VIPedge®

Application Service for Strata CIX

Messaging, Call Manager & UCedge Client User Guide

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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.

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CP01, Issue 8, Part I Section 14.1

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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.

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Introduction

The VIPedge Application Service enables the premise based Strata CIX to take advantage of messaging and call manager applications in the cloud. This guide describes the Messaging, Call Manager and other user operations for applications that are integrated with the VIPedge solution.

Organization

This guide is divided as follows:

- **Chapter 1 – Messaging Features** contains user instructions for the basic Messaging features.
- **Chapter 2 – Greetings** has procedures for the Message Greeting functions.
- **Chapter 3 – 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 4 – Call Manager Basics** covers the basics of using Call Manager.
- **Chapter 5 – Using Call Manager Features** contains user instructions for call handling features for personal calls in Call Manager.
- **Chapter 6 – Preferences** covers the Preferences options in Call Manager.
- **Chapter 7 – Buttons** discusses the various buttons and options available in Call Manager and how to change, edit, etc.
- **Chapter 8 – Actions** defi nes the powerful actions that can used with Call Manager.
- **Chapter 9 – Personal Call Handler** covers the setting up of call handling rules and other personal call handling options.
- **Chapter 10 – Using Microsoft Outlook** provides user instructions for Microsoft Outlook integration using Call Manager.
- **Chapter 11 – Using Companion Applications** contains procedures for Companion applications available with Call Manager, such as, Contacts, History, Chat, Dialer, Buttons, and Web Browser.
- **Chapter 12 – UCedge Client** contains procedures for UCedge application available for Android and iOS clients.

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 bottom up. 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.
➤	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 VIPedge solution.

- VIPedge General Description
- VIPedge Installation Manual
- VIPedge Feature Description and Implementation
- VIPedge IP Telephone, Messaging and Call Manager User Guide
- IP5000-Series Telephone Quick Reference Card

Important! This document may contain references to features that are for future implementation.

Messaging Features 1

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.

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Greetings 2

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.
- **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 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.

Other Messaging Applications 3

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 and 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 feature provides telephone operation integration with the following capabilities.

1. Follow Me feature control button on the phone:
   User can now 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 take the call from the cell phone and return to the office, the call can be easily handed off to the desktop phone by pressing the same button.
3. Status Indication:
   The button has the LED to show 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.

Button LED	**Description** (continued)
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 when 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.

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 Admin.
4. “Net Server monitor” checkbox in mailbox email setting must be checked.

Setting up Follow me

1. Call the voice messaging system and select 3 1 2 2 from the subscriber’s menu.
2. Enter a phone number (the call-out number), followed by #, the system will then repeat the number back for confirmation.
3. 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.

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 # to accept the call or * to reject the call and send it to voicemail.

Transfering 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 # to accept the call.
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.

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

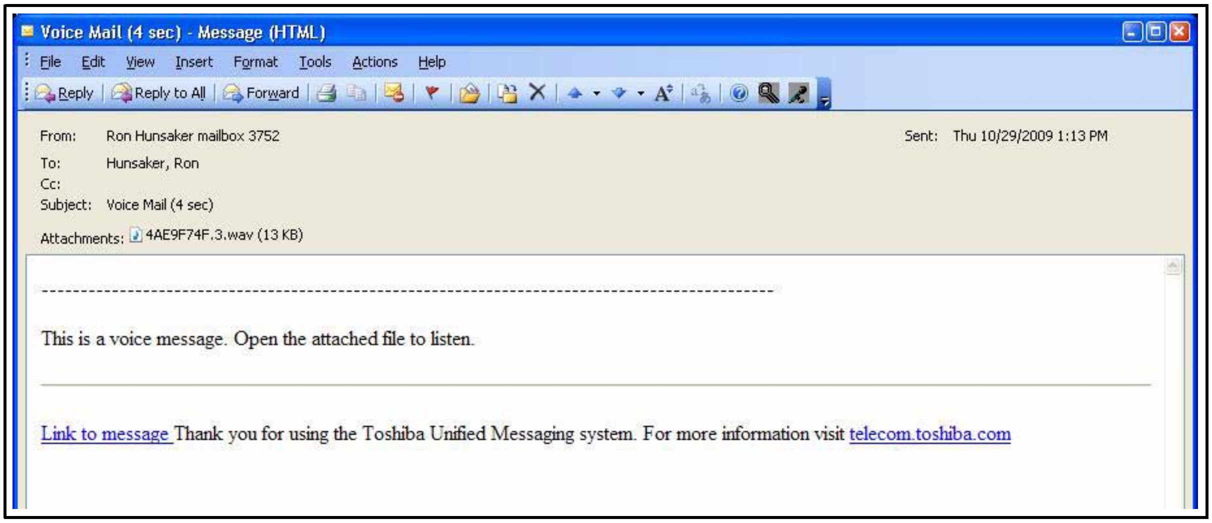
Unified Messaging

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.

Call Manager Basics 4

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 the WAN. The Call Manager can support XMPP (Extensible Messaging and Presence Protocol). Licenses are required for each concurrent Call Manager client.

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.

Call Manager Advanced version is included for all VIPedge users and provides enhanced functionality, including full Unified Communications (UC).

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 works with Windows applications and enables users to make calls, initiate Instant Messaging, and integrate with some third party applications.
- It can easily interface with many popular programs (like Microsoft Outlook, Tigerpaw, Goldmine, ACT, etc.). This allows you to dial from and “screen-pop” into these programs or the Internet / Intranet.

The Main Screen

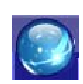
This section gives an overview of the main user interface of the Call Manager, including the buttons, displays, and indicators, which allow you to easily and efficiently operate your phone. Call Manager provides two views, Compact and Expanded, allowing you to operate using only the space on your screen 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.

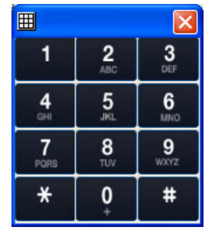
The Compact View

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.

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.

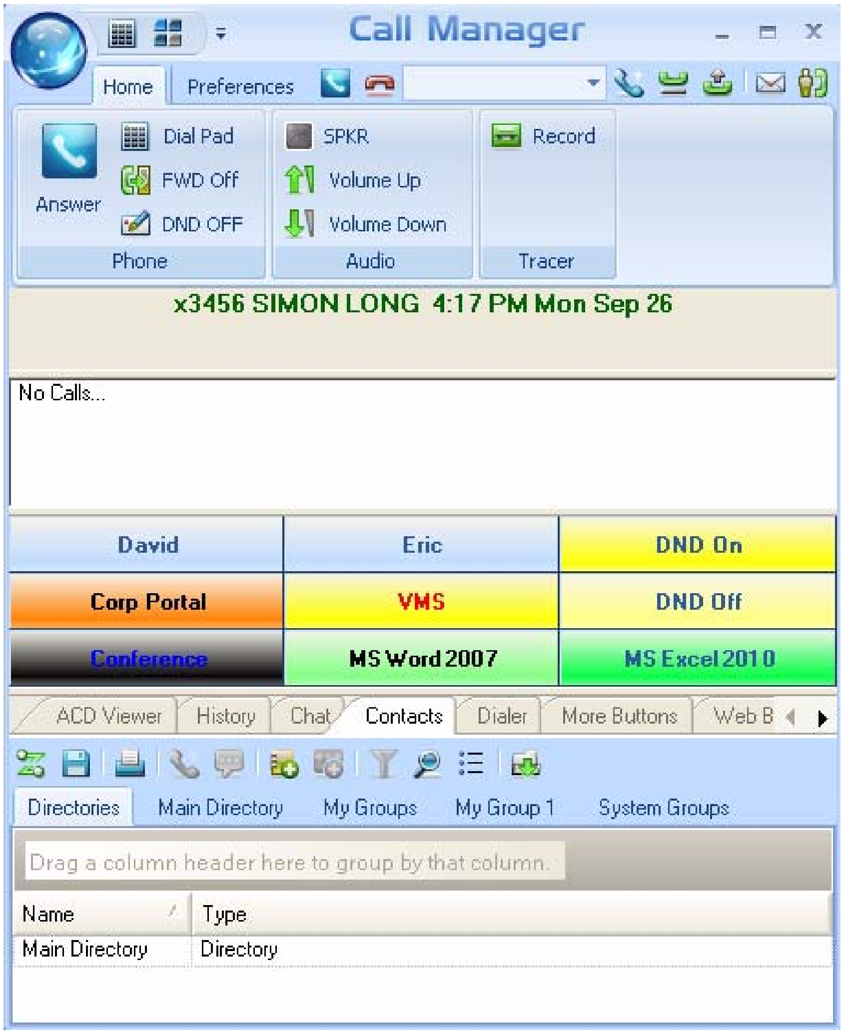
Button / Icon	Description
Tabs – Home, Preferences	The tabs control various functions and settings. • Home – has some of the basic telephone functions, such as Make Call, Answer, Hold, Transfer, Hangup, Forward, DND On/Off. It also contains Personal Call Manager Action settings. • Preferences – contains 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 (i.e. 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 following describes the additional items in the “Expanded” view.



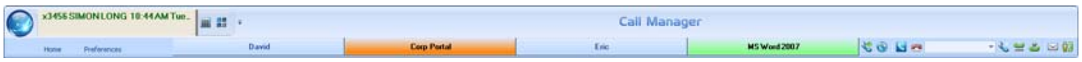
- Calls Window – This window displays that status and associated information for each active phone call on the phone. Thus you can easily view and manage multiple phone calls. Right click the mouse on any call to view a menu of options for handling the call (like Hold, Transfer to Voice Mail, Hang Up, 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.

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.

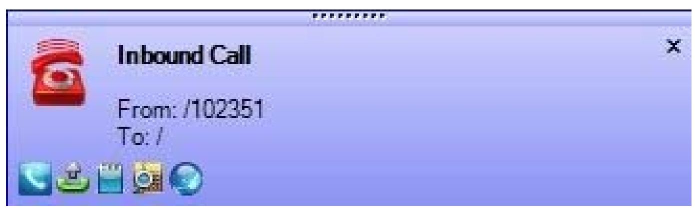
Note: If you want a tool to be available without having to navigate the ribbon, you can add it to the Quick Access Toolbar. Tools on the QAT respond to Alt+1, Alt+2, etc.

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.

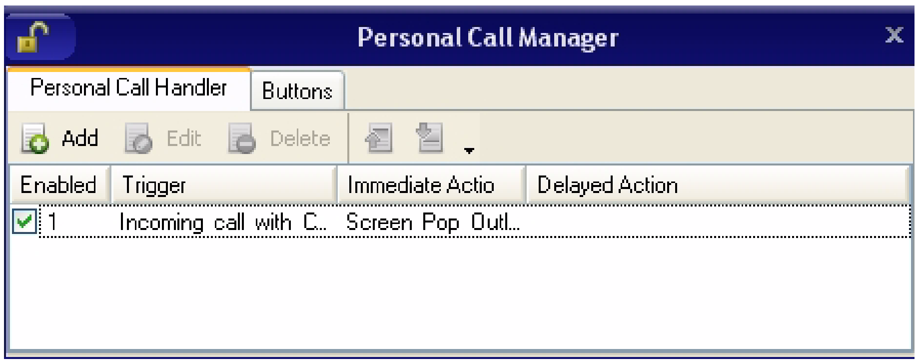


The Side Window Screen

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 user-programmable buttons.

- 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, 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.

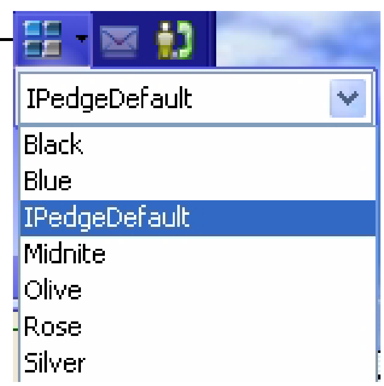
All companion applications can dock to the top, bottom, left or right side of the desktop. When docked, the companion applications can be arranged in various configurations (vertically, horizontally, pinned, unpinned). To dock a Companion Application window to one of these edges, first undock the window 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



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Using Call Manager Features 5

This chapter defines how to use the VIPedge features using Call Manager. Features included are Call Handling, System 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.

Adding a Call Manager Account

1. Click the Call Manager Main Menu button.
2. Click on the Change Login, Change Account Profile. The Call Manager Login Profile dialog box displays.
3. Click the Add New button. The Add Profile dialog box displays.
4. Enter a profile name in the Description field. This should be a recognizable name.
5. Click the Edit Primary button to change the extension. A Net Server Client Logon Settings screen displays.
6. Enter the user name in the Login Name field.
7. Enter the password.
8. Enter the Extension.
9. Enter the Hostname. This is the name of the Call Processing container (FQDN – Fully Qualified Domain Name).
10. Click OK.
11. In the Type field, select the Audio source . If you select “Use PBX phone” the audion will go to the desk telephone.
    The VoIP Softphone will use the softphone of the computer. If VoIP is selected, then complete the following:

    Primary IP Address: This is the same as the FQDN (hostname)

    Secondary IP Address: blank

    Passcode: Enter the passcode to connect to the softphone
12. Click the Save button.
13. Then click the Use button.

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 Dialpad

1. Click the dialpad button to expose the dialpad.
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 “Campon”), 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

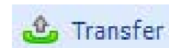
  or right-click on the call in the Call View Window and select Hold from the menu.

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.

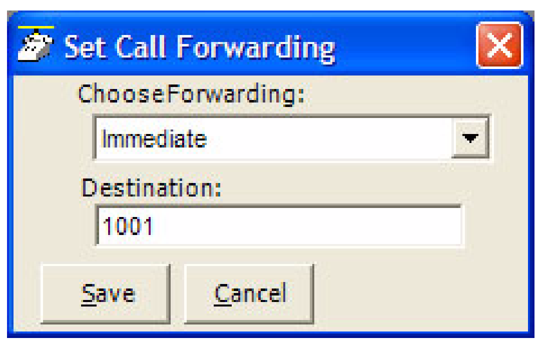
Using Drag and Drop

- While talking with a caller, use the mouse to drag and drop the call from the Calls Window onto a 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

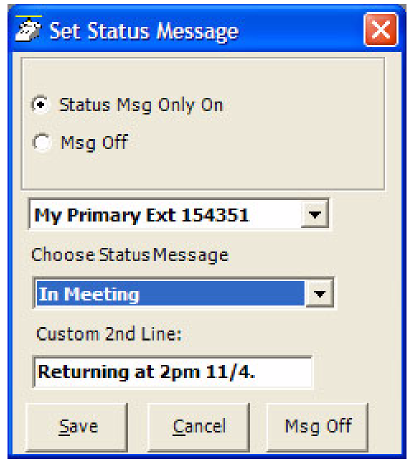
Status messages is available under the DND Off option.

Setting a Status Message

1. Click the 

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.

Turning Off DND or Message Only

1. Click the 

button to bring up the or Status Message window.
2. Click the Msg Off radio button to remove the Status Message.

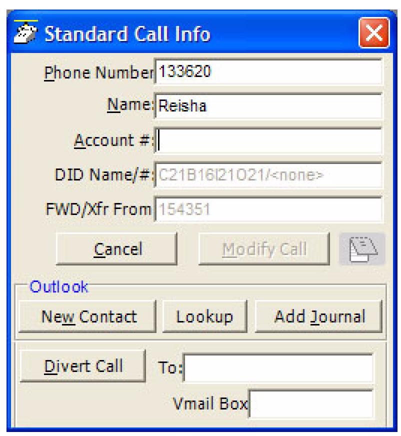
Viewing Extra Call Information

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.

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.

Preferences 6

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.

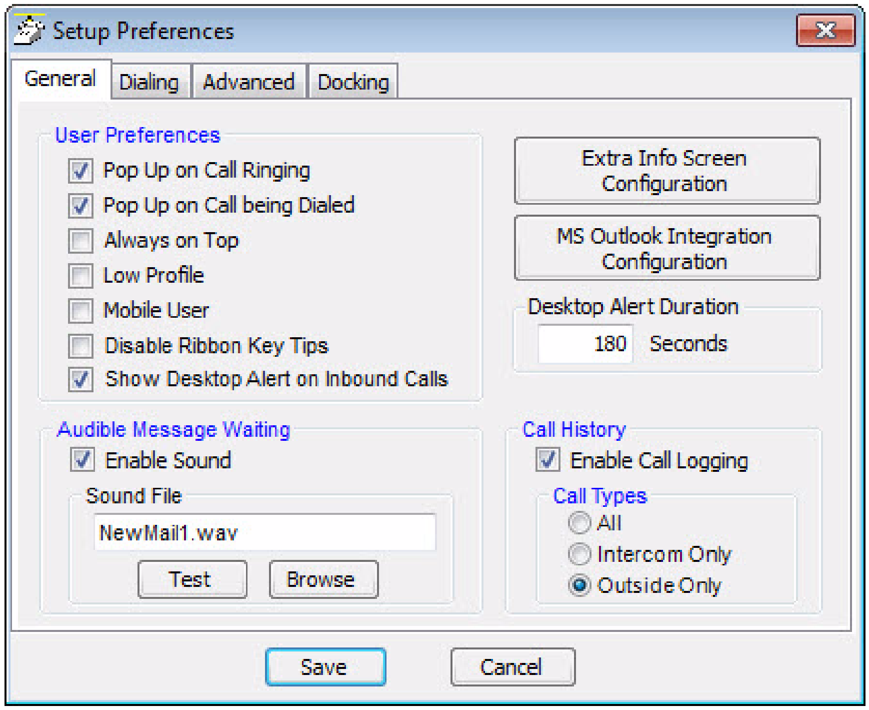
These settings are arranged under the Preferences tab (shown below), Hot Keys, dialing options, docking, and tabs settings. Each of these sections will define the settings and how to change these settings to match your needs.

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.

