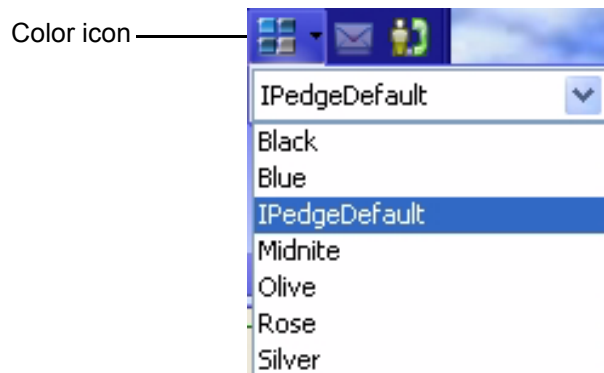
Using Call Manager Features 11

This chapter defines how to use the IPedge features using Call Manager. Features included are Call Handling, system, Call Center, and Microsoft Outlook features. Personal Call Handler (PCH) rules can be created to respond and take actions on calls automatically, or Programmable Buttons can be used for even easier access to many features.

Call Handling Features

Call Handling features include how to dial, answer, hold, transfer and hang up calls. It also includes how to view the Extra Call Information when attached to a call.

Making Outgoing Calls

Call Manager supports a number of ways to place calls including open architecture links to other programs or contact managers, which can also be used to dial calls. The following are some of the typical ways to place a call using Call Manager. Most of these functions are found on the Call Manager Home tab.

Manual On-screen Dialing

1. Click within the dial number box and enter the number from the keyboard (shown below).

2. Press Enter when done to start the number to be dialed.

Dial Number Box

Re-dial a Recently Used Number

1. Pull down the list of numbers in the dial number box and select the number to dial.

2. Click the Make Call button to dial.

Using Call Manager keypad

1. Click the keypad button ▦ to expose the keypad.

2. Enter the number to be dialed including a trunk access code; the call will proceed automatically once a valid number is entered.

Hot Key Dialing

1. Highlight a telephone number in another application.

2. Using the keyboard, press the key combination assigned for Hot Key Dialing. The call will proceed dialing the number highlighted.

Using Drag and Drop

• Use the mouse to drag and drop a call from either the Call History or Contacts tab list into the LCD Display window. The call will proceed to dial.

Using Contacts / Personal Speed Dial List

1. Click the Contacts Companion tab to open the contacts page, and navigate to a Directory or Group.

2. Make a selection from the listing and double-click the name to proceed dialing.

    or right-click on the selected name and choose Call Now to proceed.

Using Call History to Re-dial a Number

1. Click the History Companion tab.

2. Scan the list for a recently dialed number or look for a number of someone that called you.

3. Right-click on the line with the person to call and select Call Now

    or double-click on the line with the person to call.

Using Speed Dial User Button

• Click on a User Programmable button that has been programmed as a Speed Dial button. The call will proceed immediately.

Answering Calls

Typically the longest ringing calls are answered first, but calls can be answered in any order with a click of the button.

To Answer Oldest Call

• While a call is ringing, click the Answer button.
  or double-click on the top call in the Calls View Window.
  or press the Answer Hot Key (F9).
  Note: Call Manager must have focus for the key to work.

To Answer Calls in Any Order

• Double-click on the selected call in the Calls View Window.

To Answer a Call while Talking (Call Waiting)

• While on an existing conversation, another call may ring. The existing call can be placed on hold and the ringing call answered.

- While talking on an existing call and another call rings in (not marked "camp-on"), click the Answer button

  or double-click on the ringing call in the Calls View Window

  or press the Answer Hot Key (F9).

  Note: Call Manager must have focus for the key to work.

Hang Up · Hanging Up or Disconnecting Calls

- When the call is completed, click the hangup button to disconnect the call

  or right-click on the call in the Call View Window and select Hangup.

  or press the Hangup Hot Key (F12). Note: Call Manager must have focus for the key to work.

Holding Calls · To Place Call on Hold

- While talking with a caller, click the hold button to place call on hold

  or right-click on the call in the Call View Window and select Hold from the menu.

To Retrieve Call

- To re-connect a held call, click the hold button again

  or press the answer button.

  or double-click on the held call in the Call View Window

  or right-click on the held call and select Answer from the menu.

Transferring Calls · Using Transfer Button

1. While talking with a caller, click the transfer button to get intercom dial tone

   or right-click on the call in the Call View Window and select Transfer.

2. Using the keyboard enter the number to transfer the caller to, press Enter when done.

   or use the on-screen dial pad and dial the number. Once the system recognizes a valid number, the call will proceed automatically.

Using Drag and Drop

- While talking with a caller, use the mouse to drag and drop the call from the Calls Window onto a DSS button for immediate transfer to another station.

  or use the mouse to drag and drop the call from the LCD display window onto a DSS button for immediate transfer to another station.

Call Forwarding

To Set Call Forwarding

1. Click the FWD Off button.

2. Choose a Forwarding type from the pull-down listing (shown below).

3. Enter a Destination for the forwarded calls.
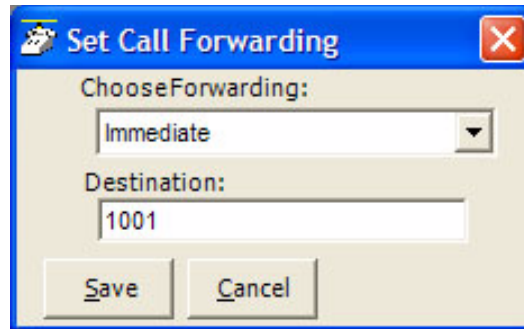
4. Click Save to compete the setting.
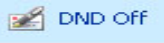
To Clear Call Forwarding

1. Click the. button

2. Choose <None> from the pull-down listing.

3. Click Save to remove the previous setting.

Status Messages and DND

Status messages is available under the DND Off option.

Setting a Status Message

1. Click the [DND Off] button to bring up the Set Status Message window. The following screen displays.
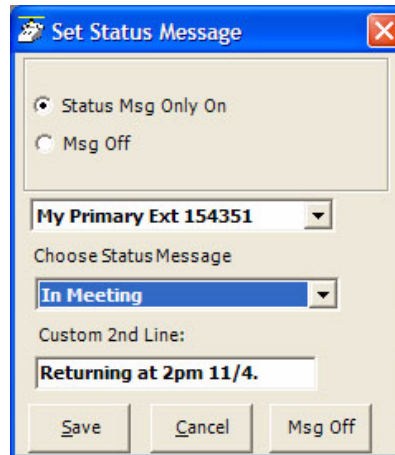
2. Change the selection to Status Msg Only On

3. Use the pull down listing and select a Status Message.

4. When needed enter additional information on the Custom 2nd Line.

5. Click the Save button when done. The status message will appear on the DSS keys throughout the system.

Turning Off DND or Message Only

1. Click the [MSG On] button to bring up the or Status Message window.

2. Click the Msg Off radio button to remove the Status Message.
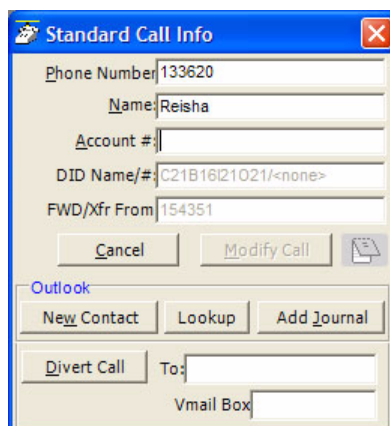
Viewing Extra Call Information

Call Manager has the ability to attach, retain, and display extra information taken on a call. This could include information input by an IVR, added/ attached information by the Call Router, attached from a database, or added by any user who handled the call. This information is retained with the call as it is transferred about in the phone system. The following Call Info icons are displayed in the Calls window or LCD Display to indicate the presence of additional information. The icon changes color depending upon the information available:

- 📝 – No call information attached to this call.

- 📝 – Normal call information attached to this call.

- 📝 – At least one field of priority call information is attached.

To View Call Information

Right click the "Call Info" icon 📝 on the right side of the Call key for the desired call. This window can contain many different fields depending on your configuration and the call information attached. Note: These windows can automatically popup whenever a new call arrives by using the Popup Call Info Screen action in the Personal Call Handler.

To Add or Change Information

1. With the "Call Info" window open, place the cursor into the box to be changed and use the keyboard to add or erase information.

Note: The ability to add or change information is controlled by Preferences > General > Extra Info settings.

2. Click the Update button to save the new information. Once changed, other programs will use this information. For example, the call is being screened and transferred into an ACD queue; the caller could define a Preferred Agent by entering an agent's ID into the Preferred Agent Information field. When the call is transferred this information is available to be used by the ACD application.

To Copy Call Information to Another Application

With the "Call Info" window open, click the Copy button to place that specific information on the Windows clipboard for pasting into another program. For example, the user may need to use the Customer number to look up the status of an order. Clicking Copy and switching to the other program and pasting into the appropriate field allows for a fast lookup.

Call Center Features

The ACD actions can be used to Log In / Log Out to/from ACD groups. Going temporarily unavailable and an ability to end wrap times can be part of the features available. Additional Call Center features are possible using User Programmable buttons.

Logging In or Out

Click the ACD Login button to open the ACD Login/Logout window.

Note: The right list box shows available groups for the identified agent number. The left list box shows groups currently logged into.

To Log Into or Out Of one or more groups

1. Highlight the group name(s) in the right-hand box and click <<Log In. If your Agent ID is listed as a Supervisor, then the Supervisor: Take Calls check box will be offered on your screen. Placing a check in this box will log you in to take calls for the group(s) selected when <<Log In was pressed.
2. Click Done when finished.
3. The ACD Key will display the number of ACD groups the extension is logged into and the total number of ACD groups you are a member.

To Log Out

1. Highlight the group name(s) in the left-hand box and click the >>Log Out button.
2. Click Done when finished.

Changing Agent Status

1. Click the ACD Status button. The following ACD Agent Status window will appear:
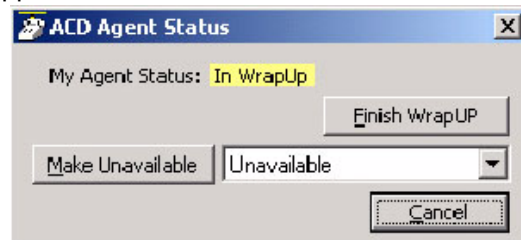
To Make Agent Unavailable

1. Use pull-down list and choose a reason.

2. Click the Make Unavailable button.

3. Click Done.

To Make Agent Available

1. Click the Make Available button.

2. Click Done.

To Set the ACD Status to Wrap-up

1. Click Set Wrap-up button.

2. Click Done.

Note: The Set Wrap-up button is NOT available on all installations.

To End Wrap-up

1. Click the ACD Status button.

2. Click the End Wrap-up button.

3. Click Done.

Preferences

12

PREFERENCES

This section defines settings that are available to the user and can be changed to meet their needs. A number of additional settings are available for the System Administrator for setting more advanced features such as controlling access to some features, creating a server-based rules and configurations. This section will concentrate on the settings readily available to the user.

These settings are arranged under the Preferences tab (shown below), Hot Keys, dialing options, docking, and tabs settings. Each of these sections will define the settings and how to change these settings to match your needs.
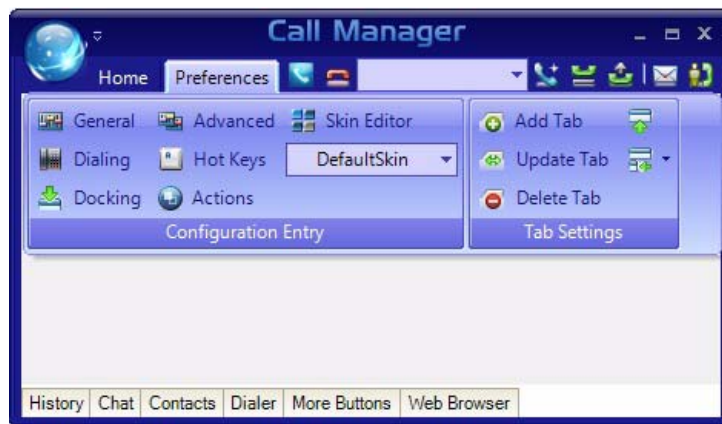
Config Settings

Preferences has a number of settings for making Call Manager work and look the way you choose. To access Preferences click on Preferences tab. The settings in Preferences are divided between four tabs each defined below.

Note: Depending on your configuration you may not be able to change the Preferences, in which case you should check with your System Administrator.

General   These settings control how Call Manager interacts with other Windows-based programs and how it should react when calls ring or are being dialed. Extra Call Information can be enabled and content to be displayed defined as well as details for Microsoft Outlook Integration when used.
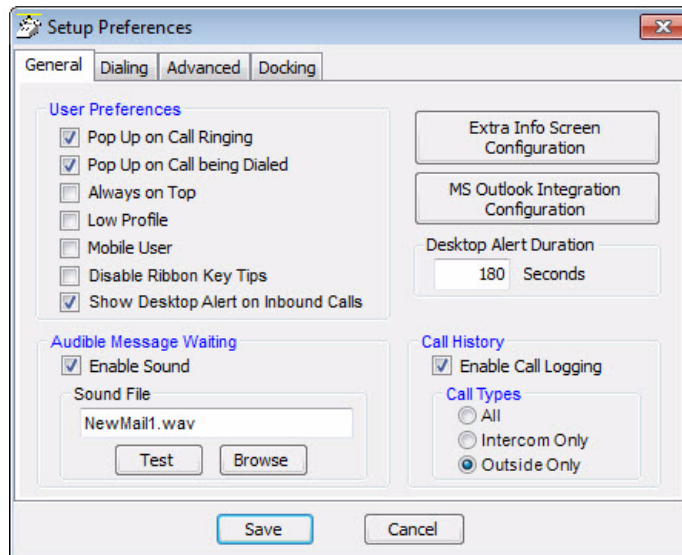
User Preferences

- Pop Up on Call Ringing – Check this option if you'd like your Call Manager to automatically pop up when a call rings on your phone.

- Pop Up on Call being Dialed – Check this option if you'd like your Call Manager to automatically pop up whenever a call is being dialed from another program (via TAPI or DDE dialing) or dialed via Hot Key dialing.

- Always on Top – Use this option to keep Call Manager on top of all other programs. This makes it easily accessible.

- Low Profile – Enabling this option makes the Call Manager very thin in the "Streamlined Mode" by eliminating the Option Buttons on the bottom of the screen.

- Mobile User – some users travel with a laptop PC from desktop to desktop each time using the Call Manager with a different PBX extension. This Mobile User option will pop up a "Login" screen each time Call Manager is started so that they can log into the appropriate PBX phone extension.

- Disable Ribbon Key Tips – When this box is unchecked, pressing ALT while using Call Manager will popup the ribbon KeyTips, which allow you to access any tool with a few keystrokes. When checked, KeyTips will be disabled, allowing you to use the ALT key without them popping up.

Call History

- Enable Call Logging – To have Call Manager collect and display Call History, Call Logging must be enabled.

Call Types

- Once Call Logging is enabled, a choice needs to be made to log All, Intercom Only, or Outside Only calls.

- Sound File – Enter the path to the .WAV file to be played. Use the Browse button when needed to search for the path to the sound file.

Audible Message Waiting

An audible sound can be played when the Message Waiting indication turns on. The sound played can be any .WAV file of your choosing.

- Enable Sound – Placing a check mark in the box enables playing a sound in the file shown. Clicking the Test button will allow you to listen to the sound selected.

Desktop Alert Duration

- Specify the duration of the pop up message for incoming call and other notifications.

Extra Info Screen

Each call may have additional information attached to the call that may be useful. The Configuration button in the window accesses the screen for enabling this feature as well as choosing the extra information items to be displayed along with their properties shown below. With the Extra Info Feature enabled, this symbol appears with each call. When the symbol is gray, no information is present, when cyan, information is attached and when red, high priority information is available.

- Extra Info Feature – Provides for enabling or disabling this feature. When disabled, the Call Information icon will not appear with each call.

- Static Information Fields – These fields will have a fixed area within the Call Notes window for the information to be displayed. You have the ability to Add, Change an existing or Remove any field.
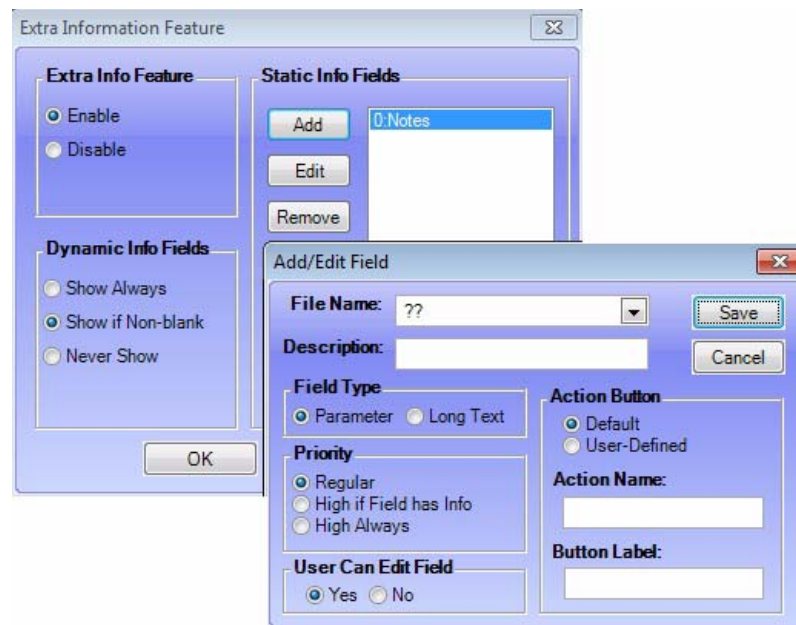
To Add or Change a Static Info Field:

- Field Name – Select from the pre-defined list of fields or create you own field name. This name must match exactly the information field where the information is held.

- Description – Enter any description you desire to mark this field.

- Field Type – Each field can be selected to be either a fixed parameter (1 line) or long text (multiple lines) fields.

- Priority – The field priority selected will mark the color of the icon attached to the call.

- User Can Edit Field – This determines if this field can be changed or fixed.

- Action Button – A button can be defined to use trigger user defined Action. The Action Name must match exactly the name of the Action defined in User Defined Actions.

- Dynamic Info Fields – Allows the choice of when these fields will show. provides a large set of fields, which are automatically filled in based upon the call information. Dynamic fields are fields set by another application and are not pre-defined in.

MS Outlook Integration   Call Manager is specifically designed to work in concert with Microsoft's Outlook contact management program.

- Initial Setup – Click the Configuration button to reach the Outlook Preferences screen with the following options:
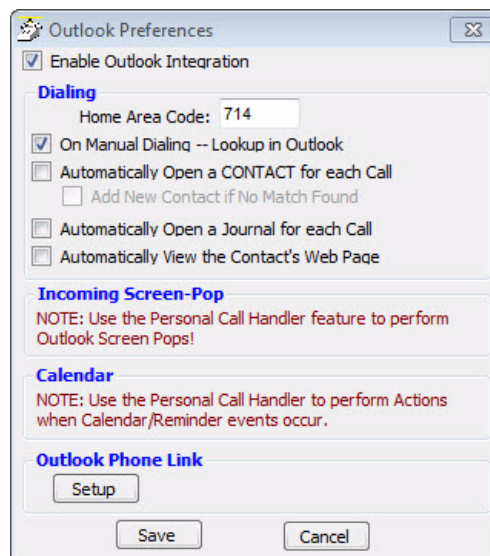
- Enable Outlook Integration – This main option enables/disables the Outlook Integration features. This must be checked for any Outlook features to work. If you're not using Outlook, then this should be disabled.

- Home Area Code – Enter your home area code. This is used for dialing local calls when the area code needs to be stripped from the dialing.

- On Manual Dialing – Lookup In Outlook – When enabled, whenever you dial a phone number manually, the phone number will be looked up in Outlook to see if there is a match. If there is an exact match (only one Contact entry matches) the name and account number from the Contact will be automatically attached to the call. Typically this should always be enabled.

- Automatically Open a CONTACT for each Call – When enabled, whenever you dial a phone number that matches an Outlook Contact, that contact will be popped only – sometimes referred to as "Reverse Screen-Pop".

- Add New Contact if No Match Found – When enabled, if no contact matches this phone number, a "New" contact in Outlook will automatically pop up.

- Automatically Open a JOURNAL for each Call – Using Outlook Journal entry makes it convenient to keep track of phone calls made (or received) and to takes notes while on a call.   By enabling this option a New Journal entry will be popped open whenever you make a call. Also, if the phone number exactly matches an Outlook Contact, then this new Journal entry will be automatically "associated" with that Contact.

- Automatically View the Contact's Web Page – When enabled, if the contact record contains a Web address for the caller, this web page will pop up within the browser.

- Incoming Screen-Pop – Use the Personal Call Handler feature to perform Outlook Screen Pops!

- Calendar – Enable appointment and reminder events from Outlook Calendar.

- Outlook Phone Link – With the Outlook Link application installed, click the Setup button to access the Setup Configuration for Outlook Link. For details on setting up Outlook Link see the Application Note "Screen Pop Outlook".

Dialing Tab   Click Preferences > Dialing or Preferences > General > Dialing tab. Use this tab to determine whether to follow a Server-based dial plan, use a dial plan defined for your station, or dial all the codes yourself. The last option is not practical when using a database or using "hot key" dialing since other applications don't know what is a valid number to dial including entering a trunk access code when needed. If your System Administrator has set up the Server-based Dial Plan, this is the best choice and will save time.
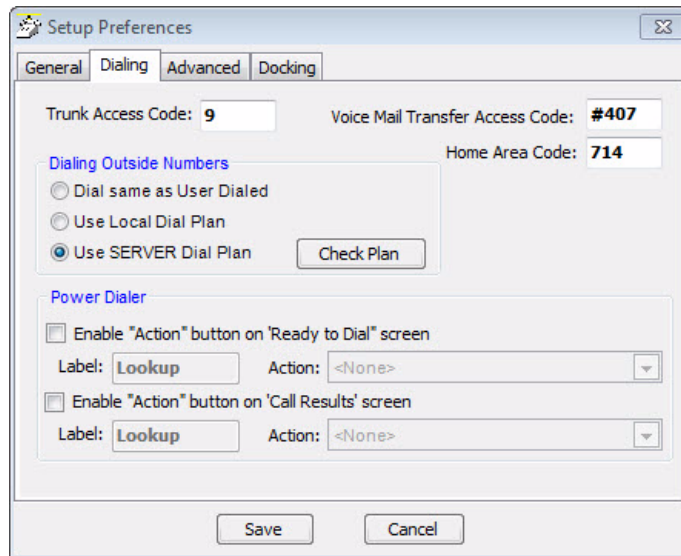
Local Dialing Plan

- Trunk Access Code – This must be set to the access code you need to dial to get an outside line or trunk. Making outside calls using "Speed Dial" keys or dialing from another program, a Trunk Access Code will automatically be dialed to access a trunk before dialing the phone number.

- Voice Mail Transfer Access Code – Specify the feature access code to transfer the call to the specific mailbox. # is assumed and automatically inserted for the first digit.

- Home Area Code – Your local area code should be defined here. This is used only when you choose to use the Local Dial Plan.

IP*edge*
Preferences

Dialing Outside Numbers
- Dial same as User Dialed – With this option selected, outside phone numbers will be dialed exactly how the user dialed them (unchanged by Call Manager).

- Use Local Dial Plan – When this option is selected, the user dials an outside phone number, the number will be analyzed according the dial plan and the number will be automatically modified (add "1+" for Long distance, etc) before Call Manager dials it. Use the Change Plan button to view and/or change the settings of the dial plan.

- Use SERVER Dial Plan – When this option is selected, the dial plan that is configured on the NET Server will be used as the dial plan. You can press the Check Plan button to bring up the Server Dial Plan Tester screen that allows you to enter a Test Phone Number and see how it will be dialed. It is the responsibility of the System Administrator to setup and maintain the server dial plan.
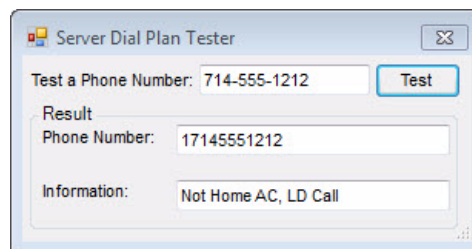
Dialer
When the Dialer option is installed, two action buttons can be defined for use with the Dialer. These user-defined buttons can appear on both the Ready to Dial and the Results screens used with the Dialer.

- Ready to Dial – Enable the Action button and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs.

- Call Results – Enable the Action button and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs.

Defining a Local Dialing Plan

Each area of the US uses a different set of rules for determining which calls are local calls or long distance. For your area, a good source for determining how to define your dialing plan, use the opening pages of your phone book. These pages generally define how to dial different areas and provide a listing of prefix codes for the local calling areas. Three typical examples are:

1. Phoenix, AZ – all calls within the "602", "480", and "623" area codes are considered to be local calls, while all calls outside those area codes are considered long distance.

2. Santa Fe, NM – calls to some office codes within the "505" area code are considered to be local calls, while other calls to the "505" area code are considered long distance.

3. Atlanta, GA – all calls to area codes "770" are considered to be local calls while some calls to the "404" and "678" area codes are also considered to be local calls.

If you chose to use the Local Dialing Plan, you need to create a dialing plan. If you chose SERVER Dial Plan, then you should check with your System Administrator if you have questions.
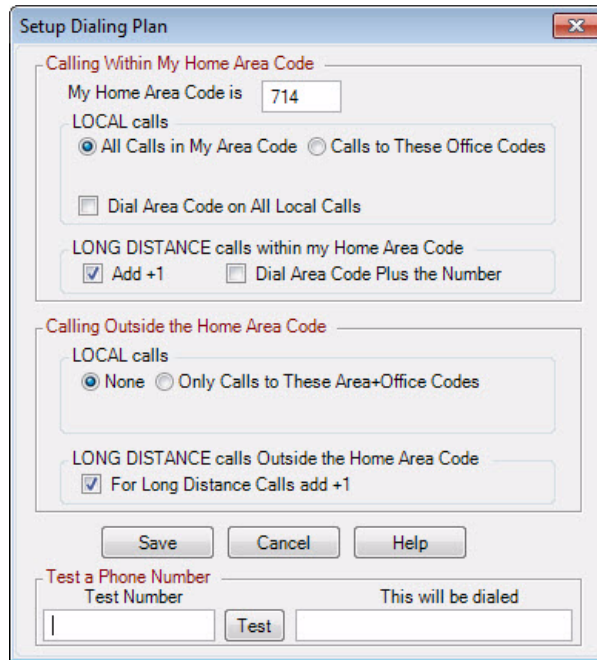
Calling Within My Home Area Code

- Home Area Code – Set this to the Area code where the phone is located. This will be used by Call Manager to determine which dialed calls are within your home area code and when searching a contact manager (reverse screen-pop) the dialed number will need the area code included, e.g. Microsoft Outlook. This is a duplicate of the entry to the one made in the Dialing Tab, thus the value entered previously will show here.

- All Home Area Code Numbers Local? – Select either All Calls in my Area Code or only Calls to these Office Codes.

- Local Office Codes – This entry is only presented if you chose Call to these Office Codes in the previous step. The pull down listing shows the exchange codes (prefix codes) that are considered to be a local call from your location. Click the C button to display the "Change Dial Rules" screen.

  - To Add Local Prefix Codes – Enter the prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 75# would represent all codes 750 to 759 and 7## would represent codes 700 to 799.

  - To Delete Local Prefix Codes – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card character.

  - To Delete a Specific Prefix Code – To delete one prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add. For example, if prefix code 755 is long distance but all other 75# codes are local, first enter 75# into the local list and the add 755 as Long Distance – the resulting local list will be 750, 751, 752, 753, 754, 756, 757, 758 and 759.

- Dial Area Code on Local Calls – Enable this feature in areas, such as Atlanta, where you must always dial the full 10-digit phone number (include the area code) even when the call is local. Most areas of the US, local calls do not include the area code and dial only 7 digit numbers for local calls. Any number dialed from another program or hot key dialing will be down to its base 7 digits by removing the Home Area Code before it is dialed.

- Add+1 – Check the box if you need to dial a leading 1 before the number for calls within your Home Area Code.

- Dial Area Code Plus the Number – Check the box when the home area code is also to be dialed.

Calling Outside My Home Area Code

- Any calls outside your Home Area Code LOCAL calls? – Select either None or Only Calls to These Area+Office Codes.

- Local Area+Office Codes – This entry is only presented when you chose Only Call to These Area+Office Codes in the previous step. The pull down listing shows the codes (area code plus prefix codes) that are considered to be a local call from your location.   Click the C button to display the "Change Dial Rules" screen.

    - To Add Local Area+Prefix Codes – Enter the six digit area+prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 602### would represent all prefix codes in area code 602.

    - To Delete Local Area+Prefix Codes – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card.

    - To Delete a Specific Area+Prefix Code – To delete one prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add.

- For Long Distance Calls add +1 – Check the box when you need to have a leading one ("1") added when making long distance calls outside your home area code.

Test a Phone Number

Dialing plans can become complex. Use these boxes to enter different telephone numbers and check to see the number that will be dialed. The dialed number should be identical to what you need to dial when using your phone.

Docking Tab   The docking tab defines the contents of Call Manager when docked to the top or bottom of the screen. This includes whether docking is enabled or disabled and a listing of contents by display priority (space limits what can be displayed).
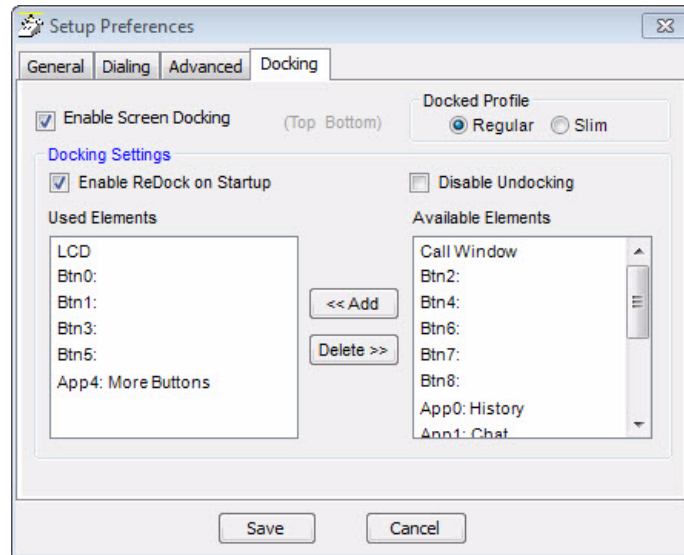
- Enable Screen Docking – When enabled, the Call Manager will automatically 'dock' to the top or bottom of the PC screen when it is moved to the top or bottom. When dragged completely to the top, it has a slim dock view.

Docking Settings
- Enable ReDock on Startup – Check this box to make Call Manager to startup in the same position and condition as when it was last shut down.

- Used Elements – The displays, buttons, etc. to be used in each profile are configured by moving available elements to the "Used Elements" list. Whenever the Call Manager is screen docked, it will place the elements from the "Used Elements" list on its screen.

- Available Elements – The "Available Elements" list shows the types of elements that are available for use in this profile.

Note: Once you've changed the screen-docking settings, the new settings will not be used until the Call Manager is 'undocked' (if it's already screen-docked) and then re-docked.

- Docked profile – Regular provides the original docking mode. Slim provides one-line docking mode.

Advanced Tab   Access this screen by clicking Preferences > General > Advanced tab. The basic connection for the Call Manager can be changed using this screen. It also has the capability of sending log files to Technical Support for debugging problems encountered. The TAPI Service Provider should not be changed unless your System Administrator has instructed you to update the settings for finding Net Server for your application.
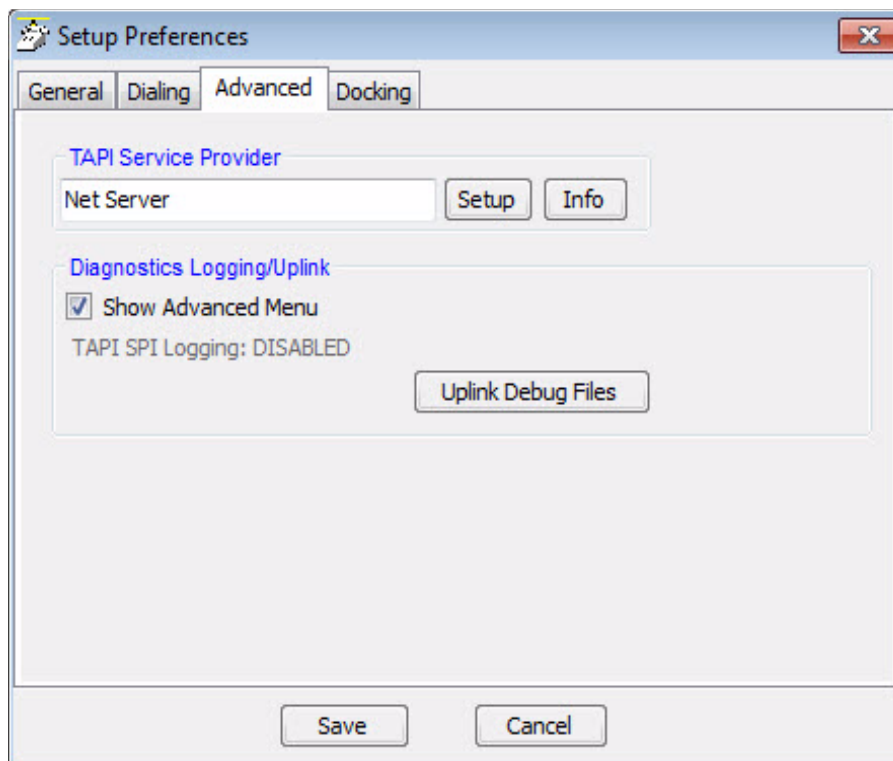
TAPI Service Provider
- Enter the Service Provider Name – This must be set to access the TAPI service provider to be used – typically, this would be set to: Net Server.

- Setup – Click the Setup button to open a screen to define the TAPI Service Provider as shown on the following page. The I button is a handy status indicator for reading the version levels and license codes for the system and is shown in the Tapi SPI Info screen.
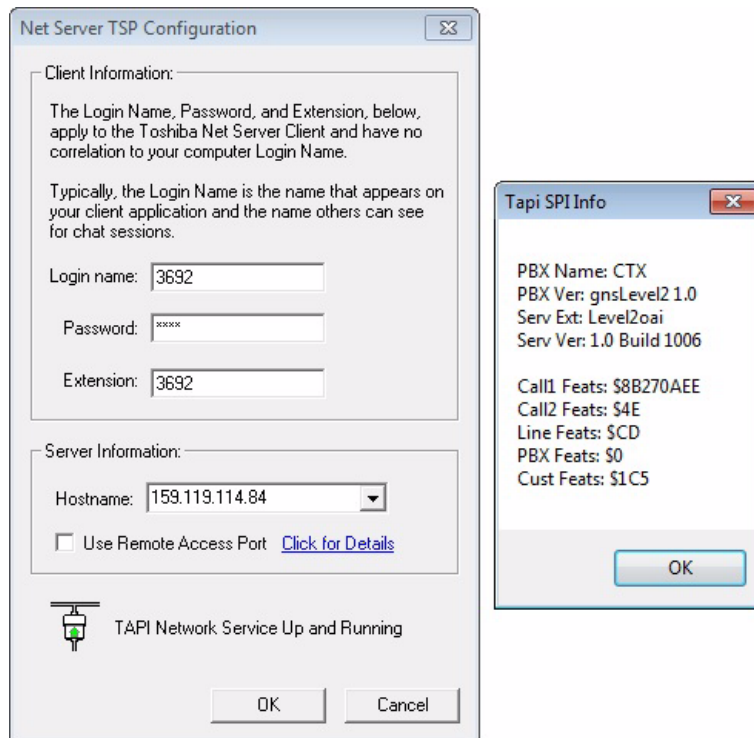
- Login name – Enter your Login name. If a new installation, a client will automatically be created in Net Server for this name. Many times the administrator will have defined your client Login name, see your administrator for the name to use.

- Password – Enter an optional password for protecting the connection, when needed.

- Extension – Enter the extension number of the phone this Call Manager is monitoring for call information.

- Hostname – Enter the name of the Server PC where Net Server resides.

- Use Remote Access Port – Check this box only when connecting remotely through the Internet. When connected locally through your LAN, do not check this box.

Diagnostic Logging/ Uplink
Clicking this button enables the Debug utility and have it show on the Main Menu under Settings as well as provide an easy utility for sending all the important information about Call Manager to assist Technical Support to help diagnose any problems when necessary.

• Show Advanced Menu – Place a check in the box to enable the Tool tab Advanced menu option. This needs to be enabled to capture events or show call information when Call Manager is operating.

Note: The statement "TAPI SPI Logging: DISABLED" is the normal indication and is provided to show Tech Support of the status of this device. Tech Support will provide specific instructions for turning on this setting.

• Uplink Debug Files Button – Click this button to access the screen for creating a site name, a contact for the file transfer, and the changing of any options for reporting a problem.

• Site Name – Before using the Uplink Debug Files button, a site name and contact must to be selected. The site name is a unique identifier to make it easier to find the log files for your site and typically, the contact should be assigned "Any Tech Support" to ensure the log files are seen by someone. Use a specific contact name once you are working with an agent.

• Description – It is highly recommended to write a description of the problem including all pertinent details such as the conditions and approximate time the incident occurred. These descriptions aid in narrowing down where to look in the log files for the problem encountered.

• Options – Clicking the Options button opens a screen to provide options for how the files are to be sent. Uncheck "Send Directly to Toshiba Support Site", and the files can be zipped into smaller files, saved on your PC in your Local Settings folder, typically `C:\Documents and Settings\<user name>\Local Settings\Application Data\Toshiba\Call Manager\Zip`

• These files may then be e-mailed.

Setting Up Hot Key Dialing & Popup

Call Manager provides two global "Hot Keys" that you can press within any application to send a request to Call Manager. The first key is the Dial Hot Key provides a method for dialing a number from any application. For example, you may have a phone number in a Microsoft Word document that you can highlight in the Word document and press the hot key combination assigned. This dials the number in Call Manager. By default the Hot Key is F11.

The second key is the Popup Hot Key, which will bring Call Manager to the front on the screen. This can be very useful if the Call Manager is minimized or is behind other windows on your screen. Call Manager must be running for this hot key to work.

Setting Shortcut Keys

Click Preferences > Hot Keys displays the Hot Key Dialing & Popup setup dialog box:
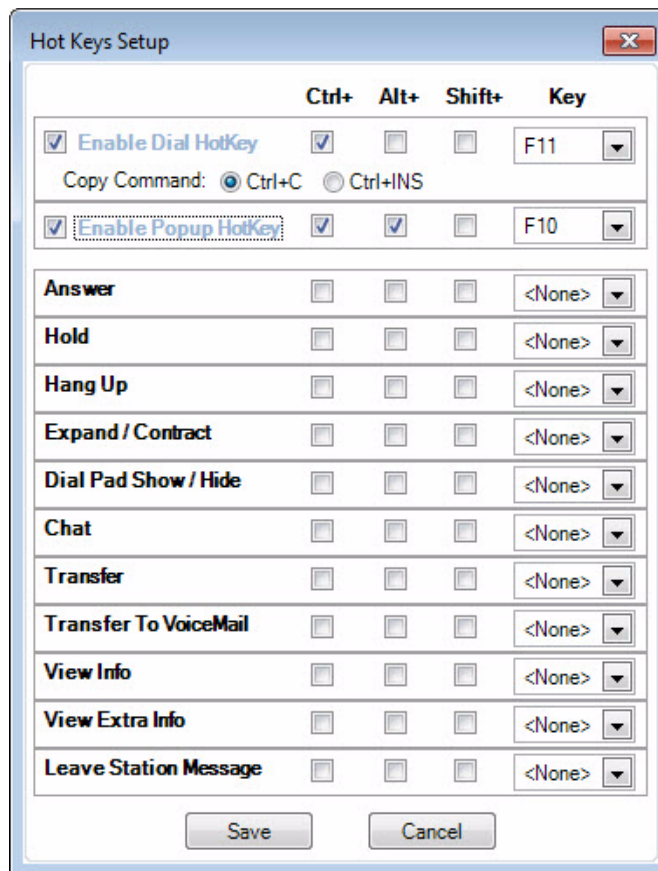
- Dial Hot Key – Enable the hot key button and select the key to use including any modifying keys to be used in combination.

- Popup Hot Key – Enable the hot key button and select the key to use including any modifying keys to be used in combination.

  - Answer – Answer the ringing call.

  - Hold – Place the active call on hold.

  - Hang Up – Disconnect the active call.

  - Expand / Contact – Toggle Call Manager between the compact mode and regular mode.

- Dial Pad Show / Hide – Show or Hide Dial pad.

- Chat – Open Chat window if the other party talking to is running Call Manager. If the phone is idle or the other party is not running Call Manager, it will select the Chat tab.

- Transfer – Divert the ringing call or transfer the active call to a third part.

- Transfer To VoiceMail – Diver the ringing call or transfer the active call to the specified mailbox of the voice mail.

- View info – Show Info screen for the active call.

- View Extra info – Show Extra Info screen for the active call.

- Leave Voice Mail – It will stop ringing the destination extension and calls the destination party's voice mailbox.

- Leave Station Message – It will set the callback request to the destination when the destination party is ringing.

Note: Many applications use various "hot keys" or keyboard shortcuts. These keys are defined in advanced settings that your administrator can change if you encounter a conflict with another application. See "Call Manager System Administration Manual" for details.

Skin Editor

The entire color scheme as well as the look-and-feel of the Call Manager can be changed dramatically, by simply selecting a different skin.

Skins can affect the following elements of Call Manager:

- Screen background colors, texture and appearance.
- LCD colors and fonts
- Calls window color and font.
- Title bar logo and Application menu logo.
- Programmable Button colors and fonts.
- ACD Keys colors.

To access the skins editor, go to Preferences > Skins Editor. The main screen for the Skins Designer (shown below), provides a preview for how the skin will look as it is being designed.
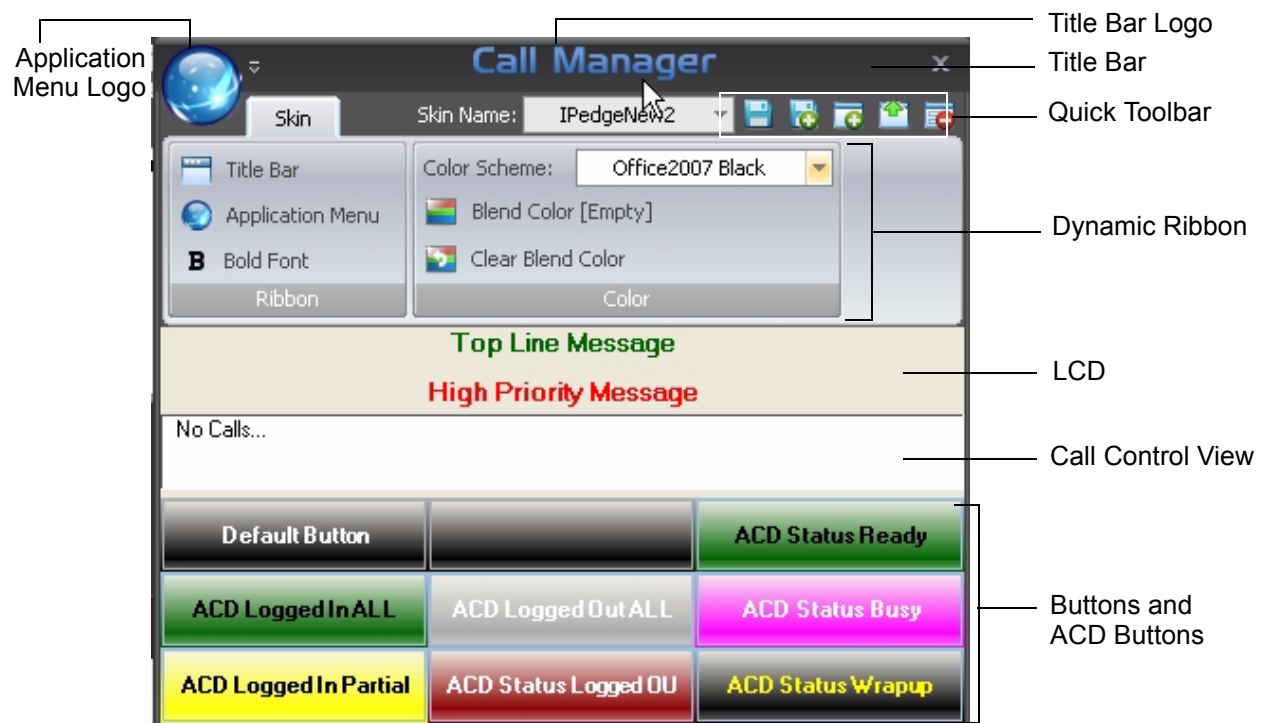
Enter the appropriate information when creating the skins:

- Skin Name – show current skin to be used and being edited. The drop down list will show currently available skin name.
- Color Scheme – set of predetermine color scheme. On some color scheme, users could blend the color secondary color to make a different color.
- Title Bar – change title bar logo to another image file. Supported image formats are PNG, BMP, JPEG, GIF.
- Application Menu – change the application menu logo to another image file. It supports similar file formats as those of Title Bar.
- Bold Font – select to change the menu font to Bold.

When the design is complete, then you can easily change to this skin by right-clicking the mouse on the logo on the main window and selecting the skin name from the Phone Colors menu.

Skins Files

Each skin design is saved in a file, which is a file starting with "skin_" and ending with ".INI". These files are stored along with other configuration data on your PC in the Local Settings Call Manager folder\skins. A number of basic skin designs are included with Call Manager.

Saving/Creating New/Deleting Skins

Icons next to the skin name provide easy access to save, save as, create new, and delete skin functions. Some of these icons can also be accessed using the application menu button. To exit the skin editor, just click the cross icon on the top right corner of the skin editor.

To Create a New Skin

Click the "new" icon, and a "Skin Name" dialog will pop up to allow you to enter the name of the skin. The new skin, initially, will have current existing configuration as you see on the skin editor. You can start changing it.

To Load an Existing Skin

Click on Skin Name drop down list to load an existing skin.

To Save a Skin

Once changes have been made, click the Save icon to save it.

To Save As a Skin

When creating a new Skin, changing an existing skin, or to save a skin using a different name, click the Save As icon. A "Skin Name" dialog will display. Enter the new skin name.

To Delete a Skin

With the Skin loaded to be deleted, click the Delete icon. Click Yes in the dialog box to confirm the action. The system should have at least one skin; deleting the last skin will be rejected.

The Skin Editor   Start by Opening a Skin File or Creating a New File.

The design begins by loading an existing Skin File or starting with a new skin design. See the procedures above.
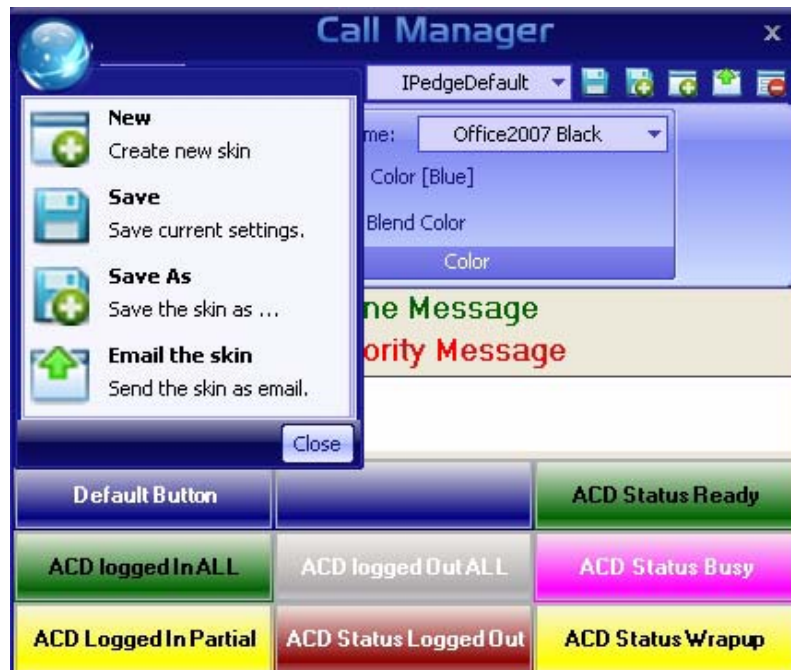
Set Background Color and General Appearance   Select the color scheme from the drop down menu. On some color schemes, e.g. Office2007 Blue, Office2007 Black, and Office2007 Silver, you have the option to blend secondary colors to make a different color from the standard Office 2007 colors.

- Blend Color – When this option is shown, you can click the option to bring up a color palette dialog box to select the blend color.

Note: The bend option is not available on some color schemes, for example, Red Planet does not have a blend option and it will not display on the menu.

- Clear Blend Color – Click this option to clear selected blend color.

LCD Background and Text Colors   The LCD Display reflects the current status of the phone and offers two lines. The background color and the top and bottom line text can be chosen for your display. Messages that appear on the bottom line can have three different colors depending upon the priority of the text being displayed. The priority is determined by your settings in the Extra Call Information configuration. These settings can be found in Preferences tab > General > Extra Call Information.

Right-click on the LCD area to bring up the menu options:

- Change background color
- Change Top Line Text color
- Change High Priority Text Color
- Change Medium Priority Text Color

- Change Low Priority Text Color
- Change Font
- Reset

Insert your Logo into the Skin

You can choose a graphic different from the default logo that may be used for display in the title line of the Call Manager display, and application menu logo. The Skin Editor provides a series of default graphics and allows for using .png, .jpg, .gif, or. bmp formatted graphics as well. The graphic size should not be larger than 22 x 224 pixels to fit within the available space.

- Click the Title Bar option to change Title Bar logo. Browse to select your graphic file in the dialog box.
- Click on Application Menu option to change application menu logo. Browse to select your graphic file in the dialog box.Set the Call Window Colors and Font

Changing Call Windows Appearance

Right click on any call window area, to show menu options:

- Change background color
- Change text color
- Change font
- Reset

Changing the Button/ACD Button Appearance

You can change default button colors and font; and change colors of ACD status buttons.

Default button – By clicking the Default button, you can revert to the default setting of any button when it is initialized or reset. Right click on the default button to show menu options:

- Change background color
- Change text color
- Change font
- Reset: Clicking the reset button resets the colors and font to the default values for buttons that have not be customized with different colors.

ACD status buttons – Select the ACD status button and right click to bring menu options:

- Change background color
- Change text color
- Reset: Click this button to reset to the default colors for the specific ACD status.
- Click Hide Colors when done.Finish by Saving your Design
- Use the Save or Save As commands to save your design before exiting. See above for details.

Email skins   To send the skin using email, click on the email skin button (shown right). A Microsoft Outlook message dialog box displays (shown below). Enter the appropriate address/addresses to send the skin.

Microsoft Outlook is required when using this function.
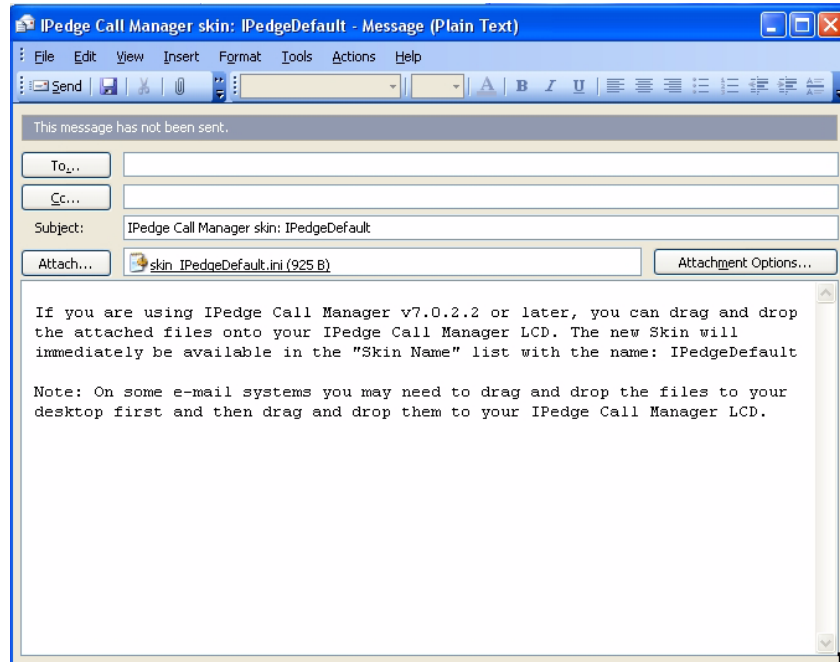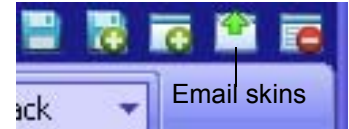
Tab Settings The options to add, update or delete tabs can be found here. Tab settings is for managing companion applications. The Revert button brings all the companion applications that have been docked outside back to the main window.

Add Tab Click the Add Tab button to add a new tab.
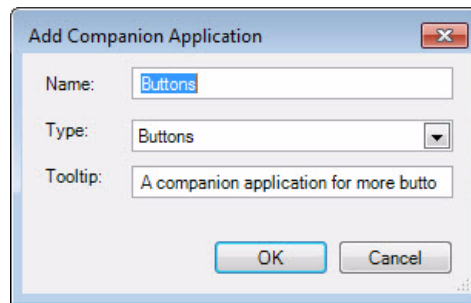
- Name – sets the text in the tab.
- Type – The drop down allows the user to select a companion application. A companion application will not appear in the 'Type' drop down if all instances are added to a tab. The More Buttons allows eight instances. All other companion application allow one instance.
- Tooltip – allows the user to set a tooltip for the tab.

Update Tab Click the Update Tab button to change the appearance order, name, type, and tooltip of each tab in your tab view. The 'Name' or 'Tooltip' can be changed by clicking in the cell and typing.Use the Up and Down buttons to move the tabs appropriately, then click OK.
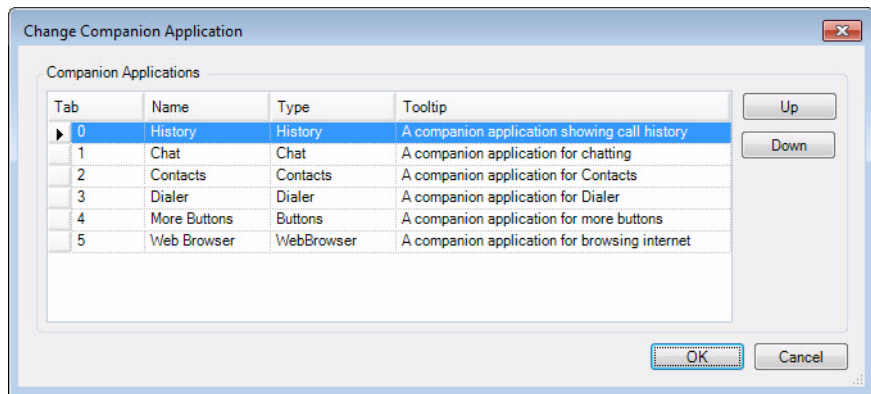
Delete Tab   Click on the item in the 'Tab' column to toggle deletion (icon has a red 'X' through it to indicate it will be deleted). Hold down the shift or control key to select multiple items. Drag the mouse to select multiple items.

Click the Delete tab button to delete any tab. However, deleting the tab does not delete it permanently, it's more like hiding it from view. All deleted tabs can be re-added with the "Add" button.

Also, not "all information" is lost. For example, deleting the history tab will not clear the history log. Deleting a buttons tab will not re-initialize all the buttons the next time a buttons tab is added. The same is true of the dialer: your planned calls are will still be there when you re-add the application (though they will not fire unless the application is running). The only exceptions is the Browser tab the browsing history may be lost, since deleting a web browser tab and adding a new one always starts on a new blank page.
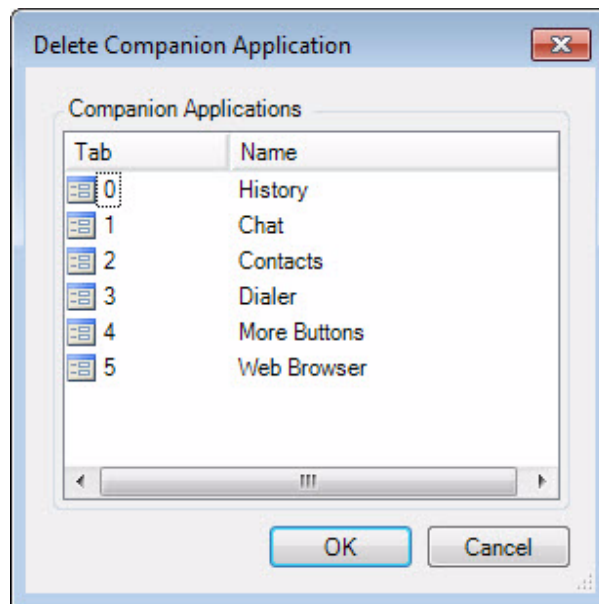
Revert   Click the revert button (highlighted in red) to bring all the companion applications back to the main window as tabs.

Buttons

13

This chapter shows how to use and add, delete or edit button and button banks.

Programmable Buttons

To access Buttons

There are three methods to access buttons:

1. Click on the Personal Call Handler button and then the Buttons tab.

2. There are nine pre-loaded buttons at the center of the Call Manager screen (shown below).

3. Only the More Buttons companion application tabs have more buttons. These buttons can also be undocked using the dock / undock

 button on the left. You can create tabs of more buttons. There are 8 banks with a total of up to 64 buttons each. Each Buttons application can be assigned to one of these 8 banks, which means the buttons in that

bank are displayed in the application (No two applications can share the same bank).
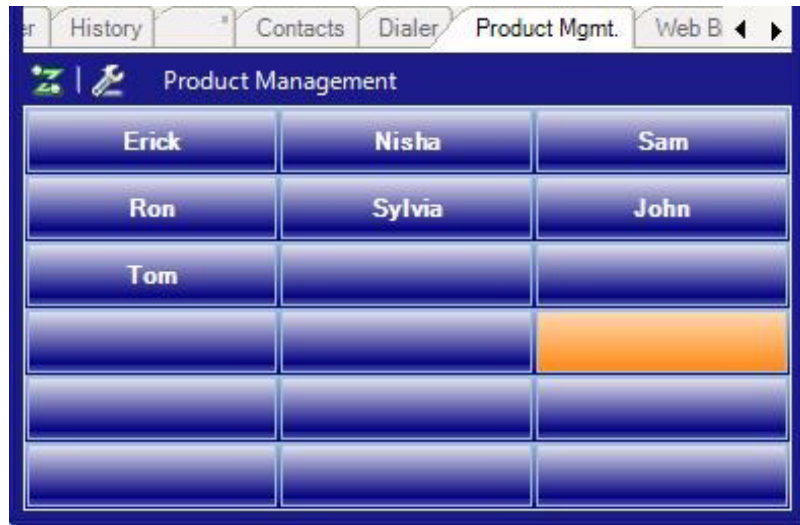
User Programmable Keys

The Call Manager has many different User Programmable keys on the main screen, on the Side Window, or on the Extra Button windows. These keys are easily configured by the user as:

- Feature Code

- Speed Dial keys

- System/PBXCommand

- User-Defined Actions

- ACD Key

- Extension Key

- Web Key

This provides the user with one-touch access to features, applications, files, phone numbers, employees, and more. To change any of these keys simply right-click the key and select one of the following options:

To Initialize Key   This resets the key to a blank default state. This makes it much easier to use the drag and drop techniques for setting up keys.

To Swap Keys   To swap the configuration of two programmable keys you can right click on a button, then select the Swap Keys option, then click on another button. Notice that the button has now been swapped. To do this, hold the Control key down while using the left mouse button to drag a key to another location. Or select

Swap Keys and then drag & drop key to new location. Keys will swap within the same window and between any other button window.

To Copy This Key   To Copy the configuration of one programmable key to another hold the keyboard Control and Shift keys down while using the left mouse button to drag the key to be copied to its target. Or select Copy This Key and then drag & drop to new location. Keys will copy within the same window and between the Side window and the Main Screen.   Keys on the Main Screen or the Side window will not copy to keys on the Extra Buttons windows or vice versa.

Change Key   This opens the Setup Key configuration settings shown below.   Several items in the upper portion of this window define the appearance and label of the button. Selecting an Action from the pull down listing will present additional parameters needed to define the choice. Details for each Action follow this procedure.

Note: Some users may not have permission to change buttons and keys.
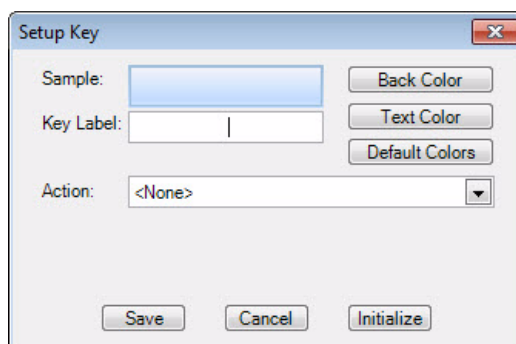
- Sample – Displays the appearance of the following selections.

- Key Label – Type a label for the key.

- Back Color – Choose the color of the key.

- Text Color – Choose the text color to use for the key label.

- Default Colors – Pressing this button will reset the colors of the key and text to the default for the skin used.

- Action – Choose an action to be performed. This selection will open additional settings corresponding to that action. See the settings below for the different possible actions.

Speed Dial Keys   Creates a speed dial key for one-button dialing. Call Manager automatically inserts the Trunk Access Code when a Dial Plan has been specified, making it unnecessary to enter this code in the speed dial number. Speed Dial numbers can be any number 0~9 and * and # digits. You can include commas to insert a 2-second pause in the dial string, e.g., setting up a key to call V-mail (x2502) and logon to a mailbox (1000 with password 12345) then enter "2502, *1000,12345".

You can also include an "X" character in a phone number string to have the dialing stop at that point and queue up the rest of the number in the dial buffer. The user can listen to the call and click the Dial button to dial the rest of the digits at the appropriate time. Examples include: (1) dialing a person who has an extension number (e.g. "4969040 x1008"), (2) dialing a pager and you want to display a number on the LCD of the pager (e.g. "5551234x4969040#"), or (3) dialing a long distance access code (e.g. "8884083279 x17135551234").   Note: You can use more than one "X" in the phone number and it will wait after each "X" (e.g. "4969040 x8 x*1009,1234").
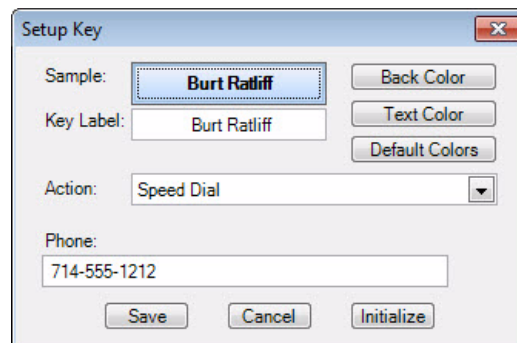
**System/PBX
Command Keys**
The System/PBX command keys are maintained for backward compatibility. It is highly recommended that the user create User Defined Actions for System/PBX Commands. The User Defined Actions have expanded the options available for a number of these commands and thus offer better choices.

The description below shows the possible features that appear in the Setup Key window. Some of the features listed are dependant upon Call Manager System Administration settings such as the Auto Call Record/Tracer Recording features, which only appear when the System Administrator enables those items. Others are dependant upon the PBX used by Call Manager.
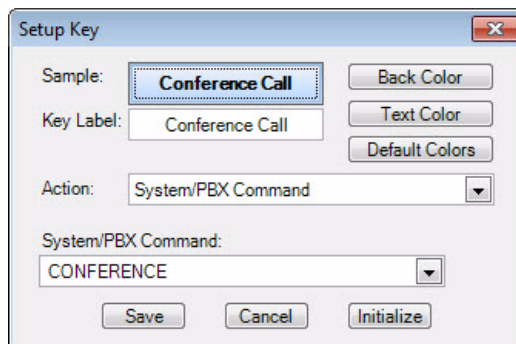
The following commands are available.

PBX Call Control	Auto Call Record/Tracer Recording
Answer – Current call	Start Record
CONFERENCE – Simulates Conf key	Stop Record
DIAL xxxxxx – xxxx= the number to dial	Set Bookmark "Msg"
HANGUP – Hangup current call	Call Center
HOLD – Hold current call	ACD – Agent Help
* MODIFYCALL "Field","Value	CD – Call Pickup
* TRANSFER	Set Work Units "Value"
SETWORKUNITS "Value"	Set Work Units "Value"
ACD_CALLPICKUP	ACD – Call Pickup
ACD_AGENTHELP	ACD – Agent Help

* An enhanced feature is available in User Defined Actions

User Defined Action Keys Customized features can be placed on keys by using User Defined Actions. Actions that have been defined will be available in the pull down list.
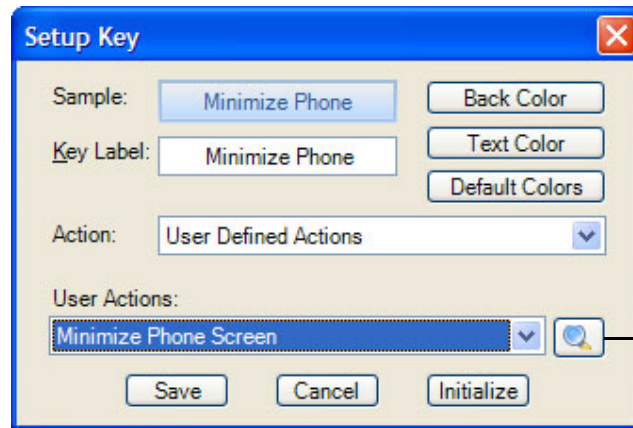
Click to view the actions list to add/edit actions

To create a new action, go to the User Actions section, click the View/Change action button on right (shown above). The following screen displays.
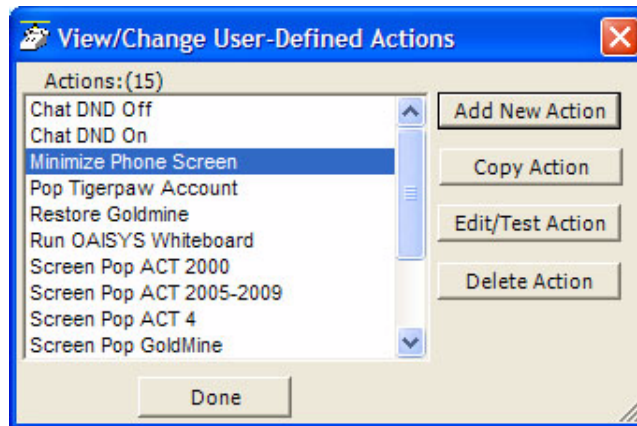
Select the appropriate action or button to add, copy, edit, test, or delete action. The appropriate action screen displays. Click Save and then click Done.

Refer to Chapter 14 – Actions for more information on editing actions.

ACD Keys   ACD keys can be set on any button, including Buttons companion applications and the side view buttons.

Depending on the configuration of your call center, these keys can be used to: (1) Login or Logout of ACD groups (via Agent ID and phone Extension) and/or (2) to Show/Set your Agent status. Other ACD functions may be available in the User-Defined Actions depending upon the PBX used with Call Manager.

Note: The color of ACD Keys cannot be changed as the colors are determined by the ACD State for the key.
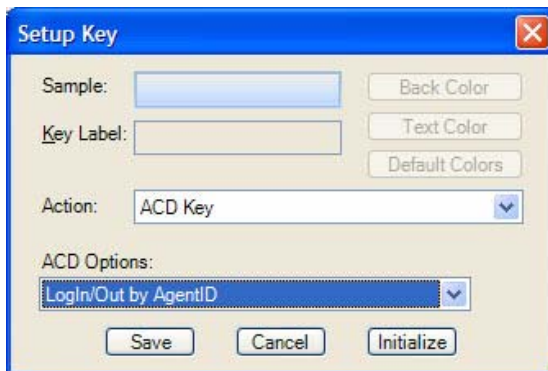
DSS Extension Keys   Direct Station Selection provides one-button dialing to a specific station. DSS Keys also provide a visual status indicator of the station: Ringing, Busy, Idle, or Do-Not-Disturb.

To create DSS keys

1. Set action to DSS extension key.

2. Click the magnifying glass.

3. Select the contact from your directory, as it is shown in the little popup on the side. This will set the label for you.