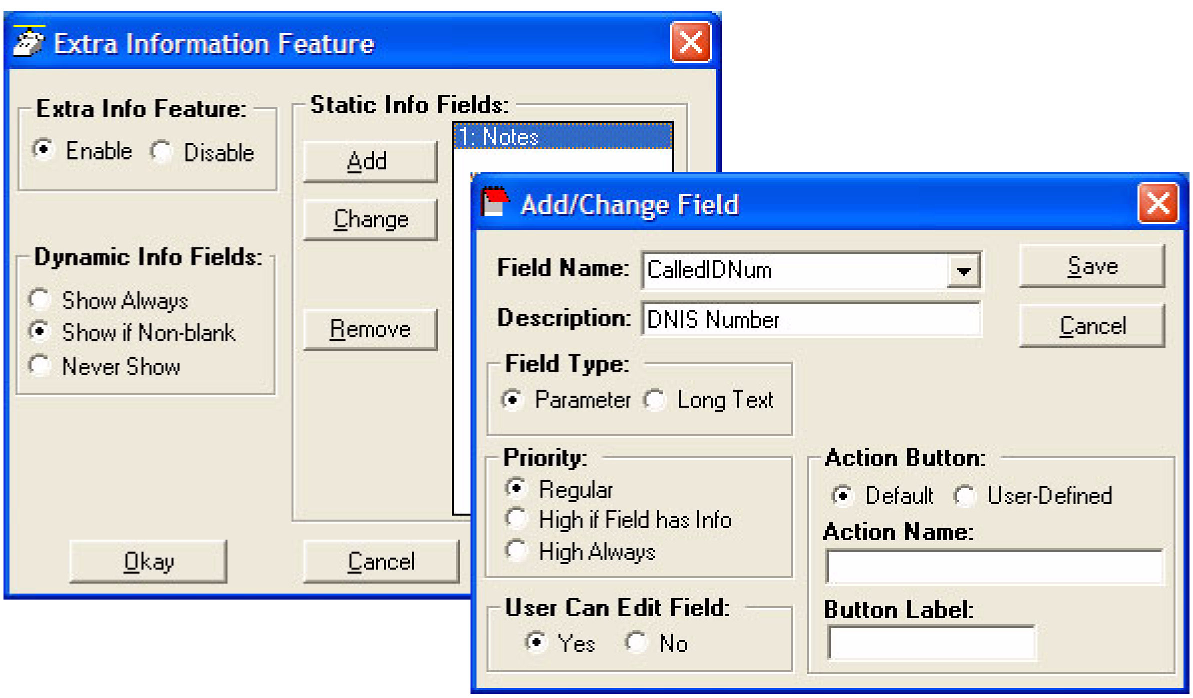
Desktop Alert Duration

- 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.



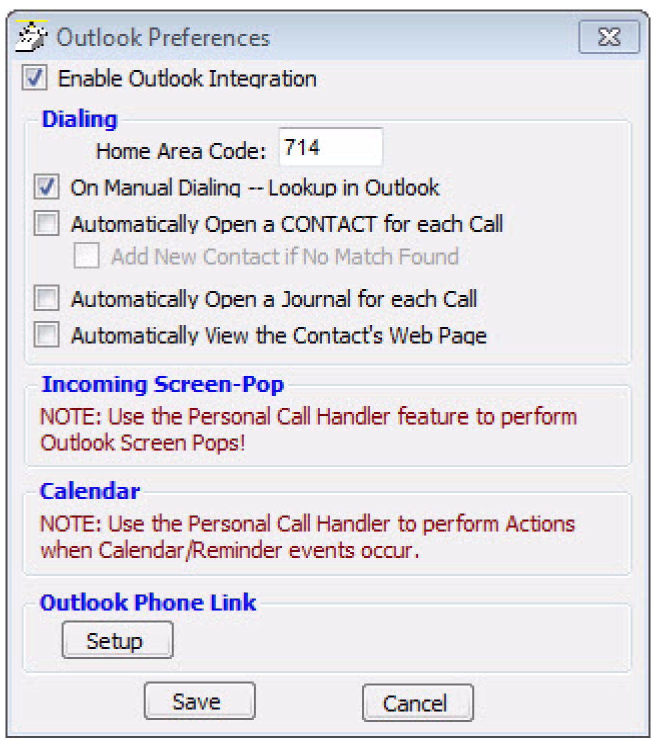
To Add or Change a Static Info Field:

- 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 harmony with Microsoft's Outlook contact management program.

- Initial Setup – Click the Configuration button to reach the Outlook Preferences screen with the following options:

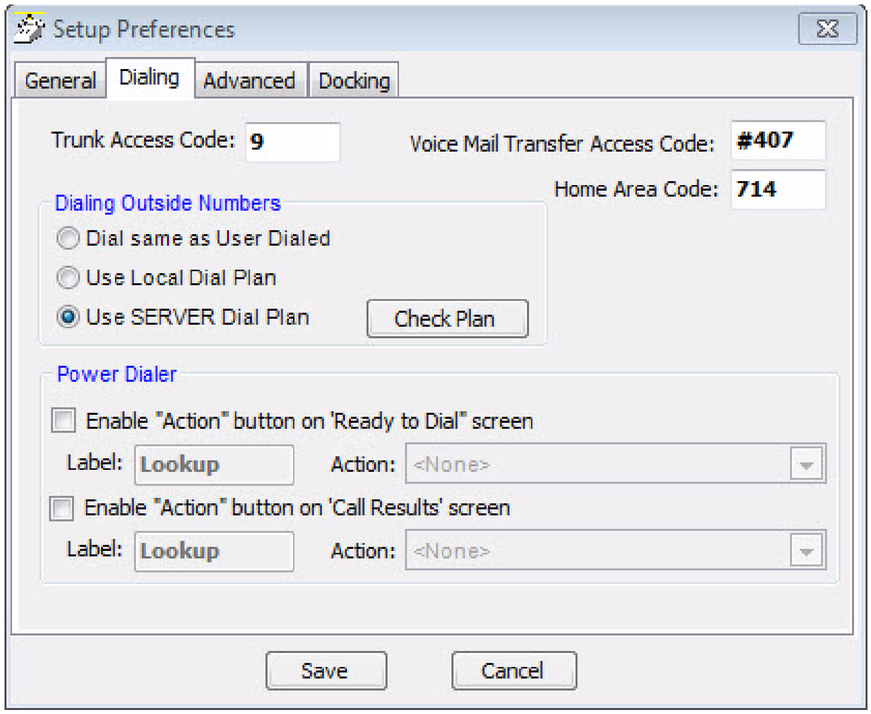


- Enable Outlook Integration – This main option enables/disables the Outlook Integration features. This must be checked for any Outlook features to work. If you're not using Outlook, then this should be disabled.

- 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 you a lot of time.

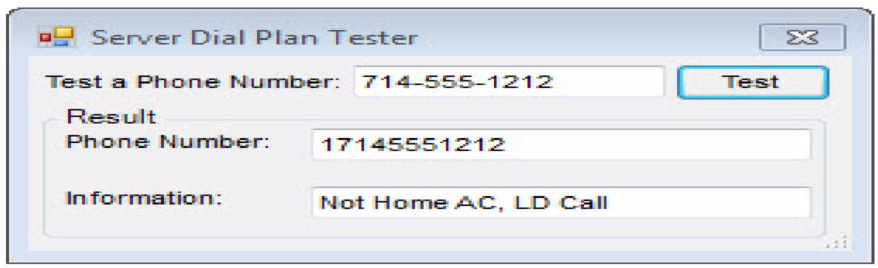


Local Dialing Plan

- 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.

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.

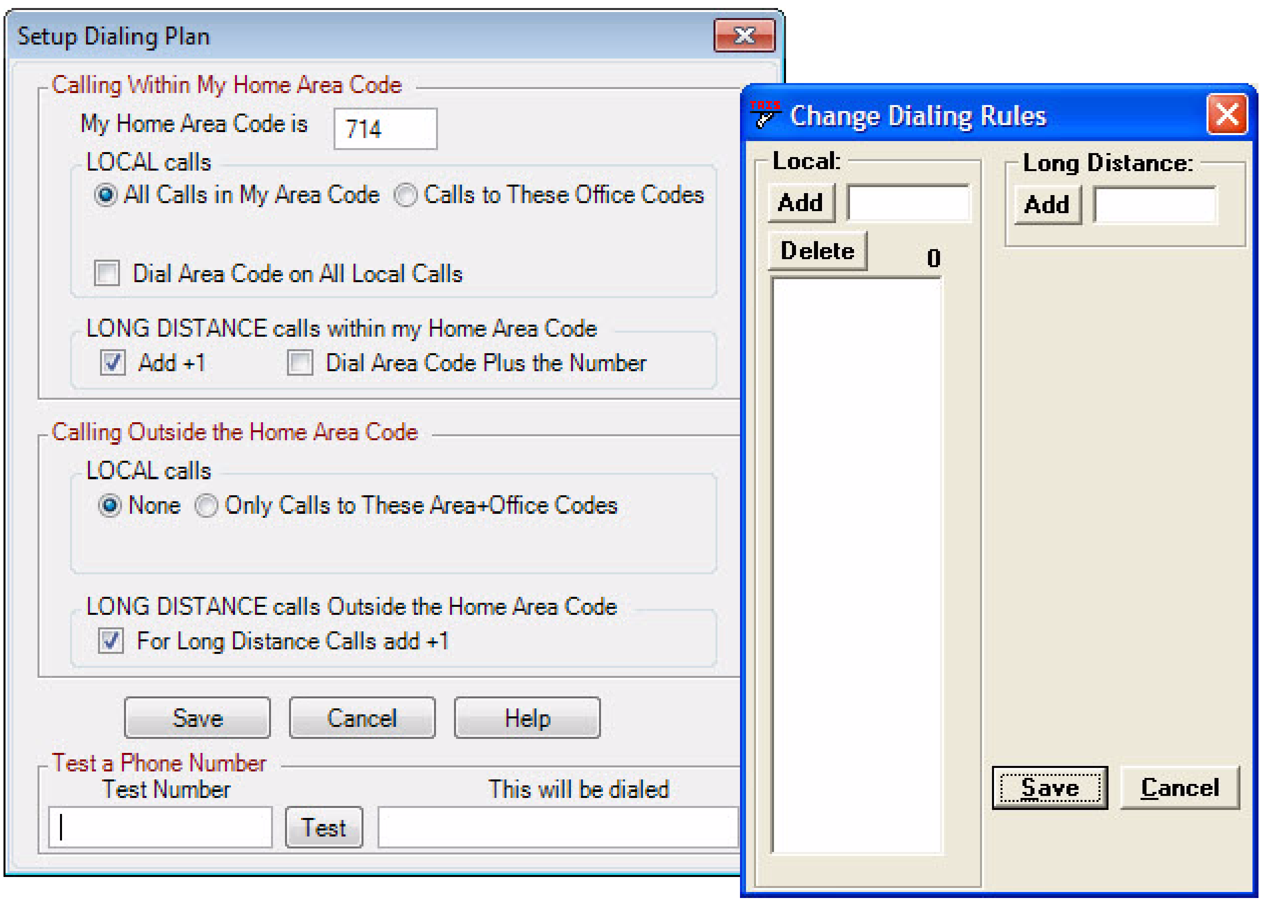
- Ready to Dial – Enable the Action button and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs.
- Call Results – Enable the Action button and select the Action to be performed when the button is pressed. Optionally, the label can be 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, i.e. 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

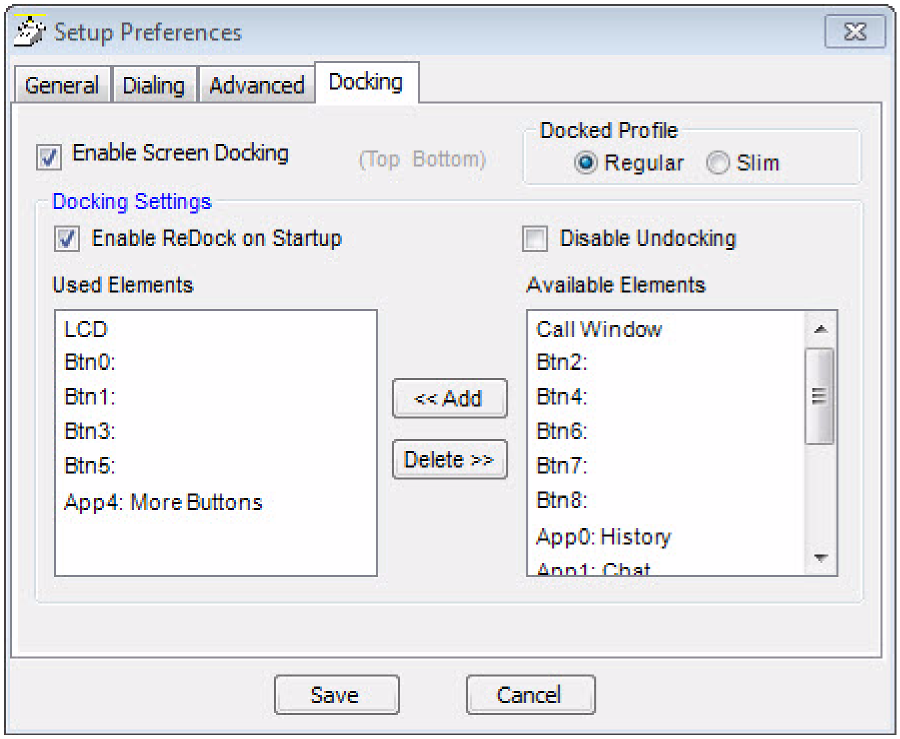
- Any calls outside your Home Area Code LOCAL calls? – Select either None or Only Calls to These Area+Office Codes.
- Local Area+Office Codes – This entry is only presented when you chose Only Call to These Area+Office Codes in the previous step. The pull down listing shows the codes (area code plus 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

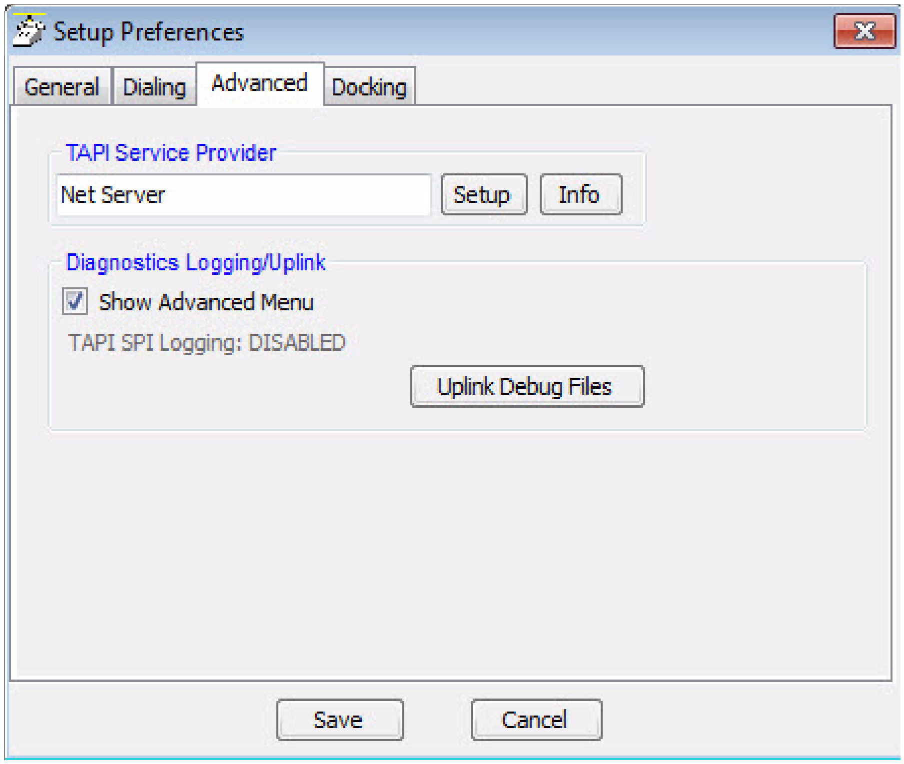
- Enable ReDock on Startup – Check this box to make Call Manager to startup in the same position and condition as when it was last shut down.
- Used Elements – The displays, buttons, etc. to be used in each profile are configured by moving available elements to the "Used Elements" list. Whenever the 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.

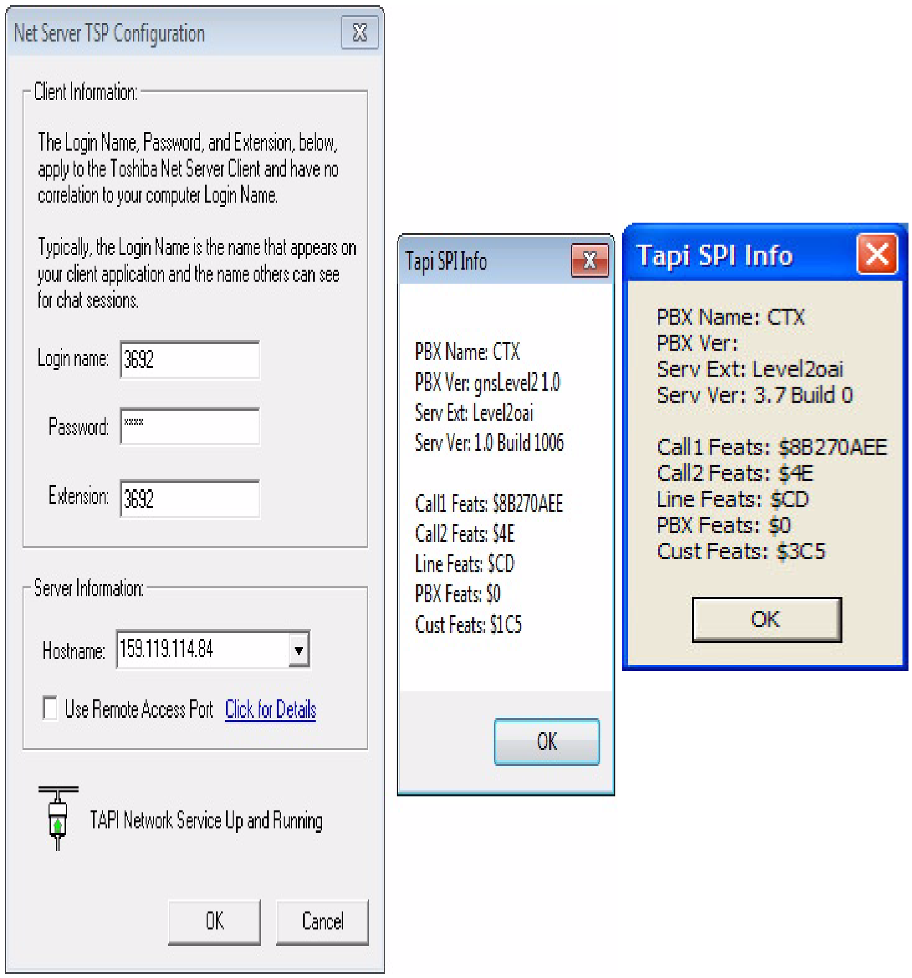
Advanced Tab

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 have to 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 VIPedge container 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 can then be e-mailed to.