You can then change the colors and edit the name for easy identification.
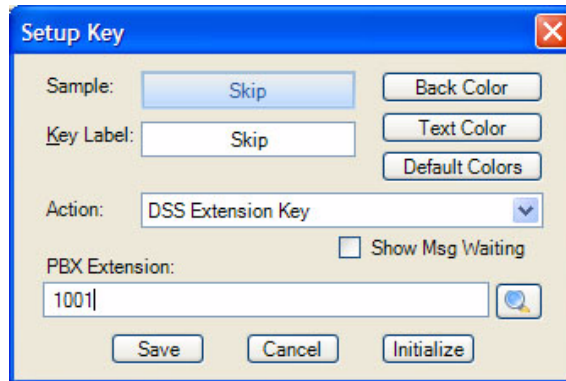
Web Keys   Web keys allow you to program an Internet (or intranet) URL into the key. Press the key to open the default web browser to the specified web page.
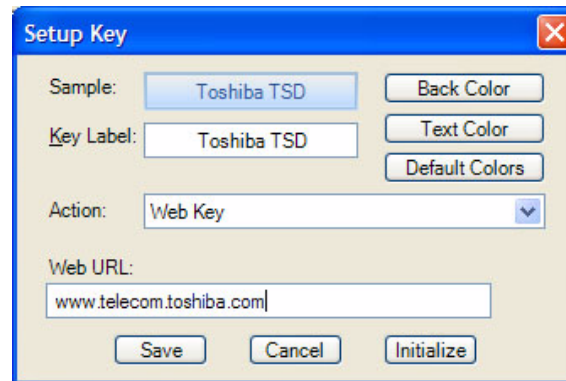
Run Program Keys   This sets the key to run a specific application or load a specific document. For example you could create a "Calculator" key to run the windows calculator by setting the "Program filename" to CALC.EXE. Alternatively you could create a

key to show your "projects" Excel spreadsheet by simply setting the "Program or Document Filename" to: PROJECTS.XLS.
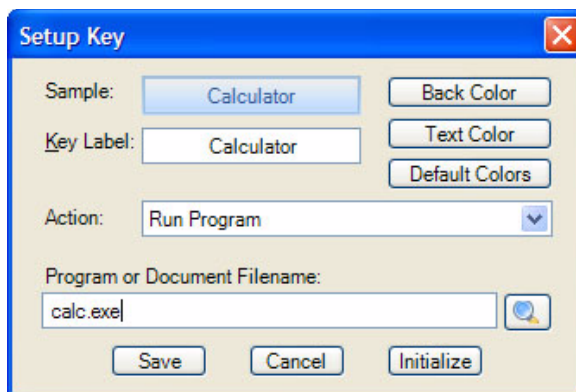
Changing or Creating a Button

Right click on a button. The following dialog box displays.
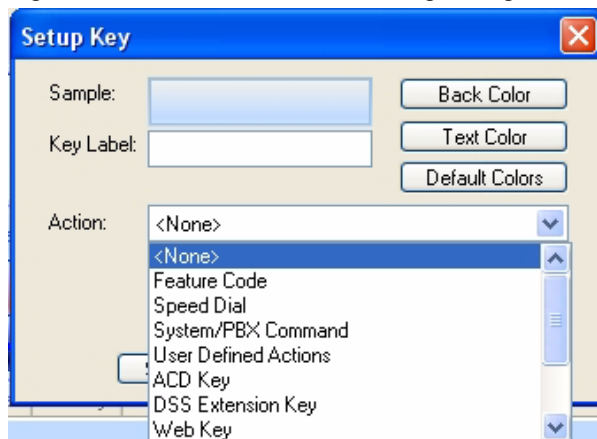
Soft Phone key

When the built-in VoIP soft hone is used, the following keys can be assigned to a button. When the button is pressed, it works as if the key on the phone is pressed.

IPT Programmable Key

Any programmable key assigned to the built-in VoIP soft phone can be mapped to a button. Specify the key number on the phone configured in Enterprise Manager, and the label associated with the key is shown on the button as well as the lam status.

IPT Fixed Key

Fix keys on the phone such as Message Waiting, Microphone, Speaker, Speed Dial, Redial, Conference/Transfer, Hold, and SHIFT key. Please note that Shift key must be disabled for the phone.

IPT Soft Key

Four soft keys on the phone can be mapped to a button. The label shows the soft key function when it is available.

Creating Keys using Drag & Drop

Program unused keys by simply dragging phone numbers or feature codes from other programs. Some examples include:

- Drag a Contact from Microsoft Outlook to a key to create a Speed Dial button

- Drag a call from the Call History to create a Speed Dial button

- Drag an entry from the Contacts application to create a Speed Dial button

Actions

<div style="text-align: right; font-size: 2em;">14</div>

You can define powerful actions that can be used with both the Personal Call Handler and under the Programmable Keys. These actions can be as simple as playing a .WAV file to as powerful as sending a specific DDE message to another programs to "Screen Pop" a database.   When defining a new action, it's usually a good idea to test the action to make sure it works correctly.   The screens for creating actions also provide a testing facility to make this testing easy.

Note: Depending on your configuration you may not be able to change the User-Defined Actions, in which case you should check with your System Administrator.

Creating Actions   The Creating of Actions can be done by going to the Actions menu.
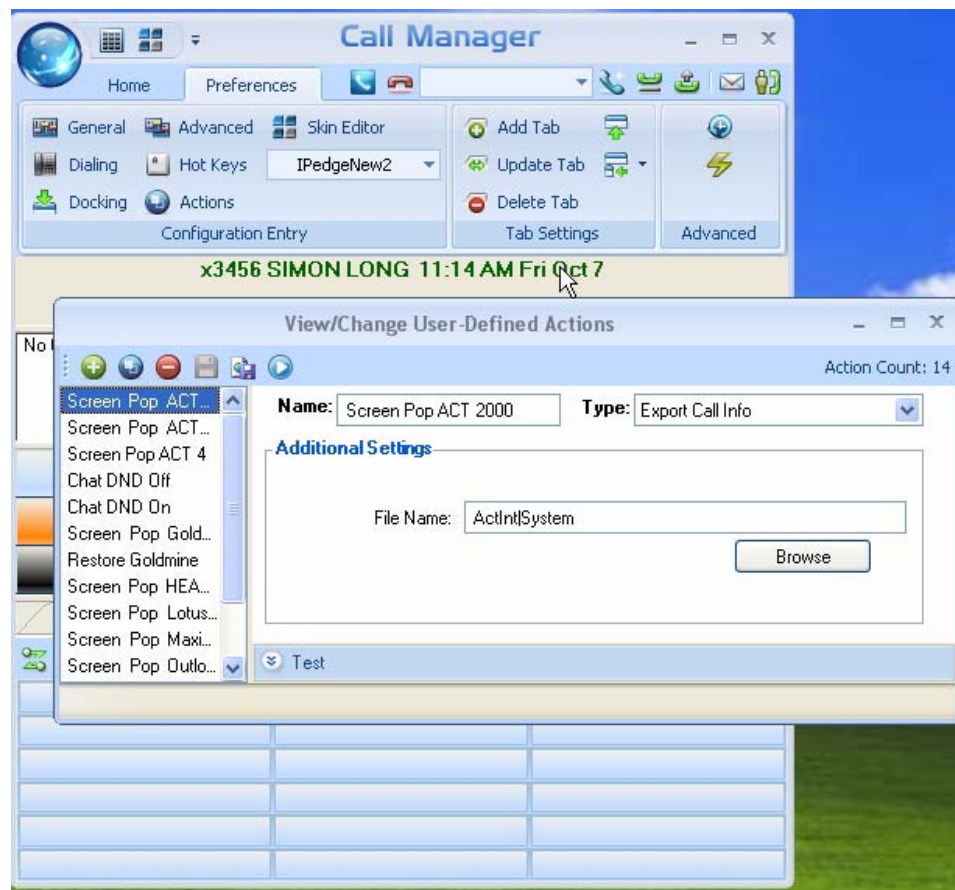
The left column shows a listing of currently defined actions that you can Add, Copy, Edit/Test or Delete using the menu. When an action is selected, its

contents are shown and can be edited. When actions are copied, created, or edited, those changes are stored in the compiled actions file (NET_PHN.acs). If this file is lost for some reason and Call Manager is restarted, all actions will revert to the individual actions stored in the User's Local Settings Call Manager folder. Thus, it is wise to save new actions by exporting the action for backup (see "Exporting Actions and Importing Actions).

Attach Account Code

This action attaches an account code to the active call. This account code is passed to other applications such as Insight or TASKE Contact.
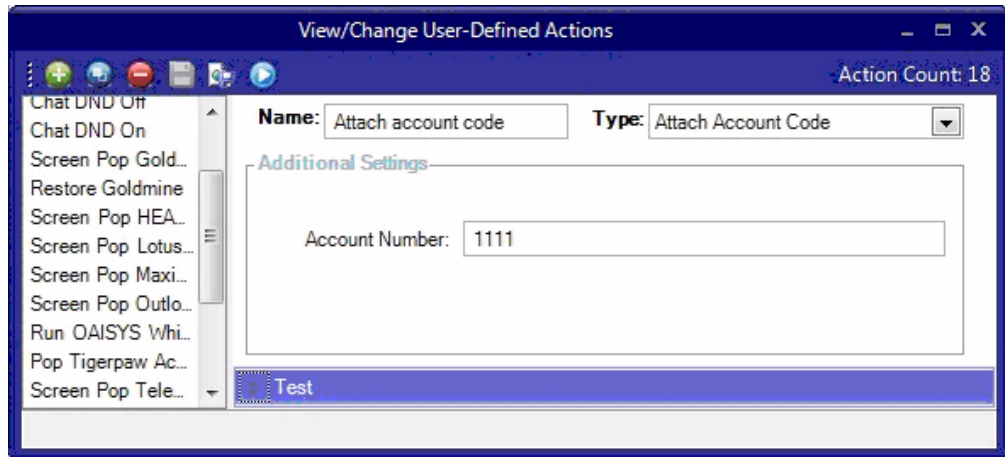
* Account # – Enter an accounting number to be associated with this call.

Export Call Info

This action is used to export call information to another program (like the CTI Call Handler) in order to keep its Call Info Database current. When this action is triggered it will Popup an "Export Call Info" screen allowing the user to fill in any missing call information (typically the 'Main Listed Phone #') before they press SAVE to export the information to the centralized database.
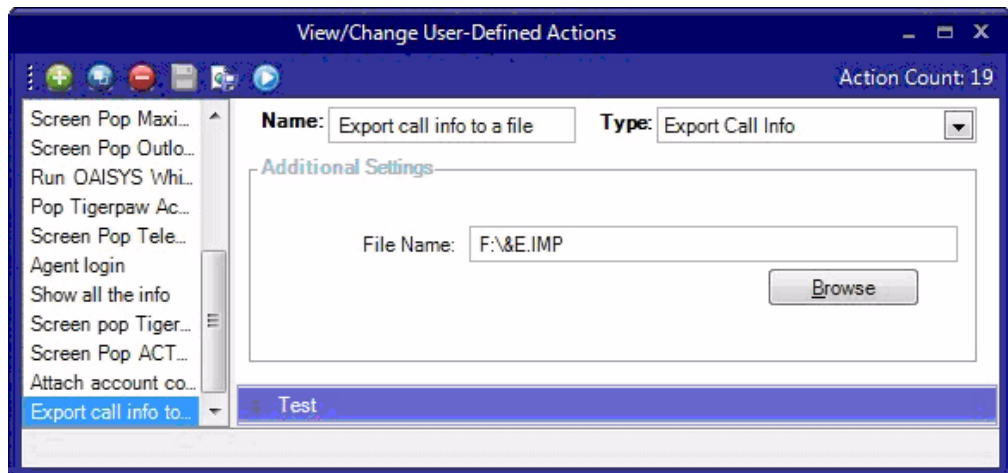
- Path & Filename – Enter the complete path name for writing the exported file or browse to find the path.

Log Info to File   This action writes a string of information to a text file. This can be used to make a call log, like personal SMDR, and/or to trigger actions in other programs. A wide range of call and system variables (see "Action Variables" on page 190) may be used to create the information to be written into the file.
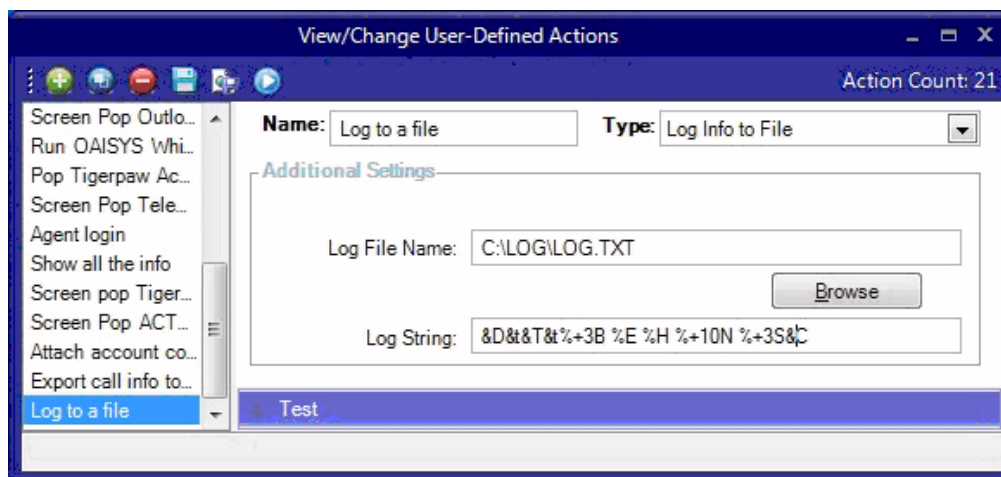
- Log Filename – Enter the complete path name of the file to log the information. Use the Browse button to find the file name, when needed.

- Log String – Create the string defining the content to be written into the file. The above example created the following entries into the file "CallsLog.txt".

Note: The number of characters sent for the name variable was limited to the first 10 characters (%+10N), which truncated the names in the file to the first 10 characters. See "Action Variables" on page 190 for details.

12/02/04	16:27	In 1027 480-496-9040 Joe Blow I No
12/02/04	16:28	In 1027 480-629-8723 Joyce Gree Yes
12/02/04	16:28	In 1027 949-853-3351 Katz Yamag Yes

Lookup in Outlook   This action will lookup the phone number in Microsoft Outlook and then selectively opens a contact, creates a new contact, or adds a journal entry.
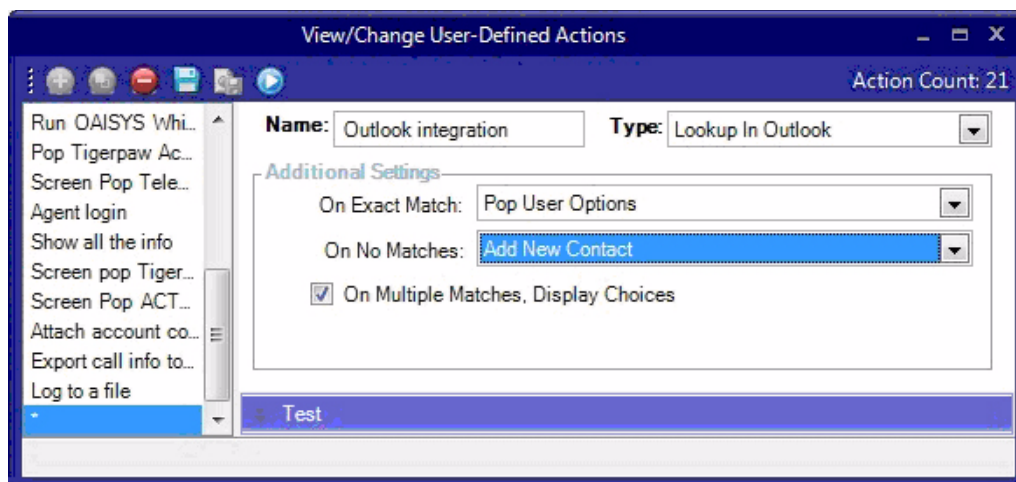
<table>
<tr><td>**Minimize Phone Screen**</td><td>This action shrinks the Call Manager screen to an Icon in the Tool Tray. To return Call Manager to its original position requires the user to either double-click the icon in the tray or right-click and select Show.</td></tr>
</table>
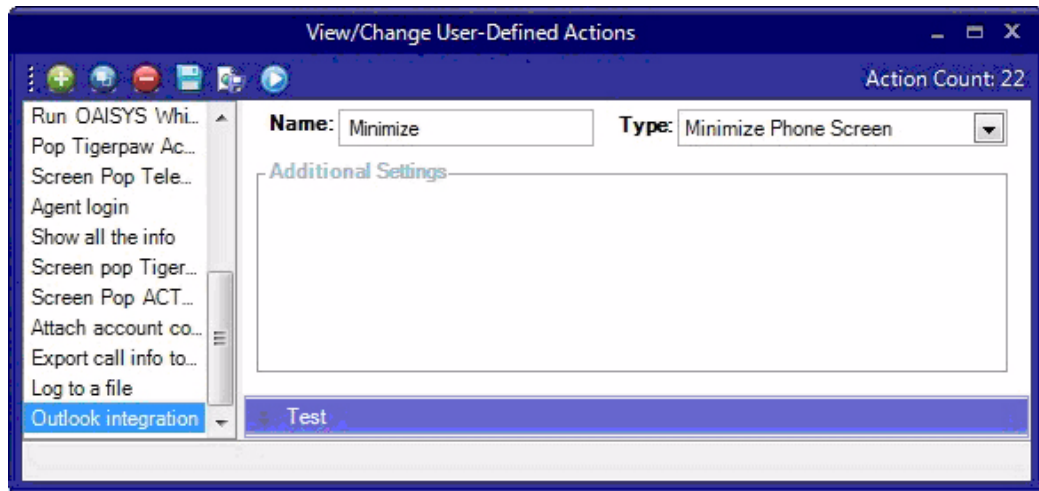
<table>
<tr><td>**Modify Call Information**</td><td>This action changes the Caller ID name, Caller ID name, or Account code of the active call on this phone and when the PBX supports the changes, the same information held in the PBX. Using the Extra Info option provides for entering or changing any other information associated with the call.</td></tr>
</table>
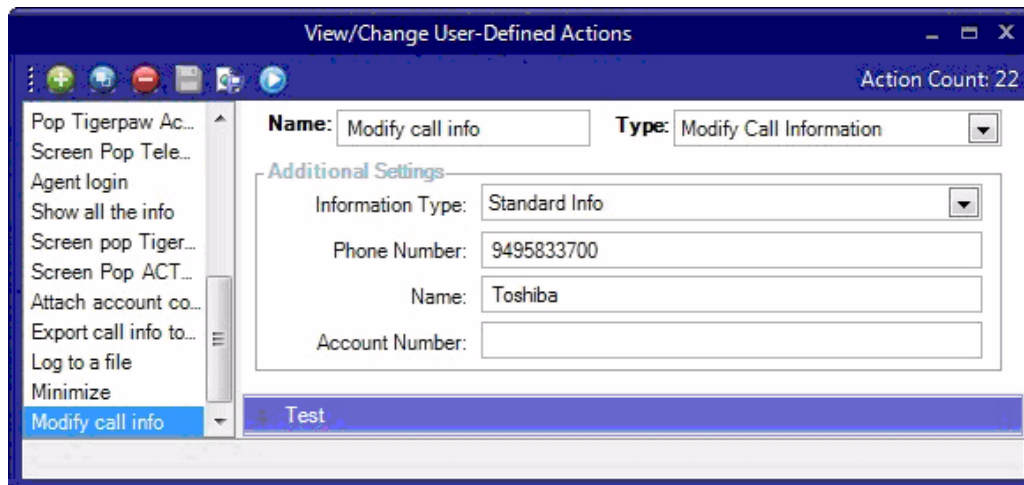
- Information Type – Select either Standard Info or Extra Info. The Standard Info option supports updating the information in the IPedge. The Extra Info option can enter or change any field for this call.

Standard Info
- Phone Number – Enter a phone number to be used as the Caller ID number for this call. This replaces an existing number or adds a number, if blank.

- Name – Enter a name for the caller to be used as the Caller ID name. This replaces an existing name or adds a name, if blank.

- Account # – Enter an account code for the call. This replaces an existing number or adds a number, if blank.

Extra Info
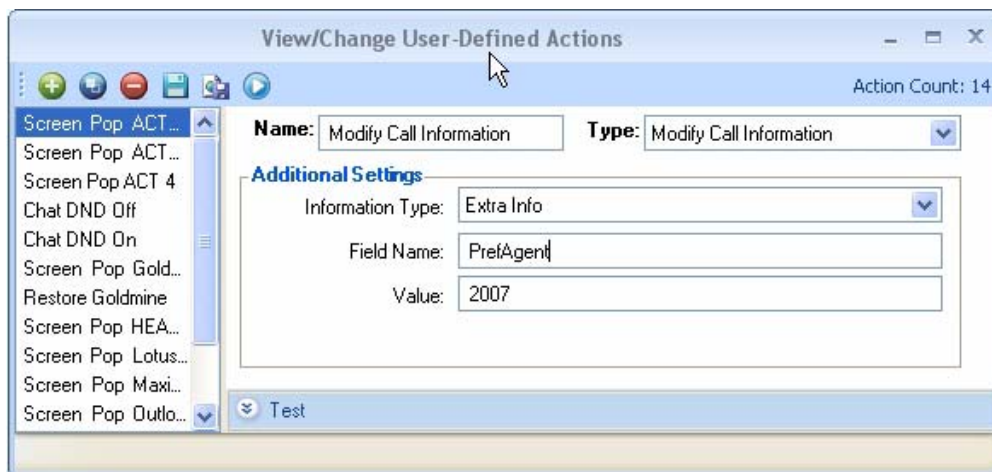
- Field Name – Enter the name of the field to be changed. This name must match exactly the field name including uppercase and lowercase syntax. For example, a user may want to create User Programmable Keys identifying the "Preferred Agent" for the call prior to transferring the call into a queue. The Field Name would be entered as PREFAGENT. The value would be the agent's ID code.

- Value – Enter the value to be used for this field. Following the above example, then the agent's ID code would be entered into this field.

Play WAV File   This action will play a specified WAV file on the PC sound card.
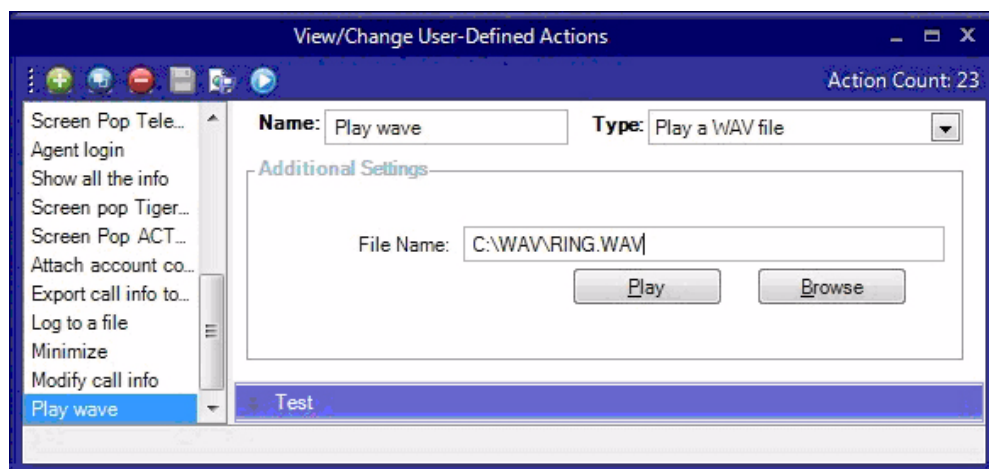
- Path & Filename – Enter the complete path name for the WAV file to be played or browse to find the path of the file.

Pop External Web Browser

This action sends a URL to the PC's default web browser (run the web browser if it isn't already running).
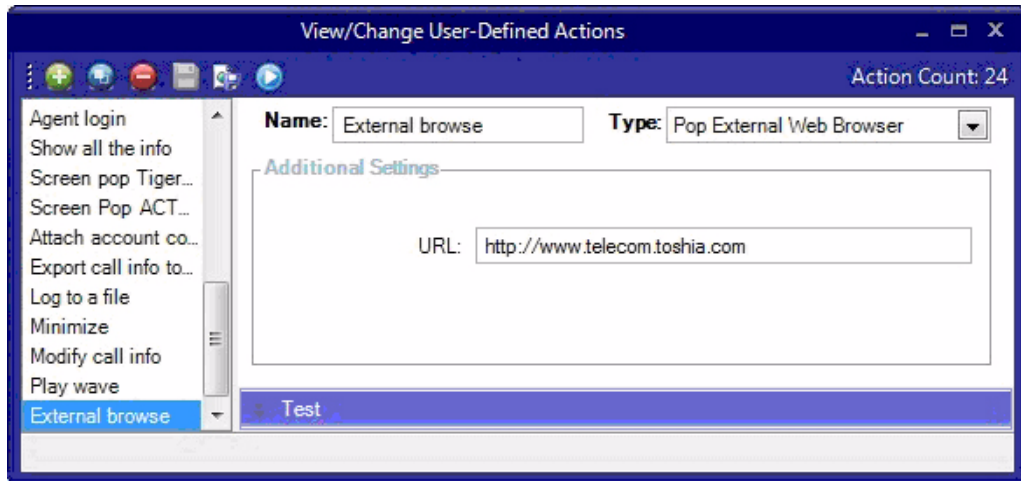
URL – Enter the complete URL name for the Web site to be opened in your browser. The URL can contain Action Variables to make the lookup use call information.

Pop Internal Web Browser

This action can be used to send a URL to the 'built-in' web browser of the Call Manager (when installed) or can be used to create access to other companion application programs.

An example of using your Personal Call Handler to automatically open the Integrated Web Window, whenever an outside call rings in, to provide a script to for answering that call. The URL can contain action variables for example using the DID/DNIS number used for the call to open a page created for each DID/DNIS number. Thus when the call arrives, a screen opens for a script or questions to use for that call.

Another use may be to have several "Personal Directories" where the 8 button limit may not allow access to more directories. Assigning a programmable button can allow opening these personal directories using one-click access.
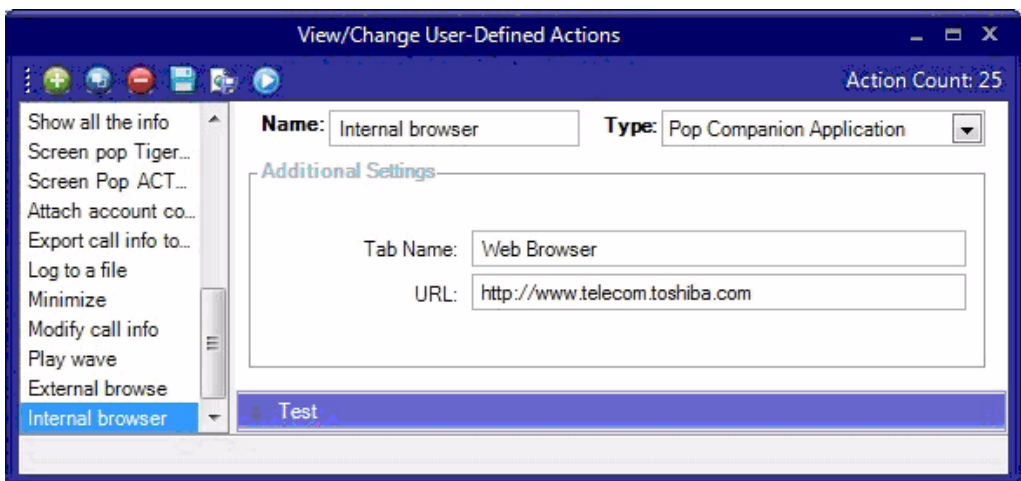
- Tab Name – Enter the name of an existing Web Browser Companion Application (tab name). This name must exactly match the name as displayed. This action uses the specified tab as the parent window.

- URL (Param1) – Enter a URL or other Param1 parameters as indicated in the table below. The URL can contain Action Variables as part of the entry.

Popup Call Info Screen

This action will pop open either the Standard Call Info screen or Extra Call Info screen. The Standard Call Info screen allows the user to type in the Caller ID name or number or Account code of a call, lookup the phone number in Outlook and/or Open a Contact or Journal, or Divert a Ringing call to another location. Either screen allows you to view, change, or attach additional extra information to a call. The fields shown in this window are defined in Preferences, General Tab (see "Extra Info Screen" on page 143).
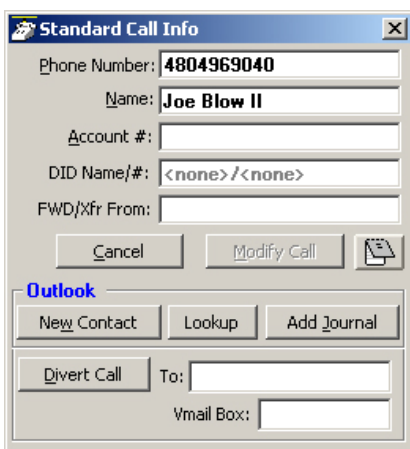
Standard Call Information window   **Extra Call Information window**
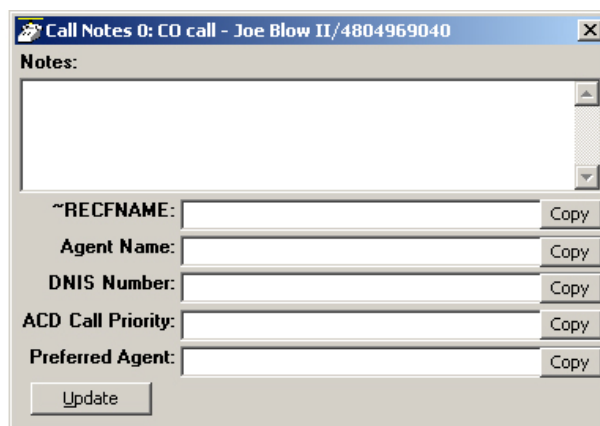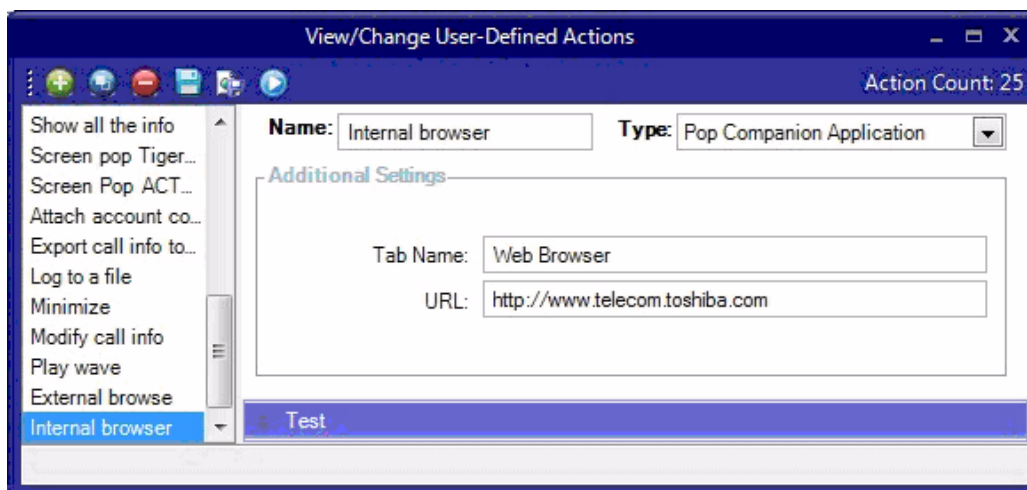
- Popup Info Screen Type – Choose either Standard Info or Extra Info. When Extra Info is selected, choose when the popup will occur: Always, Any Info Attached, or Any Priority Info.

Popup Phone Screen This action causes a popup (Restore) of the Call Manager screen from an icon.
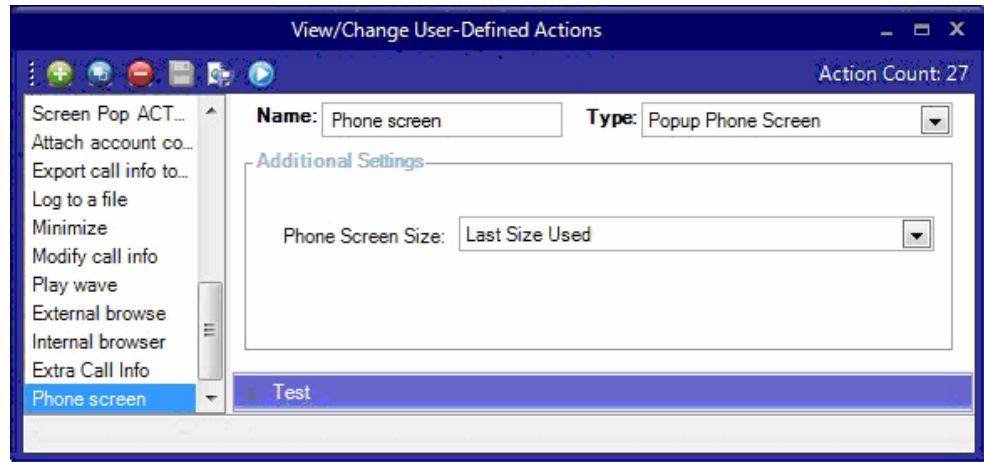
- Phone Screen Size – Select the size for Call Manager's main screen. The choices are to restore to the Last Size Used, Small (or compact view), or Large (or expanded view). When Call Manager is docked to the top or bottom, Call Manager restores to settings defined in the Preferences Docking tab.

Run another Program This action triggers the running of another program on the PC.
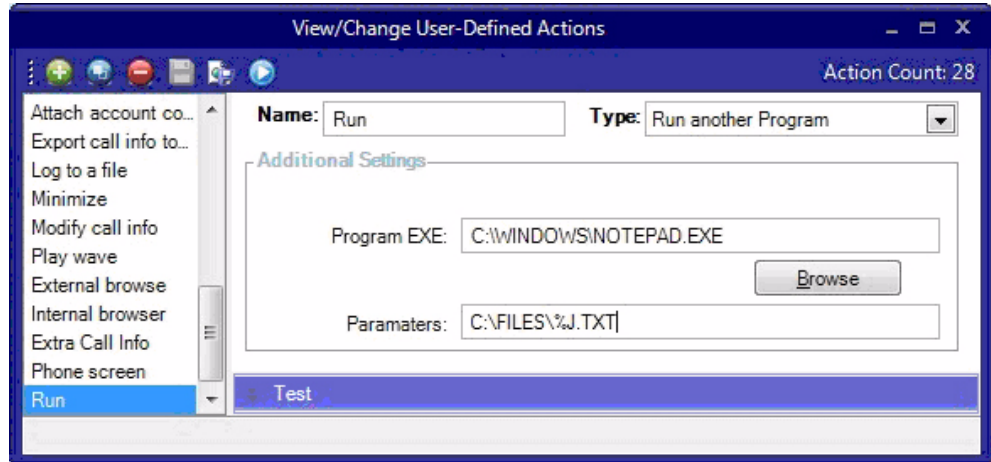
- Program EXE – Enter the name and path of the program to be run. In the example above, the program is Outlook.exe. Use the Browse button to find the file as needed.

- Parameters – Enter any additional parameters that may be accepted as part of the command line to startup the program. The example above uses Outlook to pop open a "sticky note" with data and time recorded.

Send DDE Msg   This action sends a DDE Execute message to another program on the PC. Frequently this is used to "Screen Pop" a contact management program, such as Goldmine.
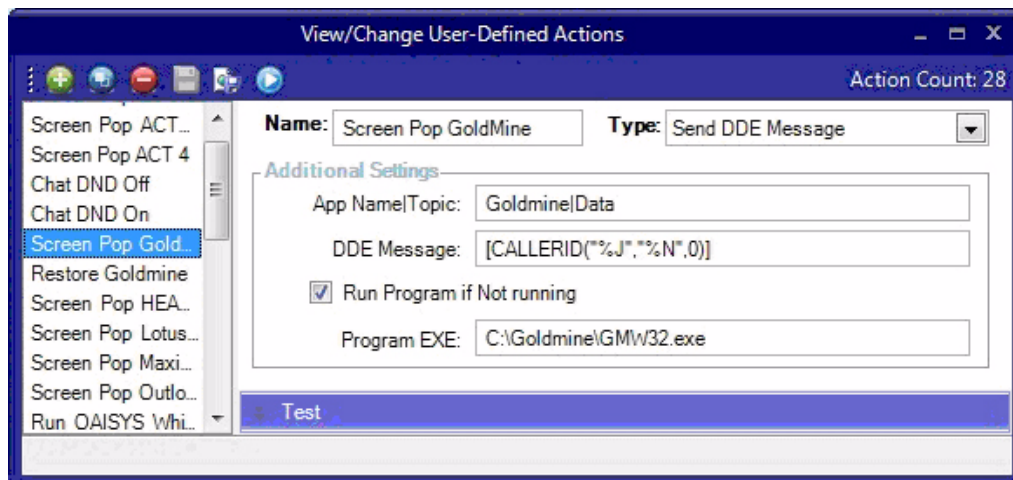
- App Name Topic – The application will specify both the application name and topic name used for making the communication link. Follow the application note or that application's documentation for specifics.

Note: The pipe character '|' must separate the application name and topic name.

- DDE Message – Follow the application note or the application's documentation to define the message to be sent for that application. The format and syntax is defined by that application.

- Run Program and Program EXE – If the target program is NOT found to be running, you can have the action attempt to automatically start the program.

Send Keystrokes to a Program

This action provides a way to send keystrokes to another Windows program just as if the user typed them into that program. This can be used, for example, to pop up another program whenever a call rings in.

Note: Use this action carefully because when the action is triggered, the keystrokes will be sent to the target program regardless of the state of that program (e.g. even when the user is in the middle of some action in that program).
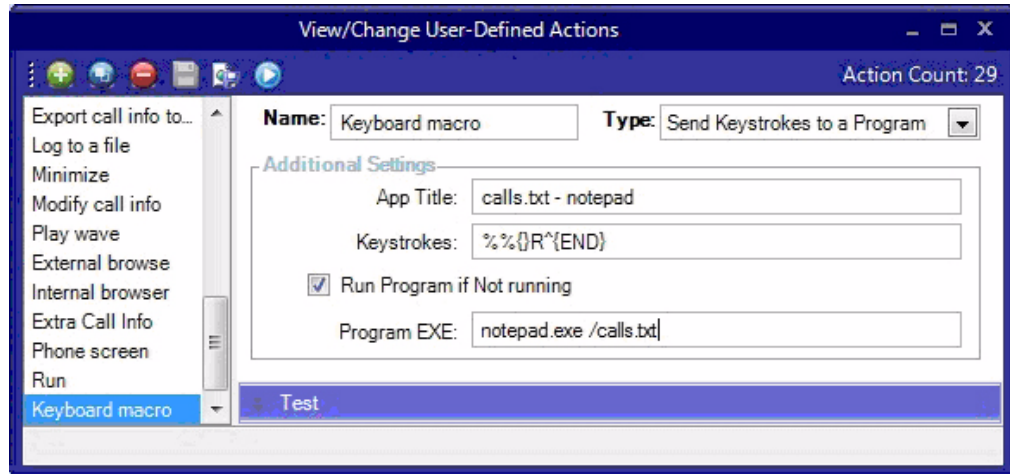
- App Title – must exactly match the text in the title bar of the target program (not case sensitive).

- Key Strokes – You can send any keys including special keys (see below). One or more characters represent each keystroke. To specify a single keyboard character, use the character itself. For example, to represent the letter A, use "A" for key text. If you want to represent more than one character, append each additional character to the one preceding it. To represent the letters A, B, and C, use "ABC" for key text.

- Run Program if Not Running – If the target program is NOT found running, you can have the action attempt to automatically start the program.

- Program EXE – Enter the path to the program to be run and a command-line parameter when needed to the target program for startup. Use a forward slash after the EXE name and before the command line parameter(s).

Example Action:

The example in the diagram sends keystrokes to the Notepad program to Popup (restore) the program and to move the cursor to the end of the file.

1. App Title: The App Title must match exactly what appears in the title bar of Notepad: calls.txt - Notepad

2. Key Strokes: To restore Notepad (Alt+Space+R): Key Strokes:= %%{ }R and to move to the end of the file (Control+End): append to Key Strokes: ^{END}

3. In Program EXE: Enter program name and file name to open "Notepad.exe /calls.txt".

Note: The forward slash after "Notepad.exe" is needed to allow the command-line parameter "/calls.txt" to be used. The result is that the file "calls.txt" will open, if not open, and popup with the cursor at the end of the file allowing additional entries to be made.

Special Keys The plus sign (+), caret (^), percent sign (%), tilde (~), and parentheses ( ) have special meanings. To specify one of these characters, enclose it inside braces. For example, to specify the plus sign, use {+}. Brackets ([ ]) also must enclose them in braces. To send brace characters, use {{} and {}}.

To specify characters that aren't displayed when you press a key (such as Enter or Tab) and keys that represent actions rather than characters, use the codes shown below:

Key	Code	Key	Code
Backspace	{BS} or {BKSP}	Tab	{TAB}
Break	{BREAK}	Up Arrow	{UP}
Caps Lock	{CAPSLOCK}	F1	{F1}
Clear	{CLEAR}	F2	{F2}
Del	{DEL}	F3	{F3}
Down Arrow	{DOWN}	F4	{F4}
End	{END}	F5	{F5}
Enter	{ENTER}	F6	{F6}
Esc	{ESC}	F7	{F7}
Help	{HELP}	F8	{F8}
Home	{HOME}	F9	{F9}
Ins	{INS}	F10	{F10}
Left Arrow	{LEFT}	F11	{F11}
Num Lock	{NUMLOCK}	F12	{F12}
Page Down	{PGDN}	F13	{F13}
Page Up	{PGUP}	F14	{F14}
Right Arrow	{RIGHT}	F15	{F15}
Scroll Lock	{SCROLLLOCK}	F16	{F16}
Spacebar	{ }	Control	^
Shift	+	Alt	%%

Combination Keys

To specify keys combined with any combination of Shift, Control, and Alt keys, precede the regular key code with Shift, Control, or Alt code.

To specify that Shift, Ctrl, and/or Alt should be held down while several other keys are pressed, enclose the code in parentheses. For example, to have the Shift key held down while E and C are pressed, use "+(EC)". The code "+EC" will send the characters Ec instead of EC and "E+C" will send the characters eC.

To specify repeating keys, use the form {key number}; you must put a space between key and number. For example, {LEFT 42} means press the Left Arrow key 42 times; {h 10} means press h 10 times.

Note: Keystrokes cannot be sent to an application that is not designed to run in Microsoft Windows (MS-DOS programs, even in a DOS window) nor can the Print Screen (PRTSC) key be sent to any application.

Set Phone Status Message

This action works much the same as Set Phone Do Not Disturb except it does not change the phone's DND status and the message only appears within Call Manager and the DSS keys on other users of Call Manager.
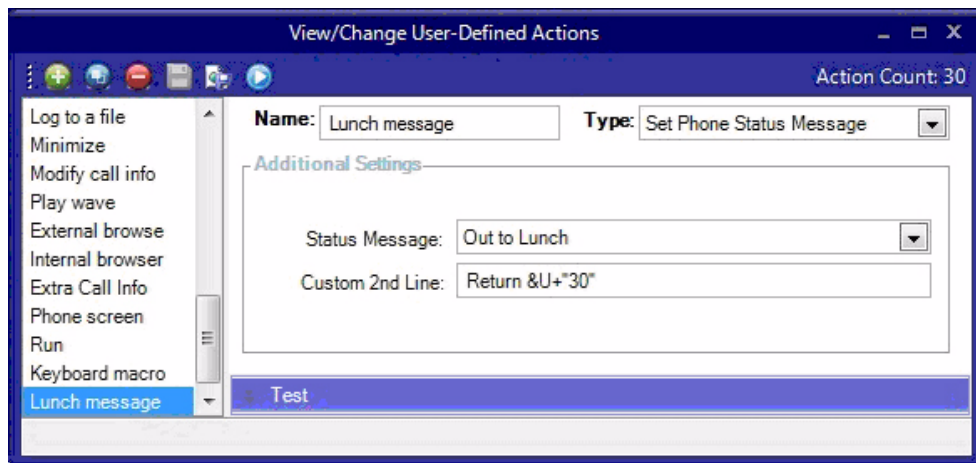
- Choose DND Message – Select from the available messages in the drop down list for the message that appears in the upper line of the phone's display.

- Custom 2nd Line – Optionally enter a second line to display on the lower line of the phone's display message.

Note: Action Variables may be used including the time variable plus 'x' minutes to set a current time plus 60 minutes in the example above.

Set Phone Forwarding   This action changes the Call Forwarding setting of the phone in the PBX for the prime DN of the phone. The action can determine the type of forwarding (Immediate, Busy, No Answer, Busy/No Answer, or Off) and the destination.
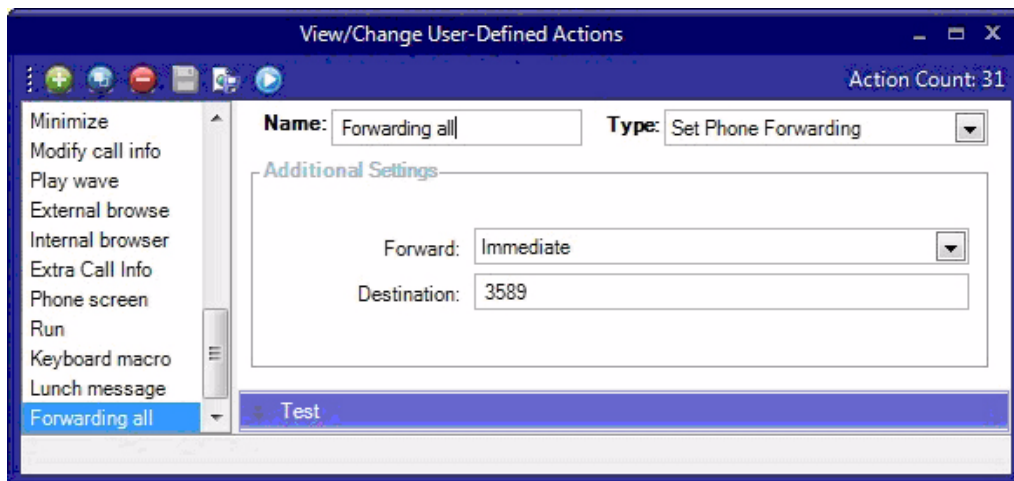
- Choose Forwarding – Select from the drop down list the forwarding action to use.

- Destination – Define the number for the destination of the forwarding. This is left blank when using Forwarding Off.

System/PBX Command This action can be used to send appropriate OAI commands to the PBX to perform functions. Up to five commands can be specified, and each command is executed sequentially when this action is called.
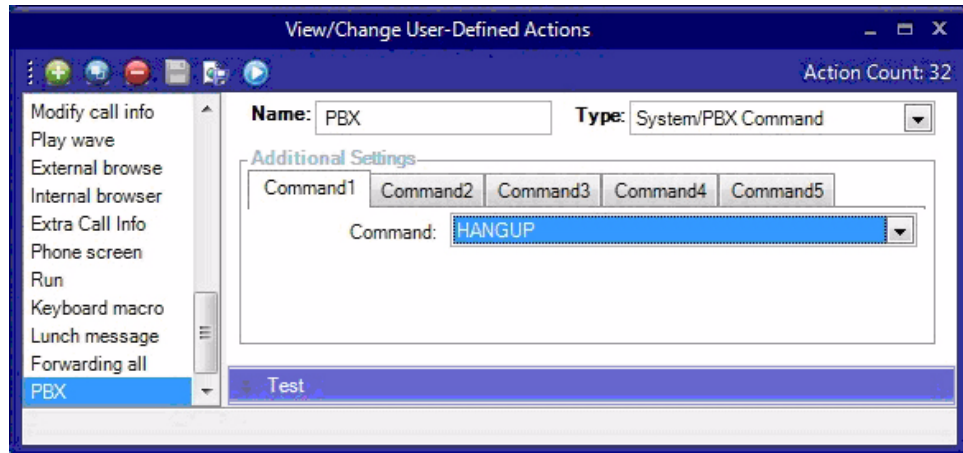
- System/PBX Command – Select from the list of available commands and edit the variable values (shown in quotation marks) as needed. The commands available are as follows:

ANSWER	
CONFERENCE	
DIALxxxxx	Where xxxxx – is the number to be dialed. Digits 0~9,*,#. A ',' is a pause and '!' is a hook-flash. Parenthesis, semi-colons, dashes, and spaces are ignored, thus (480) 496-9040 can be entered.
HANGUP	
HOLD	
MODIFYCALL "Field", "Value	Recommend using Modify Call Information or Attach Acct Code action.
TRANSFER	Recommend using Transfer Call action.
Recording Option	When Recording is active on Call Manager.
RECORD	
RECORDBKMAKR "Text	Substitute your bookmark text for "Text"
RECORDSTOP	
ACD Option	When ACD is available on some PBXs.
ACD HELP	
ACD PU	
SET WORKUNITS	

Transfer Call   This action causes the active call to be transferred to another phone, directly to a specific Voice mailbox, or to an outside phone number (e.g. 9,4969040).
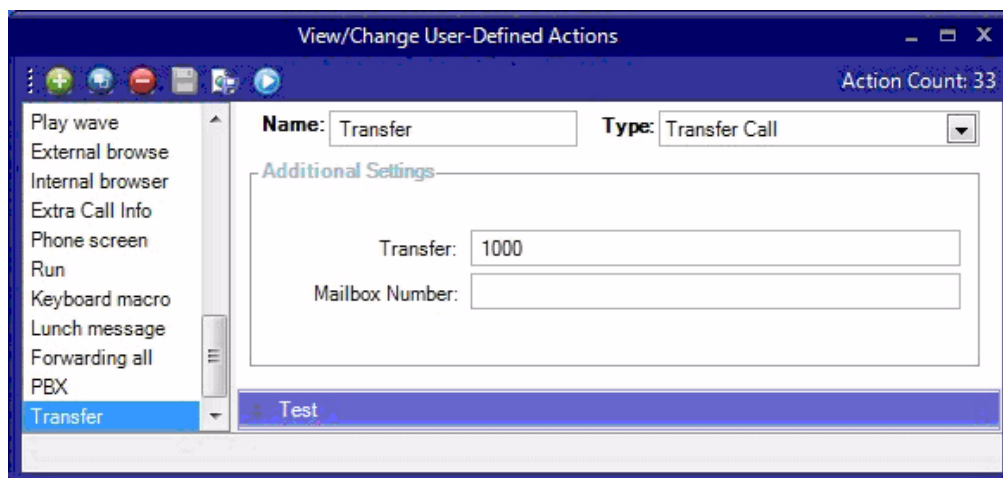
- Transfer To – Enter an extension number or outside number to be called.
- Transfer Mbox – Enter a mailbox number if going to a Voice Mail number.

Action Variables

Call Manager uses variables to provide information to actions. Call Manager replaces the variable token code with the appropriate value when the action executes. For example, %P becomes '4804969040' when you receive a call from Toshiba.

Call Variables

Refer to the table below for call variables and their values.

Variable	Information
%A	Account Number
%B	Call Direction ("In" or "Out")
%C	DNIS Called Name
%D	DNIS/DID Number
%E	This Call Manager's Extension Number. (Can be used for Primary DN or Secondary DN when using Set DND Action.)
%F	Call Forwarded from Extension number
%G	DND Message, when phone is in DND. (Can be used for Primary DN or Secondary DN when using Set DND Action.)
%H	Calling Number (hyphenated – type 1, format defined in agnt_ph.ini)
%I	TAPI Call ID
%J	Calling Number (hyphenated – type 2, format defined in agnt_ph.ini)
%L	Elapsed Time of Call (H:MM:SS)
%M	Main Listed Phone Number (Use with Export Call Info actions)
%N	CallerID Name (outside calls only, requires CallerID)
%OR("field") or %OC("field")	Outlook Calendar/Reminder "fields": 1. "SUBJECT" – subject field of Outlook event. 2. "START" – start Date/Time of event. 3. "END" – ending Date/Time of event. 4. "IMPORTANCE" – Importance (Low, Normal, High) of event. 5. "LOCATION" – location of event. 6. "ADVANCE" – number of minutes of advance notice. 7. "STATUS" – Busy status (Free, Busy, Out of Office) of event. 8. "STIM" – start Time without the Date. 9. "DIFF" – time difference before event start, e.g., 15 minutes will report "15 Minutes". Used for text to speech announcments.
%P	Incoming: CallerID Number / ANI; Outgoing: Dialed Number
%S	Call Answered ("Y"es or "N"o)
%T	Call Type ("IC" or "CO"): IC= Intercom call; CO= Outside call.

Variable	Information
%V	The Extra Call Info screen allows you to configure a button for each Call Info field. This variable,%V, contains the value of that Call Info field for use when defining an Action trigger.
%W	Contains '1' if Outlook Link found a match in Outlook. Contains '0' if Outlook Link did not find a match, or was not active.
%X("name")	Extra Call Info Field, e.g. %X("Notes"). The name of the field must be in double quotations. For a list of field names in your system, go to Preferences > General Tab > Extra Info button, Add and use the pull down list for fields available on your system.
%Y	Contains the Outlook Unique Identifier if Outlook Link found a matching record in Outlook.
%Z	Call Status ("Ringing", "Talking", etc.)

Note: Insert +x following the '%' character to restrict the variable value to the first 'x' or left-most characters. Insert –x to restrict the variable value to the last 'x' or right-most characters. For example, to pass the first 8 characters of the Calling Party Name, enter: %+8N. To send the last 4 digits of the Calling Phone Number, enter: %-4P.

System Variables Call Manager also uses System Variables for Action parameter strings, such as Date and Time. They can also provide some control over text logging actions with Carriage Return, Line Feed, Tab, and Random Numbers (for file names.) Note: Many System Variables duplicate the Action Variables to provide increased compatibility with legacy applications and 3rd Party Application Notes.

Variable	Information
&A	Account Number
&B	PBX Call ID
&C	Insert a Carriage Return character
&D	Insert the Date in format: "mm/dd/yy"
&E	Insert Extension Number of My Phone
&F	ACD Group Name
&G	Agent ID
&H	Calling Phone Number (hyphenated - type 1)
&I	TAPI Call ID
&J	Calling Phone Number (hyphenated - type 2)
&K	ACD Group extension number
&L	Insert a Line Feed character
&N	Calling Party Name (outside calls only)
&n	Insert the Date and/or time in user-specified format e.g. "&Nhh:mm:ss AM/PM&"
&P	Calling Phone Number
&Q	Random Variable (6 digits)
&R	Random Variable (8 digits)
&T	Insert the Time in format: "HH:MM" (24 hour clock).
&U	Insert the Time in US format: "H:MM AM/PM".
&V1	VoIP Ringer Audio device (Soft Phone must be used to use)
&V2	VoIP Headset Audio device (Soft Phone must be used to use)
&X	Destination Field (for Export of Call Info)
&Y	Call Type ("IC" or "CO"): IC= Intercom call; CO= Outside call.
&t	Insert a Tab Character
%%	Insert a Percent "%" character
&&	Insert an Ampersand "&" character

Note: &T and &U variables accept a relative addition of time in the format &U+'30' results in the current time plus 30 minutes. The number of minutes must be within single quotation marks. Example: A Set Phone Status Message action can be specified selecting the OUT TO LUNCH message and a second line of UNTIL &U+'30'. If this action is used at 11:55 AM, then the resulting message on Call Manager is OUT TO LUNCH UNTIL 12:25 PM.

Examples for Text Reader/ Announcer:

Speak Reminder: SPEAK,"Reminder,%OR("SUBJ"),Starting %OR("DIFF")",&V1,&V2

Speak Appointment: SPEAK,"Appointment,%OC("SUBJ"),Starting Now",&V1,&V2

Announce Call: CA,%T,&F,"%N",%H,&V1,&V2

**Exporting
Actions**

Once an action has been designed, exporting the action is recommended to provide a backup copy as well as a file that can be copied to other Call Managers. To export an action, you will need to be in the Add/Edit Action screen and click the Show Test button to reveal the testing parameters and the Export Action button. Pressing Export Action copies the details of the action into a special file named: xx.ACI   where 'xx' is a number assigned by the software corresponding to the action number (e.g. 2.ACI).

This file is exported into the user's application data folder (typically, "C:\Documents and Settings\<user name>\Local Settings\Application Data\Toshiba\Strata Call Manager"). In order to identify the file more easily you may want to user Explorer to rename that file to something more appropriate (e.g. PLAYBELL.ACI). When renaming an action file always limit the file name to 8 characters prior to the .ACI extension. This file can then be copied to another PC to give a copy of the action to another user of Call Manager. Leaving a copy in this folder provides a backup copy of the action. That will be then be loaded at startup if that action were deleted in the Actions List (see Importing Actions below for more details).

Note: When exporting an action, if a file with that name already exists, an error message will occur and the action will not be copied – when this occurs you will need to use Explorer to rename the existing file and then export again.

**Importing
Actions**

When the Call Manager program starts up, it automatically imports actions from the compiled NET_PHN.ACS action file plus all action files (*.ACx) it finds in its startup folder. The last character used in the extension of the file name defines how the action file is treated on importing:

- .ACI – These files are individual actions created by Exporting Actions. These will be imported only when an action using the same action name does not exist in the compiled file. Thus, when this file exists and the user had made changes to this action, the user can revert back to the original operation by deleting the current action in Call Manager then stopping and restarting Call Manager.

- .AC1 – Upon startup, Call Manager always imports all "One-Shot" action files (*.AC1). When an action of the same name exists, the action will be overwritten. Once imported, the One-Shot export files are deleted.   These one-shot files can thus be used to import an action just one time allowing the user to change or delete the action as desired.

- .ACO – Upon startup, Call Manager always imports all "Over-Write" action files and overwrites any action with the same name. These are useful to ensure the actions do not get changed or when making corrections on other Call Managers.

- .AC0 – This type of file is only imported at initial startup of the Call Manager or when the compiled actions file "AGT_PHN.ACS" is not found at startup.

These files allow you to design an action, export it, rename it, and then copy the file to all PCs that need that action. These are also useful to overcome a user accidentally deleting an action since they can have a copy of that file on their PC, when they exit and restart Call Manager that action will be restored.

Testing Actions   While in the Add/Edit Action screen, a Show Test/Hide Test button is offered. Pressing this button when it is titled Show Test, will expand the window to a set of "Test Values" that can be set representing the variables used within the action. This sets the values of any real time variables for testing your action. For example, if your action will be using the "Phone Number" variable (%P, %H, or %J) you will want to set the test value of %P to the phone number you want to simulate (e.g. 7145551234). Then press the Perform Test button to test your action. The "Test Results" screen will show the results of the test and if the action fails, you can change the parameters of the action and test again. When another application is involved in the action, that application, in general, will need to be installed and running to perform the test. Pressing the button titled Done Testing will close the "Test Window".

Note: If the action seems to work fine when you test it from this screen, but doesn't seem to work properly when the action is used by the Call Handler you may want to open the Main Menu Icon > Setup > Advanced > Show Events screen (see your System Administrator if you do not have the Advance menu item) to see what is actually occurring when that action is being used.

Personal Call Handler   15
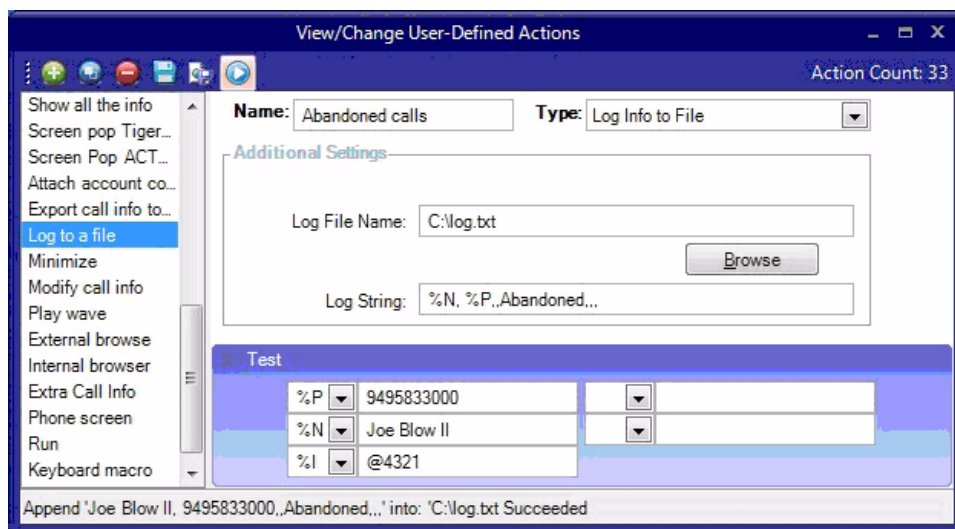
Personal Call Handler

This powerful feature of Call Manager allows you to create Call Handling Rules to automatically take actions when certain events occur and specific conditions are true. That is, you create a rule so that (1) when an Event occurs, and (2) if certain conditions are true, and then (3) perform specific Actions. Following are a few examples of what you can accomplish with these Rules:

- When an Outside call with CallerID rings and I'm not on another call, popup Microsoft Outlook and lookup the caller info in the database.

- Whenever I answer a call without CallerID, automatically present a screen so I can type in the caller info for that call.

- Whenever I dial a call, automatically present a screen so I can type in the name for that call.

- When that nagging broker calls, immediately transfer him to my voice mailbox.

- I'm working on an important project, so whenever anyone other than my boss calls, immediately transfer them to voicemail.

- When my spouse calls, if I haven't answered the call within 5 seconds, play a special tone on my PC to alert me.

Note: Depending on your configuration you may not be able to change the Call Handler Rules, in which case you should check with your System Administrator.

The basic process for creating Personal Call Handling rules is to first define the actions you would like to accomplish and test them. Then you can create a Personal Call Handling Rule and choose which event will trigger the action(s) and then refine this by setting the conditions for when the trigger will occur.

Creating Personal Call Handling Rules

The following items will define how to edit, delete or add new rules. Many rules can be created and exist simultaneously. To allow rules to be defined and not applied, an enable/disable check box appears before each rule to make it easy to disable or enable different rules are different times.

The order of the listing of the rules determines the sequence the rules will be used. Thus, some rules may prevent following rules to be used. For example, if the first rule in the list causes the call to divert to another station followed by a rule to Screen Pop Outlook, then the Screen Pop will never take place. If the rules were reversed, then the Screen Pop will take place prior to the call being diverted. In either case, the user may not see the Screen Pop since the call will leave this station, thus the Screen Pop will likely disappear as well. For the user to see who is calling and provide an ability to answer the call or "do nothing", then creating the Screen Pop to occur immediately and the Call Divert action to occur using a time delay, then the two rules would result in displaying the Screen Pop and then pausing before diverting the call.

Note: This example was for illustration purposes. These two actions can actually be done within a single rule to make the creating of rules simpler.

To Open Call Handler Rules

1. Click the Personal Call Handler icon > Personal Call Handler tab.

The following screen displays.
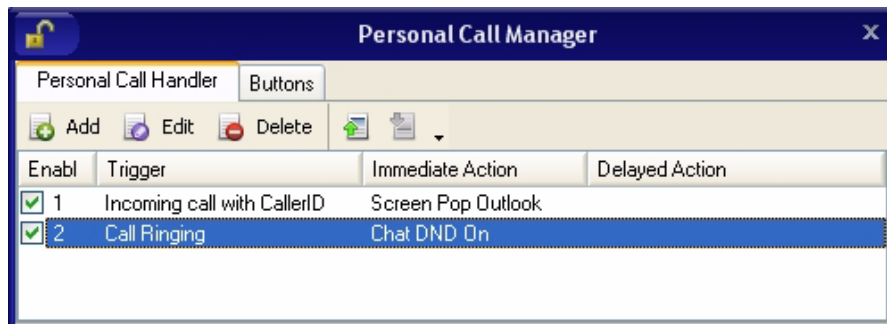
To Delete a Rule

• Highlight the rule to delete and click Delete.

To Add or Change a Call Handling Rule

1. Click the Add button

or highlight the rule to be changed and click Edit.

2. Select a Triggering Event and Set the Conditions

The types of events that can be used to trigger a rule can be divided into call related triggers, system triggers, and status change triggers. Each grouping is shown below along with the Conditions offered for the trigger to take effect:

- **Call Ringing** – Whenever a call rings on the phone.Call Type – Select the call type for the ringing call.

- Phone State – Select the Phone State when the call arrives.
- Caller ID Number – Select the Caller ID to be used in the trigger. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Extra Info – Select a "Field Name" (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **Call Answered** – Whenever a call is answered on the phone.Call Type – Select the call type for the ringing call.

- Call Direction – Select the direction of the call to be triggered.

- Caller ID Number – Select a Caller ID number. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- Extra Info – Select a "Field Name" (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **Call Disconnect** – Whenever a call leaves the phone (whether the caller hung up or the call was transferred or forwarded).

- Call Type – Select the call type for the ringing call.
    - Call Direction – Select the direction of the call to be triggered.
    - Call was Answered – Select whether the call was answered.

- **Phone Software Startup** – Happens whenever the Call Manager software starts up and is in full operation with the PBX.

- **Phone Software Shutdown** – Happens whenever Call Manager software is shutdown (using a normal Exit).

> - **FWDed/XFRed Call Ringing** – Whenever a call rings on the phone that has been either Forwarded or Transferred from another extension.

- Call Type – Select the call type for the ringing call.
- Phone State – Select the Phone State when the call arrives.
- FWD/XFR Ext # – Select the extension number the call is from. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Extra Info – Select a "Field Name" (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **ACD Call Ringing** – Happens whenever a call rings on the phone that is part of an ACD group (ignores non-ACD calls).

- Call Type – Select the call type for the ringing call.
- Phone State – Select the Phone State when the call arrives.
- ACD Pilot Ext # – Select the pilot number the call is from. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Extra Info – Select a "Field Name" (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **Status is Idle** – Whenever the station is idle and the DND button is toggled or whenever an ACD agent ends "wrap-up" time and becomes available to take a call.

- Do Not Disturb Status – Select whether the station is to be considered idle when the DND Status is...
  - ACD Agent Status – Check the box to trigger when an agent goes idle after completing the "wrap-up".

- **Change in DND Status** – Whenever the DND or message status change takes place, the message set is checked to see if it matches the defined conditions.

- Do Not Disturb Change – Select the DND Status change to cause the trigger. For the item with a message to match, enter the

beginning characters of the message. See Like Matches and Unlike Matches for use of wildcards.

- • Affected Phone – Select whether this rule will be based upon My Phone or My Secondary Extension.

- **Outlook Calendar Appointment** – An event that occurs at the start time of the appointment and again when the appointment time ends ('Free').

- • Calendar Status – Select to match the Outlook Calendar Status options: Any, Free, Busy, Out of Office.
- • Event Importance – Select to match the Outlook Calendar Importance options: Any, Low, Normal, or High.
- • Subject – Select either Any or Matches this Subject. For making the match enter the text for the subject to match. See Like Matches and Unlike Matches for use of wildcards.

Note: Outlook Calendar may also send a 'Tentative' status setting which is treated using the 'Any' setting.

- **Outlook Calendar Reminder** – An event that occurs at the time scheduled for sending the reminder message for an upcoming appointment. This event will trigger again if the appointment time is changed after the Reminder event was previously given.

- Calendar Status – Select to match the Outlook Calendar Status options: Any, Free, Busy, Out of Office.
- Event Importance – Select to match the Outlook Calendar Importance options: Any, Low, Normal, or High.
- Subject – Select either Any or Matches this Subject. For making the match enter the text for the subject to match. See Like Matches and Unlike Matches for use of wildcards.

Note: Outlook Calendar may also send a 'Tentative' status setting which is treated using the 'Any' setting.

Like Matches

When you design a Rule to trigger using a Specific Number (for the CallerID number or Account number) or on a Specific Name (for the CallerID name) you can design the rule to either search for an exact match or a "LIKE" match. A "LIKE" match simply uses wildcard characters in the string that you specify to accept a range of values. The following wildcards are available:

? Any single character

* Zero or more characters

Any single digit (0-9)

Example 1: To trigger on any caller from your area code 602: Set the Specific Number on Caller ID Number to: 602*

Example 2: To trigger on any caller from your local office code 496: Set the Specific Number on Caller ID Number to: 602496?

Example 3: To trigger on any caller with a caller ID name starting with C: Set the Specific Name on Caller ID name to: C*.

Unlike Matches
In addition, you can precede any of the search strings with the characters <> to request all matches that "aren't equal" or "aren't Like".

Example: To trigger on any caller from NOT from your area code 602: Set the Specific Number on Caller ID Number to: <>602*.

3. Apply User-Defined Actions – This section will define how to apply the User-Defined Actions to a Personal Call Handling Rule.

- Set an Immediate Action – Pull down the listing and select the action to be applied immediately. Either an Immediate or a Delayed Action is needed for the rule to be complete.

- Set a Delayed Action – Define the number of seconds to delay the action and then pull down the listing and select the action to be applied. Both immediate and delayed actions can be performed in the same rule.

- To Check the Action – Clicking the Check Action button will transfer you to User Defined Actions to allow changing the action and/or test the action.

- To Add an Action – Click the Add Action button to transfer to User Defined Actions to allow you to create a new action to be used.

- To Delete an Action – Click the Delete Action button to remove an action from the listings. Use this with caution, as this will remove the action for all other functions as well.

4. Complete the Rule

- To Save Rule – Click the Save button to save your changed or new rule.

- To Cancel Settings – Click Cancel to exit without saving the settings.

- To Export Call Handler Rule – Click the Export Rule to create a.RUI file in the PC user's "C:Document and Settings\Application Data\Toshiba\Strata Call Manager" folder. Each rule created can be saved as a file for backup purposes and copying to another PC to allow the same rule to be used by other users.

Export Rules

Once a rule has been designed, exporting the rule is recommended to provide a backup copy and that file can be copied to other Call Managers. To export a rule, you will need to be in the Add/Edit Rule screen and click the Export Rule button. Pressing Export Rule copies the details of the rule into a special file named: xx.RUI   where 'xx' is a number assigned by the system corresponding to the rule number (e.g. 2.ACI).

The file is exported into the user's application data folder (typically, "C:\Documents and Settings\<user name>\Application Data\Toshiba\Strata Call Manager"). In order to identify the file more easily you may then want to user Explorer to rename that file to something more appropriate (e.g. PLAYBELL.RUI). When renaming a rule file always limit the file name to 8 characters prior to the .RUI extension. This file can then be copied to another PC to give a copy of the rule to another user of the Call Manager. Leaving a copy in this folder will provide a backup copy of the rule that will be loaded at startup of Call Manager if that rule had been somehow deleted in the Personal Call Handler Rules List (see Importing Rules below for more details).

Note: When exporting a rule, if a file with that name already exists, an error message will occur and the rule will not be copied – when this occurs you will need to use Explorer to rename the existing file and then export again.

Importing Rules

When the Call Manager program starts up, it automatically imports rules from the compiled NET_PHN.RUL rules file plus all rule files (*.RUx) it finds in its startup folder. The last character used in the file name extension defines how the rule file is treated when importing:

- .RUI – These files are individual rules created by exporting. These will be imported only when a rule using the same name does not exist in the compiled file. Thus, when this file exists and the user made changes to this rule, the user can revert back to the original operation by deleting the current rule in Call Manager then stopping and restarting Call Manager.

- .RU1 – Upon startup, Call Manager always imports rules from all "One-Shot" rule files (*.RU1). When a rule with the same name exists, the rule will be overwritten. Once imported, the One-Shot export file is deleted. These one-shot files can thus be used to import a rule just one time allowing the user to change or delete the rule as desired.

- .RUO – Upon startup, Call Manager always imports all "Over-Write" rule files, which overwrites any rule of the same name. These files can be useful to ensure the rules do not get changed or when wanting to make the same update on other Call Managers.