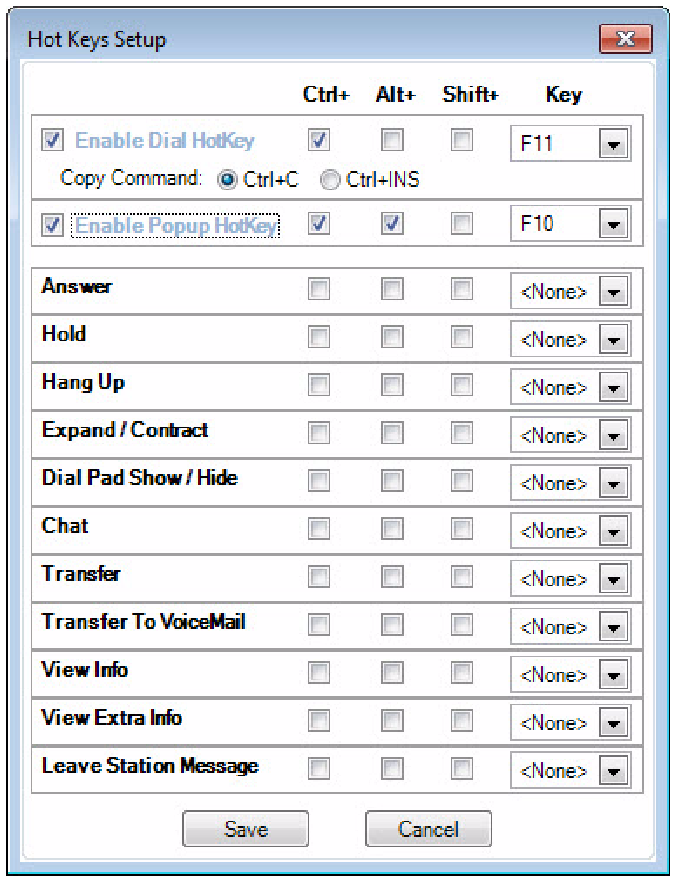
Setting Up Hot Key Dialing & Popup

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.
- 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.

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.

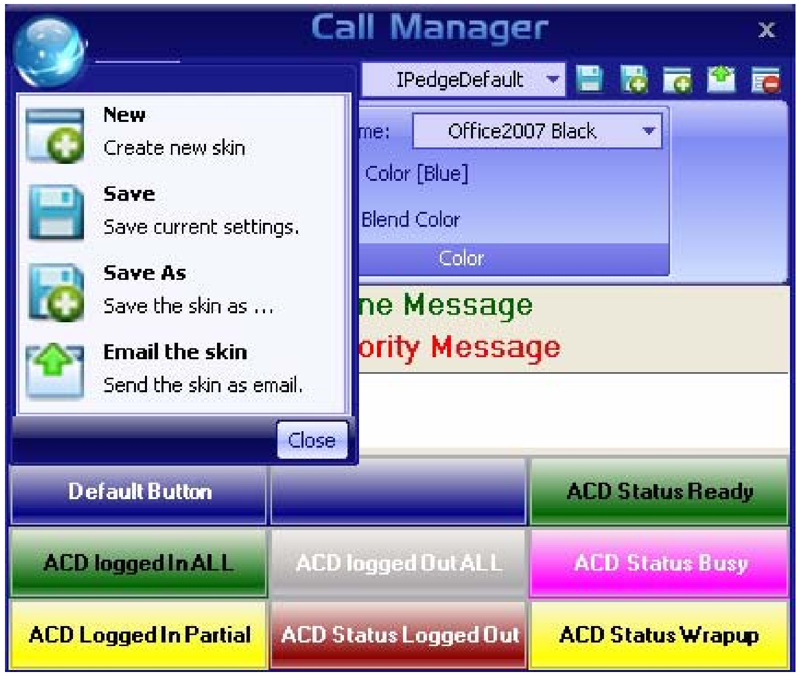
To Delete a Skin

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, i.e. 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

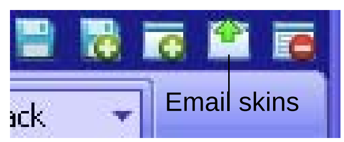
Changing Call Windows Appearance

Right click on any call window area, to show menu options:

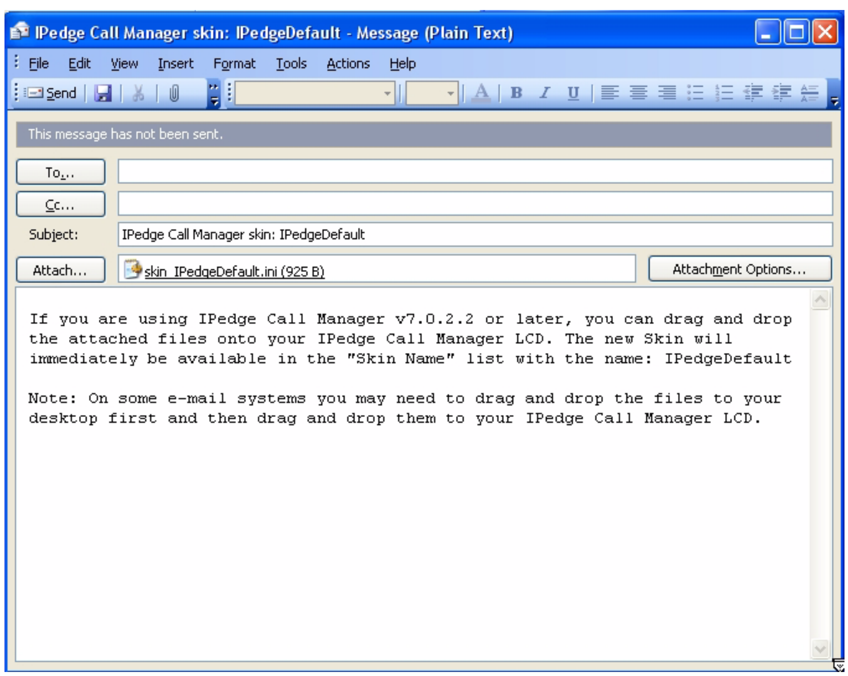
- Change background color
- Change text color
- Change font
- Reset

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(s) to send the skin.



Microsoft Outlook is required when using this function.

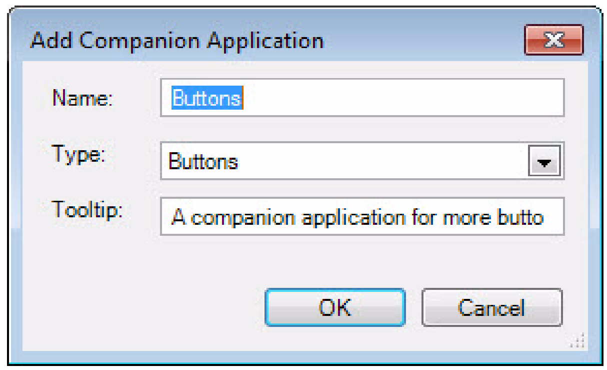


Tab Settings

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

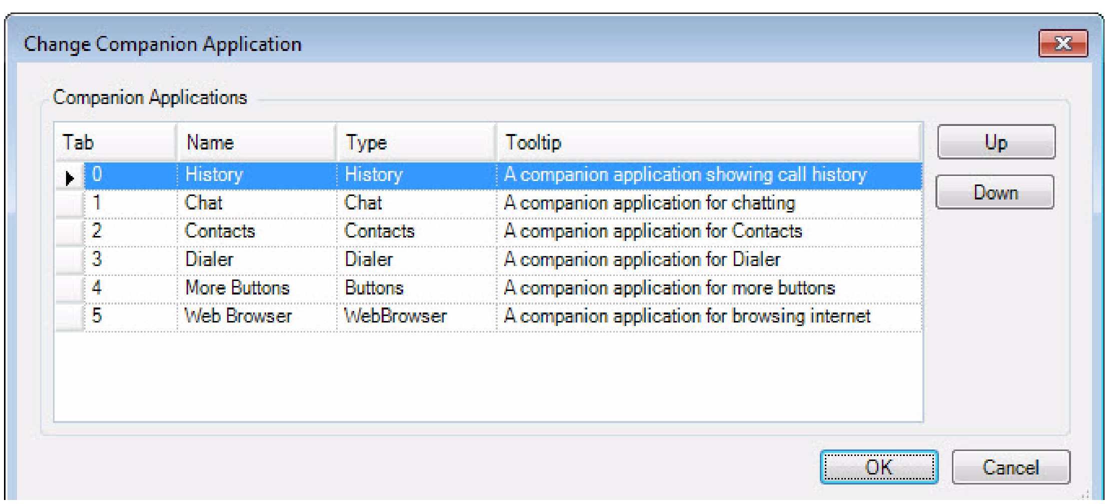
Click the Add Tab button to add a new tab.



- 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.

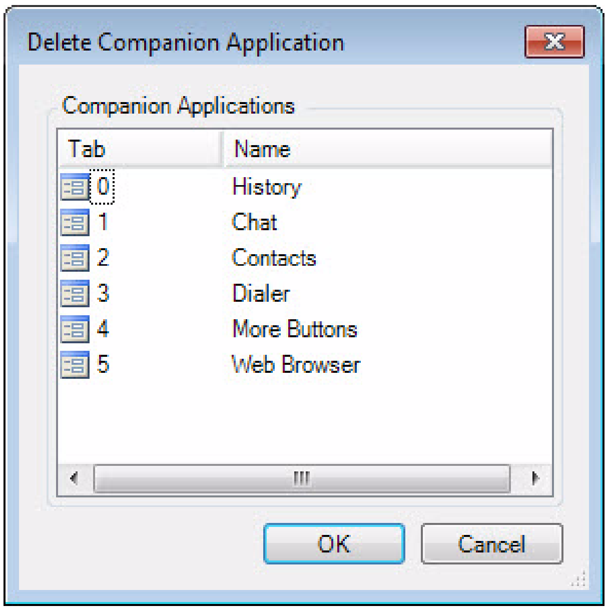


Delete Tab

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 to bring all the companion applications back to the main window as tabs.

Buttons

7

This chapter shows how to use and add, delete or edit button and button banks.

Programmable Buttons

To access Buttons

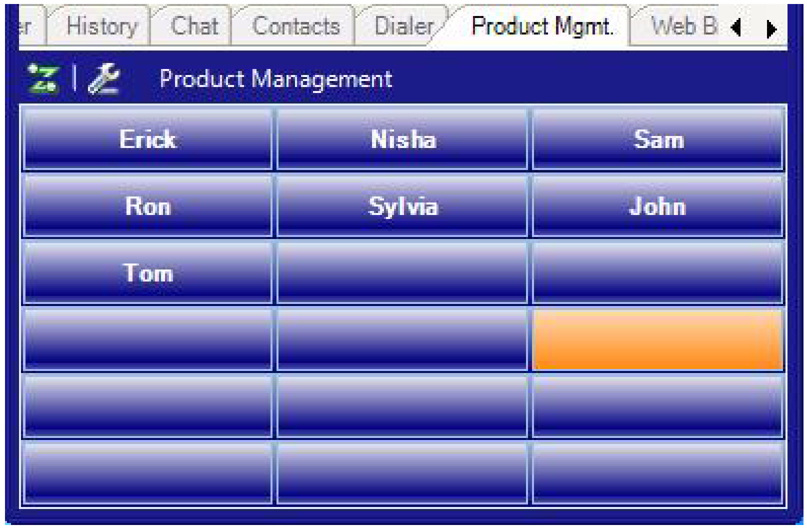
There are three methods to access buttons:

1. Click on the Personal Call Handler button  and then the Buttons tab.

2. There are nine preloaded 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 and can be easily configured by the user as “Feature” keys, “Speed Dial” keys, “User Action” keys, “Web Access” keys, “Run another Application” keys, etc. 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 mouse over the key and select from the menu 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.

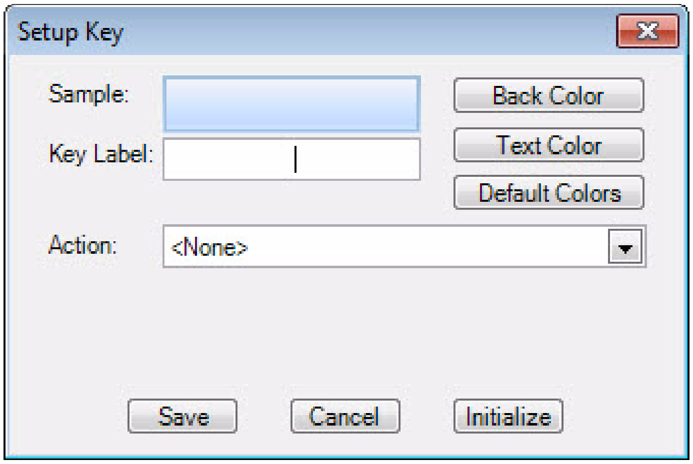
To Copy This Key

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.

To 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.

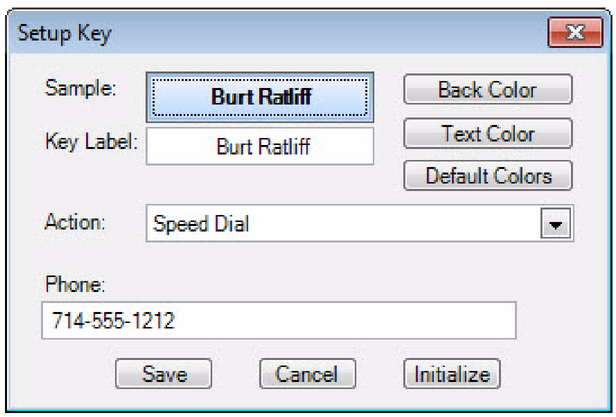
Note: Some users may not have permission to change buttons and keys.



- 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, i.e., setting up a key to call V-mail (x2502) and logon to a mailbox (1000 with password 12345) then enter “2502, *1000,12345”.

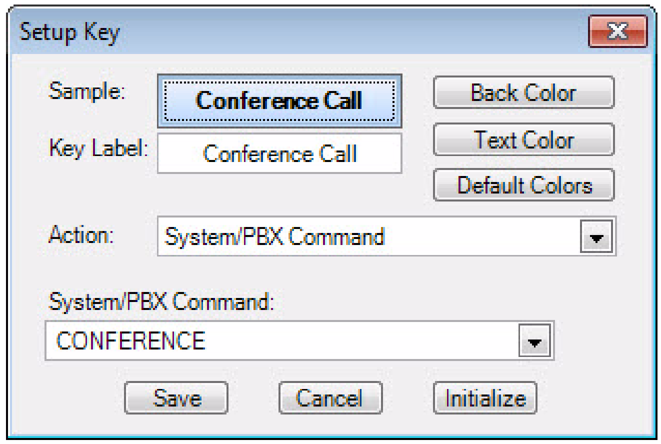
You can also include an “X” character in a phone number string to have the dialing stop at that point and queue up the rest of the number in the dial buffer. The user can listen to the call and click the Dial button to dial the rest of the digits at the appropriate time. Examples include: (1) dialing a person who has an extension number (i.e. “4969040 x1008”), (2) dialing a pager and you want to display a number on the LCD of the pager (i.e. “5551234x4969040#”), or (3) dialing a long distance access code (i.e. “8884083279 x17135551234”). Note: You can use more than one “X” in the phone number and it will wait after each “X” (i.e. “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.



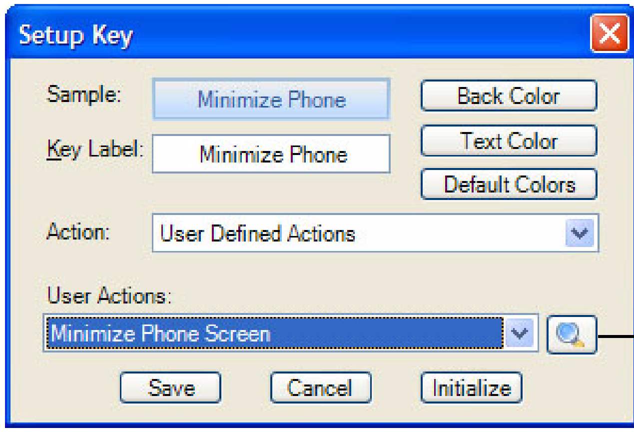
The following commands are available:

PBX Call Control	* Modify Call “Field” “Value
Answer – Current call.	* Transfer
Conference – Simulates pushing Conf key.	Auto Call Record/Tracer Recording
Dial xxxxxx – xxxx= the number to dial.	Start Record
Hangup – Hangup current call.	Stop Record
Hold – Hold current call.	Set Bookmark “Msg”

* An enhanced feature is available in User Defined Actions

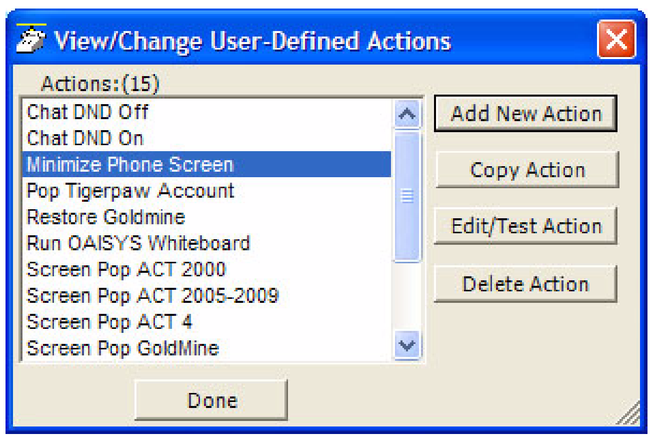
User Defined Action Keys

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 8 – Actions for more information on editing actions.

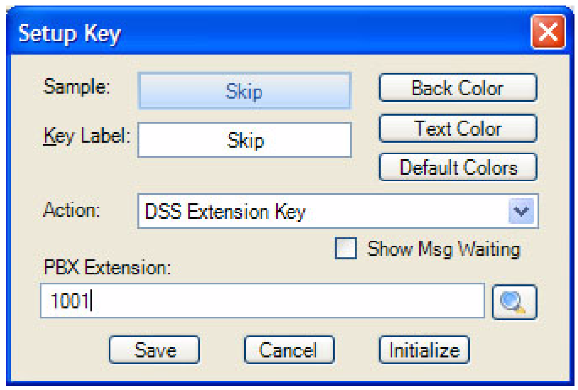
DSS Extension Keys

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

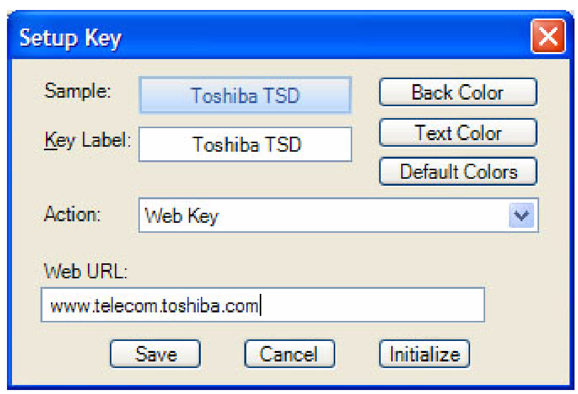
1. Set action to DSS extension key.
2. Click the magnifying glass.
3. Select the contact from your directory, as it is shown in the little popup on the side. This will set the label for you.

You can then change the colors and edit the name for easy identification.



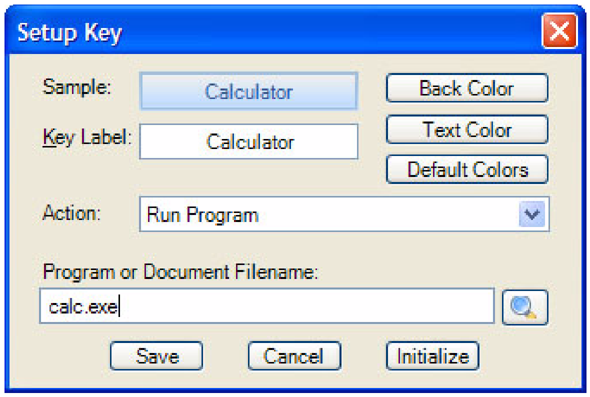
Web Keys

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.



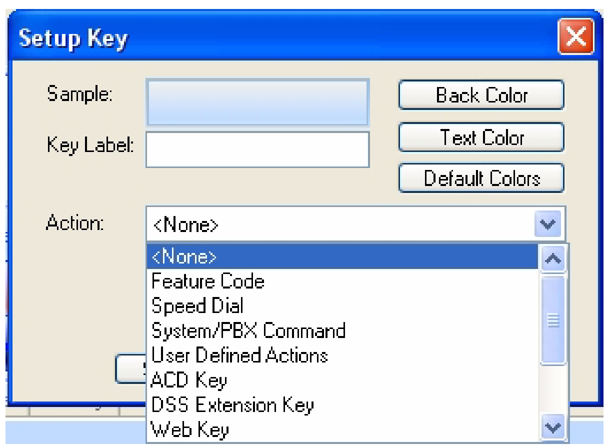
Run Program Keys

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

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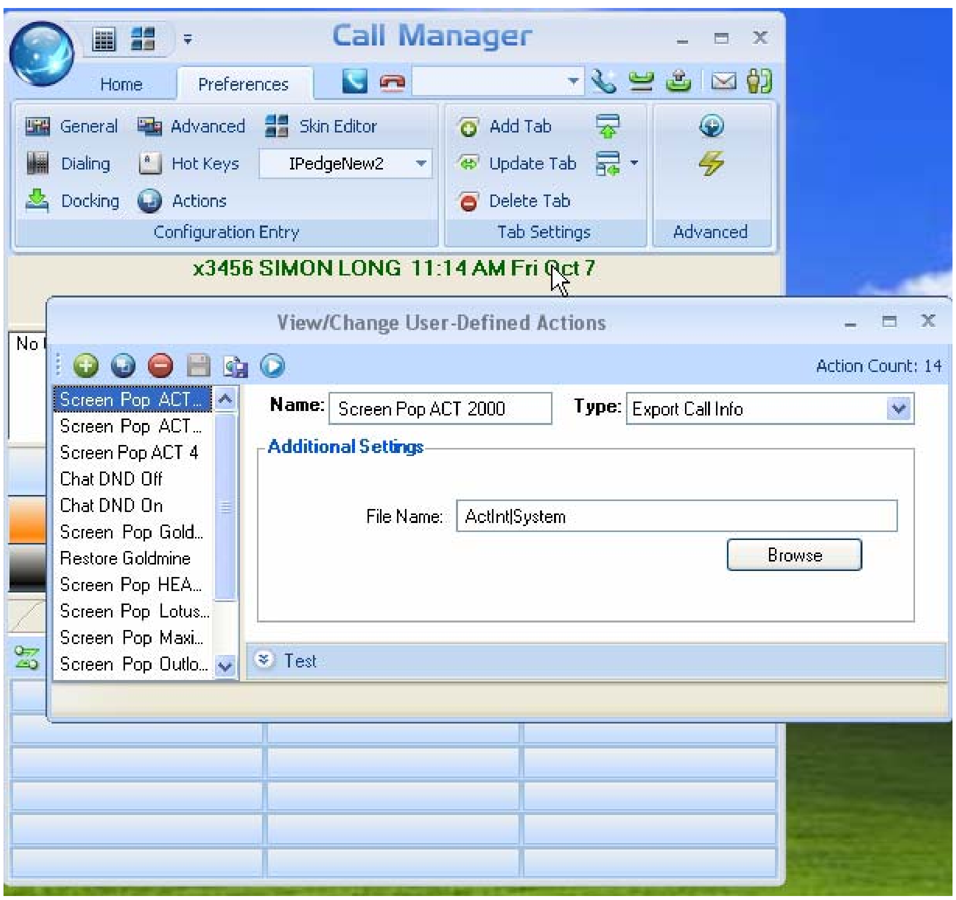
Actions 8

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

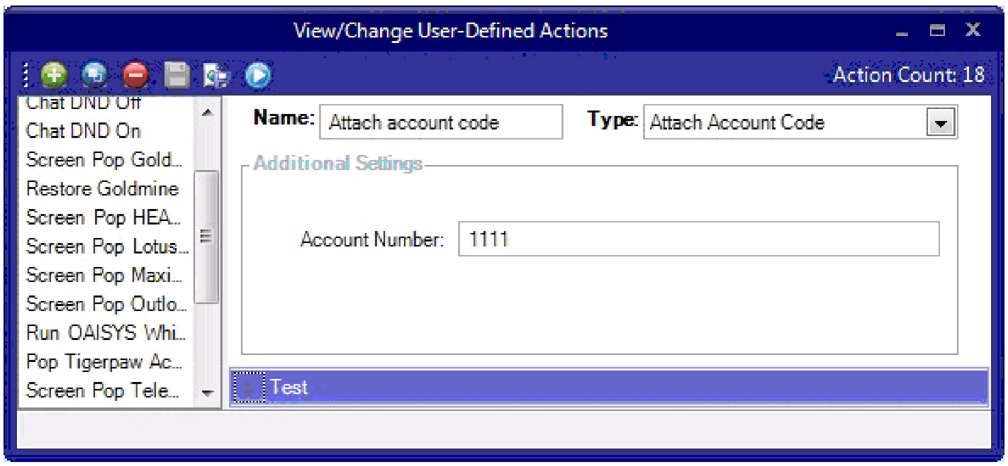
The Creating of Actions can be done by going to the Actions menu.



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

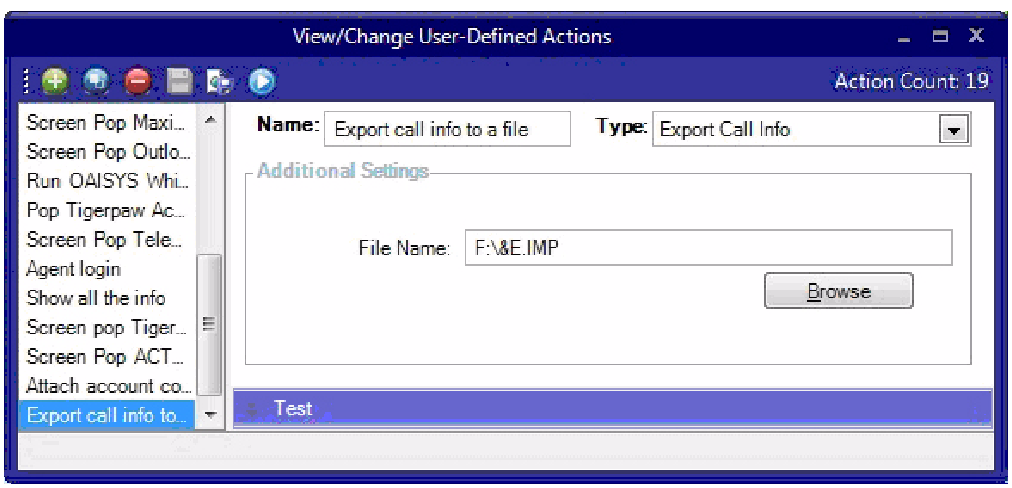
This action attaches an account code to the active call. This account code is passed to other applications such as Insight or TASKE Contact.



* Account # – Enter an accounting number to be associated with this call.

Export Call Info

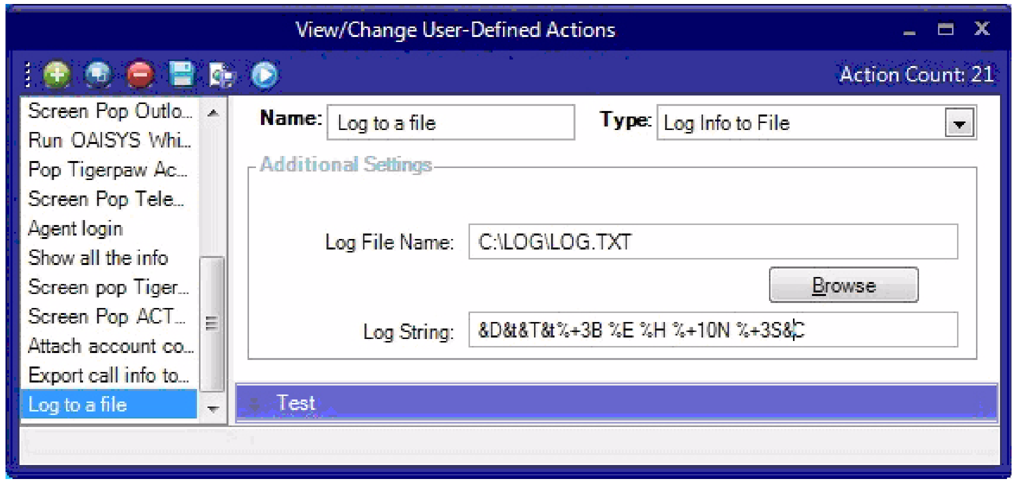
This action is used to export call information to another program (like the CTI Call Handler) in order to keep its Call Info Database current. When this action is triggered it will Popup an "Export Call Info" screen allowing the user to fill in any missing call information (typically the 'Main Listed 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 92) may be used to create the information to be written into the file.



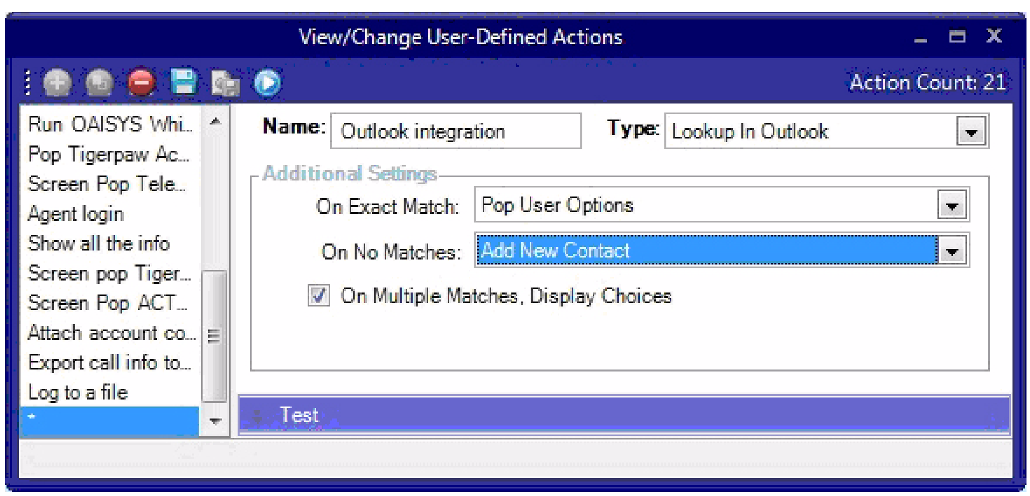
- Log Filename – Enter the complete path name of the file to log the information. Use the Browse button to find the file name, when needed.
- Log String – Create the string defining the content to be written into the file. The above example created the following entries into the file "CallsLog.txt".

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 92 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

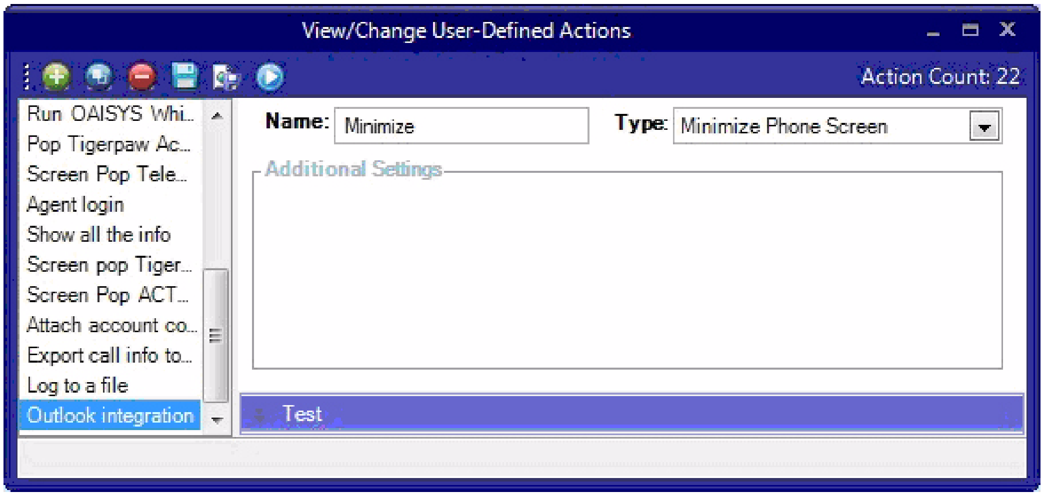
Lookup in Outlook

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.



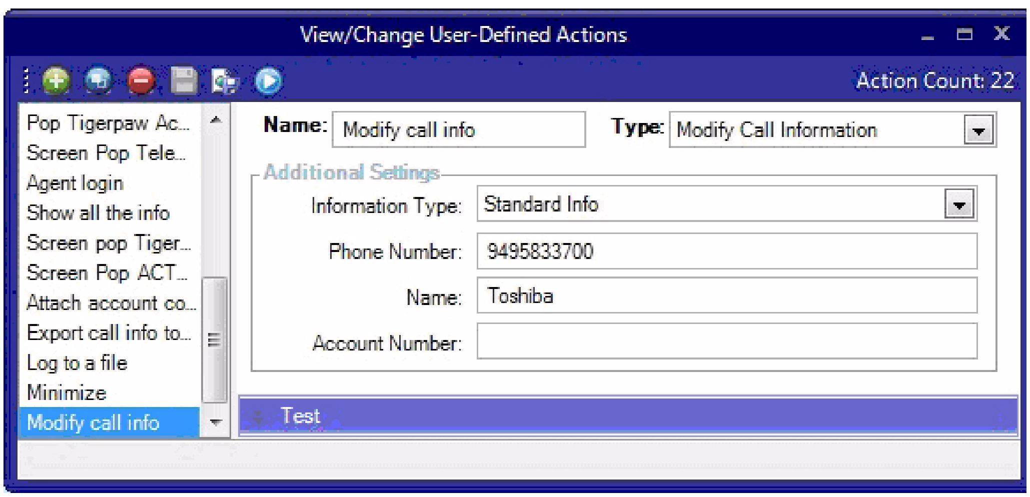
Minimize Phone Screen

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.



Modify Call Information

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.