- .RU0 – These are another type of rule file that is imported only at initial startup of the program or when the compiled rules file "AGT_PHN.RUL" is not found at startup.

These types of files allow you to design a rule, export it, rename as needed and then copy the exported file to all PCs that need that rule. These are also useful to overcome a user accidentally deleting a rule, since exiting and restarting Call Manager will restore that rule.

Using Microsoft Outlook 16

Dialing from within Outlook

When Outlook Phone Link has been installed, a "Phone Icon" will appear on your Outlook main Tool bar. Then when you are in any Outlook Contacts folder and you have a contact highlighted, you can press this button to dial. A dialing screen will pop up showing each of the phone numbers available for that contact. Simply select the appropriate phone number and press the Call button to place the call.   Note: Please refer to the on-line help file in Outlook Phone Link for available dialing options.

When the call is being dialed in Call Manager, the name from the Contact will be automatically attached to the phone call (for display on the LCD, the Call Key, SMDR, etc).

Incoming Calls

Using the Personal Call Handler you can set up a rule(s) to automatically run the "Lookup In Outlook" action. This action will then lookup the phone number in Outlook and, depending on how your action is configured, will pop open a Contact and/or a Journal.
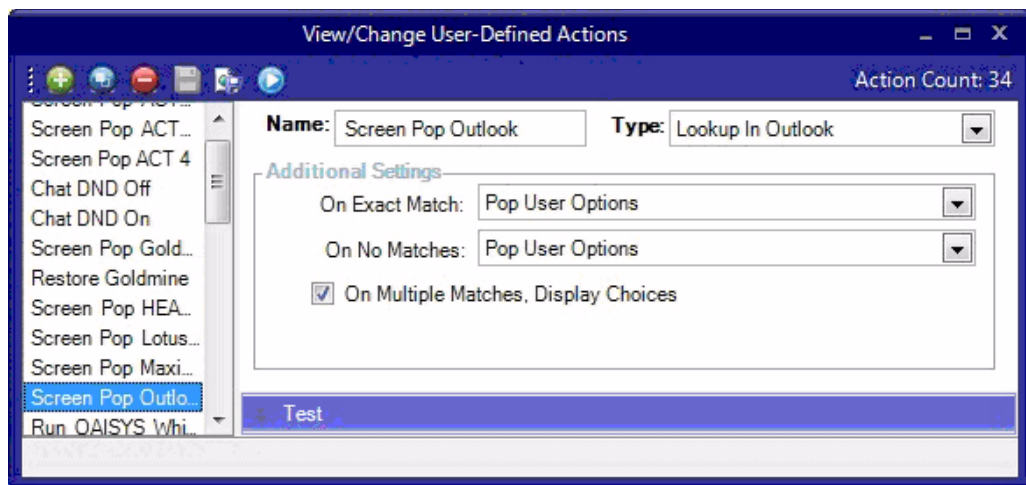
Note: If you setup a rule to trigger on "When Ringing", you may NOT want to have the action automatically open a Contact or Journal because it will do this for every matching call whether you are present or not. So, if while you're away from your desk, you have missed 20 outside calls that rang on your phone, you could have 20 different Contact screens and 20 Journal screens popped up on your PC screen.   A better alternative is to have your "When Ringing..." trigger use Pop User Options instead of the Open Contact or Add Contact or Add Journal options. Now, when a call is ringing on your phone, a small "User Options" window will pop up showing the Contacts that match the

phone number (if any) as well as buttons that let you manually "Open/
Add Contact" or "Add Journal".
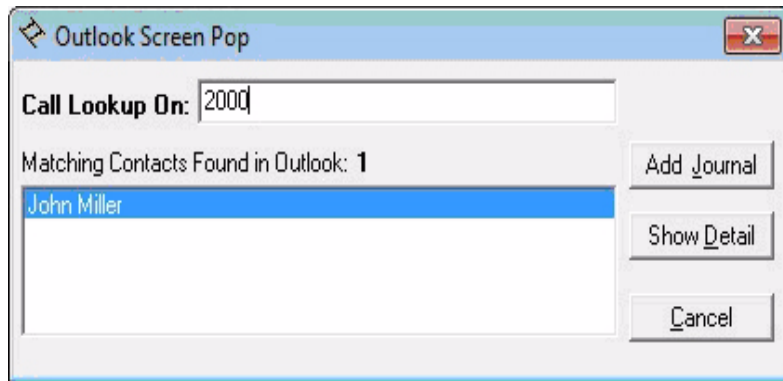
With this, you can see the information about who is calling and then can
manually open a Contact or Journal.   If opening a contact/journal manually is
not desirable, you could also have a 2nd 'trigger/action' so that when you
"Answered" a call it would automatically open a Contact and/or Journal as
desired.

Integrating with Outlook Calendar

One typical integration with Outlook Calendar is to put Appointment
information on DSS key so that all other Call Manager users know your
current presence status. This example will turn on the DSS key with Status
Message only and turn off the message when the scheduled meeting is over.

Create Actions to set and clear the DSS Message

The first Action will set a Status Message and add the Subject field of the
Appointment as part of the message. On the DSS key, the first line and
second line are appended to each other, thus the preset Status Message can
be modified to become something very simple to allow for the Subject to
become the predominant part of the message.
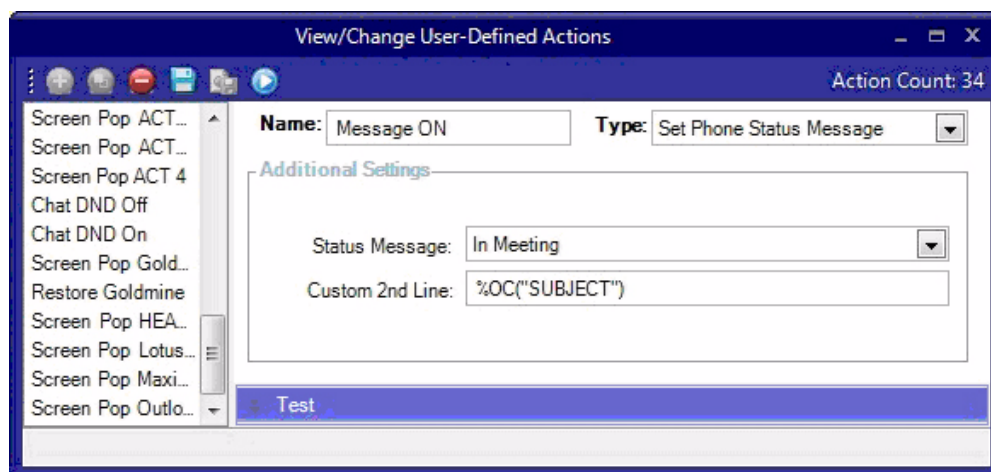
The second Action will clear the message when the appointment ending time is reached.
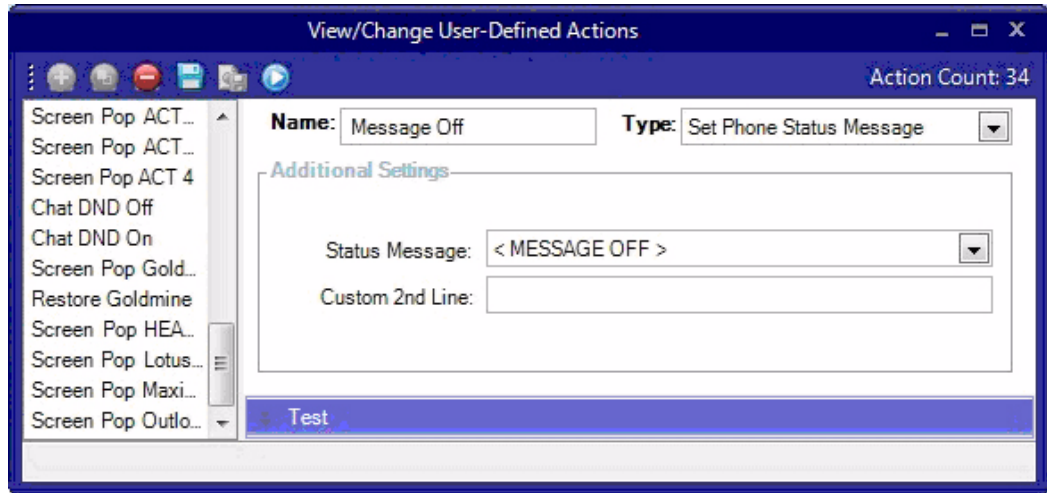
Create Personal Call Handler Rules

Two Personal Call Handler Rules will be needed, both using the Outlook Calendar Appointment event which sends a message when an appointment starts and a second when it ends. In this example, I want to trigger the setting of the DSS message for any Calendar Status to ensure all appointments are reflected and also for any Event Importance and any Subject. These items are part of the appointment created in Outlook Calendar. When this event triggers, I want to use the first Action that I created which sets a message "In Meeting" and appends the Subject line to the message to be displayed.
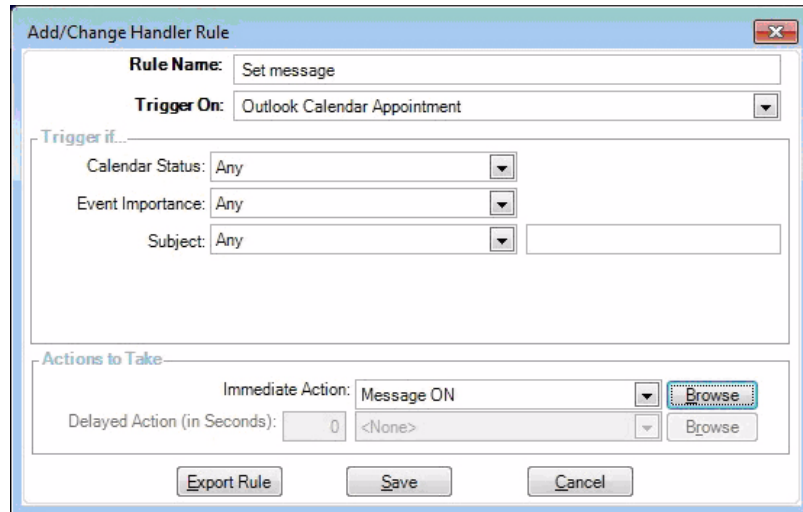
The second rule will trigger only when the Appointment sends an indication of the Appointment be set to a "Free" status. The action is to turn off the DSS message.
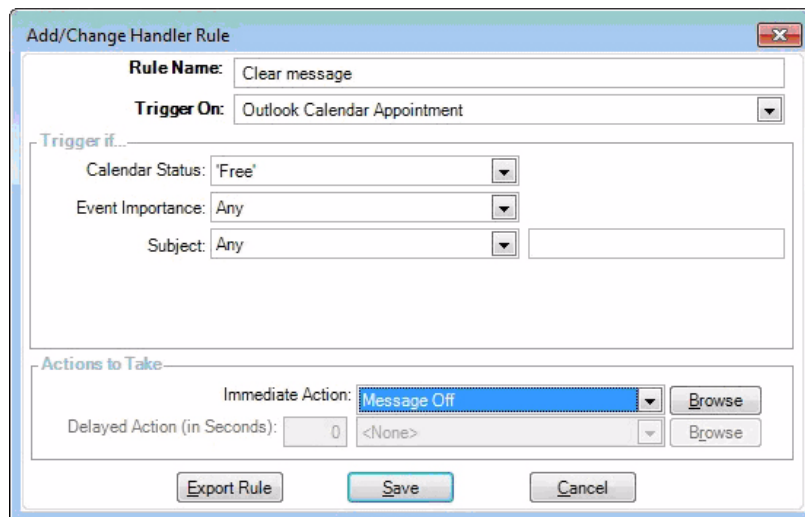
The Final PCH Rules

The main thing is to ensure that the PCH rule to "Clear DSS Message" must follow "Set DSS Message". If not, the "Set DSS Message" triggers on 'any' Calendar Status including 'Free' and the clear command would be followed by a command to set the message, thus the message would never clear. The final set of PCH rules should be in the order of items 3 and 4 in the PCH Rules screen.

Using Companion Applications **17**

Contacts

The Contacts companion application tab has Directories, Presence status and Speed Dial combined.

The Contacts tab lists current phone directories. Phone directories will include "Directory" (created by default), and any personal directories that you create.

Sorting Entries

Click on a column header to sort the entries using that column. Click the same column header again to reverse the sort from ascending to descending (or vice versa). A small, light colored arrow in the column header indicates the current column used for sorting.

Searching Entries

Press the Search button (next to the Filter icon) to go into search mode. Above each column is a search area in which to type search criteria.

All the entries that match the search criteria will be shown, while the rest are hidden.

The default search method is "Starts with", where only entries starting with the same letters as the search criteria will be shown. Other search methods are available, and can be accessed with the button to the left of the search area.
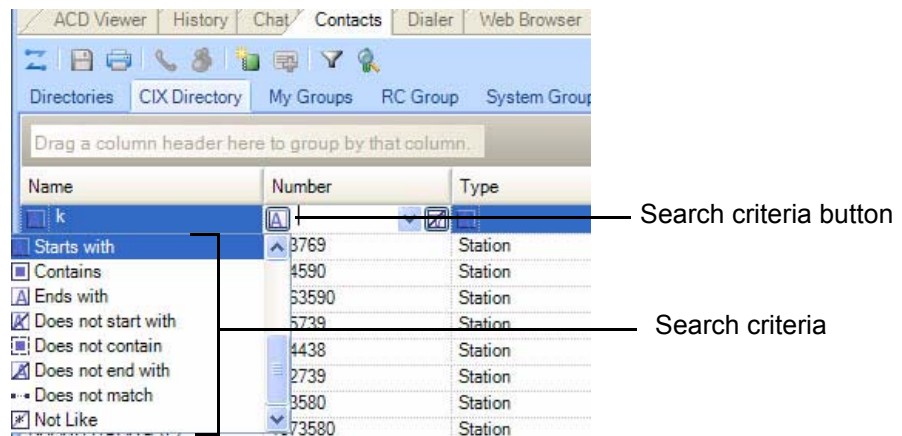
Directory   List of names and extensions on the telephone system.

- To Call – Press Enter to dial the highlighted number, or double-click the desired name from the list.

- Drag and Drop to Create Speed Dial Button – Drag an entry from the Directory to a Programmable User button to automatically create a Speed Dial button with the selected extension number.

- **Additional Options** – The menu icons under the tab let you access other functions:

Note: Not all options may be available due to the settings for the tab.

  - Call Now – Place a phone call to this person or extension. (Same as double-clicking.)

  - Edit – Allows you to Add, Change, Delete, and Copy entries (typically available only in the Personal directory).

  - Print Listing – Print a listing of all entries shown in the directory. Change the position and width of the columns to format the printout as desired. Use Filters and Find to print only the entries you want.

  - Export Listing – Export the listing using either a CSV or Text format.

  - Chat – Initiate a chat call to the person at this extension (Extension directory only, target must have Chat installed and running.)

- Filtering Entries – Many PBX systems use default names for unassigned extensions. You many not want these unnecessary entries in the Directory, so Call Manager provides a Filter to remove certain items from the list.

  - Press the Filters button to access the Directory Filters screen.

- Enable the Hide Names option to enable the filter.

- To Add a Filter Entry – Place the cursor in the text box. Type in the characters to be filtered and press Enter or click the Add button.
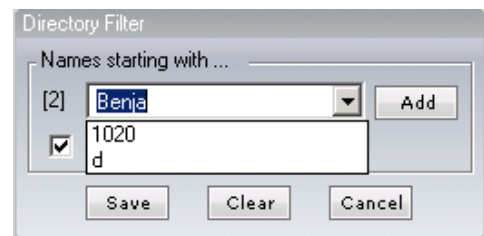
- To Delete a Filter Entry – Use the pull down list and select an entry to be removed and press Del.

The filter strings are case sensitive and will hide all entries starting with exactly the same string of characters. Entering "A" hides all entries that begin with an uppercase A.

Personal / Speed Dial Directory

List of telephone numbers. The user may add entries to provide fast access to frequently dialed numbers.

- To Call – Press Enter to dial the highlighted number, or double-click the desired number from the list.

- Add by Drag and Drop from Outlook – Drag a contact from Microsoft Outlook to the Directory and automatically add to the list.

- Add by Drag and Drop from Call History – Drag a number from the "Call History" window to the Directory to add the number to the list.

- Drag and Drop to Create Speed Dial Button – Drag an entry from the Directory to a Programmable User button to automatically create a speed dial button with that phone number.

- Additional Options – Right-click on the entry to access a menu of other functions:

- Call Now – Place a phone call to this person or extension. (Same as double-clicking.)

- Edit – Allows you to Add, Change, Delete, and Copy entries (typically available only in the Personal directory).

- Lookup in Outlook – Lookup this number in Microsoft Outlook and open the matching contact.

- Print Listing – Print a listing of all entries shown in the directory. Change the position and width of the columns to format the printout as desired. Use Filters and Find to print only the entries you want.

- Export Listing – Export the listing using either a CSV or Text format.

Presence Viewer

This capability is integrated in the Contacts companion application tab. Click on a Group tab within Contacts. Note that you can create as many groups as needed. You can look at the Presence status of members in each group.

To add a Group

1. Select by clicking on the My Groups or System Groups tab.

2. Right click and select Create New Group.

Note: The different between "My Groups" and "System Groups" is that "My Groups" is personal and you can create their own. "System Groups" applies to all and only a user with "Admin" right can create and change the group entry.

To manage the Presence Viewer

1. Click the Group tab assigned for the Presence Viewer.

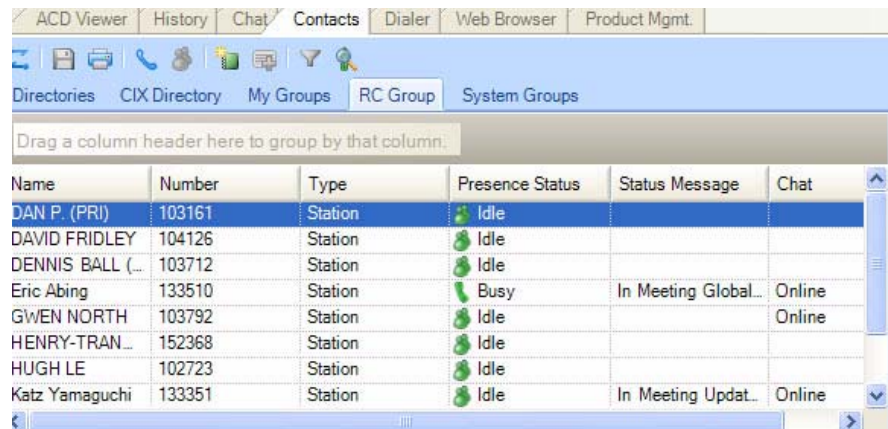2. Right click on an entry for options to either call, chat, broadcast, edit or delete group.
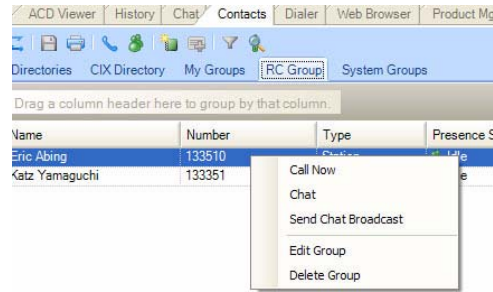
3. When you select Edit group, the following dialog box displays. Use the double arrow buttons to add or remove users from the group (shown right).
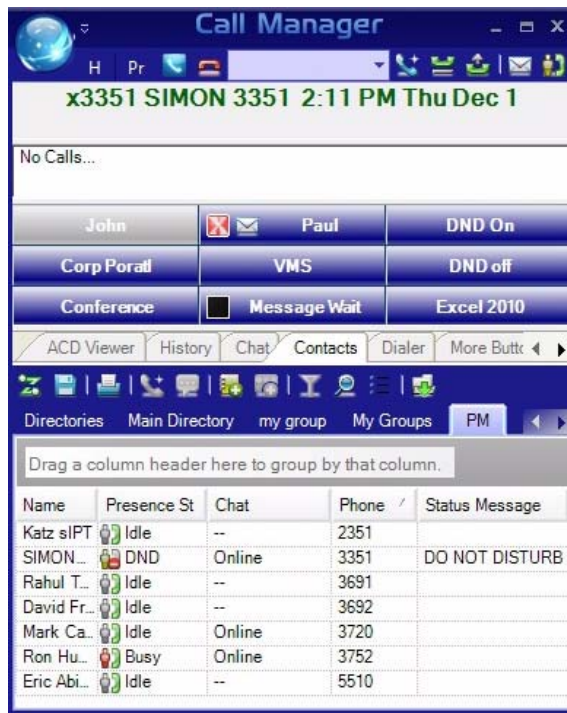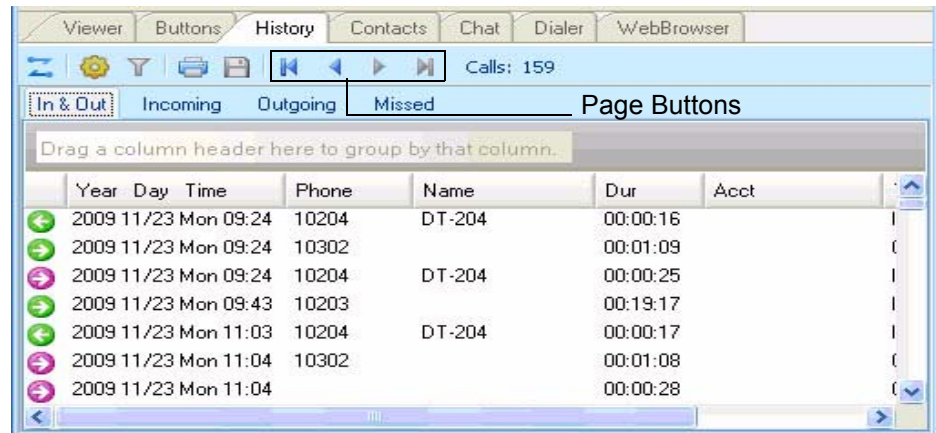

To use view Presence Status

The Presence status shows the status of users, such as Idle, Busy, etc.

Right click the member to start Chat or call the person through Call Manager.

History

Call Manager automatically creates a log of calls dialed and received on the local telephone extension. This Call History provides the user with a valuable log of his or her phone calls.

- Pages Buttons – In addition to the other toolbar icons, you can use the First Page, Previous Page, Next Page, and Last Page icons/buttons to navigate between the various pages. Call History creates Pages when the call log exceeds a certain number of Call records to improve performance. The Last page contains the most recent calls.

- Call Information – Each call in the call history appears as one line in the Call Display area. The column headers indicate what information is shown in each column.

    - Column 1 (Icons) – Indicates whether or not a call is an incoming call or outgoing call (arrow pointing right = incoming, arrow pointing left = outgoing) and the call is answered or not (Green = answered, pink = not answered).

    - Year Day Time – Shows the date and time that the call completed (not started). This column also includes the day-of-week for the first call of each day.

- Phone – the phone number you dialed (outgoing,) or the CallerID Number / ANI (incoming.)
- Name – The name of the person you called (based on Outlook), or who called you (based on CallerID.)
- Dur –The Duration or length of time the call spent on this Call Manager extension, in hours, minutes, and seconds. This time does not include any time the call spent on any other extensions before or after being on this extension.
- Acct Code – Shows the account code, if any, that was attached to this call. Customers often use Account Codes to indicate something about the call, such as the Customer ID, the result code of the call (e.g. "order was placed", "needs follow-up", "unable to reach – party was busy"), etc. This account code could have been attached to the call prior to reaching this phone, or it could have been added or changed by you while it was on your extension. Call History logs the current Account Code when the call leaves the Call Manager extension.
- Type – This can either be IC or CO indicating the type of call, internal or external. It also indicates the Station (ACD/Hunt Group, Announcement (AA), and voicemail.
- Notes – Shows the 'Notes' that were taken during this call. These Notes could have been attached to the call prior to reaching this phone, and/or they could have been added or changed by you while it was on your extension. Call History logs the current set of Notes when the call leaves the Call Manager extension.

- To Call – Double-click the desired number from the list.

- Drag and Drop to Call – You can select a call and then use your mouse to drag and drop it to either the Call window or the LCD Display to start the dialing of that number.

- Drag and Drop to Create Speed Dial Button – You can select a call and then use your mouse to drag and drop it to a Call Manager button.

- Drag and Drop to Add to Speed Dial List – You can select a call and then use your mouse to drag and drop it to your Personal Directory.

- Additional Options – Right-click on the entry to access a menu of other functions:
  - Call Now – Dial the phone number using Call Manager.
  - View Info – Provides a read-only view of all of the information about the call, including the "Notes."

     Note: You cannot change this information – you can view and copy/paste it to other applications.

*   Lookup in Outlook – Look up the telephone number in Microsoft Outlook and open any matching Contact.
*   Listen to Call – When the Tracer Integration is provided, this button provides a link to Replay to allow the recording to be played back.

The following functions are available on the toolbar:

- Find Similar Calls (Filter icon) – Enables the Filters option pre-configured with information to match the selected call. This is very useful for finding calls made to or received from a certain person or phone number.

- Print Calls (Printer icon) – Prints a listing of all entries shown in Call History. Change the position and width of the columns prior to printing to format the printout as desired.

- Export Listing (Export icon) – Export the listing to either a CSV, Text, Excel or Text format.

- **Filtering** – Use filters to limit the number of calls or view a certain type of calls. For example, you might want to see only the calls you made/received in the last 7 days. Or you want to see all Outgoing calls made to a specific area code since the first of the year.

1. Press the "Filters" icon to open the Call History Filters screen.

Note: The filters button changes from Grey to Green when filters are active. This serves as a reminder that the call display list may not display all call records while filters are active.

2. Select the options and data for the calls that you want to see.

- Dates – Select the date(s) – "All" means any date.

- Call Direction – Choose whether you want to see incoming ("In Only"), outgoing ("Out Only"), or all calls ("In & Out".)

- Phone Numbers – Choose "All" for calls made to/from any number. Use the "Matching" option to limit the search to calls made to/from specific numbers. You can enter a specific phone number (like 480-496-9040,) the last part of a number (496-9040,) or the first part of a number (480+) to find all matching calls. You may also use wild cards, such as: 480-???-9040 and 480-496*.

- Names – Choose "All" for calls to/from any name including blank names. Use the "Starting with" option to limit the search to calls with a specific name. Enter an entire name (Jack Jones) or just the first part of a name (Jac). The name search is NOT case sensitive.

- Account Codes – Choose "All" for calls with any or no account code. Use the "Starting with" option to limit the search to calls matching or starting with a specific account code. For example, '123' returns calls with account codes 123 and 123xxx.

3. Press the Search button to find the calls (on the current page) that match ALL of the selected options. Call History will update the "Calls" counter and "Call Display" area on the main screen.

- Search Button – Finds the calls (on the current page) that match ALL of the selected filtering options.

- Clear Filters Button – Resets all filters to 'Off'. Press Search to re-load all Call History record. Or, select new filter settings and start a new Filter search.

- Cancel Button – Closes the filters screen with no update to the "Calls Display".

ACD Viewer

The Call Manager ACD Viewer program allows Call Manager users connected to Strata ACD to view the status of all ACD groups in which they are members. It shows the operating status of each group and as the group becomes busier it changes colors and can provide warning sounds to alert you of status changes. You can expand each group view to see the number of calls and the status of each of the agents and supervisors in the group. Each group contains a "My Status" icon showing your own status in the group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status.

The ACD Viewer is fully integrated with the Call Manager Chat so you can easily place a chat call to a supervisor or another agent by simply right-clicking on that person's icon. Plus you can broadcast a chat notification to all agents and supervisors in the group.

ACD Viewer appears by default as a companion application tab.

Note: Strata ACD must be operating in Enhanced Mode for ACD Viewer to be used.

The ACD actions can be used to Log In / Log Out to/from ACD groups. Going temporarily unavailable and an ability to end wrap times can be part of the features available. Additional Call Center features are possible using User Programmable buttons.

Logging In or Out

- Click the Change Agent ID icon to open the ACD Login/Logout window.

Note: The right list box shows available groups for the identified agent number. The left list box shows groups currently logged into.

To log into or out of one or more groups

1. Highlight the group name(s) in the right-hand box and click <<Log In. If your Agent ID is listed as a Supervisor, then the Supervisor: Take Calls check box will be offered on your screen. Placing a check in this box will log you in to take calls for the group(s) selected when <<Log In was pressed.

2. Click Done when finished.

3. The ACD Key will display the number of ACD groups the extension is logged into and the total number of ACD groups you are a member.

To Log Out

1. Highlight the group name(s) in the left-hand box and click the >>Log Out button.

2. Click Done when finished.

Changing Agent Status

1. Right click My Status once you have expanded the views in the ACD Viewer pane. The following ACD Agent Status window will appear:

To Make Agent Unavailable

1. Use pull-down list and choose a reason.

2. Click the Make Unavailable button.

3. Click Done.

To Make Agent Available

1. Click the Make Available button.

2. Click Done.

To Set the ACD Status to WrapUp

1. Click Set WrapUp button.

2. Click Done.

Note: The Set WrapUp button is NOT available on all installations.

To End WrapUp

1. Click the ACD Status button.

2. Click the End WrapUp button.

3. Click Done.

The ACD View has many configuration options that allow you to customize it to your needs. When the ACD Viewer is operating and visible you can configure it's settings by clicking on the wheel icon in the upper left hand corner and selecting the Setup menu.

ACD Group Status This section allows you to setup how ACD viewer changes ACD group status based on activity conditions. Different colors represent the different status conditions of (how busy is) each ACD group. Yellow and Red represent warning and urgent status levels respectively and can be specifically configured to decide when those levels should be reached.

Urgent Status (Red) This is the highest level status of a queue and should typically be reached when the load or conditions in the ACD queue indicates a problem that needs attention. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Red. In addition to these two conditions, this status will automatically be reached whenever the queue is enabled but there are NO agents available. Available conditions are:

Calls Waiting > 'x' calls

Longest Waiting Call > 'x' Secs

Waiting Calls / Agent > 'x' %

Warning Status (Yellow) This is the 2nd highest level status of a queue and should typically be reached when the load in the ACD queue is approaching a problem level. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Yellow. The available conditions are:

Calls Waiting > 'x' calls

Longest Waiting Call > 'x' Secs

Waiting Calls / Agent > 'x' %

Active Status (Green), Idle Status (Blue), and Disabled Status (Black)	The ACD Group Status will automatically appear Green if there are agents logged into the group and there are calls taking place in the group, but there are no waiting calls for the group. The status will automatically appear Blue when there are agents available to take ACD calls, but there are no calls. Black indicates the queue is Disabled (or off-schedule) and not receiving calls.
Notifications	This section allows you to setup audible and visible notifications that can be taken when an Urgent, Warning, and Active status is met. If desired, enter a check mark in the Play Sound box to hear a sound over the speakers on your PC when a status is met. Use the Browse button to browse to a specific .wav file. Use the test button to hear the selected sound. Enter a check mark in the box if you'd like to Show the ACD Viewer if it is hidden on your screen when a Status is met. This will bring the Call Manager and the ACD Viewer to the forefront of your screen.

Click **Save** to save all changes.

CM LCD   In some cases you may want to keep the ACD viewer hidden but have it send messages to the LCD display of the Call Manager to show the ACD queues status. This is often very useful when the Call Manager is docked to the screen and you want to conserve screen space for use by other applications. Thus, ACD Viewer can be configured to send Low/Medium/High priority messages to scroll along the 2nd line of the Call Manager LCD display.

Select the appropriate check box to indicate whether or not you'd like to display a message when each ACD Group Status condition has been met.

Enter the text you'd like to display for the Urgent, Warning, or Background Messages.

Enter the text exactly as you'd like it displayed in the Call Manager. Use the following tokens to represent ACD Group information.

ACD Viewer Tokens   %G – ACD Pilot Extension

%L – Longest Waiting Call

%W – ACD Group Name

% % – Percent Sign

%Q – # of Waiting Calls

%Z – Calls per agent

%Y – # of Agents Available

%C – Total Calls

%X – Total Agents

%G Urgent Message %Q Waiting Calls: Longest Waiting Call: %L

Miscellaneous   If on your system each Agent ID is the same as his/her PBX extension you should enable the "PBX extensions correspond to Agent IDs" option. That is agent ID "100" uses PBX extension "100", agent ID "105" uses PBX extension "105, etc.   With this type of installation, you will be able to place a chat call (or chat broadcast message) to an agent even when he/she is not Logged In to an ACD group.

Using ACD Viewer   This section describes how to use the ACD Viewer for both agents and supervisors.

Collapsed View   The ACD Viewer starts out with a 'collapsed' view of each ACD queue. This takes up very little screen space but still provides a high-level status of each of your ACD groups. That is, the ACD Status View window displays one line for each of the ACD Groups of which you are a member. The ACD Group Name, Queue Number, and Status (Enabled or Disabled) are displayed. If the queue is on a schedule, the time the queue will be enabled/disabled by the schedule is displayed.

Each ACD queue has an activity LED that changes colors based on the status of the queue:

Gray (Idle) = no calls active (or waiting) and at least 1 agent logged-in and available.

Green (Active) = at least one call active but no calls waiting and at least one agent logged-in and available.

Yellow (Warning) = Default: one call waiting and at least one agent logged in. But this threshold is configurable.

Red (Urgent) = Default: Two or more calls waiting OR no agents logged-in and available. But this threshold is configurable.

Black (Disabled) = the ACD queue is disabled (either by a supervisor or by being after-hours in the schedule).

To 'expand' the information on an ACD group, simply click on the Plus sign next to the status icon. Other things you can do to a queue via right-click menu include:

Chat Broadcast – Send a broadcast chat message to all agents and supervisors in the queue.

Enable Queue – Enable the queue 24x7 if currently disabled. (Supervisor only)

Disable Queue – Disable the queue if it is currently enabled. (Supervisor only)

Use Schedule – Enable the queue using the Schedule for the queue. (Supervisor only)   *The schedule days/times are setup in Strata ACD.

Expanded View   When you want to see more detailed information on an ACD queue, you can change to the 'expanded' view. As mentioned previously, to 'expand' the information on an ACD group, simply click on the Plus sign in the status LED or right-click the group and select 'Expand' menu. In this view you see a more detailed view of: (1) Calls in the queue, (2) other Agents and Supervisors in the group and (3) your own status.

1. The "Calls" line shows the current number of Active and Waiting calls in queue as well as how long the longest call has been waiting (displayed as LCW for "Longest Call Waiting").

2. The "Agents" line shows how many total agents are in the ACD Group as well as a breakdown showing the number of Idle, Busy, Unavailable, and Logged Off agents. By clicking on the Plus sign you can further expand the view to show each agent's ID, Name, and Status. Plus the status of each Supervisor is also shown in this list.   Right-click on an agent or supervisor in the ACD Group to send them a Chat message, or if you are idle, to Call the agent or supervisor on the phone.

3. The last line in the expanded view is the "My Status" line. This not only shows your personal status in this ACD group but allows you to change your status and perform functions using right-click menus as described in the following section.

In the expanded view, the "My Status" icon is a special icon that shows your status in the ACD group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status or perform a function. The options provided are:

- Log In – this will log you into this ACD group.

- Log In and Take Calls – (supervisor only) – This allows a supervisor to simultaneously log in as a supervisor and as an agent (to take calls).

- Log Out – this will log you out of this ACD group.