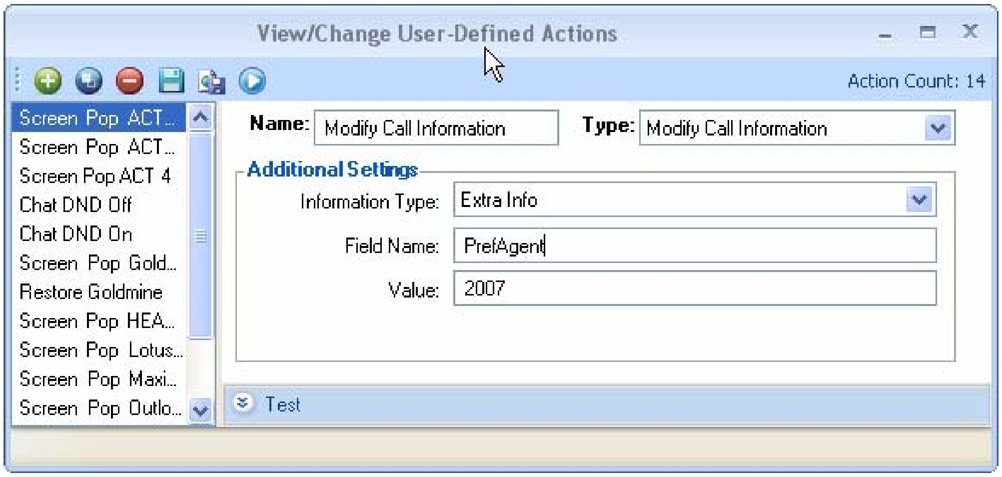


- Information Type – Select either Standard Info or Extra Info. The Standard Info option supports updating the information in the VIPedge. The Extra Info option can enter or change any field for this call.

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.

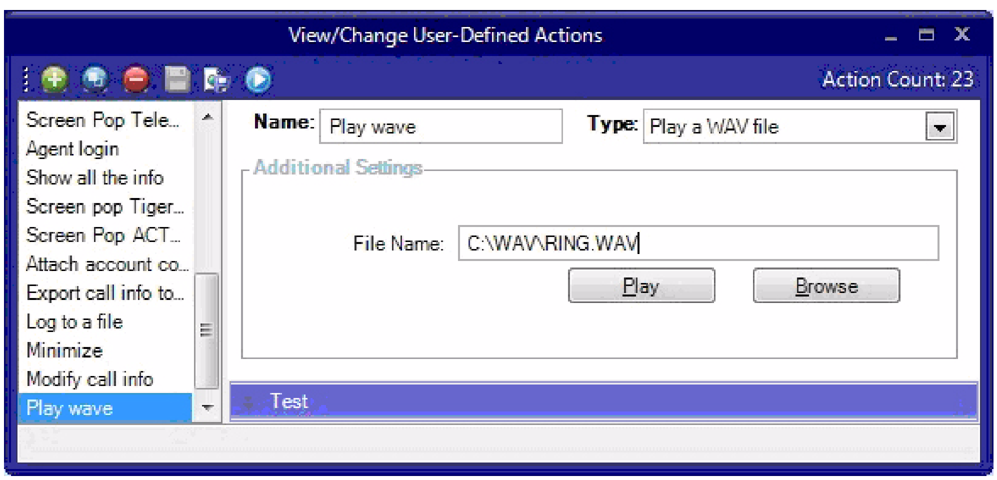
Extra Info



- 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

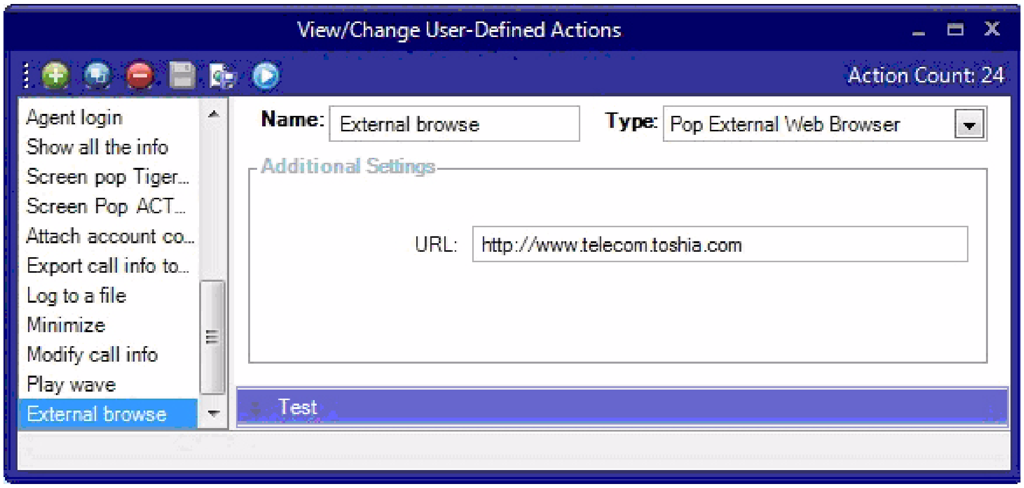
This action will play a specified WAV file on the PC sound card.



- 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). Works with Netscape Navigator and Microsoft Internet Explorer.



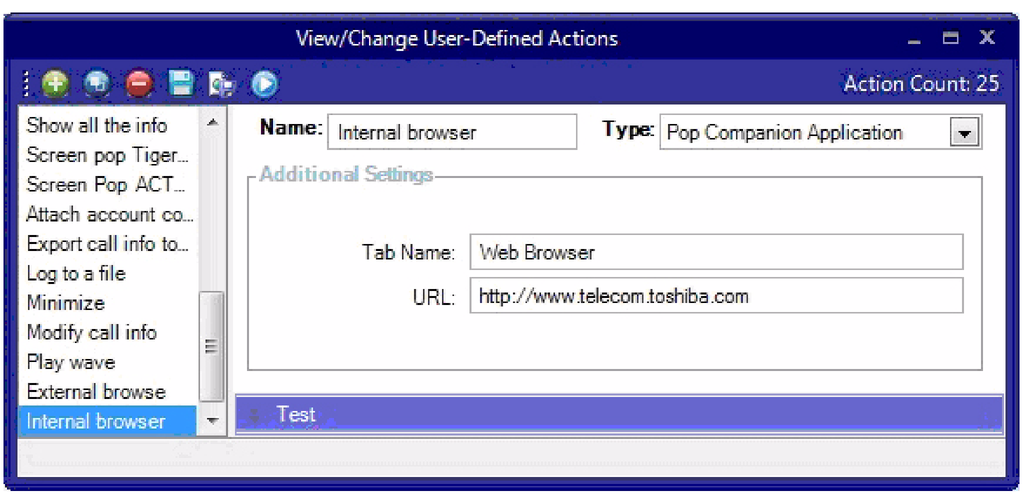
URL – Enter the complete URL name for the Web site to be opened in your browser. The URL can contain Action Variables to make the lookup use call information.

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.

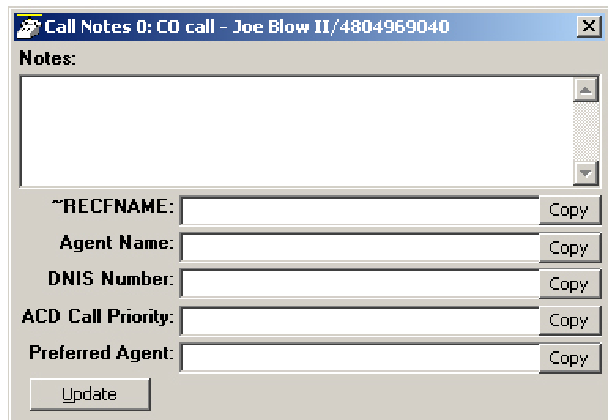


- Tab Name – Enter the name of an existing Web Browser Companion Application (tab name). This name must exactly match the name as displayed. This action uses the specified tab as the parent window.
- URL (Param1) – Enter a URL or other Param1 parameters as indicated in the table below. The URL can contain Action Variables as part of the entry.

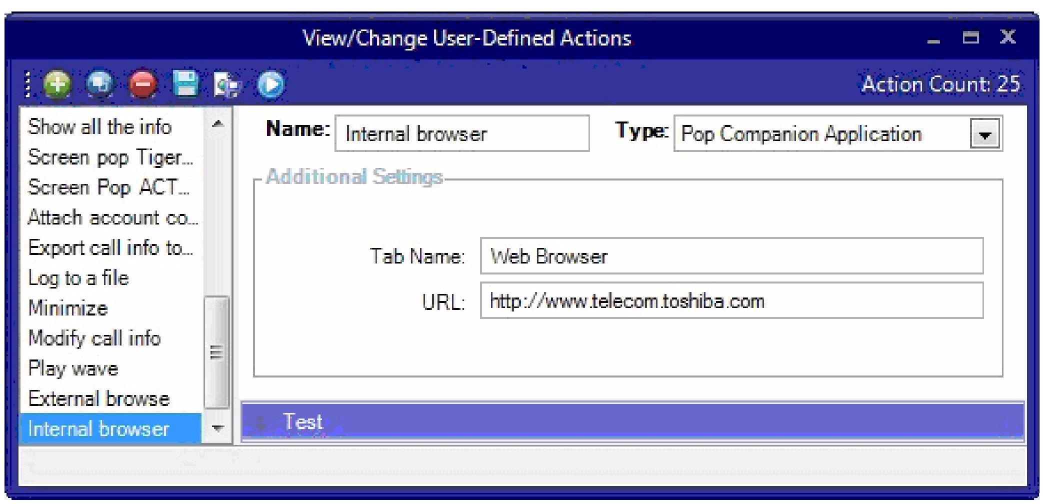
Popup Call Info Screen

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 47).

Standard Call Information window



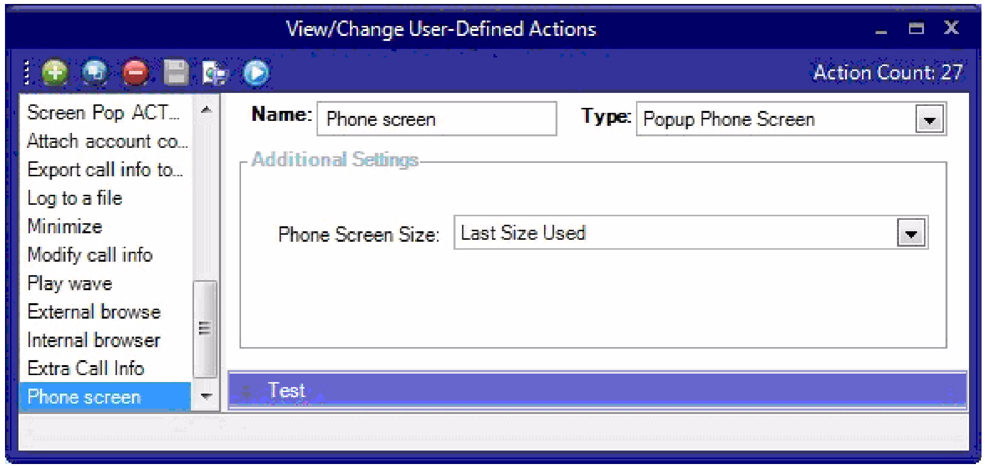
Extra Call Information window



- 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

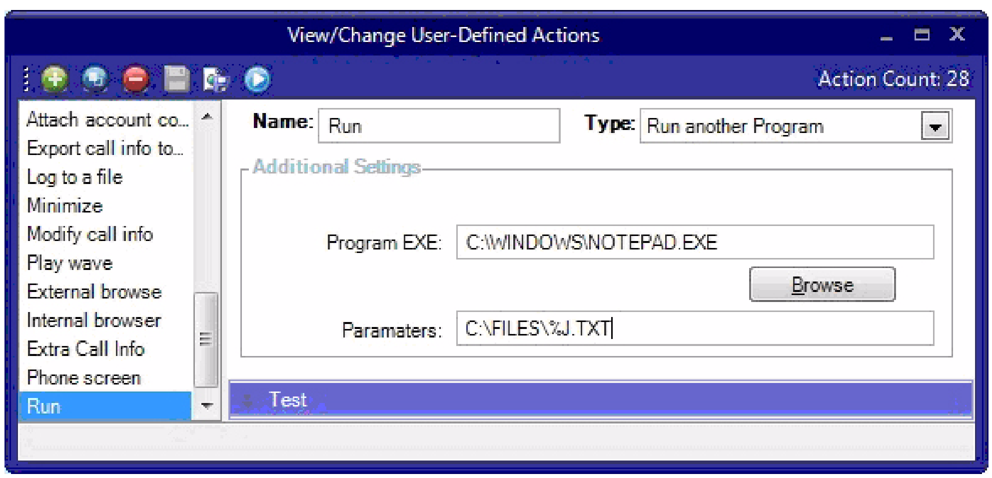
This action causes a popup (Restore) of the Call Manager screen from an icon.



- 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

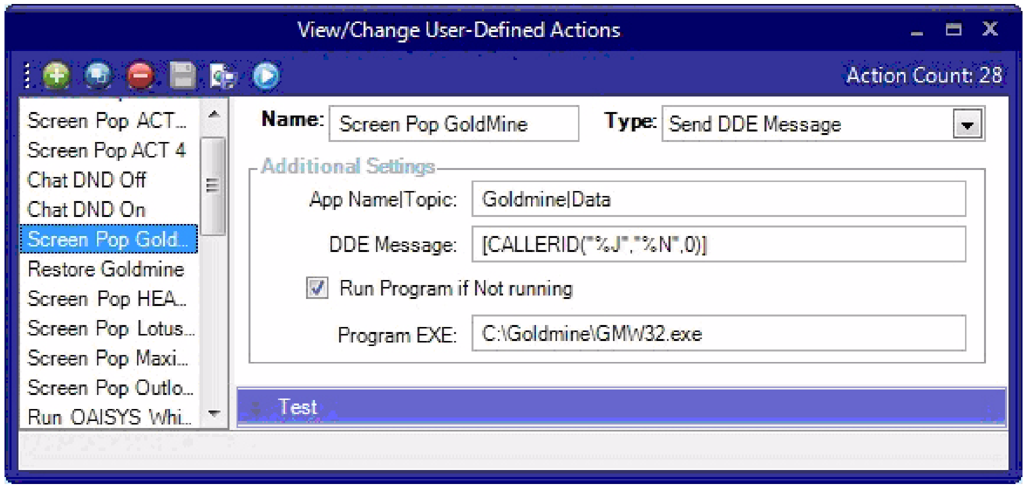
This action triggers the running of another program on the PC.



- 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.

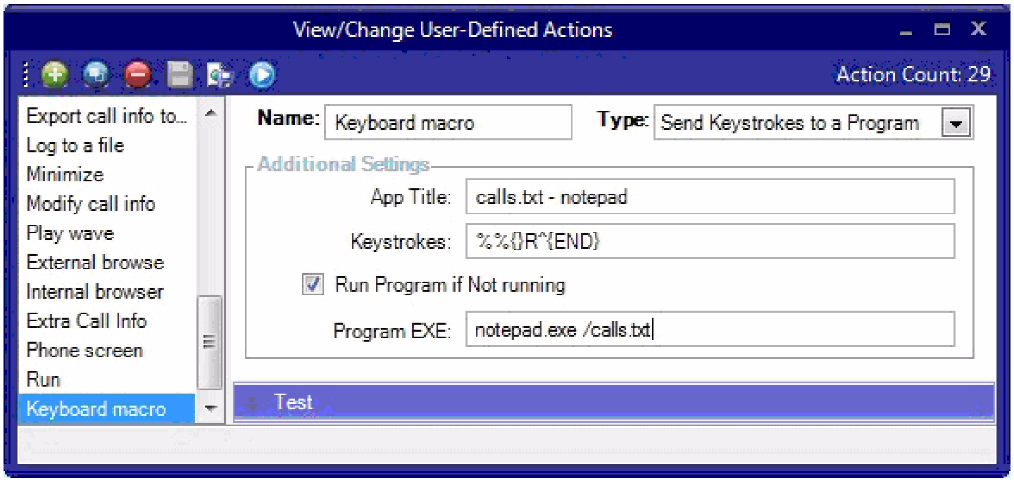
Note: The pipe character ‘|’ must separate the application name and topic name.

- 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 (i.e. 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 Sp 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.

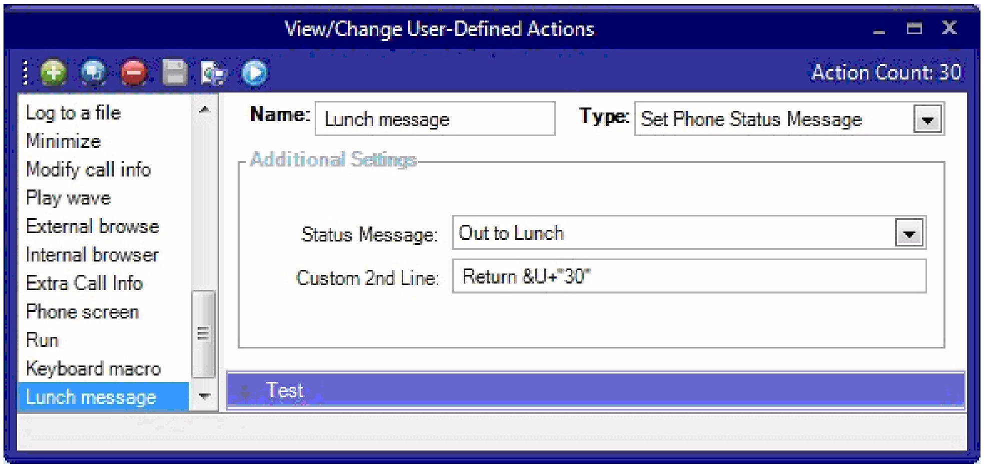
To specify that Shift, Ctrl, and/or Alt should be held down while several other keys are pressed, enclose the code in parentheses. For example, to have the Shift key held down while E and C are pressed, use “+(EC)”. The code “+EC” will send the characters Ec instead of EC and “E+C” will send the characters 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.

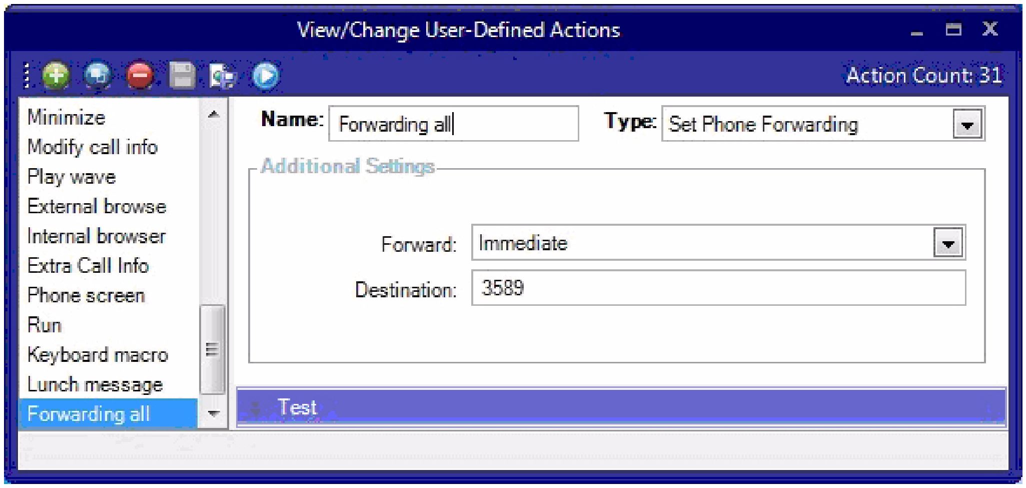


- Choose DND Message – Select from the available messages in the drop down list for the message that appears in the upper line of the phone’s display.
- Custom 2nd Line – Optionally enter a second line to display on the lower line of the phone’s display message.

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

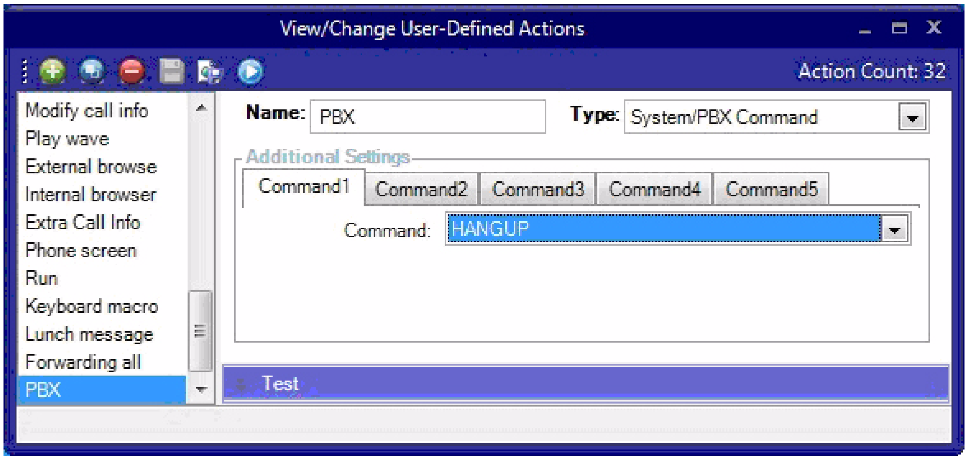
This action changes the Call Forwarding setting of the phone in the PBX for the prime DN of the phone. The action can determine the type of forwarding (Immediate, Busy, No Answer, Busy/No Answer, or Off) and the destination.



- 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

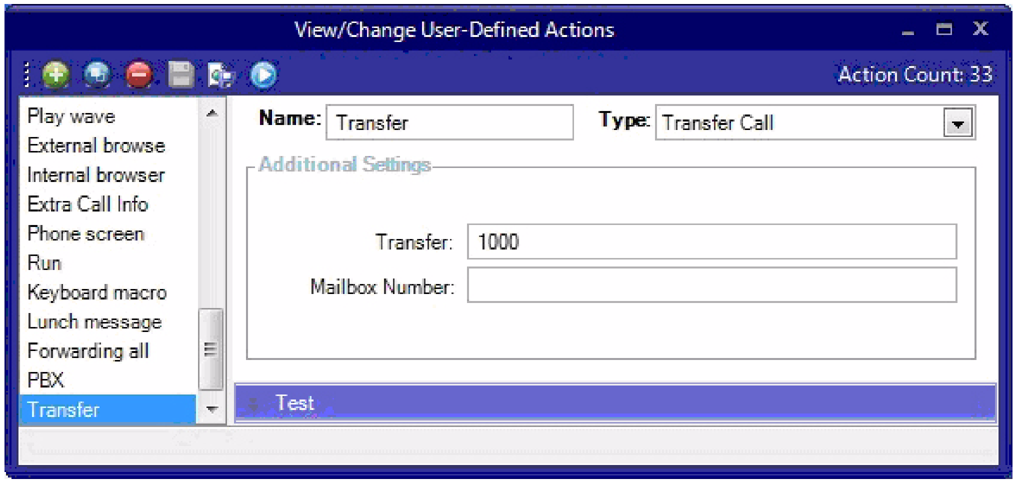
This action can be used to send appropriate OAI commands to the PBX to perform functions. Up to five commands can be specified, and each command is executed sequentially when this action is called..



- 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	
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 (i.e. 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, i.e. %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 leftmost characters. Insert –x to restrict the variable value to the last ‘x’ or rightmost 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
&G	Agent ID
&H	Calling Phone Number (hyphenated - type 1)
&I	TAPI Call ID
&J	Calling Phone Number (hyphenated - type 2)
&L	Insert a Line Feed character
&N	Calling Party Name (outside calls only)
&n	Insert the Date and/or time in user-specified format i.e. "&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 (i.e. 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 (i.e. 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:

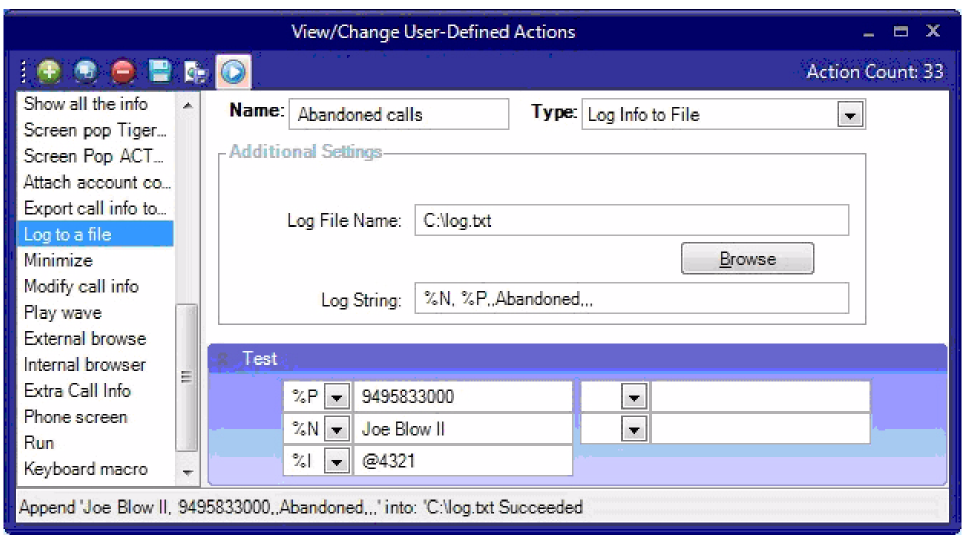
- .ACI – These files are individual actions created by Exporting Actions. These will be imported only when an action using the same action name does not exist in the compiled file. Thus, when this file exists and the user had made changes to this action, the user can revert back to the original operation 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 (i.e. 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 9

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.

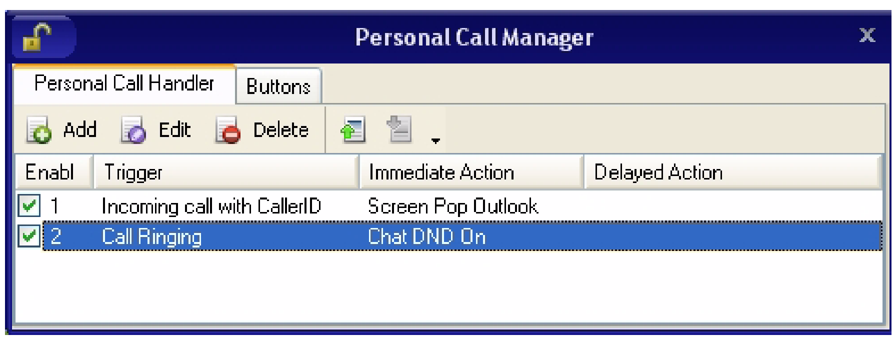
The order of the listing of the rules determines the sequence the rules will be used. Thus, some rules may prevent following rules to be used. For example, if the first rule in the list causes the call to divert to another station followed by a rule to Screen Pop Outlook, then the Screen Pop will never 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.



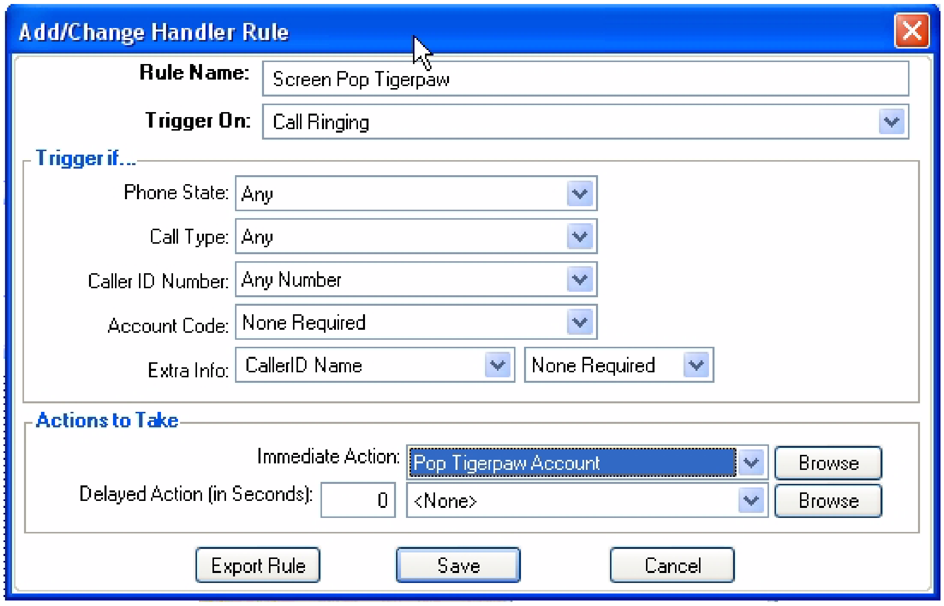
To Delete a Rule

- Highlight the rule to delete and click Delete.

To Add or Change a Call Handling Rule

1. Click the Add button

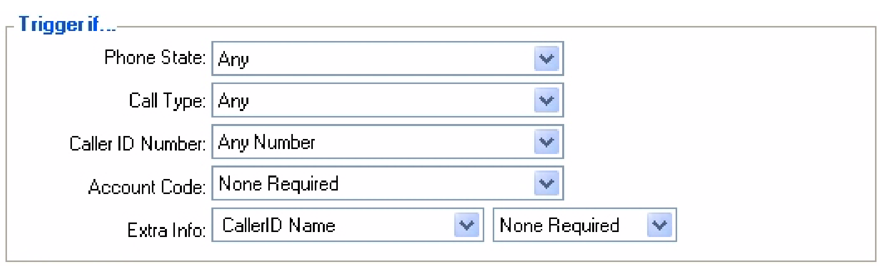
or highlight the rule to be changed and click Edit.



2. Select a Triggering Event and Set the Conditions

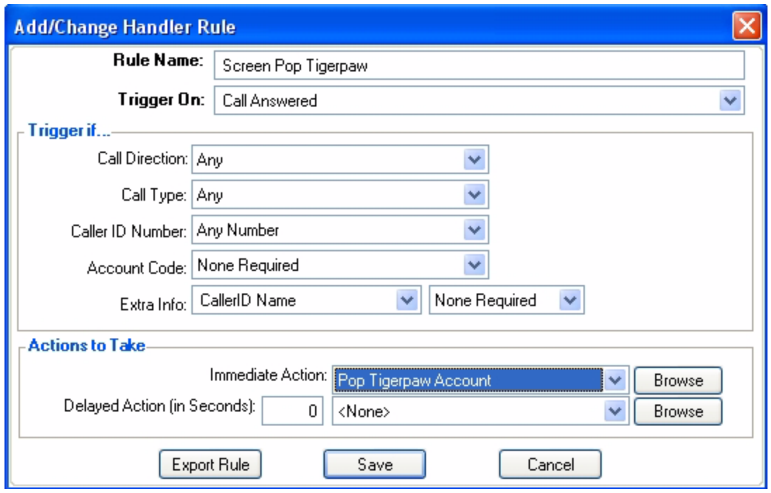
The types of events that can be used to trigger a rule can be divided into call related triggers, system triggers, and status change triggers. Each grouping is shown below along with the Conditions offered for the trigger to take effect:

- **Call Ringing** – Whenever a call rings on the phone.Call Type – Select the call type for the ringing call.



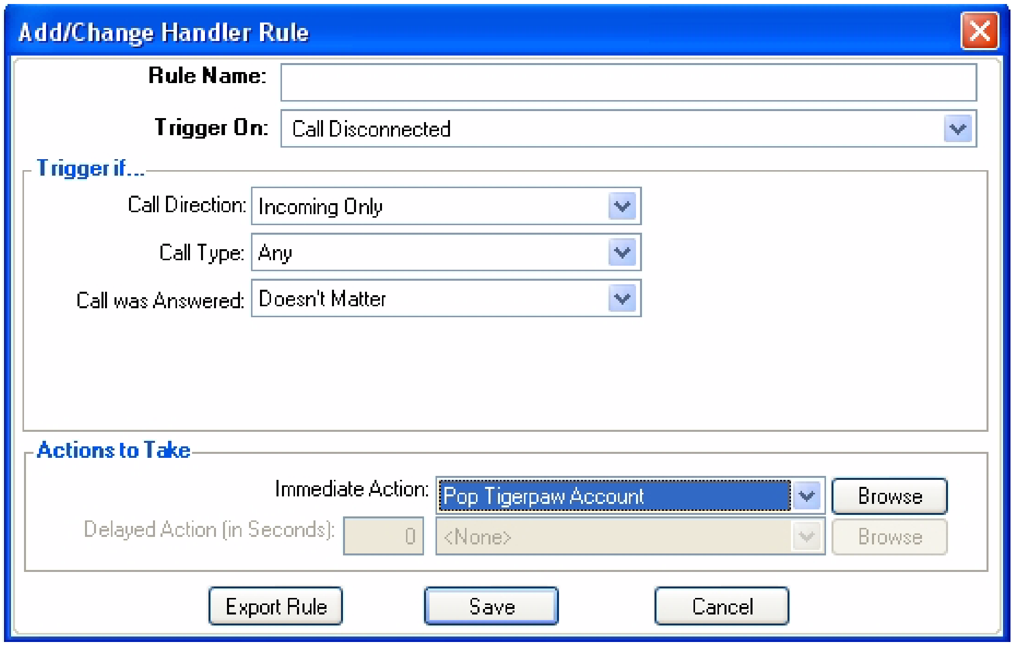
  - Phone State – Select the Phone State when the call arrives.
  - Caller ID Number – Select the Caller ID to be used in the trigger. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Extra 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.

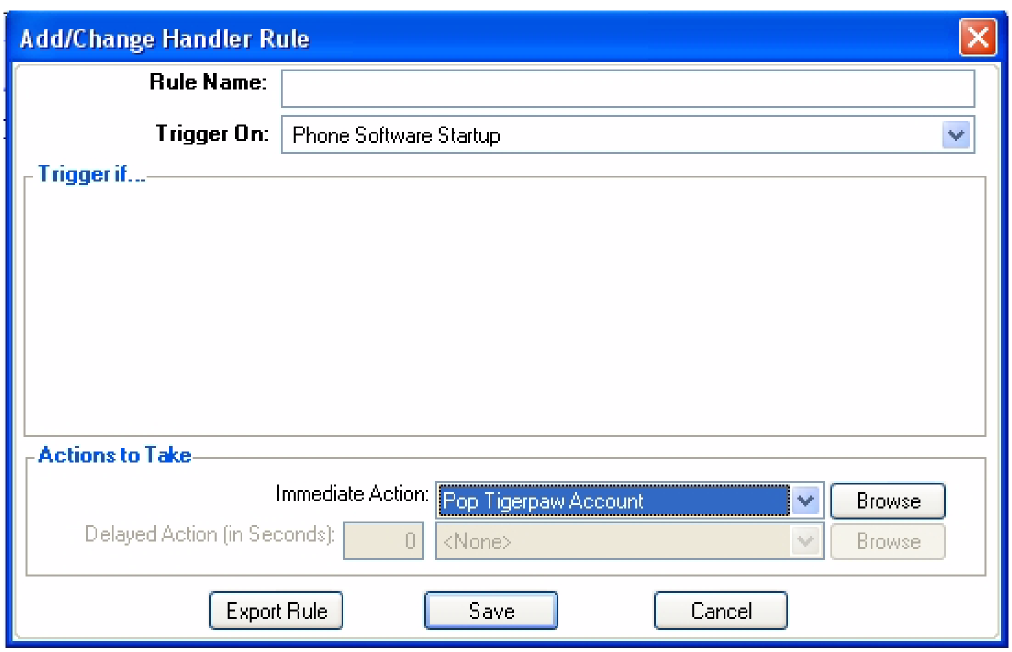


  - Call Direction – Select the direction of the call to be triggered.
  - Caller ID Number – Select a Caller ID number. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Extra Info – Select 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).