- Make Me Available – If you are set to 'unavailable' or are in 'wrap-up', this will change you to 'available' status.

- Make Me Unavailable – you can select this to make yourself 'unavailable' – a list of unavailable message choices will be provided.

- Request Help Call to Supervisor – while you are on an ACD call, you can use this to initiate a request for a help call to a supervisor in the ACD group. This is further explained below.

Requesting Supervisor Help

When the Request Help Call to Supervisor function is selected, this sends a Help Request to a supervisor in the ACD Group. Once you initiate the request you will receive a notification that the request has been sent.

ACD Help Request

ⓘ Your Help request has been sent to Supervisor: 4407 x406:406

[Okay]

If the supervisor accepts your request for help you will receive notification.

ACD Help Request

ⓘ Your Help request has been accepted.

[Okay]

If the supervisor denies your request you will receive a rejection notification.

ACD Help Request

ⓘ Your Help request has been rejected.

[Okay]

If a supervisor or supervisors do not respond to your request you will see the following:

ACD Help Request

ⓘ Presently no supervisors are available to provide help.

[Okay]

Chat

The Call Manager Chat program allows Call Manager users connected to the Net Server to interactively have chat conversations. This is an integrated text-messaging function that lets you communicate with other Call Manager users using text messaging 'calls' even while you're busy on the phone.

This program works as a companion program with Call Manager to allow workers in the enterprise to communicate using real time text-based communications with others. Using Call Manager Chat you can have individual conversations with anyone else on the sever with the same feature installed.

Chat can also be used to send a broadcast message to an individual or to an entire group. A broadcast message is a one-time message that will appear on the recipient's Chat window.

Chat Operation   The primary function of Call Manager Chat is to allow you to place and receive chat calls and conduct one-on-one chat conversations with other chat users in your company. Chat also contains some features that may make Chat more user friendly in certain applications. These include a Do Not Disturb, changing the "quick send" text buttons, and the ability to form groups of users for broadcast messages,

Using Chat Messaging   This section defines how to place a call to another Chat user, how to communicate with that person, how to answer an incoming Chat communication, and how to send Broadcast messages.

- **To Access Chat** – Click the Chat tab on Call Manager. The following screen will display.

To Place a Chat Call

1. Choose whom to send a message to by expanding a group in the main Chat window. If someone has logged out of Call Manager Chat the icon will appear in gray, and it will show Off Line and the date and time they went off line. You cannot place a chat call to someone who is off line. The offline time is the last known offline time. If Call Manager was not running and a user went offline, the offline time will not show.

Note: If you do not want to receive a Chat response you can send a Broadcast Message.

You can receive a response to a broadcast by selecting the 'Give "Chat Back" option' in the broadcast dialog.

2. Double click on the person with whom you wish to converse

or Right click and choose Chat Call from the menu.

This will bring up a Silent Message Conversation window, which is used to send and receive messages opening a chat conversation. Chat can only be between two users. You cannot have a multi-way chat (more than two users). You can have multiple two-way chat conversations.

To Answer a Chat Call

1. A Silent Message Conversation window will automatically pop up showing who is calling you and a sound will play based upon your Preference Settings.

2. You must respond within 30 seconds to this message or the caller will get a message "User did not respond. However, the 30 seconds setting is configurable.

3. Ongoing conversations follow those described in To Send a Text Message and Options During a Chat Conversation.

To Send a Text Message

1. Press a pre-programmed Response button or

Type the message into the text box at the bottom of the window and press either the Send button or the Enter key on your keyboard (shown below).

Options During a Chat Conversation

Several options are available to the user when right clicking within the conversation window to open a menu of options. The chat window contains three windows: the Chat Box, the Canned Replies, and the Whiteboard.

The whiteboard may not be visible in the chat window (it depends on configuration). The three windows are accessed from the view menu.

To Call the Person using your Phone

This option is to make it more convenient when you need to speak with the person rather than just sending text.

- Click Chat tab, then Phone. Enter the phone number or if the number is automatically populated, then click Call.

To Copy the Conversation

- From the Edit menu, click either Copy or Copy All to copy the highlighted or all of the conversation to the Windows Clipboard for pasting into another application.

To End the Conversation

- Press the Close button to end the conversation.

To Open a Whiteboard (Collaborative) Session

- Click Share Whiteboard Screen. This option is only offered once the called party has responded to the Chat session.

To Send a Broadcast Message

Call Manager Chat allows you to send a broadcast message to one or more Chat recipients. For example, if the Sales Manager would like to call a meeting with all of his sales representatives, he could use this feature to send a message to the Sales Group telling them there is an important meeting in 15 minutes in the conference room.

1. To initiate a broadcast message, double click on any group name in the Chat Window and click on the Broadcast icon or

Right click on any group name or select Broadcast.

2. Enter a message into the Message box.

3. Define the Urgency, Normal or Urgent for the message delivery.

When Normal is selected, the Broadcast message is sent to your recipient(s) in black text and when Urgent is selected the text is in red (shown below).

4. Define the Destination Options:

   • A check mark in the Timeout (default choice) will display the message for the number of seconds defined in the time box (default is 60 seconds).

   • Entering a check mark in the Give "Chat Back" option box will give your recipients the option to send a Chat message back to you once they receive your Broadcast Message.

   NoteBe aware that when using the "Chat Back" option sending to a group of people, all recipients will have the Chat back option and if everyone responds, it could result in a large number of simultaneous chat calls back to you.

5. Click Send.

Chat Feature Operation

Do Not Disturb

The Chat Do Not Disturb (DND) feature is disabled by default. For this feature to operate, the "Enable Do Not Disturb" feature must be selected in the Features Tab of Chat Setup. This feature works independent of Call Manager's DND. See for details on how to automatically link the Chat DND status with Call Manager.

To Set Do Not Disturb

When you want to prevent further incoming chat calls, the Do No Disturb feature can be turned on. This feature allows you to provide a specific message, such as "In a Meeting Until 3pm", to anyone attempting to place a chat call to you.

- **To go into DND status** – DND is set in the chat toolbar by selecting the DND Check box and/or entering text into the text box on the toolbar.

While in Do No Disturb the main window will show the text DND On in red.

- **Other Users Experience** – When a Chat call is placed to someone who has their Do Not Disturb feature set you will see a message showing "User Not Available" along with any return message they provided. If they didn't setup a return message, the text "Do Not Disturb" will be shown.

To Clear Do Not Disturb

- **To Clear the DND Status** – Clear the DND Check box.

Response Buttons   All buttons can be changed on-line from the Silent Message Conversation window. The first 8 buttons can have their responses defined in Chat Settings; all others can only be defined using the following procedure.

To Add/Change Text in Response Buttons

- Right click on the button and a drop down menu appears. Select Edit to edit the button. The dialog box shown below appears. You can change the caption, the type, the text, and whether to send immediately.

- **Caption** – Type in a caption for the button.
- **When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:
- **Send Text** – will send a text string to the other party on the chat call.
- **Push URL** – will send a URL to the other party on the chat call and pop open a web browser window to that URL. However, the pop open url can be disabled by the receiver.
- **Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.
- Click **OK** to save the changes you have made to your Response Button.

Personal Groups

To Add or Change a Personal Group

- Right click a group name in the Chat window and choose either Add a New Group or, if offered, Change this Group to create a personal group. Name the group and add or remove names for that group as follows:

- Chat List Name – Enter a name for the group to identify your group. All names must be unique.

- Chat Clients in List – To add members to your group, highlight individuals you want to be part of your group in the All On-Line Chat Clients box and then click on the left double arrow (<<) button to move the members to the Chat Clients in List box. To select multiple individuals, hold down your Ctrl or Shift key while making selections by clicking the mouse. If you want to add a member that is not presently on-line, right-click your mouse in the "Chat Clients in List" and select the "Add an OFF-line client" menu item, then type in the name of the client.

  Note The name of the client must exactly match the client name when he/she is on-line. To remove members from your group simply highlight the members and then click on the right double arrow key (>>).

- Click on Save when done.

To Copy a Group to Create a New Group

- To create a new group by copying another group, select the group to be copied, right-click on the group and select Copy this Group. Follow the same process for creating a new group above.

To Delete A Personal Group

To delete a group, right-click the group in the Chat List and choose the Delete Group option. A confirmation box will appear and needs to be affirmed before the group is actually deleted.

Whiteboard Operation

To access the Whiteboards option, from the View menu, select Whiteboard. This window provides tools for sharing information on each of your PCs with the another user with an open Chat conversation.

Whiteboard Menus

The menus on the whiteboard are context sensitive. The File and View menus remain constant. The whiteboard is accessed from the View menu. The whiteboard menus are accessed by right clicking in the Whiteboard space or by clicking Whiteboard. Use the Whiteboard menu to capture screens, crop pictures, scale, highlight color, and change pen widths.

The file menu has the following options:

- Open - takes you to an Open window to find a file, etc to share.

- Close - closes the whiteboard application.

- Save as - lets you save the whiteboard.

- Send as email - brings up an email message window, where the whiteboard is attached as a .jpg file and you can add you contacts in the To and cc fields.

- Set as wallpaper

- Print - prints the whiteboard

- Exit.

Similar to the above, you can use the Edit menu to cut, copy, edit, paste, delete, clear and clear highlighting.

The View menu contains Chat Box, Canned Replies, and Whiteboard.

Drag and Drop Files   Files can be shared using the Whiteboards. A file such as a .JPG file can be dragged onto the White Board window and the image will display on the other's shared window. Also, other files can also be shared such as Word documents. These files will be shared and require an appropriate application on the other PC to open that file. For example, if Word is running on the other PC, the Word document will open on the other PC. The user will be capable of using the Pen Tool to mark areas on the document when viewing the White Board screen. To make changes on the document requires switching to Word, editing the document, saving the file and then sending the edited copy back to the originator.

Send Whiteboards as Email...   Using this tool opens your e-mail service on your PC, takes a snapshot of the Whiteboards, including all pen marks, and attaches the image as a JPG file to the new e-mail message. You then can address the e-mail; create a subject and type a message to go along with the attached file.

Save Whiteboards Save As...   Using this tool causes a snapshot of the Whiteboards to be saved as a JPG file. The screen opens to a "Save" window to allow you to choose the file name and location for the file to be saved. The default location is under your "...Documents and Settings/<user name>/Local Settings/Application Data/Toshiba/Strata Call Manager".

Whiteboards Setup   The Chat application Setup menu provides access to the Whiteboards Preferences screen in the Features tab.

> •**Highlighting** – The Whiteboards Preferences screen defines a default Pen Width and Color to be used when Whiteboards session is opened. During a communication session, these can be changed at will as described above.

Whiteboard Preferences

Configuring Chat　　You configure Chat by making parameter choices in the Setup dialog box. You can make Chat integrate with other applications including your soft phone by using the DDE Interface commands. These are defined in the "Interfacing with Other Programs" on page 290 section later. Examples are provided for using these commands with Call Manager are also included.

Setup　　To set up your preferences, click the Setup button.

Messages Tab

These settings define the arrival responses provided for incoming and broadcast messages.

On Incoming Message

- **Dismiss new popup window** – Check the box and specify the time (in seconds) when no response is seen when a new message arrives. This will tell Chat to notify the caller of no response after a certain length of time. The response message returned is "User didn't respond."

- **Play Wave file** – Check the box to play a WAV file each time a new message comes in. Click on Browse to specify a different WAV file. You can test your WAV file by clicking on the Test button.

- **Beep on Each New Line Received** – Check the box to have Chat beep each time a new line arrives into the conversation. Click Test to verify operation.

- **Timestamp Each Line** – Check the box to show a time stamp Message Box each time a new message is received.

On Incoming Broadcast Message

- **Normal Message** – Check box next to "Play Wave file:" to allow playing a WAV file each time a new broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.

- **Urgent Message** – Check box next to "Play Wave file:" to allow playing a WAV file each time an urgent broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.

Response Buttons Tab

The Response Buttons are a series of buttons located at the bottom of the Chat Message Window. These can be customized to meet your specific needs by clicking on these buttons to send immediate messages to someone without typing or clicking the Send button. Once a communication channel is established, you just click the Response Button with the message you want to send.

- Define the Number of rows to create response buttons.

To Change Message in Response Buttons

> Note Only the first eight Response Buttons can be changed from the Preferences window. All buttons can be changed on-line when in a conversation. The procedure to change a button is identical in the Preferences Window as when done on-line.

• Click the Setup icon in the Chat application, then click on the Response Buttons tab.

• Click the button to change and the "Response Button" window will appear:

•**Caption** – Enter a caption for the button.

•**When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:

•**Send Text** – will send a text string to the other party on the chat call.

•**Push URL** – will send a URL to the other party on the Chat call and pop open a Web Browser window to that URL.

•**Send Text** – Type in the text message or URL you want to send when you click on this button. Your text message can be any length in size.

•**Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.

• Click **OK** to save the changes you have made to your Response Button.

Features Tab   In the Features tab, two features can be enabled and the location where the settings will be saved is specified.

Features

- **Allow Others to Push a URL to me** – Check to allow URL's to be pushed to this location by others. When disabled, other users cannot push a URL to open a browser window on your PC.

- **Enable Do-Not-Disturb Feature** – Enter a check mark in the box to enable the Do-Not-Disturb option. This option allows you to block incoming Chat messages and returns a DND message that you specify to the caller.

- **Show Offline Users in <<Everyone>>** – Check (default setting) to show both online and offline users in the <<Everyone>> group. Remove the check mark to only show online users.

Save Setting

- **Save As Local Machine Data** – Click to enable this option if the settings are to apply to all users of this PC.

- **Save As Current User Data** – Click to enable this option if the settings are unique for each user of this PC.

Logging Tab

The logging tab window is used to enable the logging of all conversations to a file and define how the file is to be named.

Log Silent Message Conversations To a File

- **Auto Logging Enabled** – Enter a check mark in the box to log all Chat conversations to a file. If you do not wish to log the conversations to a file take the check mark out of this box.

- **View Log Button** – Click the View Log button to view your current log file.

- **Log Filename:** – Enter a file name or click on Browse to select where you would like your files to be logged.

- Use the variable **%d** to log the conversation to a file name that includes the date. For example, if you had a Chat conversation on November 3, 1999, you file name would be 110399.log.

- Use %**t** for the time. The user will end up with a separate file for each chat.

- Use the variable **%u** to log a conversation to the file name of the user that you conversed with. For example, if you had a conversation with January your file name would be Jan.log.

- You can combine the use of the variables if desired. For example, the log file name could be C:\PROGRAM FILES\CTS\CHAT\%d%u.log. The log files will be defined first by date, then by the name of the Chat party. Reversing the parameters (...%u%d.log) would be organized by name then date.

Interfacing with Other Programs

Call Manager Chat is designed to operate with other Windows applications. For example, a user of a phone program, such as Call Manager, may want to press a button to immediately open a chat window with your ACD supervisor when you're on an Urgent Call. Or you may want to coordinate the DND settings of your phone with the DND of Chat. Or you may need to periodically send a broadcast message to a group of people based upon a trigger such as a meeting reminder. These types of operations are supported by a DDE

Command interface. This section defines the format for the DDE Command Interface, its supported commands with examples with how they can be used.

Format of the DDE Command Interface

Other programs can be setup to send DDE commands to trigger actions in Chat to perform a set of functions. The basic format for this DDE command is as follows:

- Application Name: MSGPOP
- Topic: SYSTEM
- DDE Execute String: <Command>

Command 1 – Open a Chat Session with this Extension Number

Format: CALLEXT, Ext #, Msg_Type, "Message", Send_Option where:

- CALLEXT = The command name.
- Ext # = the extension number of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- "Message" = Message to be sent. When using Call Manager, call and system variables can be used in the message.
- Send_Option = I or C
  - •I – send message immediately
  - •C (or blank) – type message into user buffer but wait for user to press SEND

Example: The user sits at the front door and acts as the receptionist and needs to inform people when someone is waiting in the lobby.
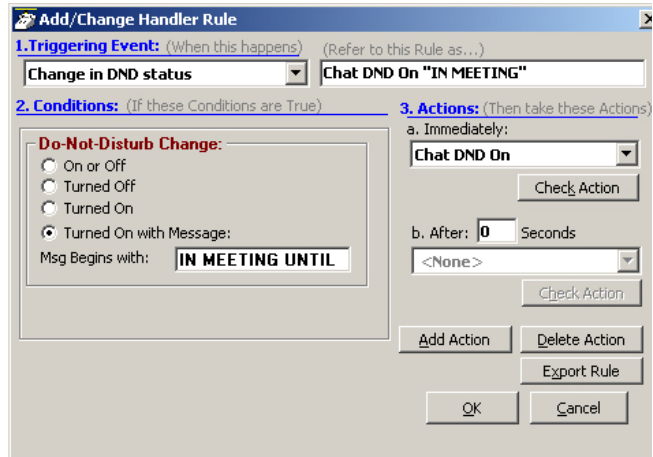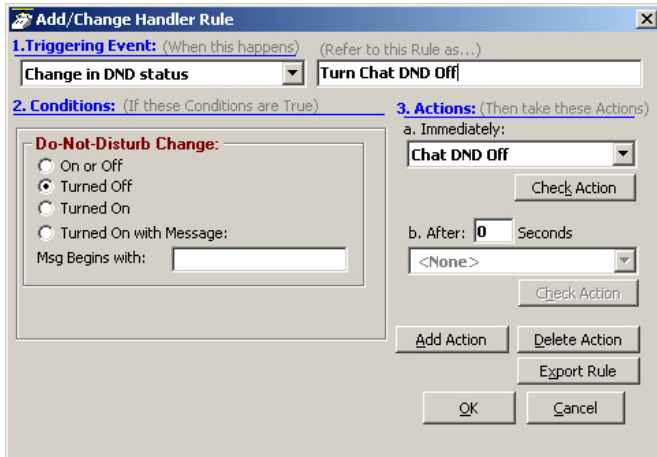
1. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

    In App Name | Topic enter: MSGPOP|SYSTEM

    In DDE Message enter: CALLEXT,,,"Your visitor is waiting in the Lobby",I

    Note No extension was specified to allow the person to choose whom the message is to be sent.

2. Choose a key on Call Manager, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select "Visitor Waiting" from the list of actions and Save.

Command 2 – Open a Chat Session with this User Name	**Format:** CALLNAME, "Name", Msg_Type, "Message", Send_Option where:

- CALLNAME = The command name.

- "Name" = The name of the person to chat with. This name must match the name used in the Chat directory. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.

- Msg_Type = leave blank, future feature.

- "Message" = Message to be sent

- Send_Option = I or C

  - •I – send message immediately or

  - •C (or blank) – type message into user buffer but wait for user to press SEND

Example: Agents in a Call Center want to quickly notify the supervisor that an abusive caller is on the phone. The supervisor's name is Jan and the persons phone number (formatted for easier reading) and name should be included when available using Caller ID.

1. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: CALLNAME,"Jan",,"Help! I have an abusive call from: %J/%N",C

2. Choose a key on Call Manager, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select "Notify Jan – Abusive Call" from the list of actions and Save.

Command 3 – Set DND option on or off in Chat	**Format:** DND,DND_State,"Message" where:

- DND = The command name.
- DND_State = Enter "ON" for turning on DND or "OFF" when turning off DND.
- "Message" = Enter the text message to be sent to callers reaching this station. If the message is left blank (opening and closing quotes only), then the message previously used will be displayed without change.

Example: The Call Manager user would like to have Chat DND follow the status of Call Manager's DND status automatically when Call Manager is changed. In this case, Chat should be in DND when the user is in a meeting. Chat should reflect the same message that is seen on Call Manager DSS keys.

1. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: DND,OFF,

2. In Call Manager create another User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: DND,ON,"In Meeting Until &U+'60'"

Note: We are using the same time parameter used for setting Call Managers DND which uses another User Defined Action that also includes &U='60' to set the time to 60 minutes from now.

3. In Call Manager create two Personal Call Handler Rules to trigger when the DND status changes causing Chat DND to follow Call Manager's DND status. The two rules are shown below.

Command 4 – Sending a Chat/Broadcast Message

Format: ONESHOT, Ext #/"Name", Urgency, "Message", Timeout where:

- ONESHOT = The command name.
- Ext #/"Name" = The extension number or name of the individual or group to receive the message. Examples:
  - Ext # = 1001
  - "Name" = "Linda", "<Tech Support>" or "<<Sales>>"
  - For Everyone = "*

Note The broadcast group names must contain the < and > or << and >> characters as part of the name.

- Urgency = enter H if urgent message and leave blank if normal message.
- "Message" = The text message to be sent.
- Timeout = The number of seconds for popup to expire. If left blank it will be set to the default of 60 seconds.

Example: The Tech Support Manager schedules Group Meetings with his staff. He wants to use Outlook to schedule the meeting and use the Outlook Reminder to send a Chat Broadcast to his group a few minutes before the meeting.

1. In Chat a Personal Group is created containing the members of <Tech Support>.

2. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

In DDE Message enter: ONESHOT,"<Tech Support>",H,"Group Meeting at &U+'15'",60

3. In Call Manager creates a Personal Call Handler Rule to trigger when a Calendar Reminder event occurs and the Subject matches Group Meeting. This trigger will result in the action Group Meeting Broadcast to be taken. The assumption is the Outlook meeting reminder is provided 15 minutes prior to the scheduled meeting.

Dialer

The Dialer allows Call Manager users to easily schedule phone calls to be placed later. For example, when a sales representative arrives in the morning he may know he needs to make calls to 15 of his customers, so from MS Outlook he can drag/drop the contact information of all 15 of the customers into his Dialer. When the designated time arrives for each call to be placed the user will be presented with a pop-up screen alerting him it's time to place the call. Once the call is finished, the user will be presented with another pop-up screen requesting information about whether the call was successful and if not whether it should called again later (for example if the party was busy).

The Dialer tab displays all calls yet to be placed as well as calls that have recently been completed, plus as the status of the dialers and the phone. This information is shown on the main screen similar to the following:

Main Screen
- **Fly out/Fly in button** – is used dock the window back to the main screen of Call Manager or if its already docked to hide it 'inside' the main screen.

- **Setup** – Brings up the Dialer configuration screen.

- **Reset button** – Puts Dialer back to its initial state.

- **Enabled Check box** – This is the Check box in the toolbar. This box indicates whether the dialer is enabled. This allows the user to easily Enable (Start) or Disable (Stop) the entire dialer function. For example, if you need to take a break to do some paperwork, you could simply disable the power dialer until you're ready to start making calls again.

- **Add Call** – Click the Add Call button to place a dialer call. The AddDialer box displays.

- **Phone Status** – this shows whether the phone is idle, busy, in Do-Not-Disturb, etc.

- **Calls Display Area** – this area shows the list of calls that have been placed or have yet to be placed (details below).

- **Column Headers** – these show what information is contained in each column. Using your mouse, you can resize and reposition these headers to customize your viewing area.

Calls Display Area
This area shows each call that is either (1) yet to be placed or (2) that has already been completed. The available columns include:

- **Date** – this column shows the date the call is to be placed or when the call was completed.

- **Time** – this column shows the time the call is to be placed or was completed.

- **Status** – the status of the call. If this is blank the call is not due yet. Other status values include:
    - Due Now – The time has arrived for this call to be placed.
    - Overdue – This call has not yet been placed and it is overdue.
    - Done – This call has been completed.

- • DISABLED – This call is disabled. It will not be placed until it is enabled.
- • In Progress – This call is underway.

- **Name** – the name of the person to be called.

- **Phone** – the phone number to be dialed.

- **Account** – this shows the account code, if any, for this call. Often an account code is used to indicate something about the call like: the customer ID, the result code of the call (e.g. "order was placed", "needs follow-up", "unable to reach – party was busy"), etc. This account code will be attached to the call when this call is placed.

- **Subject** – this column shows the 'subject' of the call. This information can be added/changed up until the call is placed, at which time this information is attached to the subject field of the call.

- **Last Result** – If the call has been placed and it is either successfully completed or will try again later, this field shows what happened on the last attempt. The user chooses these result values after each call is completed:
  - • Completed
  - • Busy
  - • Left a Message
  - • No Answer
  - • Wrong Number

Functions   When you have selected an entry in the Calls you can change the entry by simply double-clicking on the desired entry.

However, if you right-click on the entry, additional menu options will appear to show other functions you may want to perform:

- **Call Now** – immediately place this call. This can be used even if the power dialer has been disabled.

- **Edit** – Allows you to Add, Change, Delete, and Copy individual entries. Entries can also be added using drag-and-drop and/or importing as described in the Adding Calls to the Dialer.

- **Lookup in Outlook** – lookup this number in Microsoft Outlook and open the matching contact.

- **Print Listing** – print a listing of all entries shown in the calls window. The position and width of the columns can be changed to format the printout as desired.

Sorting Entries   To sort the entries simply click on the column header by which you desire the sort to occur. Click the same column header again and it will switch the sort from ascending to descending (or vice versa).   Thus if you want to sort-by-name click the "Name" column header, to sort by phone number click the "Phone" column header, and so forth.

Dialer Operation

Ready to Dial   Click the AddCall button to place a dialer call. The following screen displays.

In the Date and Time drop down are used to set the date and time of your call. You also have a choice of selecting Today and Now to place a call immediately.

Calls in the list that are enabled will automatically pop up a screen for the user indicating that it is time to place the call. This screen is "Ready to Dial" screen. The screen will contain the information entered into the list about the caller and if the optional "User-defined" Action button is enabled, then pressing this key can cause more information to be available about the party or trigger one of a number of other functions. The user has the choice of Call Now or Later. If later is chosen, then you will be asked for a new time after which the call will return to the list. Pressing Cancel will disable the call before returning the call to the list.

Results   When the call is completed, a Results dialog box appears (shown below). The status of the call can be changed, by default it is marked as "completed". If the call needs to be placed again, checking the Try Again box will open a time frame for the retry (second dialog box shown below). Setting the time (an actual time or an elapsed time) and pressing Okay will place the call back into the list.

As was done in the Ready to Dial screen, an optional "User-defined" button can be provided with an action to be performed at the end of the call. This

action could be anything, but typical uses would probably be to open a Journal entry or pop up an after-call survey form to take notes on the call.

Adding Calls to the Dialer

Adding/Changing a Call Record

Calls can be added manually, imported or use drag-and-drop techniques as explained below. First, a call can be manually added or changed at any time by double clicking on a call in the dialer list. The telephone number must be entered a name being called and optionally an Account Number and any Subject as needed. The call can be scheduled by date or elapsed time. The default date is "Today", but any date can be entered or a Calendar button is provided to pick a date for the call. Any time can be entered or any elapsed time frame can be entered. The pull down list shows some common elapsed times for placing the call. The call record will need to be enabled to be dialed at the appointed time.

Methods for Adding Calls

Often times you may want to add multiple calls from contact or call information that might be contained in other applications. The Dialer provides a couple of ways to accomplish this.

Drag-and-Drop from MS Outlook

If you are using Microsoft Outlook, you can simply select one or more of your contacts in your Outlook Contacts database and simple use the mouse to drag them over and drop them on the power dials "Calls Window". Each contact will then be individually added to the power dialer allowing you to specify the date/time of each call to be placed.

Drag-and-Drop from Call Manager Call History

Often times you may want to place a call to someone you've called (or who called you) in the past.   Since the Call Manager call history provides a complete list of all calls placed and received, you can simply find the desired call in the call history and use the mouse to drag-and-drop a copy over to the power dialer window.

Drag-and-Drop MS Excel file

In Microsoft Excel it is quite easy to create and keep a list of desired contacts and add them into the power dialer. In MS Excel simple create a spreadsheet

with at least two columns (Name and Phone number) as shown in the following example.

Then simply use "Save As" and save the file as a "Text (Tab delimited)" file, as shown in the following window. Note: The "CSV (comma delimited)" format can also be used.

Then in windows explorer simple drag this file into the power dialer window and all the contacts will be immediately added to the power dialer list of calls. Note: Alternatively, if you save this file from MS Excel directly into the "..\PDimport" sub-folder of Call Manager the entries will be automatically imported into the power dialer .

Drag-and-Drop Other files

Any program that can export contacts into a "tab-delimited" or "comma-delimited" text file format can operate with the Dialer. Similar to the MS Excel file, those files can then be dragged/dropped or automatically imported into the power dialer.

Goldmine Export

The Goldmine contact management software provides a way to setup re-usable filters and export formats as well as a way to add a "Dialer (export)" button on the Goldmine screen. Using these features and the automatic import feature of power dialer described above it is very easy to send a list of Goldmine contacts directly to the power dialer to be dialed.

Configuration Settings

The Dialer provides some configuration options for the user. To view or change the configuration, right-click on the icon in the upper-left corner of the main screen and then select the "Setup" menu option. This will bring up the Setup window as shown below.

- **Place Calls While in Do-Not-Disturb** – This setting controls whether the power dialer should attempt to place calls if the user's phone is in Do-Not-Disturb. For example the user may want to set his phone into "Do-Not-Disturb" mode to stop all incoming calls but still continue using the power dialer to place outgoing calls. Note: On some phone systems the Call

Manager cannot detect and display the Do-Not-Disturb setting of the phone, in which case this setting has no effect.

- **Delay Between Calls** – it's often desirable to provide some "wrap-up" time after the last call before dialing the next call. This value is used to provide this time delay between calls placed by the power dialer.

- **Play Sound** – on a sound-equipped PC, the user may want to play a selected WAV file to alert him/her whenever a call is ready to be placed. This feature and the desired WAV file can be set up here.

- **Delay Before Requesting Call Result** – it's sometimes useful to give the user some "wrap-up" to finish up some activity in another application before requesting the result of the call. This value is used to provide this time delay after the call ended before requesting the user to enter the result.

- **Clear Out Completed Calls** – When calls have been completed, they will still appear in the calls window, but they will be automatically cleaned-out based on this setting.

Note: The Call Manager provides a "Call History" feature for more permanent storage of calls placed and received. The settings options are as follows:

  - Hourly
  - Daily
  - Weekly
  - Monthly

- **Overdue calls** – when a call is due to be placed, it will only be placed if the power dialer is enabled and the phone status is idle (and possibly not in Do-Not-Disturb). Thus, since the power dialer will wait until dialing conditions are true, the date/time selected for a call to be placed may pass by, and the settings in this area pertain to those calls:

  - Calls are Overdue if more than 'x' minutes past due – This setting is used to designate how long "Due Now" calls should wait before they are considered to be "Overdue".

  - Place Overdue calls before "Due Now" calls – this option, when enabled, allows the "Over Due" calls to be placed first before the "Due Now" calls.

  - Remove Overdue calls more than 'x' days past due – If the dialer is disabled for an excessive amount of time, the power dialer will automatically clean out overdue calls that are way past due as defined by this setting.

Adding Action Buttons to Ready to Dial and Results Screens

An optional user-defined button can appear on both the "Ready to Dial" and the "Results" screens in Dialer. To setup these buttons, go to the Call Manager main menu select Setup then Preferences, go into the Dialing Tab. Under the Dialer, enable either or both of the "Action" buttons and select the Action to be performed

when the button is pressed. Optionally, the label can be changed to meet your needs. Press Save to keep your new settings.

Advanced Topics

Import File format ASCII text files can be easily imported by the power dialer as long as the file format is as follows:

- One record per line with the following fields:
    - Name – Required – must be non-blank
    - Phone – Required – must have a minimum of 4 digits – can have punctuation {e.g. (480)496-9040}
    - Account code – Optional
    - Subject – Optional
    - Date – Optional – if not provided "Today" is assumed
    - Time – Optional – if not provided "Now plus 5 minutes" is assumed
- The fields within each record can be either Tab-delimited or comma-delimited, however the entire file must be one format or the other (cannot mix formats within a file). Comma-delimited fields can/should use quotation marks around any field containing a comma. For example: "Jones, Skip", 480-496-9040, 1111, "Sample 1,2,3"
    - A maximum of 1000 records can be imported.

Automatic Imports The Dialer will automatically import any file in the above-described format if the file is
(1) named with ".TXT" suffix and (2) saved into the "\PDimport" sub-folder in the Call Manager folder. Once the file is imported, it will immediately be deleted.

Buttons

All buttons in the Call Manager are created equal so that any button can be programmed as any other button. The More Buttons companion application also be used for ACD functionality. Each Button companion application can be assigned one of the 8 global banks, which each have 64 buttons. You can have eight instances of the More Buttons companion applications to ensure that you have enough buttons in Call Manager. All buttons can be programmed by the user for the following:

- Feature Code

- Speed Dial

- System/PBS Commands

- User Defined Actions

- ACD keys

- DSS Extension Key

- Web Key

- Run Program

For more information, refer to Chapter 13 – Buttons.

Web Browser

Call Manager provides an integrated web browser window for access to Internet or Intranet locations, or direct access to local HTML files. In addition to basic browsing, you can create custom web applications to extend the functionality of Call Manager for your business.

For example, your call center could have incoming calls automatically open the Call Manager browser window to a "Caller Survey" page. The Call Survey page could display information about the caller and display an answering script the agent could use to guide the conversation. The web page might also allow the agent to enter answers from the caller into HTML forms and submit the results to a company web server.

The Call Manager Web Window is based on Microsoft Internet Explorer. You must have Internet Explorer 6.0 or higher installed on the PC.

Click the setup icon to set Home URL and the tools to display in the toolbar (home, stop, refresh, go back, go forward, URL).

Soft phone

As a license option, Call Manager can have the VoIP softphone option. If that option is activated, the user can use all of Fixed buttons, Programmable buttons, and Soft keys on the telephone. In addition, if the user prefers, the softphone screen can be shown as a companion application.

The user can click keys on the softphone and it behaves the same as the IP telephone. The telephone must be configured as the 10 button large display telephone in IPedge, and the SHIFT button must be disabled.

History

Call Manager automatically creates a log of calls dialed and received on the local telephone extension. This Call History provides the user with a valuable log of his or her phone calls.

- Pages Buttons – In addition to the other toolbar icons, you can use the First Page, Previous Page, Next Page, and Last Page icons/buttons to navigate between the various pages. Call History creates Pages when the call log exceeds a certain number of Call records to improve performance. The Last page contains the most recent calls.

- Call Information – Each call in the call history appears as one line in the Call Display area. The column headers indicate what information is shown in each column.

  - Column 1 (Icons) – Indicates whether or not a call is an incoming call or outgoing call (arrow pointing right = incoming, arrow pointing left = outgoing) and the call is answered or not (Green = answered, pink = not answered).

  - Year Day Time – Shows the date and time that the call completed (not started). This column also includes the day-of-week for the first call of each day.

  - Phone – the phone number you dialed (outgoing,) or the CallerID Number / ANI (incoming.)

  - Name – The name of the person you called (based on Outlook), or who called you (based on CallerID.)

  - Dur –The Duration or length of time the call spent on this Call Manager extension, in hours, minutes, and seconds. This time does not include any time the call spent on any other extensions before or after being on this extension.

  - Acct Code – Shows the account code, if any, that was attached to this call. Customers often use Account Codes to indicate something about the call, such as the Customer ID, the result code of the call (e.g. "order was placed", "needs follow-up", "unable to reach – party was busy"), etc. This account code could have been attached to the call prior to reaching this phone, or it could have been added or changed by you while it was on your extension. Call History logs the current Account Code when the call leaves the Call Manager extension.

- Type – This can either be IC or CO indicating the type of call, internal or external. It also indicates the Station (ACD/Hunt Group, Announcement (AA), and voicemail.