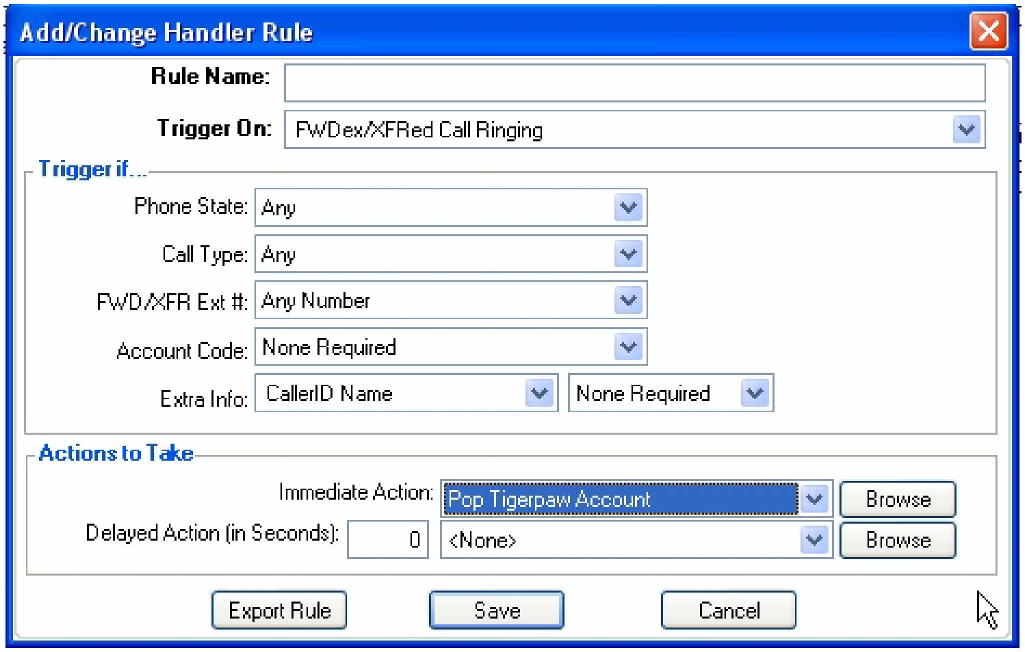


- Call Type – Select the call type for the ringing call.
  - Call Direction – Select the direction of the call to be triggered.
  - Call was Answered – Select whether the call was answered.
- **Phone Software Startup** – Happens whenever the Call Manager software starts up and is in full operation with the PBX.

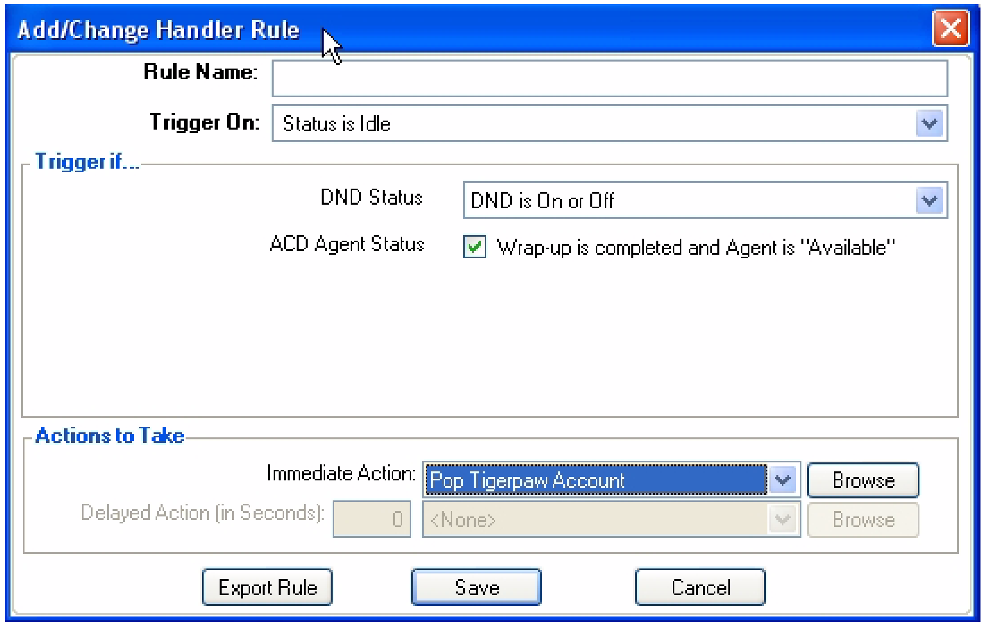


- **Phone SoftwareShutdown** – Happens whenever Call Manager software is shutdown (using a normal Exit).

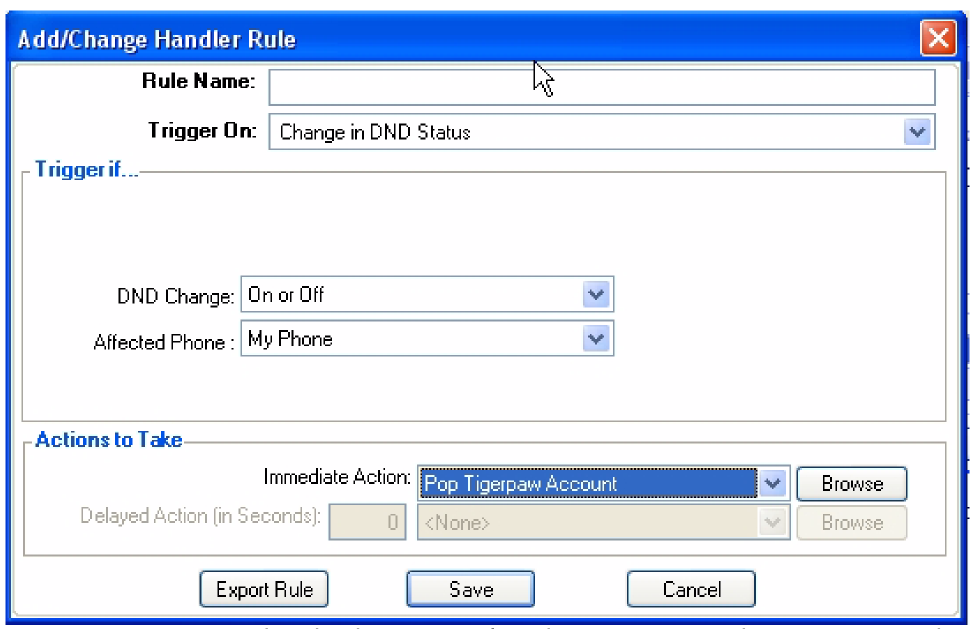
- **FWDed/XFRed Call Ringing** – Whenever a call rings on the phone that has been either Forwarded or Transferred from another extension.



- 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.

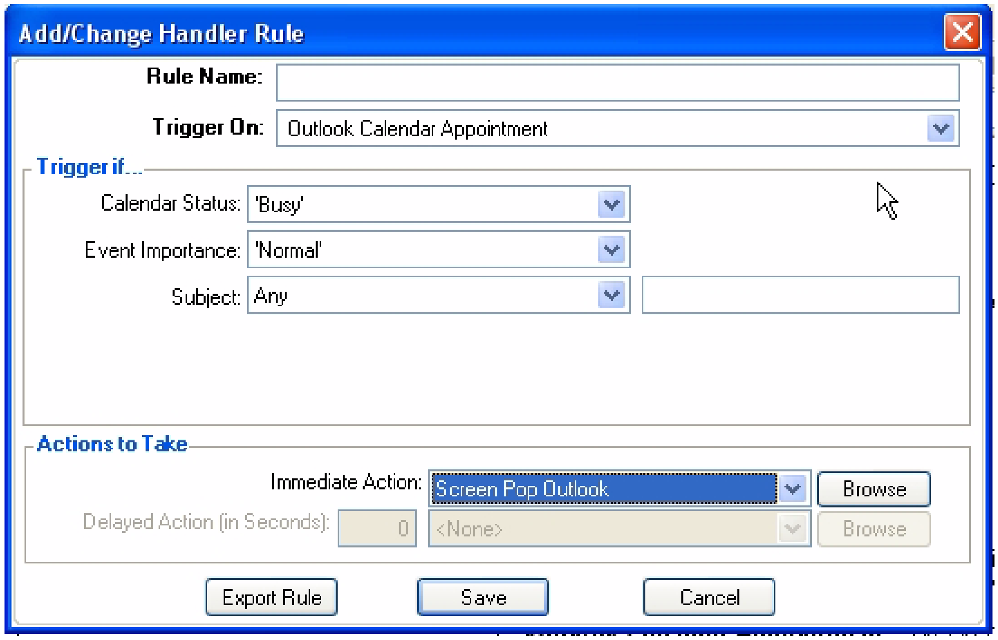


- Do Not Disturb Status – Select whether the station is to be considered idle when the DND Status is...
- **Change in DND Status** – Whenever the DND or message status change takes place, the message set is checked to see if it matches the defined conditions.



- 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.

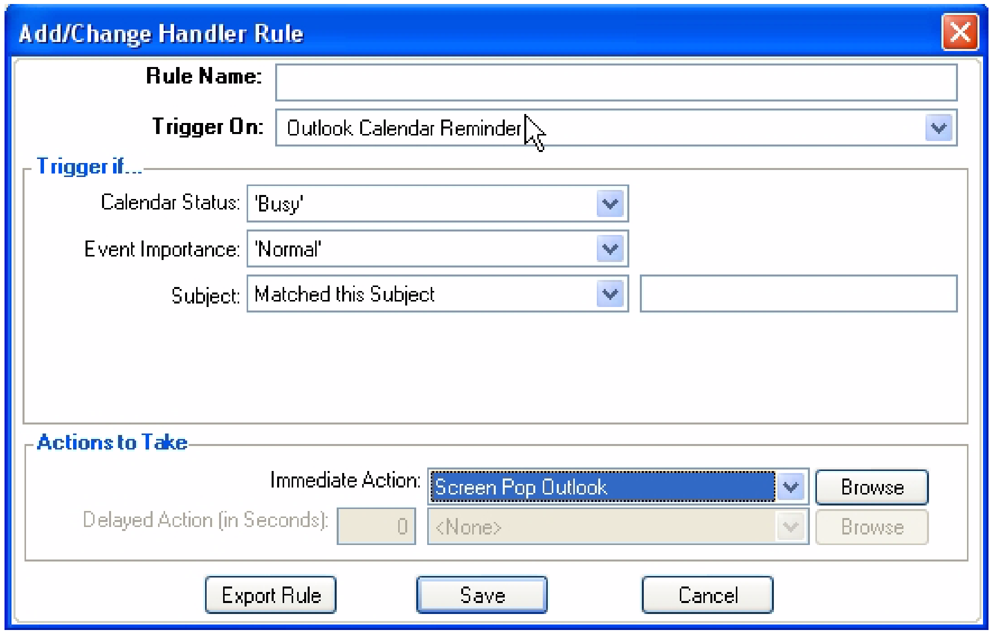
- **Outlook Calendar Appointment** – An event that occurs at the start time of the appointment and again when the appointment time ends (‘Free’).



- 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 (i.e. 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 (i.e. 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.

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Using Microsoft Outlook 10

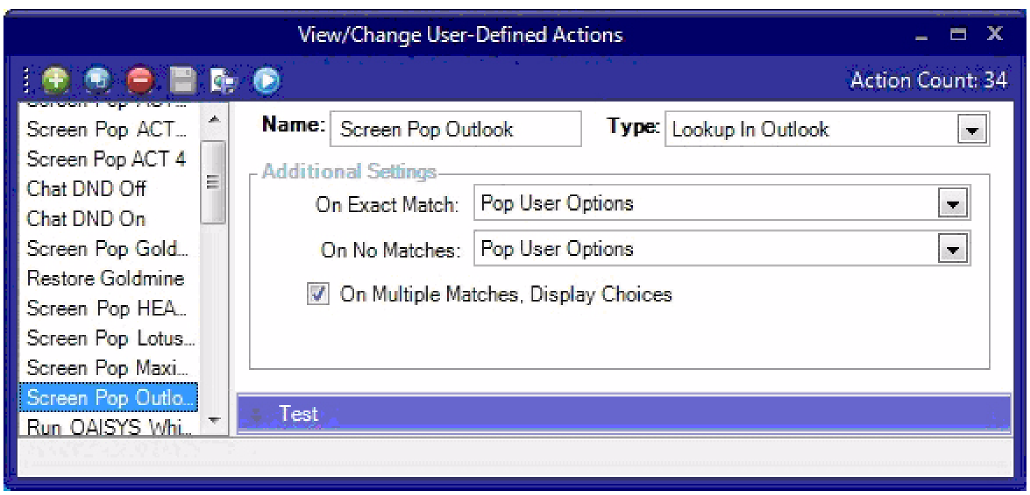
Dialing from within Outlook

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.

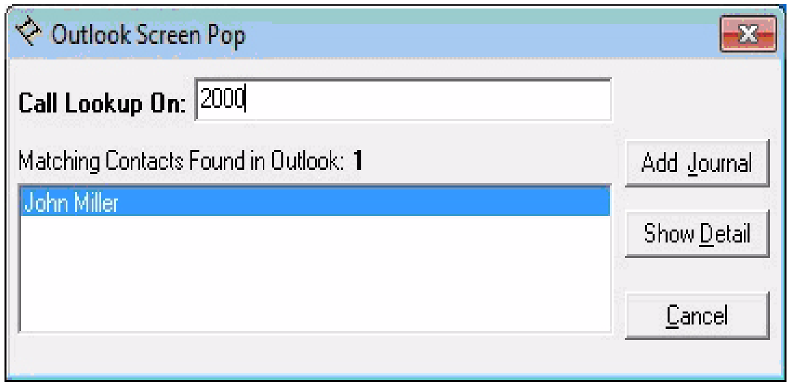
When the call is being dialed in Call Manager, the name from the Contact will be automatically attached to the phone call (for display on the LCD, the Call Key, SMDR, etc).

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".



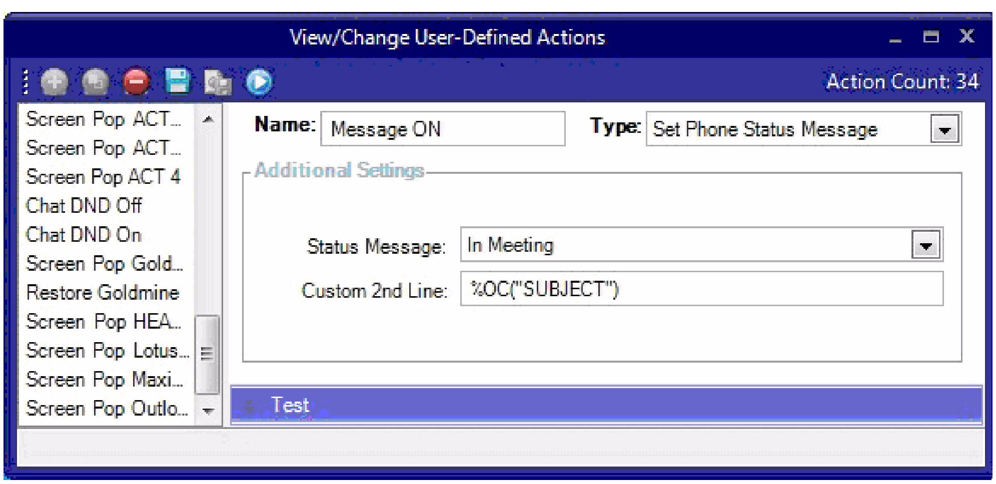
With this, you can see the information about who is calling and then can manually open a Contact or Journal. If opening a contact/journal manually is not desirable, you could also have a 2nd 'trigger/action' so that when you "Answered" a call it would automatically open a Contact and/or Journal as desired.

Integrating with Outlook Calendar

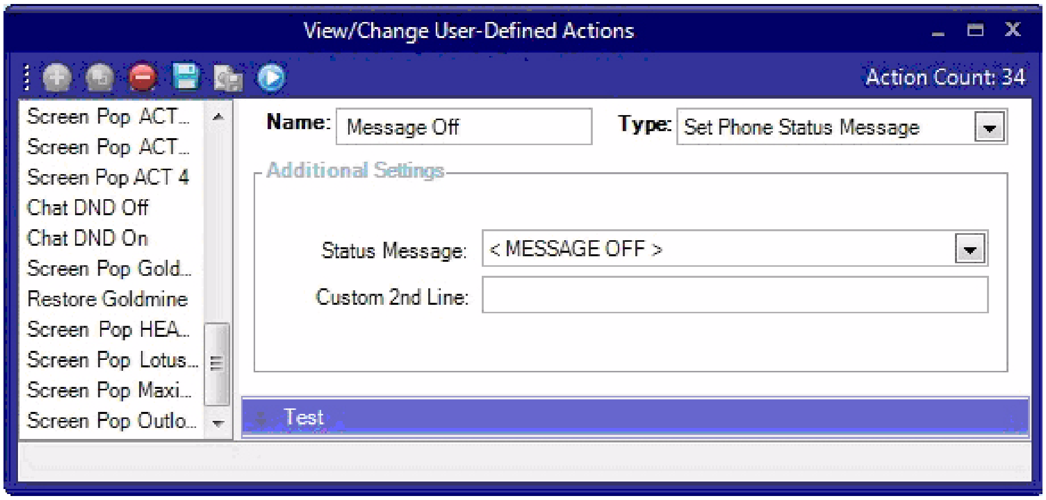
One typical integration with Outlook Calendar is to put Appointment information on DSS key so that all other Call Manager users know your current presence status. This example will turn on the DSS key with Status Message only and turn off the message when the scheduled meeting is over.

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.