- Notes – Shows the 'Notes' that were taken during this call. These Notes could have been attached to the call prior to reaching this phone, and/or they could have been added or changed by you while it was on your extension. Call History logs the current set of Notes when the call leaves the Call Manager extension.

- To Call – Double-click the desired number from the list.

- Drag and Drop to Call – You can select a call and then use your mouse to drag and drop it to either the Call window or the LCD Display to start the dialing of that number.

- Drag and Drop to Create Speed Dial Button – You can select a call and then use your mouse to drag and drop it to a Call Manager button.

- Drag and Drop to Add to Speed Dial List – You can select a call and then use your mouse to drag and drop it to your Personal Directory.

- Additional Options – Right-click on the entry to access a menu of other functions:

  - Call Now – Dial the phone number using Call Manager.

  - View Info – Provides a read-only view of all of the information about the call, including the "Notes."

Note: You cannot change this information – you can view and copy/paste it to other applications.

- Lookup in Outlook – Look up the telephone number in Microsoft Outlook and open any matching Contact.

- Listen to Call – When the Tracer Integration is provided, this button provides a link to Replay to allow the recording to be played back.

The following functions are available on the toolbar:

- Find Similar Calls (Filter icon) – Enables the Filters option pre-configured with information to match the selected call. This is very useful for finding calls made to or received from a certain person or phone number.

- Print Calls (Printer icon) – Prints a listing of all entries shown in Call History. Change the position and width of the columns prior to printing to format the printout as desired.

- Export Listing (Export icon) – Export the listing to either a CSV, Text, Excel or Text format.

- **Filtering** – Use filters to limit the number of calls or view a certain type of calls. For example, you might want to see only the calls you made/received in the last 7 days. Or you want to see all Outgoing calls made to a specific area code since the first of the year.

1. Press the "Filters" icon to open the Call History Filters screen.

Note: The filters button changes from Grey to Green when filters are active. This serves as a reminder that the call display list may not display all call records while filters are active.

2. Select the options and data for the calls that you want to see.

- Dates – Select the date(s) – "All" means any date.

- Call Direction – Choose whether you want to see incoming ("In Only"), outgoing ("Out Only"), or all calls ("In & Out".)

- Phone Numbers – Choose "All" for calls made to/from any number. Use the "Matching" option to limit the search to calls made to/from specific numbers. You can enter a specific phone number (like 480-496-9040,) the last part of a number (496-9040,) or the first part of a number (480+) to find all matching calls. You may also use wild cards, such as: 480-???-9040 and 480-496*.

- Names – Choose "All" for calls to/from any name including blank names. Use the "Starting with" option to limit the search to calls with a specific name. Enter an entire name (Jack Jones) or just the first part of a name (Jac). The name search is NOT case sensitive.

- Account Codes – Choose "All" for calls with any or no account code. Use the "Starting with" option to limit the search to calls matching or starting with a specific account code. For example, '123' returns calls with account codes 123 and 123xxx.

3. Press the Search button to find the calls (on the current page) that match ALL of the selected options. Call History will update the "Calls" counter and "Call Display" area on the main screen.

- Search Button – Finds the calls (on the current page) that match ALL of the selected filtering options.

- Clear Filters Button – Resets all filters to 'Off'. Press Search to re-load all Call History record. Or, select new filter settings and start a new Filter search.

- Cancel Button – Closes the filters screen with no update to the "Calls Display".

ACD Viewer

The Call Manager ACD Viewer program allows Call Manager users connected to Strata ACD to view the status of all ACD groups in which they are members. It shows the operating status of each group and as the group becomes busier it changes colors and can provide warning sounds to alert you of status changes.   You can expand each group view to see the number of calls and the status of each of the agents and supervisors in the group. Each group contains a "My Status" icon showing your own status in the group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status.

The ACD Viewer is fully integrated with the Call Manager Chat so you can easily place a chat call to a supervisor or another agent by simply right-clicking on that person's icon. Plus you can broadcast a chat notification to all agents and supervisors in the group.

ACD Viewer appears by default as a companion application tab.

Note: Strata ACD must be operating in Enhanced Mode for ACD Viewer to be used.

The ACD actions can be used to Log In / Log Out to/from ACD groups. Going temporarily unavailable and an ability to end wrap times can be part of the features available. Additional Call Center features are possible using User Programmable buttons.

Logging In or Out

- Click the Change Agent ID icon to open the ACD Login/Logout window.

Note: The right list box shows available groups for the identified agent number. The left list box shows groups currently logged into.

To log into or out of one or more groups

1. Highlight the group name(s) in the right-hand box and click <<Log In. If your Agent ID is listed as a Supervisor, then the Supervisor: Take Calls check box will be offered on your screen. Placing a check in this box will log you in to take calls for the group(s) selected when <<Log In was pressed.

2. Click Done when finished.

3. The ACD Key will display the number of ACD groups the extension is logged into and the total number of ACD groups you are a member.

To Log Out

1. Highlight the group name(s) in the left-hand box and click the >>Log Out button.

2. Click Done when finished.

Changing Agent Status

1. Right click My Status once you have expanded the views in the ACD Viewer pane. The following ACD Agent Status window will appear:

To Make Agent Unavailable

1. Use pull-down list and choose a reason.

2. Click the Make Unavailable button.

3. Click Done.

To Make Agent Available

1. Click the Make Available button.

2. Click Done.

To Set the ACD Status to WrapUp

1. Click Set WrapUp button.

2. Click Done.

Note: The Set WrapUp button is NOT available on all installations.

To End WrapUp

1. Click the ACD Status button.

2. Click the End WrapUp button.

3. Click Done.

The ACD View has many configuration options that allow you to customize it to your needs. When the ACD Viewer is operating and visible you can configure it's settings by clicking on the wheel icon in the upper left hand corner and selecting the Setup menu.

ACD Group Status This section allows you to setup how ACD viewer changes ACD group status based on activity conditions. Different colors represent the different status conditions of (how busy is) each ACD group. Yellow and Red represent warning and urgent status levels respectively and can be specifically configured to decide when those levels should be reached.

Urgent Status (Red) This is the highest level status of a queue and should typically be reached when the load or conditions in the ACD queue indicates a problem that needs attention. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Red. In addition to these two conditions, this status will automatically be reached whenever the queue is enabled but there are NO agents available. Available conditions are:

Calls Waiting > 'x' calls

Longest Waiting Call > 'x' Secs

Waiting Calls / Agent > 'x' %

Warning Status (Yellow) This is the 2nd highest level status of a queue and should typically be reached when the load in the ACD queue is approaching a problem level. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Yellow. The available conditions are:

Calls Waiting > 'x' calls

Longest Waiting Call > 'x' Secs

Waiting Calls / Agent > 'x' %

Active Status (Green), Idle Status (Blue), and Disabled Status (Black)	The ACD Group Status will automatically appear Green if there are agents logged into the group and there are calls taking place in the group, but there are no waiting calls for the group. The status will automatically appear Blue when there are agents available to take ACD calls, but there are no calls. Black indicates the queue is Disabled (or off-schedule) and not receiving calls.
Notifications	This section allows you to setup audible and visible notifications that can be taken when an Urgent, Warning, and Active status is met. If desired, enter a check mark in the Play Sound box to hear a sound over the speakers on your PC when a status is met. Use the Browse button to browse to a specific wav file. Use the test button to hear the selected sound. Enter a check mark in the box if you'd like to Show the ACD Viewer if it is hidden on your screen when a Status is met. This will bring the Call Manager and the ACD Viewer to the forefront of your screen.

Click **Save** to save all changes.

CM LCD   In some cases you may want to keep the ACD viewer hidden but have it send
messages to the LCD display of the Call Manager to show the ACD queues
status. This is often very useful when the Call Manager is docked to the screen
and you want to conserve screen space for use by other applications. Thus, ACD
Viewer can be configured to send Low/Medium/High priority messages to scroll
along the 2nd line of the Call Manager LCD display.

Select the appropriate check box to indicate whether or not you'd like to display a
message when each ACD Group Status condition has been met.

Enter the text you'd like to display for the Urgent, Warning, or Background
Messages.

Enter the text exactly as you'd like it displayed in the Call Manager. Use the
following tokens to represent ACD Group information.

ACD Viewer Tokens   %G – ACD Pilot Extension

%L – Longest Waiting Call

%W – ACD Group Name

% % – Percent Sign

%Q – # of Waiting Calls

%Z – Calls per agent

%Y – # of Agents Available

%C – Total Calls

%X – Total Agents

%G Urgent Message %Q Waiting Calls: Longest Waiting Call: %L

Miscellaneous If on your system each Agent ID is the same as his/her PBX extension you should enable the "PBX extensions correspond to Agent IDs" option. That is agent ID "100" uses PBX extension "100", agent ID "105" uses PBX extension "105, etc.   With this type of installation, you will be able to place a chat call (or chat broadcast message) to an agent even when he/she is not Logged In to an ACD group.

Using ACD Viewer This section describes how to use the ACD Viewer for both agents and supervisors.

Collapsed View The ACD Viewer starts out with a 'collapsed' view of each ACD queue. This takes up very little screen space but still provides a high-level status of each of your ACD groups. That is, the ACD Status View window displays one line for each of the ACD Groups of which you are a member. The ACD Group Name, Queue Number, and Status (Enabled or Disabled) are displayed. If the queue is on a schedule, the time the queue will be enabled/disabled by the schedule is displayed.

Each ACD queue has an activity LED that changes colors based on the status of the queue:

Gray (Idle) = no calls active (or waiting) and at least 1 agent logged-in and available.

Green (Active) = at least one call active but no calls waiting and at least one agent logged-in and available.

Yellow (Warning) = Default: one call waiting and at least one agent logged in. But this threshold is configurable.

Red (Urgent) = Default: Two or more calls waiting OR no agents logged-in and available. But this threshold is configurable.

Black (Disabled) = the ACD queue is disabled (either by a supervisor or by being after-hours in the schedule).

To 'expand' the information on an ACD group, simply click on the Plus sign next to the status icon. Other things you can do to a queue via right-click menu include:

Chat Broadcast – Send a broadcast chat message to all agents and supervisors in the queue.

Enable Queue – Enable the queue 24x7 if currently disabled. (Supervisor only)

Disable Queue – Disable the queue if it is currently enabled. (Supervisor only)

Use Schedule – Enable the queue using the Schedule for the queue. (Supervisor only)   *The schedule days/times are setup in Strata ACD.

Expanded View   When you want to see more detailed information on an ACD queue, you can change to the 'expanded' view. As mentioned previously, to 'expand' the information on an ACD group, simply click on the Plus sign in the status LED or right-click the group and select 'Expand' menu. In this view you see a more detailed view of: (1) Calls in the queue, (2) other Agents and Supervisors in the group and (3) your own status.

1. The "Calls" line shows the current number of Active and Waiting calls in queue as well as how long the longest call has been waiting (displayed as LCW for "Longest Call Waiting").

2. The "Agents" line shows how many total agents are in the ACD Group as well as a breakdown showing the number of Idle, Busy, Unavailable, and Logged Off agents. By clicking on the Plus sign you can further expand the view to show each agent's ID, Name, and Status. Plus the status of each Supervisor is also shown in this list.   Right-click on an agent or supervisor in the ACD Group to send them a Chat message, or if you are idle, to Call the agent or supervisor on the phone.

3. The last line in the expanded view is the "My Status" line. This not only shows your personal status in this ACD group but allows you to change your status and perform functions using right-click menus as described in the following section.

IP*edge*
Using Companion Applications

In the expanded view, the "My Status" icon is a special icon that shows your status in the ACD group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status or perform a function. The options provided are:

- Log In – this will log you into this ACD group.

- Log In and Take Calls – (supervisor only) – This allows a supervisor to simultaneously log in as a supervisor and as an agent (to take calls).

- Log Out – this will log you out of this ACD group.

- Make Me Available – If you are set to 'unavailable' or are in 'wrap-up', this will change you to 'available' status.

- Make Me Unavailable – you can select this to make yourself 'unavailable' – a list of unavailable message choices will be provided.

- Request Help Call to Supervisor – while you are on an ACD call, you can use this to initiate a request for a help call to a supervisor in the ACD group. This is further explained below.

274 **TOSHIBA** IPedge UG   07/15

Requesting Supervisor Help

When the Request Help Call to Supervisor function is selected, this sends a Help Request to a supervisor in the ACD Group. Once you initiate the request you will receive a notification that the request has been sent.

ACD Help Request

Your Help request has been sent to Supervisor: 4407 x406:406

Okay

If the supervisor accepts your request for help you will receive notification.

ACD Help Request

Your Help request has been accepted.

Okay

If the supervisor denies your request you will receive a rejection notification.

ACD Help Request

Your Help request has been rejected.

Okay

If a supervisor or supervisors do not respond to your request you will see the following:

ACD Help Request

Presently no supervisors are available to provide help.

Okay

Chat

The Call Manager Chat program allows Call Manager users connected to the Net Server to interactively have chat conversations. This is an integrated text-messaging function that lets you communicate with other Call Manager users using text messaging 'calls' even while you're busy on the phone.

This program works as a companion program with Call Manager to allow workers in the enterprise to communicate using real time text-based communications with others. Using Call Manager Chat you can have individual conversations with anyone else on the sever with the same feature installed.

Chat can also be used to send a broadcast message to an individual or to an entire group. A broadcast message is a one-time message that will appear on the recipient's Chat window.

Chat Operation

The primary function of Call Manager Chat is to allow you to place and receive chat calls and conduct one-on-one chat conversations with other chat users in your company. Chat also contains some features that may make Chat more user friendly in certain applications. These include a Do Not Disturb, changing the "quick send" text buttons, and the ability to form groups of users for broadcast messages,

Using Chat Messaging

This section defines how to place a call to another Chat user, how to communicate with that person, how to answer an incoming Chat communication, and how to send Broadcast messages.

- **To Access Chat** – Click the Chat tab on Call Manager. The following screen will display.

To Place a Chat Call

1. Choose whom to send a message to by expanding a group in the main Chat window. If someone has logged out of Call Manager Chat the icon will appear in gray, and it will show Off Line and the date and time they went off line. You cannot place a chat call to someone who is off line. The offline time is the last known offline time. If Call Manager was not running and a user went offline, the offline time will not show.

Note: If you do not want to receive a Chat response you can send a Broadcast Message.

You can receive a response to a broadcast by selecting the 'Give "Chat Back" option' in the broadcast dialog.

2. Double click on the person with whom you wish to converse

or Right click and choose Chat Call from the menu.

This will bring up a Silent Message Conversation window, which is used to send and receive messages opening a chat conversation. Chat can only be between two users. You cannot have a multi-way chat (more than two users). You can have multiple two-way chat conversations.

To Answer a Chat Call

1. A Silent Message Conversation window will automatically pop up showing who is calling you and a sound will play based upon your Preference Settings.

2. You must respond within 30 seconds to this message or the caller will get a message "User did not respond. However, the 30 seconds setting is configurable.

3. Ongoing conversations follow those described in To Send a Text Messageand Options During a Chat Conversation.

To Send a Text Message

1.   Press a pre-programmed Response button or

Type the message into the text box at the bottom of the window and press either the Send button or the Enter key on your keyboard (shown below).

Options During a Chat Conversation

Several options are available to the user when right clicking within the conversation window to open a menu of options. The chat window contains three windows: the Chat Box, the Canned Replies, and the Whiteboard.

The whiteboard may not be visible in the chat window (it depends on configuration). The three windows are accessed from the view menu.

To Call the Person using your Phone

This option is to make it more convenient when you need to speak with the person rather than just sending text.

- •   Click Chat tab, then Phone. Enter the phone number or if the number is automatically populated, then click Call.

To Copy the Conversation

- •   From the Edit menu, click either Copy or Copy All to copy the highlighted or all of the conversation to the Windows Clipboard for pasting into another application.

To End the Conversation

- •   Press the Close button to end the conversation.

To Open a Whiteboard (Collaborative) Session

- Click Share Whiteboard Screen. This option is only offered once the called party has responded to the Chat session.

To Send a Broadcast Message

Call Manager Chat allows you to send a broadcast message to one or more Chat recipients. For example, if the Sales Manager would like to call a meeting with all of his sales representatives, he could use this feature to send a message to the Sales Group telling them there is an important meeting in 15 minutes in the conference room.

1. To initiate a broadcast message, double click on any group name in the Chat Window and click on the Broadcast icon or

Right click on any group name or select Broadcast.

2. Enter a message into the Message box.

3. Define the Urgency, Normal or Urgent for the message delivery.

When Normal is selected, the Broadcast message is sent to your recipient(s) in black text and when Urgent is selected the text is in red (shown below).

4. Define the Destination Options:

   - A check mark in the Timeout (default choice) will display the message for the number of seconds defined in the time box (default is 60 seconds).

   - Entering a check mark in the Give "Chat Back" option box will give your recipients the option to send a Chat message back to you once they receive your Broadcast Message.

   NoteBe aware that when using the "Chat Back" option sending to a group of people, all recipients will have the Chat back option and if everyone responds, it could result in a large number of simultaneous chat calls back to you.

5. Click Send.

Chat Feature Operation

Do Not Disturb   The Chat Do Not Disturb (DND) feature is disabled by default. For this feature to operate, the "Enable Do Not Disturb" feature must be selected in the Features Tab of Chat Setup. This feature works independent of Call Manager's DND. See "Interfacing with Other Programs" on page 290 for details on how to automatically link the Chat DND status with Call Manager.

To Set Do Not Disturb

When you want to prevent further incoming chat calls, the Do No Disturb feature can be turned on. This feature allows you to provide a specific message, such as "In a Meeting Until 3pm", to anyone attempting to place a chat call to you.

- **To go into DND status** – DND is set in the chat toolbar by selecting the DND Check box and/or entering text into the text box on the toolbar.

While in Do No Disturb the main window will show the text DND On in red.

- **Other Users Experience** – When a Chat call is placed to someone who has their Do Not Disturb feature set you will see a message showing "User Not Available" along with any return message they provided. If they didn't setup a return message, the text "Do Not Disturb" will be shown.

To Clear Do Not Disturb

- **To Clear the DND Status** – Clear the DND Check box…

Response Buttons   All buttons can be changed on-line from the Silent Message Conversation window. The first 8 buttons can have their responses defined in Chat Settings; all others can only be defined using the following procedure.

To Add/Change Text in Response Buttons

- Right click on the button and a drop down menu appears. Select Edit to edit the button. The dialog box shown below appears. You can change the caption, the type, the text, and whether to send immediately.

- **Caption** – Type in a caption for the button.
- **When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:
- **Send Text** – will send a text string to the other party on the chat call.
- **Push URL** – will send a URL to the other party on the chat call and pop open a web browser window to that URL. However, the pop open url can be disabled by the receiver.
- **Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.
- Click **OK** to save the changes you have made to your Response Button.

Personal Groups　**To Add or Change a Personal Group**

• Right click a group name in the Chat window and choose either Add a New Group or, if offered, Change this Group to create a personal group. Name the group and add or remove names for that group as follows:

• Chat List Name – Enter a name for the group to identify your group. All names must be unique.

• Chat Clients in List – To add members to your group, highlight individuals you want to be part of your group in the All On-Line Chat Clients box and then click on the left double arrow (<<) button to move the members to the Chat Clients in List box. To select multiple individuals, hold down your Ctrl or Shift key while making selections by clicking the mouse. If you want to add a member that is not presently on-line, right-click your mouse in the "Chat Clients in List" and select the "Add an OFF-line client" menu item, then type in the name of the client.

Note The name of the client must exactly match the client name when he/she is on-line. To remove members from your group simply highlight the members and then click on the right double arrow key (>>).

• Click on Save when done.

To Copy a Group to Create a New Group

• To create a new group by copying another group, select the group to be copied, right-click on the group and select Copy this Group. Follow the same process for creating a new group above.

To Delete A Personal Group

To delete a group, right-click the group in the Chat List and choose the Delete Group option. A confirmation box will appear and needs to be affirmed before the group is actually deleted.

Whiteboard Operation

To access the Whiteboards option, from the View menu, select Whiteboard. This window provides tools for sharing information on each of your PCs with the another user with an open Chat conversation.

Whiteboard Menus

The menus on the whiteboard are context sensitive. The File and View menus remain constant. The whiteboard is accessed from the View menu. The whiteboard menus are accessed by right clicking in the Whiteboard space or by clicking Whiteboard. Use the Whiteboard menu to capture screens, crop pictures, scale, highlight color, and change pen widths.

The file menu has the following options:

- Open - takes you to an Open window to find a file, etc to share.

- Close - closes the whiteboard application.

- Save as - lets you save the whiteboard.

- Send as email - brings up an email message window, where the whiteboard is attached as a .jpg file and you can add you contacts in the To and cc fields.

- Set as wallpaper

- Print - prints the whiteboard

- Exit.

Similar to the above, you can use the Edit menu to cut, copy, edit, paste, delete, clear and clear highlighting.

The View menu contains Chat Box, Canned Replies, and Whiteboard.

Drag and Drop Files   Files can be shared using the Whiteboards. A file such as a .JPG file can be dragged onto the White Board window and the image will display on the other's shared window. Also, other files can also be shared such as Word documents. These files will be shared and require an appropriate application on the other PC to open that file. For example, if Word is running on the other PC, the Word document will open on the other PC. The user will be capable of using the Pen Tool to mark areas on the document when viewing the White Board screen. To make changes on the document requires switching to Word, editing the document, saving the file and then sending the edited copy back to the originator.

Send Whiteboards as Email...   Using this tool opens your e-mail service on your PC, takes a snapshot of the Whiteboards, including all pen marks, and attaches the image as a JPG file to the new e-mail message. You then can address the e-mail; create a subject and type a message to go along with the attached file.

Save Whiteboards Save As...   Using this tool causes a snapshot of the Whiteboards to be saved as a JPG file. The screen opens to a "Save" window to allow you to choose the file name and location for the file to be saved. The default location is under your "...Documents and Settings/<user name>/Local Settings/Application Data/Toshiba/Strata Call Manager".

Whiteboards Setup   The Chat application Setup menu provides access to the Whiteboards Preferences screen in the Features tab.

> •**Highlighting** – The Whiteboards Preferences screen defines a default Pen Width and Color to be used when Whiteboards session is opened. During a communication session, these can be changed at will as described above.

Configuring Chat
You configure Chat by making parameter choices in the Setup dialog box. You can make Chat integrate with other applications including your soft phone by using the DDE Interface commands. These are defined in the "Interfacing with Other Programs" on page 290 section later. Examples are provided for using these commands with Call Manager are also included.

Setup
To set up your preferences, click the Setup button.

Messages Tab

These settings define the arrival responses provided for incoming and broadcast messages.

On Incoming Message

- **Dismiss new popup window** – Check the box and specify the time (in seconds) when no response is seen when a new message arrives. This will tell Chat to notify the caller of no response after a certain length of time. The response message returned is "User didn't respond."

- **Play Wave file** – Check the box to play a WAV file each time a new message comes in. Click on Browse to specify a different WAV file. You can test your WAV file by clicking on the Test button.

- **Beep on Each New Line Received** – Check the box to have Chat beep each time a new line arrives into the conversation. Click Test to verify operation.

- **Timestamp Each Line** – Check the box to show a time stamp Message Box each time a new message is received.

On Incoming Broadcast Message

- **Normal Message** – Check box next to "Play Wave file:" to allow playing a WAV file each time a new broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.

- **Urgent Message** – Check box next to "Play Wave file:" to allow playing a WAV file each time an urgent broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.

Response Buttons Tab

The Response Buttons are a series of buttons located at the bottom of the Chat Message Window. These can be customized to meet your specific needs by clicking on these buttons to send immediate messages to someone without typing or clicking the Send button. Once a communication channel is established, you just click the Response Button with the message you want to send.

- Define the Number of rows to create response buttons.

To Change Message in Response Buttons

> **Note**Only the first eight Response Buttons can be changed from the Preferences window. All buttons can be changed on-line when in a conversation. The procedure to change a button is identical in the Preferences Window as when done on-line.

- Click the Setup icon in the Chat application, then click on the Response Buttons tab.

- Click the button to change and the "Response Button" window will appear:

- •**Caption** – Enter a caption for the button.

- •**When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:

- •**Send Text** – will send a text string to the other party on the chat call.

- •**Push URL** – will send a URL to the other party on the Chat call and pop open a Web Browser window to that URL.

- •**Send Text** – Type in the text message or URL you want to send when you click on this button. Your text message can be any length in size.

- •**Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.

- Click **OK** to save the changes you have made to your Response Button.

Features Tab   In the Features tab, two features can be enabled and the location where the settings will be saved is specified.

Features

- **Allow Others to Push a URL to me** – Check to allow URL's to be pushed to this location by others. When disabled, other users cannot push a URL to open a browser window on your PC.

- **Enable Do-Not-Disturb Feature** – Enter a check mark in the box to enable the Do-Not-Disturb option. This option allows you to block incoming Chat messages and returns a DND message that you specify to the caller.

- **Show Offline Users in <<Everyone>>** – Check (default setting) to show both online and offline users in the <<Everyone>> group. Remove the check mark to only show online users.

Save Setting

- **Save As Local Machine Data** – Click to enable this option if the settings are to apply to all users of this PC.

- **Save As Current User Data** – Click to enable this option if the settings are unique for each user of this PC.

Logging Tab   The logging tab window is used to enable the logging of all conversations to a file and define how the file is to be named.

Log Silent Message Conversations To a File

- **Auto Logging Enabled** – Enter a check mark in the box to log all Chat conversations to a file. If you do not wish to log the conversations to a file take the check mark out of this box.

- **View Log Button** – Click the View Log button to view your current log file.

- **Log Filename:** – Enter a file name or click on Browse to select where you would like your files to be logged.

- Use the variable **%d** to log the conversation to a file name that includes the date. For example, if you had a Chat conversation on November 3, 1999, you file name would be 110399.log.

- Use %**t** for the time. The user will end up with a separate file for each chat.

- Use the variable **%u** to log a conversation to the file name of the user that you conversed with. For example, if you had a conversation with January your file name would be Jan.log.

- You can combine the use of the variables if desired. For example, the log file name could be C:\PROGRAM FILES\CTS\CHAT\%d%u.log. The log files will be defined first by date, then by the name of the Chat party. Reversing the parameters (...%u%d.log) would be organized by name then date.

Interfacing with Other Programs   Call Manager Chat is designed to operate with other Windows applications. For example, a user of a phone program, such as Call Manager, may want to press a button to immediately open a chat window with your ACD supervisor when you're on an Urgent Call. Or you may want to coordinate the DND settings of your phone with the DND of Chat. Or you may need to periodically send a broadcast message to a group of people based upon a trigger such as a meeting reminder. These types of operations are supported by a DDE

Command interface. This section defines the format for the DDE Command Interface, its supported commands with examples with how they can be used.

Format of the DDE Command Interface

Other programs can be setup to send DDE commands to trigger actions in Chat to perform a set of functions. The basic format for this DDE command is as follows:

- Application Name: MSGPOP
- Topic: SYSTEM
- DDE Execute String: <Command>

Command 1 – Open a Chat Session with this Extension Number

Format: CALLEXT, Ext #, Msg_Type, **"Message"**, Send_Option where:

- CALLEXT = The command name.
- Ext # = the extension number of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- "Message" = Message to be sent. When using Call Manager, call and system variables can be used in the message.
- Send_Option = I or C

    •I – send message immediately

    •C (or blank) – type message into user buffer but wait for user to press SEND

Example: The user sits at the front door and acts as the receptionist and needs to inform people when someone is waiting in the lobby.
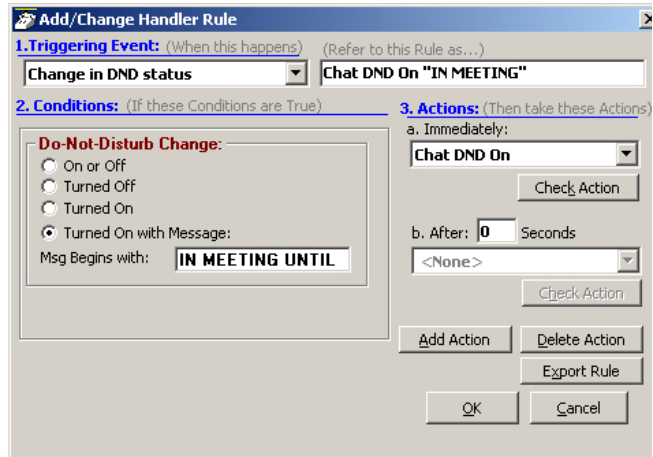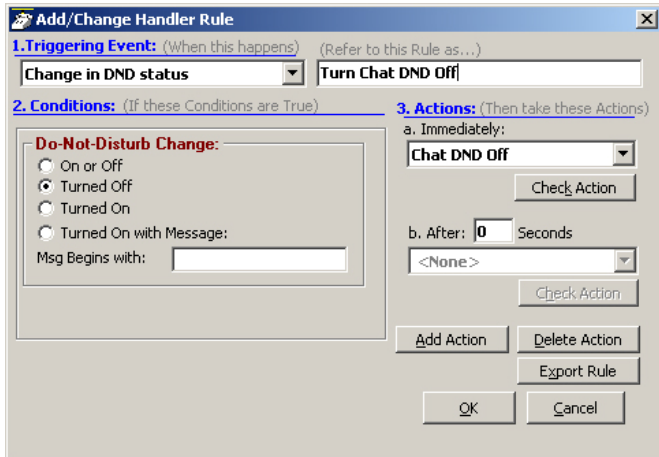
1. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

    In App Name | Topic enter: MSGPOP |SYSTEM

    In DDE Message enter: CALLEXT,,,"Your visitor is waiting in the Lobby",I

   NoteNo extension was specified to allow the person to choose whom the message is to be sent.

2. Choose a key on Call Manager, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select "Visitor Waiting" from the list of actions and Save.

| **Command 2 – Open a Chat Session with this User Name** | **Format:** CALLNAME, **"Name"**, Msg_Type, **"Message"**, Send_Option where: |

- CALLNAME = The command name.
- "Name" = The name of the person to chat with. This name must match the name used in the Chat directory. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- "Message" = Message to be sent
- Send_Option = I or C

  - •I – send message immediately or
  - •C (or blank) – type message into user buffer but wait for user to press SEND

Example: Agents in a Call Center want to quickly notify the supervisor that an abusive caller is on the phone. The supervisor's name is Jan and the persons phone number (formatted for easier reading) and name should be included when available using Caller ID.

1. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: CALLNAME,"Jan",,"Help! I have an abusive call from: %J/%N",C

2. Choose a key on Call Manager, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select "Notify Jan – Abusive Call" from the list of actions and Save.

Command 3 – Set DND option on or off in Chat

Format: DND,DND_State, **"Message"** where:

- DND = The command name.
- DND_State = Enter "ON" for turning on DND or "OFF" when turning off DND.
- "Message" = Enter the text message to be sent to callers reaching this station. If the message is left blank (opening and closing quotes only), then the message previously used will be displayed without change.

Example: The Call Manager user would like to have Chat DND follow the status of Call Manager's DND status automatically when Call Manager is changed. In this case, Chat should be in DND when the user is in a meeting. Chat should reflect the same message that is seen on Call Manager DSS keys.

1. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: DND,OFF,

2. In Call Manager create another User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: DND,ON,"In Meeting Until &U+'60""

Note: We are using the same time parameter used for setting Call Managers DND which uses another User Defined Action that also includes &U='60' to set the time to 60 minutes from now.

3. In Call Manager create two Personal Call Handler Rules to trigger when the DND status changes causing Chat DND to follow Call Manager's DND status. The two rules are shown below.

Command 4 – Sending a Chat/Broadcast Message

Format: ONESHOT, Ext #/"Name", Urgency, "Message", Timeout where:

- ONESHOT = The command name.
- Ext #/"Name" = The extension number or name of the individual or group to receive the message. Examples:
  - •Ext # = 1001
  - •"Name" = "Linda", "<Tech Support>" or "<<Sales>>
  - •For Everyone = "*

  NoteThe broadcast group names must contain the < and > or << and >> characters as part of the name.

- Urgency = enter H if urgent message and leave blank if normal message.
- "Message" = The text message to be sent.
- Timeout = The number of seconds for popup to expire. If left blank it will be set to the default of 60 seconds.

Example: The Tech Support Manager schedules Group Meetings with his staff. He wants to use Outlook to schedule the meeting and use the Outlook Reminder to send a Chat Broadcast to his group a few minutes before the meeting.

1. In Chat a Personal Group is created containing the members of <Tech Support>.

2. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name | Topic enter: MSGPOP|SYSTEM

In DDE Message enter: ONESHOT,"<Tech Support>",H,"Group Meeting at &U+'15'",60

3.   In Call Manager creates a Personal Call Handler Rule to trigger when a Calendar Reminder event occurs and the Subject matches Group Meeting. This trigger will result in the action Group Meeting Broadcast to be taken. The assumption is the Outlook meeting reminder is provided 15 minutes prior to the scheduled meeting.

Dialer

The Dialer allows Call Manager users to easily schedule phone calls to be placed later. For example, when a sales representative arrives in the morning he may know he needs to make calls to 15 of his customers, so from MS Outlook he can drag/drop the contact information of all 15 of the customers into his Dialer. When the designated time arrives for each call to be placed the user will be presented with a pop-up screen alerting him it's time to place the call. Once the call is finished, the user will be presented with another pop-up screen requesting information about whether the call was successful and if not whether it should called again later (for example if the party was busy).

The Dialer tab displays all calls yet to be placed as well as calls that have recently been completed, plus as the status of the dialers and the phone. This information is shown on the main screen similar to the following:

Main Screen

- **Fly out/Fly in button** – is used dock the window back to the main screen of Call Manager or if its already docked to hide it 'inside' the main screen.

- **Setup** – Brings up the Dialer configuration screen.

- **Reset button** – Puts Dialer back to its initial state.

- **Enabled Check box** – This is the Check box in the toolbar. This box indicates whether the dialer is enabled. This allows the user to easily Enable (Start) or Disable (Stop) the entire dialer function. For example, if you need to take a break to do some paperwork, you could simply disable the power dialer until you're ready to start making calls again.

- **Add Call** – Click the Add Call button to place a dialer call. The AddDialer box displays.

- **Phone Status** – this shows whether the phone is idle, busy, in Do-Not-Disturb, etc.

- **Calls Display Area** – this area shows the list of calls that have been placed or have yet to be placed (details below).

- **Column Headers** – these show what information is contained in each column. Using your mouse, you can resize and reposition these headers to customize your viewing area.

Calls Display Area

This area shows each call that is either (1) yet to be placed or (2) that has already been completed. The available columns include:

- **Date** – this column shows the date the call is to be placed or when the call was completed.

- **Time** – this column shows the time the call is to be placed or was completed.

- **Status** – the status of the call. If this is blank the call is not due yet. Other status values include:

  - Due Now – The time has arrived for this call to be placed.

  - Overdue – This call has not yet been placed and it is overdue.

  - Done – This call has been completed.

  - DISABLED – This call is disabled. It will not be placed until it is enabled.

  - In Progress – This call is underway.

- **Name** – the name of the person to be called.

- **Phone** – the phone number to be dialed.

- **Account** – this shows the account code, if any, for this call. Often an account code is used to indicate something about the call like: the customer ID, the result code of the call (e.g. "order was placed", "needs follow-up", "unable to reach – party was busy"), etc. This account code will be attached to the call when this call is placed.

- **Subject** – this column shows the 'subject' of the call. This information can be added/changed up until the call is placed, at which time this information is attached to the subject field of the call.

- **Last Result** – If the call has been placed and it is either successfully completed or will try again later, this field shows what happened on the last attempt. The user chooses these result values after each call is completed:

  - Completed

  - Busy

  - Left a Message

  - No Answer

  - Wrong Number

Functions When you have selected an entry in the Calls you can change the entry by simply double-clicking on the desired entry.

However, if you right-click on the entry, additional menu options will appear to show other functions you may want to perform:

- **Call Now** – immediately place this call. This can be used even if the power dialer has been disabled.

- **Edit** – Allows you to Add, Change, Delete, and Copy individual entries. Entries can also be added using drag-and-drop and/or importing as described in the Adding Calls to the Dialer.

- **Lookup in Outlook** – lookup this number in Microsoft Outlook and open the matching contact.

- **Print Listing** – print a listing of all entries shown in the calls window. The position and width of the columns can be changed to format the printout as desired.

Sorting Entries   To sort the entries simply click on the column header by which you desire the sort to occur. Click the same column header again and it will switch the sort from ascending to descending (or vice versa). Thus if you want to sort-by-name click the "Name" column header, to sort by phone number click the "Phone" column header, and so forth.

Dialer Operation

Ready to Dial   Click the AddCall button to place a dialer call. The following screen displays.

In the Date and Time drop down are used to set the date and time of your call. You also have a choice of selecting Today and Now to place a call immediately.

Calls in the list that are enabled will automatically pop up a screen for the user indicating that it is time to place the call. This screen is "Ready to Dial" screen. The screen will contain the information entered into the list about the caller and if the optional "User-defined" Action button is enabled, then pressing this key can cause more information to be available about the party or trigger one of a number of other functions. The user has the choice of Call Now or Later. If later is chosen, then you will be asked for a new time after which the call will return to the list. Pressing Cancel will disable the call before returning the call to the list.

Results   When the call is completed, a Results dialog box appears (shown below). The status of the call can be changed, by default it is marked as "completed". If the call needs to be placed again, checking the Try Again box will open a time frame for the retry (second dialog box shown below). Setting the time (an actual time or an elapsed time) and pressing Okay will place the call back into the list.

As was done in the Ready to Dial screen, an optional "User-defined" button can be provided with an action to be performed at the end of the call. This

action could be anything, but typical uses would probably be to open a Journal entry or pop up an after-call survey form to take notes on the call.

Adding Calls to the Dialer

Adding/Changing a Call Record

Calls can be added manually, imported or use drag-and-drop techniques as explained below. First, a call can be manually added or changed at any time by double clicking on a call in the dialer list. The telephone number must be entered a name being called and optionally an Account Number and any Subject as needed. The call can be scheduled by date or elapsed time. The default date is "Today", but any date can be entered or a Calendar button is provided to pick a date for the call. Any time can be entered or any elapsed time frame can be entered. The pull down list shows some common elapsed times for placing the call. The call record will need to be enabled to be dialed at the appointed time.

Methods for Adding Calls

Often times you may want to add multiple calls from contact or call information that might be contained in other applications. The Dialer provides a couple of ways to accomplish this.

Drag-and-Drop from MS Outlook

If you are using Microsoft Outlook, you can simply select one or more of your contacts in your Outlook Contacts database and simple use the mouse to drag them over and drop them on the power dials "Calls Window". Each contact will then be individually added to the power dialer allowing you to specify the date/time of each call to be placed.

Drag-and-Drop from Call Manager Call History

Often times you may want to place a call to someone you've called (or who called you) in the past.   Since the Call Manager call history provides a complete list of all calls placed and received, you can simply find the desired call in the call history and use the mouse to drag-and-drop a copy over to the power dialer window.

Drag-and-Drop MS Excel file

In Microsoft Excel it is quite easy to create and keep a list of desired contacts and add them into the power dialer. In MS Excel simple create a spreadsheet

with at least two columns (Name and Phone number) as shown in the following example.

Then simply use "Save As" and save the file as a "Text (Tab delimited)" file, as shown in the following window. Note: The "CSV (comma delimited)" format can also be used.

Then in windows explorer simple drag this file into the power dialer window and all the contacts will be immediately added to the power dialer list of calls.   Note: Alternatively, if you save this file from MS Excel directly into the "...\PDimport" sub-folder of Call Manager the entries will be automatically imported into the power dialer.

Drag-and-Drop Other files

Any program that can export contacts into a "tab-delimited" or "comma-delimited" text file format can operate with the Dialer. Similar to the MS Excel file, those files can then be dragged/dropped or automatically imported into the power dialer.

Goldmine Export

The Goldmine contact management software provides a way to setup re-usable filters and export formats as well as a way to add a "Dialer (export)" button on the Goldmine screen. Using these features and the automatic import feature of power dialer described above it is very easy to send a list of Goldmine contacts directly to the power dialer to be dialed.

Configuration Settings

The Dialer provides some configuration options for the user. To view or change the configuration, right-click on the icon in the upper-left corner of the main screen and then select the "Setup" menu option. This will bring up the Setup window as shown below.

- **Place Calls While in Do-Not-Disturb** – This setting controls whether the power dialer should attempt to place calls if the user's phone is in Do-Not-Disturb. For example the user may want to set his phone into "Do-Not-Disturb" mode to stop all incoming calls but still continue using the power dialer to place outgoing calls. Note: On some phone systems the Call

Manager cannot detect and display the Do-Not-Disturb setting of the phone, in which case this setting has no effect.

- **Delay Between Calls** – it's often desirable to provide some "wrap-up" time after the last call before dialing the next call. This value is used to provide this time delay between calls placed by the power dialer.

- **Play Sound** – on a sound-equipped PC, the user may want to play a selected WAV file to alert him/her whenever a call is ready to be placed. This feature and the desired WAV file can be set up here.

- **Delay Before Requesting Call Result** – it's sometimes useful to give the user some "wrap-up" to finish up some activity in another application before requesting the result of the call. This value is used to provide this time delay after the call ended before requesting the user to enter the result.

- **Clear Out Completed Calls** – When calls have been completed, they will still appear in the calls window, but they will be automatically cleaned-out based on this setting.

Note: The Call Manager provides a "Call History" feature for more permanent storage of calls placed and received. The settings options are as follows:

- Hourly
- Daily
- Weekly
- Monthly

- **Overdue calls** – when a call is due to be placed, it will only be placed if the power dialer is enabled and the phone status is idle (and possibly not in Do-Not-Disturb). Thus, since the power dialer will wait until dialing conditions are true, the date/time selected for a call to be placed may pass by, and the settings in this area pertain to those calls:

  - Calls are Overdue if more than 'x' minutes past due – This setting is used to designate how long "Due Now" calls should wait before they are considered to be "Overdue".

  - Place Overdue calls before "Due Now" calls – this option, when enabled, allows the "Over Due" calls to be placed first before the "Due Now" calls.

  - Remove Overdue calls more than 'x' days past due – If the dialer is disabled for an excessive amount of time, the power dialer will automatically clean out overdue calls that are way past due as defined by this setting.

Adding Action Buttons to Ready to Dial and Results Screens

An optional user-defined button can appear on both the "Ready to Dial" and the "Results" screens in Dialer. To setup these buttons, go to the Call Manager main menu select Setup then Preferences, go into the Dialing Tab. Under the Dialer, enable either or both of the "Action" buttons and select the Action to be performed

when the button is pressed. Optionally, the label can be changed to meet your needs. Press Save to keep your new settings.

Advanced Topics

Import File format ASCII text files can be easily imported by the power dialer as long as the file format is as follows:

- One record per line with the following fields:
  - Name – Required – must be non-blank
  - Phone – Required – must have a minimum of 4 digits – can have punctuation {e.g. (480)496-9040}
  - Account code – Optional
  - Subject – Optional
  - Date – Optional – if not provided "Today" is assumed
  - Time – Optional – if not provided "Now plus 5 minutes" is assumed

- The fields within each record can be either Tab-delimited or comma-delimited, however the entire file must be one format or the other (cannot mix formats within a file). Comma-delimited fields can/should use quotation marks around any field containing a comma. For example: "Jones, Skip", 480-496-9040, 1111, "Sample 1,2,3"
  - A maximum of 1000 records can be imported.

Automatic Imports The Dialer will automatically import any file in the above-described format if the file is
(1) named with ".TXT" suffix and (2) saved into the "\PDimport" sub-folder in the Call Manager folder. Once the file is imported, it will immediately be deleted.

Buttons

All buttons in the Call Manager are created equal so that any button can be programmed as any other button. The More Buttons companion application also be used for ACD functionality. Each Button companion application can be assigned one of the 8 global banks, which each have 64 buttons. You can have eight instances of the More Buttons companion applications to ensure that you have enough buttons in Call Manager. All buttons can be programmed by the user for the following:

- Feature Code

- Speed Dial

- System/PBS Commands

- User Defined Actions

- ACD keys

- DSS Extension Key

- Web Key

- Run Program

For more information, refer to Chapter 13 – Buttons.

Web Browser

Call Manager provides an integrated web browser window for access to Internet or Intranet locations, or direct access to local HTML files. In addition to basic browsing, you can create custom web applications to extend the functionality of Call Manager for your business.

For example, your call center could have incoming calls automatically open the Call Manager browser window to a "Caller Survey" page. The Call Survey page could display information about the caller and display an answering script the agent could use to guide the conversation. The web page might also allow the agent to enter answers from the caller into HTML forms and submit the results to a company web server.

The Call Manager Web Window is based on Microsoft Internet Explorer. You must have Internet Explorer 6.0 or higher installed on the PC.

Click the setup icon to set Home URL and the tools to display in the toolbar (home, stop, refresh, go back, go forward, URL).

Soft phone

As a license option, Call Manager can have the VoIP softphone option. If that option is activated, the user can use all of Fixed buttons, Programmable buttons, and Soft keys on the telephone. In addition, if the user prefers, the softphone screen can be shown as a companion application.

The user can click keys on the softphone and it behaves the same as the IP telephone. The telephone must be configured as the 10 button large display telephone in IPedge, and the SHIFT button must be disabled.

This page is intentionally left blank.

IPedge Enterprise Manager

18

This chapter familiarizes you with the Toshiba IPedge® Enterprise Manager, a web-based system administration tool which allows users to manage communication devices using a web browser.

The user may access the IPedge system to personalize telephone settings, retrieve information and remotely activate/deactivate phone features. The following features may be performed using this application.

As a Super EMPA user, you can manage the following functions for normal users that are assigned to you. Check with your System Administrator your user level (Normal or Super User).

- Key/Button programming
- Name changes
- Do-Not-Disturb (DND)
- List in Directory
- Distinctive Ringing Patterns
- Phone Settings
- Call Forward – Activate/Deactivate call forward
- Speed dial
- One-touch
- Display Dial Code
- Display Advisory Message
- Preferences
- Account Codes

Note: Not all of the features listed here may be available; feature availabliity depends on user access limits established by the System Administrator.

Prerequisites

The IPedge System Administrator may assign different user levels.

- Check with your System Administrator your user level (Normal or Super-user)
- Log in path/URL for the Web
- Security Code (password) – By default password assigned by your System Administrator

Log In

1. Start Microsoft Internet Explorer.

2. Enter the appropriate URL address field (check with your System Administrator). The Enterprise Manager screen displays.

3. Enter the following:

User Name: Extension Number

Password: Extension Number (default)

Note: This screen may also have a Server Name field depending on your extension. You must know your Server name if your extension is in multiple servers or if your extension number is the same as another extension number in a different server. Check with your System Administrator for your server name.

4. Set the time to remain logged in in the Session Timeout pulldown list

5. Click Submit

To change your Security Code/ Password

1. Select the Preferences tab.

2. Check "Change Password".

3. Enter a password in the New Login Password field confirm it.

4. Click the Save icon

Log Out

Click on the Logout tab on the upper right of the screen.

Home   Using the Home screen, you can do any of the following functions. The buttons that display on this screen is based on the your telephone - 10 button or 20 buttons.

- Set Distinctive ringing patterns
- Assign new keys or change keys
- Change button labels
- Change the display name
- List your name in the directory
- Turn Do Not Disturb (DND) on or off
- Activate/Deactivate Follow Me
  To set up Follow Me button, right click the button, then select Voice Mail > Follow Me.
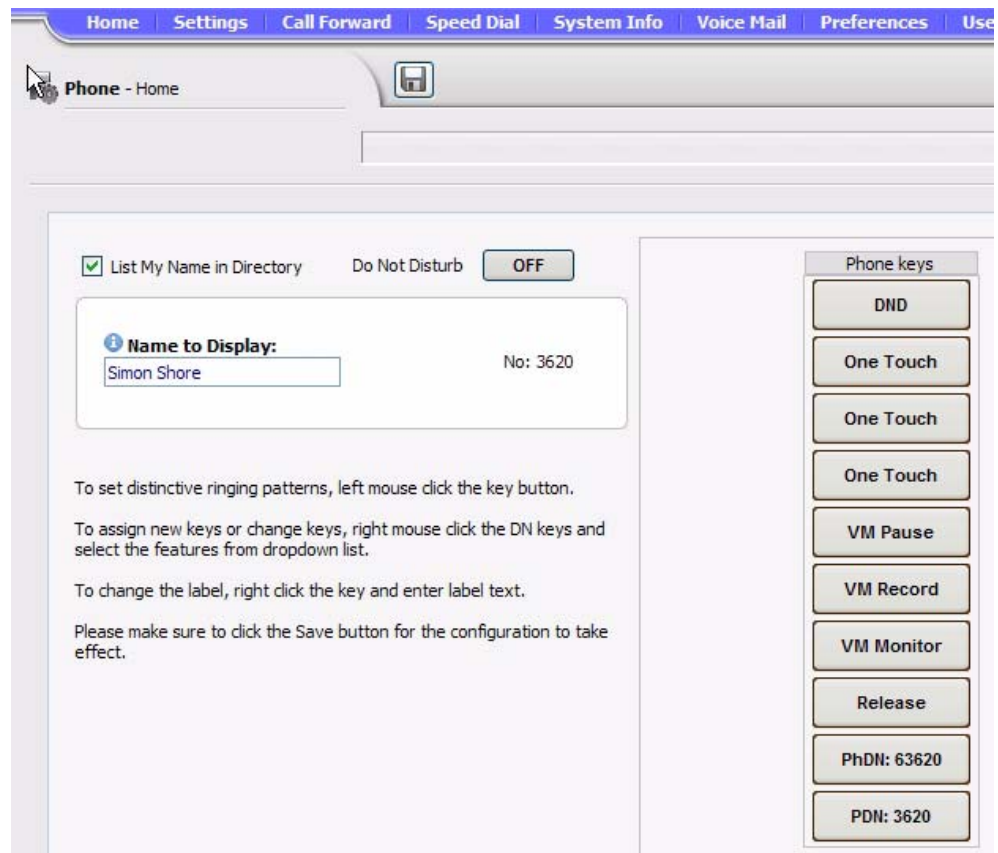
Keystrip Labels

The Feature Key or Button assignments enable each button on the telephone to be addressed and coded to represent a function or feature to be performed. The telephone button layout on the screen will look like the telephone connected to this extension. Some feature buttons require additional parameters to completely define the key (e.g., a Phantom DN needs a directory number, ringing assignment, and the tone pitch when ringing occurs).

1. From the Home screen, right click on the key and enter the label.

2. Click the desired option from the panel that displays.

- Directory No (displays only when logged in as a Super User) – Assign a Primary DN key, Secondary/Phantom DN, Phantom DN Message Waiting, or DSS key to this Key.

- Features – Assign Automatic Busy Redial (ABR), Automatic Call Back (ACB), Do Not Disturb (DND), Short Flash, Long Flash, Privacy, Privacy Release, BGM Key, DSS Key, Program, Account Code, Microphone Cut Off, and Application Starting are available selections.

- Call Control – Activate Speed Dial, Release Button, Release/Answer, Cancel, Source Party, Destination Party, CLID or Night Transfer are available selections.

- Call Forward – Set Call Forwarding assignments for this FB. Forward All Calls, Forward Busy, Forward No Answer, Forward Busy No Answer, Forward Ext/All Call, Forward Ext/Busy, Forward Ext/No Answer and Forward Ext/Busy No Answer and PhDN Message Waiting are available selections.

- Park Page – Assign Call Park Orbit, All Paging, Group Paging, All Emergency Paging, Individual Emergency Paging and Paging Answer Feature access are available selections.

- Call Pickup – Assign FB to a Pickup-Group, Pickup-Directed Terminal, Pickup-Directed Group, Pickup-Directed DN, Pickup-Any External, Pickup-CO Retrieve, Pickup-Local Retrieve, Pickup-Remote, Pickup-Directed DN Retrieve and Pickup-On Hold and Incoming.

- Voice Mail – Enable button to Record or Pause/Resume Voice Mail.

- ACD – Assign FB as either Log In/Out, Available/Unavailable, Work Unit, ACD Help, ACD PickUp, End WrapUp, Join ACD Call, Monitor ACD Call, Start/End Shift, or Display status.

- One Touch – One Touch buttons can be used for storing frequently used features or dialed numbers. Assign and Submit a button as a One Touch button. Once the One Touch button is created, double click the button to enter the programming dialog box.

- Blank – Clear button assignment.

DND Activating

When you activate Do Not Disturb (DND), internal and external calls do not ring your telephone. Callers may be blocked and receive DND busy tone when they call your telephone; or, calls will call forward busy or no answer depending on how many appearances of your extension button are on your telephone. You can continue to make calls normally when in the DND mode.

Your telephone dial tone will sound a stuttered tone when in the DND mode. Stuttered dial tone can be turned off from the Basic Settings screen by disabling Message Waiting & DND Dial Tone.To activate DND on your Telephone

1. From the Home menu, click DND under the Phone Key. The DND default is Off.
2. Change the Do Not Disturb button to ON.
3. Click Save.

One Touch Buttons

One Touch buttons can be used for storing frequently used features or dialed numbers, such as Speed Dial numbers. One-touch buttons can be preassigned to your telephone – your System Administrator can help you identify them.

If you do not have a One Touch button, but you have an available Programmable Feature Button, you can convert the Programmable Feature Button to a One Touch button. Once you have created a One Touch button, you can change the function by using the following procedure.

Changing a One Touch Button

1. Right click on the pre-programmed One Touch.
2. Select One Touch. The dialog box below displays.

3. Enter the digits or special buttons for the function to be dialed. You can include the following in the dial string:

   - Dial pad digits **0~9**.To program special characters, see .
   - A maximum of 32 characters.

- Station and System Speed Dial index numbers can be entered. The Speed Dial index number will automatically dial out on the extension or Line programmed on the One Touch button with the associated Speed Dial index number.
- Function buttons, except One Touch or a **Program** button.
- Handset hooking (on-hook/off-hook) cannot be recorded.

4. Enter the key strip label, eg., Engineering Conference, Cell, etc. This label will display on your telephone.

5. Click OK, then the Save icon to save the entry.

Table 10: Special Characters

Entry	Meaning
∗+ **Hold**	Indicates "stop." The One Touch button blinks rapidly and stops the delivery of the remaining digits in the string until it is pressed again. Multiple "stops" can be programmed into one string.
∗ **(1~9)**	Pause (1~9) seconds. If you need to pause longer than nine seconds, enter additional pause escape sequences. For example, to insert a 17-second pause, enter **∗9∗8**. The display of a pause in the Speed Dial Number shows a "P" without specifying the duration. In this example, you would see "PP."
∗∗	**∗**
∗#	**#**

Example of Special Character Usage

To create a One Touch for Park and Page under one button, program the following sequence under the One Touch button.

CNF #33∗∗∗HOLD FB1 #30

CNF – puts the caller on hold and gets new dial tone.

#33 – code to park call

∗∗ – this special character outputs a single ∗ which will select an available orbit and display the selected orbit on the phone.

∗HOLD – This special character is a Stop. The dial string pauses and enables the user to view the selected orbit on the display. The dial string will restart from this point when the One Touch button is pressed again.

FB1 – gets new dial tone on the PDN

#30 – code for All Call Page which allows the user to page the location of the orbited call.

To Use a One Touch Button

On your telephone, press the labeled One Touch button.

Ring Tones

To set distinctive ringing

1. Left mouse click the key button. The Station key data dialog box displays.

2. Under Tone Pitch, enter the appropriate levels for External Pitch and Internal Pitch. See table below.

3. Click OK.

4. Click the Save icon to save settings.

Table 11: Internal and External Call Ringing Tones

Tone No.	Frequency and Cadence
01	500 Hz 1 sec. On, 3 sec. Off, repeat
02	1300 Hz 1 sec. On, 1 sec. Off, repeat
11	500/640 Hz 1 sec. On, 3 sec. Off, repeat
12	500/640 Hz 1 sec. On, 1 sec. Off, repeat
13	860/1180 Hz 1 sec. On, 3 sec. Off, repeat
14	860/1180 Hz 1 sec. On, 1 sec. Off, repeat
15	1300/1780 Hz 1 sec. On, 3 sec. Off, repeat
16	1300/1780 Hz 1 sec. On, 1 sec. Off, repeat
17	860/1180 Hz 0.5 sec. On, 1300/1780 Hz 3 sec. Off, repeat
18	860/1180 Hz 0.5 sec. On, 1300/1780 Hz 1 sec. Off, repeat

Settings

You can modify your telephone settings using Settings screen. You can click on the different tabs to access different telephone settings.

1. After you have entered the settings in the parameters.

2. Click the Save icon.

Note: Hover over the bubbles located above the parameters to read the flyover text for information to be entered in each field.
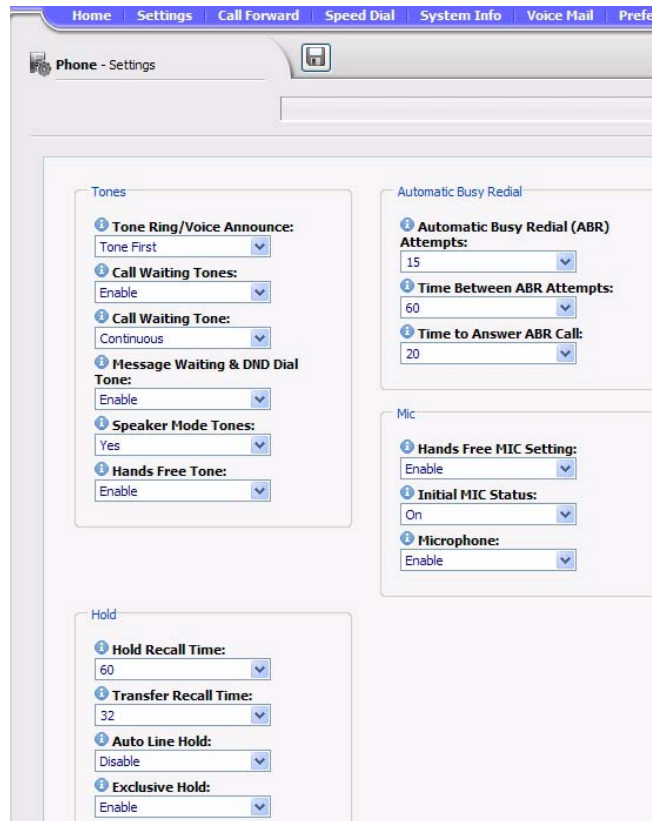
Call Forward

This screen has two parts:

- CF Internal Calls and Line Calls
- CF Direct Line Calls

CF Internal and Line Calls

This Call Forward option allows you to forward internal calls and outside line calls that come to your extension to another destination. The destination can be voice mail, another telephone extension connected to your telephone system or private network; or, an external telephone number connected through the public telephone network.

Definitions

1. Line calls are calls that come to your extension through the public telephone network lines. If your telephone has a direct line and the "CF Direct Line Calls" option is activated, direct line calls to your extension will forward to the "CF Direct Line Calls" destination – not to the destination set in this option.

2. Internal calls are calls that come to your telephone from the Attendant Console, other telephones and voice mail devices connected to your telephone system or telephone system private network.

3. Your telephone may call forward even if you do not activate it; this is because your system administrator has activated System Call Forward on your telephone.

CF Direct Line Calls

This Call Forward option allows you to forward direct line calls to another destination. When you activate this CF option, only line calls to your direct line telephone number will forward calls to the destination set in this option. Internal calls will not forward to the destination set in this option. The destination can be voice mail, another telephone extension connected to your telephone system or private network; or, an external telephone number connected through the public telephone network.

Definitions

1. Direct Line calls are calls that ring your extension when outside callers dial your direct line telephone number. They do not include internal calls from telephones that dial your extension number or outside line calls that ring multiple telephones on your telephone system.

2. When this option is activated, direct line calls forward to this destination and ignore the destination set in the "CF Internal and Line Calls" option.

3. Internal calls are calls that come to your telephone from the Attendant Console, other telephones and voice mail devices connected to your telephone system or telephone system Private Network.

4. Your telephone may call forward even if you do not activate it; this is because your system administrator has activated System Call Forward on your telephone.

This feature enables you to assign Call Forward (CF) destinations for each extension on your telephone that will override the telephone's System CF settings.

To set up Station Call Forward

1. Select Call Forward tab.The Call Forward screen displays.
2. Enter the appropriate fields.

Note: Hover over the bubbles located above the parameters to read the flyover text for information to be entered in each field.

3. Click the Save button.

Table 12: Call Forward Internal Calls and Line Calls, CF Direct Line Calls

FIELD	DESCRIPTION
CF All Calls to	Call Forward Destination.
CF Busy to	The call forward destination is the telephone number that should be called when your telephone call forwards.
CF No Answer to	The call forward destination can be:
CF Busy or No Answer to	1. Any extension number connected to your telephone system or telephone system private network.
	2. The extension number of the Voice Mail device on your telephone system or telephone system private network.
	3. Any external telephone number that you are allowed to dial from your telephone. When you forward calls to an external telephone number you must enter the outgoing line access code in the destination.Your telephone LCD will display EXTERNAL CALL FORWARD when set CF to an external telephone number.
	Example: If you want to forward calls to external number 5833700 and if you dial 9 to access an outside line, enter: 95833700 as the destination when you set CF to an external telephone number. If the number is a long distance number, you must enter 1+ Area Code before the other digits.
NA Timer (CF No Answer to)	This timer determines how long your telephone will ring before it forwards to the CF No Answer destination. The timer value is in seconds.
NA Timer (CF Busy or No Answer to)	If you telephone is not busy, this timer determines how long your telephone will ring before it forwards to the CF Busy/No Answer destination. The timer value is in seconds.

Table 13: Call Forward Direct Line Calls

FIELD	DESCRIPTION
CF Internal – CF All Calls to	When Call Forward All Calls is activated on your telephone, your telephone will not ring; all internal calls and incoming line calls will be sent directly to the CF All Calls destination.
	Note: If Direct Line Call Forward is activated on your telephone, calls to your direct line telephone number will not forward to this destination; they will forward to the direct line CF destination - if activated.
CF Internal – CF Busy to	When Call Forward Busy is activated and your telephone is busy on an existing call, new internal calls and incoming line calls will not ring your telephone; all new calls will be sent directly to the CF Busy destination.
	Note: If Direct Line Call Forward is activated on your telephone, calls to your direct line telephone number will not forward to this destination; they will forward to the direct line CF destination - if activated.
CF Internal – CF No Answer to	When Call Forward No Answer is activated on your telephone and your telephone receives internal calls and incoming line calls, your telephone will ring; if the call is not answered within a predetermined amount of time, the call will be sent to the CF No Answer destination. The amount of time your telephone will ring before it forwards is the amount of time set in the Ring No Answer timer.
	Note: If Direct Line Call Forward is activated on you telephone, calls to your direct line telephone number will not forward to this destination; they will forward to the direct line CF destination - if activated.

Table 13: Call Forward Direct Line Calls (continued)

FIELD	DESCRIPTION
CF Internal – CF Busy or No Answer to	When Call Forward Busy or No Answer is activated on your telephone and your telephone receives an internal call or incoming line call the following call forward operation occurs:
	If your telephone is busy on an existing call, new internal calls and incoming line calls will not ring your telephone; all new calls will be sent directly to the CF Busy or No Answer destination.
	If your telephone is idle, your telephone will ring; if the call is not answered within a predetermined amount of time, the call will be sent to the CF Busy or No Answer destination. The amount of time your telephone will ring before it forwards is the amount of time set in the Ring No Answer timer.
	Note: If Direct Line Call Forward is activated on you telephone, calls to your direct line telephone number will not forward to this destination; they will forward to the direct line CF destination - if activated.
CF Direct Line Calls – CF All Calls to	When Direct Line, CF All Calls is activated on your telephone, and you receive a call on your direct line telephone number, your telephone will not ring; the call will be sent directly to the CF All Calls destination.
	Notes:
	1. Internal calls will not forward to the direct line destination. Internal calls only forward to the "Internal Call and Line Call" destinations.
	2. Your telephone may forward even if you do not activate Call Forward; this is because your system administrator has activated System Call Forward on your telephone.
CF Direct Line Calls – CF Busy to	When Direct line CF Busy is activated and your telephone is busy on an existing call, new calls to your direct line telephone number will not ring your telephone; direct line calls will be sent directly to the CF Busy destination.
	Notes:
	1. Internal calls will not forward to the direct line destination. Internal calls only forward to the "Internal Call and Line Call" destinations.
	2. Your telephone may forward even if you do not activate Call Forward; this is because your system administrator has activated System Call Forward on your telephone.
CF Direct Line Calls – CF No Answer to	When Direct Call CF No Answer is activated on your telephone and your telephone receives a call to your direct line telephone number, your telephone will ring; if the direct line call is not answered within a predetermined amount of time, the call will be sent to the CF No Answer destination. The amount of time your telephone will ring before it forwards is the amount of time set in the Ring No Answer timer.
	Notes:
	1. Internal calls will not forward to the direct line destination. Internal calls only forward to the "Internal Call and Line Call" destinations.
	2. Your telephone may forward even if you do not activate Call Forward; this is because your system administrator has activated System Call Forward on your telephone.

Table 13: Call Forward Direct Line Calls (continued)

FIELD	DESCRIPTION
CF Direct Line Calls – CF Busy or No Answer to	When Call Forward Busy or No Answer is activated on your telephone and your telephone receives an internal call or incoming line call the following call forward operation occurs:
	If your telephone is busy on an existing call, new calls to your direct line telephone number will not ring your telephone; all new direct line calls will be sent directly to the CF Busy or No Answer destination.
	If your telephone is idle, your telephone will ring; if the direct line call is not answered within a predetermined amount of time, the call will be sent to the CF Busy or No Answer destination. The amount of time your telephone will ring before it forwards is the amount of time set in the Ring No Answer timer.
	Notes:
	1. Internal calls will not forward to the direct line destination. Internal calls only forward to the "Internal Call and Line Call" destinations.
	2. Your telephone may forward even if you do not activate Call Forward; this is because your system administrator has activated System Call Forward on your telephone.

Speed Dial

Your telephone must have Station Speed Dial numbers enabled by your System Administrator to provide the Station Speed Dial feature. You can have a maximum of 100 Station Speed Dial Numbers (up to 32 digits each) assigned to each station. Only the Speed Dial numbers that are assigned to you by your System Administrator appear on this screen.

1. Select Speed Dial tab.The Station Speed Dial screen displays.

2. Select the row/number to program.

Note: Hover over the bubbles located above the parameters to read the flyover text for information to be entered in each field.

3. Click the Save button.

System Speed Dial

All telephones in your system can share a list of up to 800 System Speed Dial numbers under the exclusive control of the System Administrator. In some cases, System Speed Dial enables you to reach numbers that you would not be allowed to dial directly from your telephone. System speed dial is a view only screen.

System Info

This is a view only screen.

Display Advisory Messages

Advisory messaging enables you to store an informative message for LCD telephones that call your telephone. This is view only under System Info.

Voice Mail

You can modify your Voice Mail settings using this screen.

1. Make the appropriate changes.
2. Click the Save button.

Using this menu, you can make changes to the following:

• Change the Message Waiting light for the mailbox.
• Time zones in which the user normally uses the mailbox.
• Change your voice mail password.
• Click on the Question bubble for Help information relating to the different parameters.
• Call Screening
• Follow Me
• Set up the mailbox to make wake-up calls

Account Code

Account Codes can be used for a variety of reasons including billing, tracking, and line restriction applications. Account Codes are assigned in the system as a fixed length (default is six digits) and are recorded by the system, along with the details of the calls, which can be printed on a Station Message Detail Recording (SMDR) report.

The list of accounting codes that can be verified is limited to 800. Each code entered may be flagged whether it is to be used for verification prior to the call be placed or whether it is used for changing the restriction level for that call or both.

Table 14   Account Code Data

FIELD	DESCRIPTION
Account Code	Enter the code to be used as a valid accounting code that the user will be expected to dial. The Registered Digit Length (FB02) must be greater than or equal to the Verified Digit Length (FB01).
	Possible values: 4~15 (default = 6)
DRL	This option allows a station user change the DRL assigned to the station (in Prg.200/260 etc.) by dialing an account code. The DRL of the an account code will be applied to a call when this Verified Account Code is entered.
	Possible values: 0~16 (default = 0)
	Notes:
	If 0 is set, the DRL of the station will not change when the station dials the account code - in this case the DRL set for the station in Prg 200/260 etc. will be applied to the call even if the station dials the account code.
	1f 1~16 is set, the DRL of the station will change to the DRL selected here when the station dials the account code - in this case the DRL set for the station in Prg 200/260 etc.will be overridden to the call.

Table 14   Account Code Data

FIELD	DESCRIPTION
FRL	This option allows a station user change the FRL assigned to the station (in Prg.200/260 etc.) by dialing an account code. The FRL of the an account code will be applied to a call when this Verified Account Code is entered.
	Possible values: 0~16 (default = 0)
	Notes:
	If 0 is set, the FRL of the station will not change when the station dials the account code - in this case the FRL set for the station in Prg 200/260 etc. will be applied to the call even if the station dials the account code.
	1f 1~16 is set, the FRL of the station will change to the FRL selected here when the station dials the account code - in this case the FRL set for the station in Prg 200/260 etc. will be overridden to the call.
Network COS	This Network COS will be applied to a call when this Verified Account Code is entered.
	Possible values: 0~32 (default = 0)

Preferences

Using this screen you perform the following functions:

Select the Phone display language

Enterprise Manager display language

Enterprise Manager Color scheme

Email address to be displayed

Enter the Remote Call Forward / DND password

Change your Enterprise Manager User access password

Meeting

Using EMPA, you can access the Meeting application.

Note: Using Enterprise Manager, the System Administrator should first create a Moderator account for Meeting.

1.   Log into EMPA as a user.

2.   Select Applications > Meeting. You have access to all Meeting functions. Refer to the IPedge Meeting Audio and Web Conferencing User Guide or Help for procedures on using the Meeting application.

EMPA Super User

The EMPA Super Users can administer certain functions that are allowed, on their own telephones and the allowed functions on the telephones in their 'other EMPA users' list.

1. Select the **EMPA** tab. See following screens.

2. Select the "**Manager another DN**" button.

3. Select the user you want to manage.

4. A dialog box displays, "Do you wnat to exit the current user and switch to use ..."

5. Click **OK**.

Index