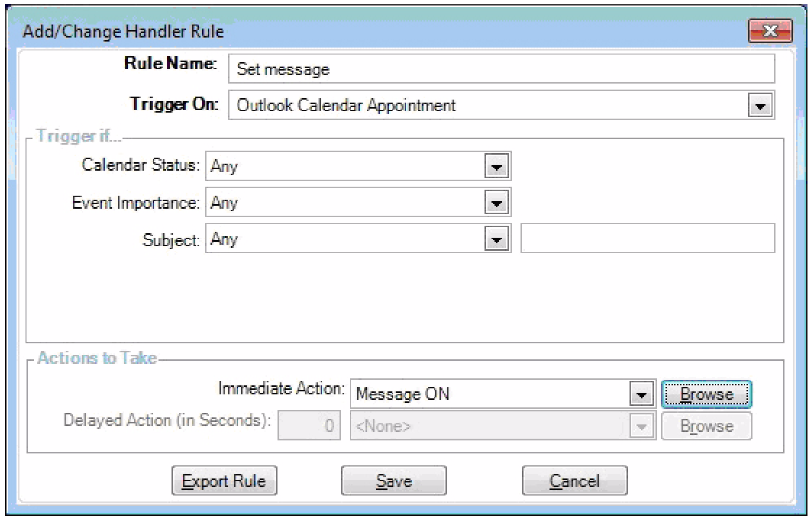


The second Action will clear the message when the appoinment ending time is reached.

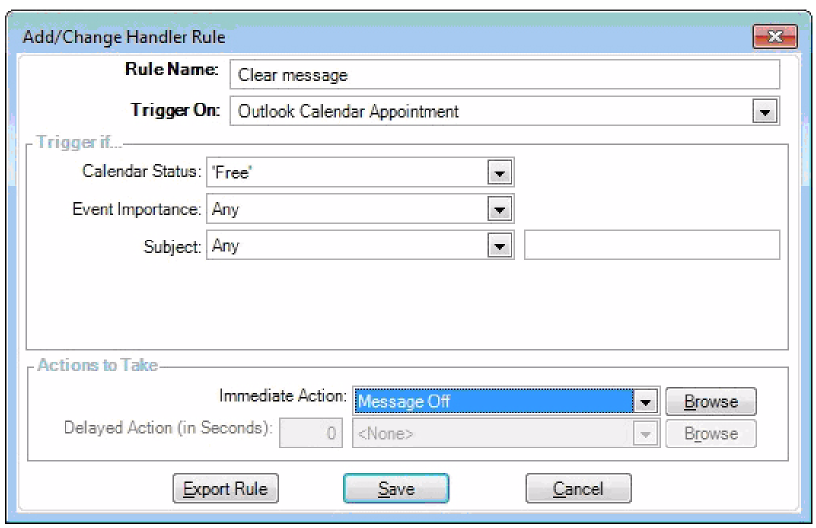


Create Personal Call Handler Rules

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 11

Contacts

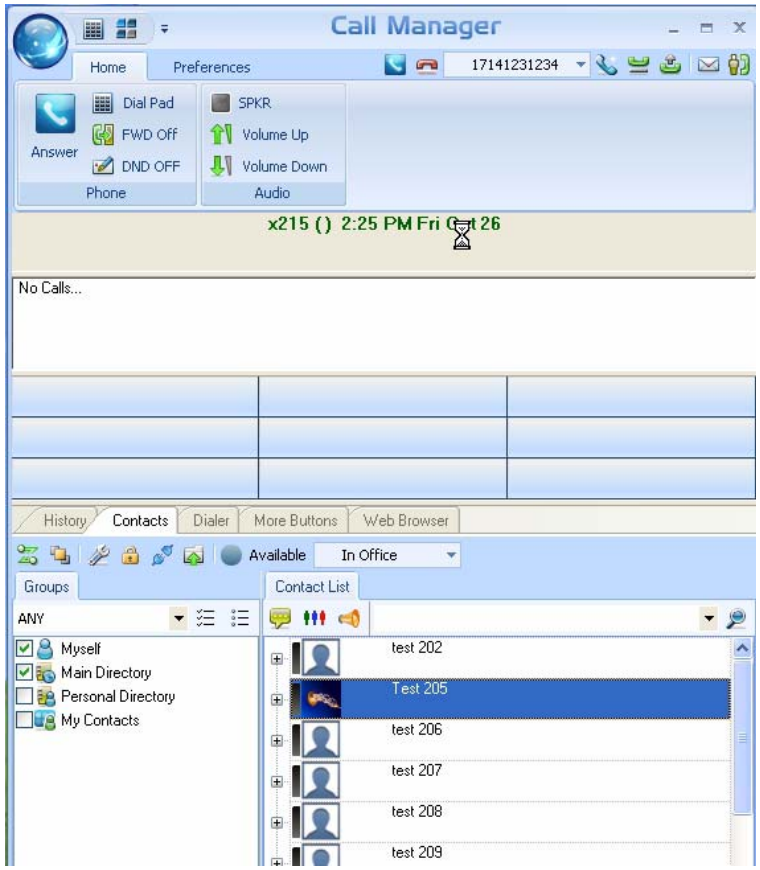
The Contact companion application function is to organize contact information. This program works as a companion program with Call Manager to allow workers in the enterprise to communicate using real time text-based communications with others. Using Call Manager IM, you can have individual conversations with anyone else on the sever with the same feature installed.From these contacts one can search, and subscribe to some contacts presence status, initiate IM, Group IM or Call.

IM is an integrated text-messaging function that lets you communicate with other Call Manager users using text messaging or calling even while you're busy on the phone.

The way contacts are organized is based on groups. The Group tab provides a user with a quick narrow down Contact list. The groups consists of permanent groups, such as, MySelf, Main Directory, Personal Directory, and My Contacts; and user defined roster groups.

- MySelf – Displays own Contact information & status
- Main Directory – Displays system directory (contacts belong to the systems).
- Personal Directory – Displays contacts that a user manually enters.
- My Contacts – Displays contacts that user has subscribed to the presence status.
- User defined roster groups – Display contacts that user has put in the user's defined groups.

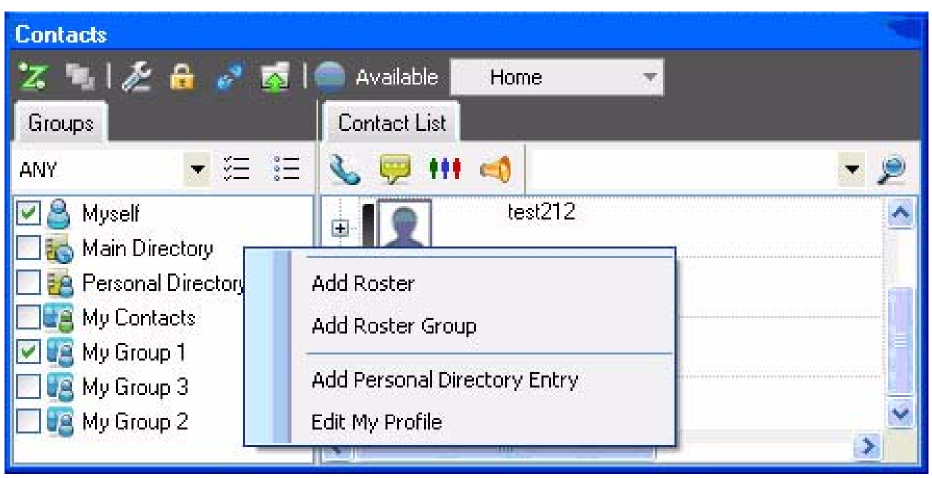
IM can also be used to send a broadcast message to an individual or to an entire group. A broadcast message is a one-time message that will appear on the recipient's IM window.



User Profile

As a user, you can most of your profile with the exception of the Jabber ID and extension.

1. Select Myself from the left pane.
2. Right click on your contact information display on the right.
3. Select Edit My Profile (shown below).



Their profile consists of the following information:

- Avatar
- Jabber ID
- Nickname
- Full Name
- First Name
- Middle Name
- Last Name
- Phones
    - Extension
    - Up to 5 additional phones; each consists of the following parts:

      Type – any combination of the following: Home, Work, Cellular, Preferred, Voice, Fax, Pager

      Phone number
- Emails
    - Up to three email addresses; each consists of the following parts:

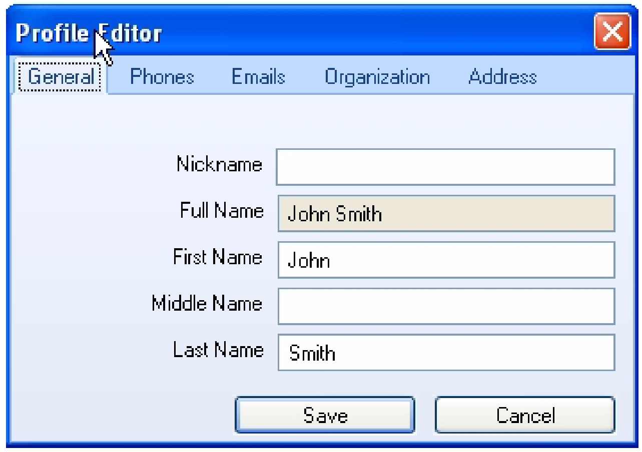
      Type – any combination of the following: Home, Work, Internet, Preferred, X 400

      Email address
- Organization
    - Name
    - Unit
    - Description
- Address – One address consists of the following parts:
    - Street
    - Additional line
    - City
    - State
    - Zipcode
    - Country

Personal Directory Entry

1. Select Personal Directory.
2. Right click on Personal Directory.

3. Select Add Personal Directory Entry. (shown below)



The personal directory entry contains the following information:

- General Tab
    - Nickname
    - Full Name
    - First Name
    - Middle Name
    - Last Name
- Phones
    - Extension
    - Up to 5 additional phones; each consists of the following parts:

      Type – any combination of the following: Home, Work, Cellular, Preferred, Voice, Fax, Pager

      Phone number
- Emails
    - Up to 3 email addresses; each consists of the following parts:

      Type – any combination of the following: Home, Work, Internet, Preferred, X 400

      Email address
- Organization
    - Name
    - Unit
    - Description
- Address – One address consists of the following parts:
    - Street
    - Additional line
    - City
    - State

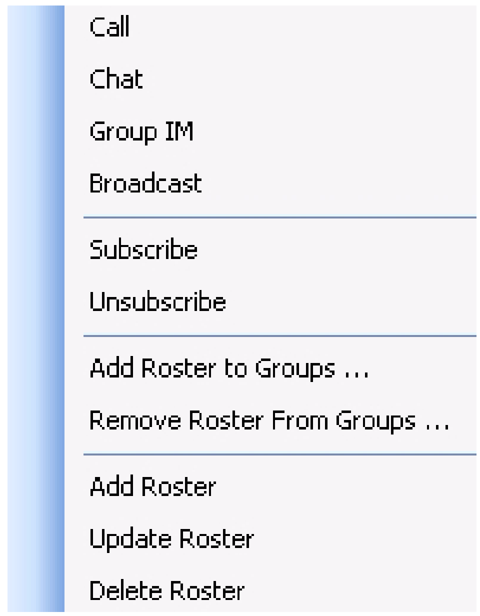
- Zipcode
- Country

Instant Messaging

To use IM, select a Directory or Group from the Groups tab. The list of contacts for the Directory/Group displays. The various Presence status also displays.

Right click on a Contact name and the following options display (shown below).

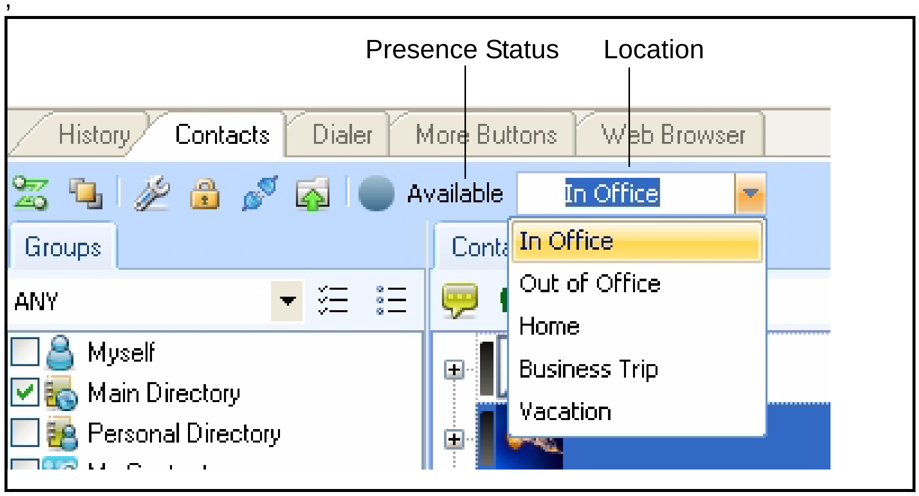
- Call – Use Call to call the person.
- Chat – Enables you to have a chat conversation/IM with the contact.



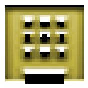
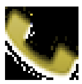
Presence

The Presence is a function of Call Manager IM. The IM user can see the presence status of other members, such as Available, Busy, DND, Away, Offline, and Unknown. The location (shown below) includes In Office, Out of Office, Vacation, Home, Business trip, and [user entered text] (custom).

,



Presence Status These are icons display next to the names of your contacts.

Icon	Meaning
	In Office.
	Out of Office.
	On a call.
	In a chat.
	Involved in Texting

Icon	Meaning
	At home.
	Away on vacation.
	Away on business.
	Away custom

IM Chat

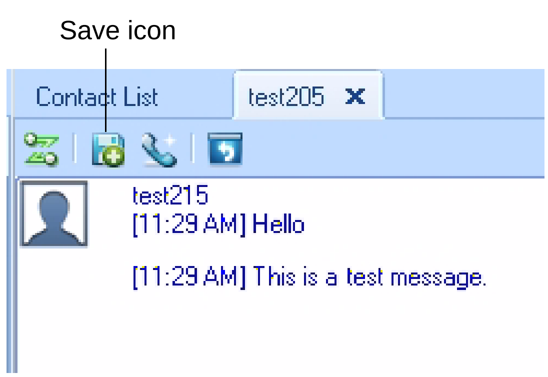
1. Select a contact.
2. Right click and select Chat. The Chat window displays.

   ... or click the Chat icon  .

   You can select Canned Replies, such as – Hello, Hold, Ok, Good Bye.
3. Type in the “Type here” area, then press Enter.

To Save an Instant Message Conversation

Click on the Save icon to save the IM conversation.



IM Call

Calls can be made by using the contact list.

1. Select a single contact record.
2. Right click and select Call.

...or

Select the contact, then click the Call icon. 

If the selected contact contains only one phone number, call will be make to that number. If the selected contact contains more than one phone number, select the specific number to call when you initiate call to that contact.

Click the red end call icon to end a call. 

Divert/Transfer Call

User should also be able to drag a call to the contact to either initiate divert or transfer depend on the call state of the call. If the call state is ringing, Call Manager will divert the call to the contact's phone number. If the call state is talking, Call Manager will initiate transfer call to the contact. Similar to make call, if there are more than one phone number in the contact, user will be asked to select the specific number.

To Answer a IM 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.

To End the Conversation

- Press the Close button to end the conversation.

Groups

The groups are to categorize the contact records. Four types of groups defined:

- Myself – As the group name, it contains only the user contact/profile. This group cannot be deleted.
- Main Directory – This group defines all contacts found in the VIPedge systems. This group cannot be deleted.
- Personal Directory – This group holds user's personal defined contacts. This is a simpler version of previous Contacts companion application where user can create his/her own personal directories. The differences are
  - User cannot create the directories, instead user can adds contacts to this directory
  - Unlike in old contact, this contact can hold multiple phones, emails, and one address
  - Outlook contact can be drag-and-drop to this directory

- My Contacts – This is a special roster group where members are defined as all contacts that the users have subscribed. User does not explicitly add to “My Contacts” group. Instead, when user subscribe/unsubscribe to a contact, the contact is automatically added/removed from “My Contacts” group. This group cannot be deleted.
- Roster Groups – The roster groups are user created groups to organized his/her contacts. This type of group is not preserved upon Call Manager exits if the group has no member. If the group has at least one member, the group is preserved on Call Manager exits. These roster groups are limited to 16. These groups are equivalence to personal groups in old Contacts. On initial upgrade, it can convert up to the first 16 personal groups from old Contacts to Roster groups.

Add Roster Group

There are three ways to add roster group:

From Group popup menu or Contact popup menu.

1. Select “Add Roster Group”:
2. From Group tab, right click to bring up Group popup menu; From Contact List tab, right click to bring up Contact popup menu.

3. Select “Add Roster Group”
4. Enter new group name and click OK button

From Group popup menu.

1. Select “Add Roster”:
2. Bring up Group tab.
3. Right click to bring up Group popup menu
4. Select “Add Roster”
5. In “Add Contact” dialog, user is given option to create new group
6. Select “Add Roster”

From Contact pop up menu

1. select “Add roster to Groups…”:
2. Bring up Contact List tab
3. Right click to bring up Contact popup menu

4. Select "Add Roster to Groups…"
5. On "Select Groups to Add" dialog, user is given option to create new group.

Rename Roster Group

A roster group can be renamed to a new roster group name. When the group name is changed, existing members are moved to the new group.

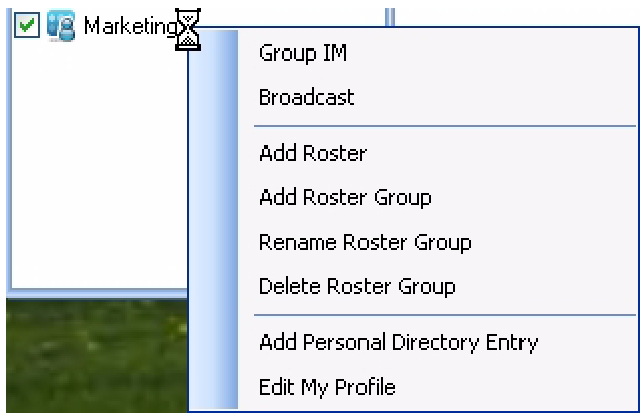
1. Bring up group tab
2. Select one roster group
3. Right click to bring up popup menu
4. Select "Rename Roster Group" menu option

Enter new group name in the following dialog and click OK button

Delete Roster Group(s)

When roster group is deleted, all the members are removed from the group.

1. Bring up group tab
2. Select roster group(s)
3. Right click and select "Delete Roster Group" (shown below).



4. Confirm the delete when asked.

Rosters

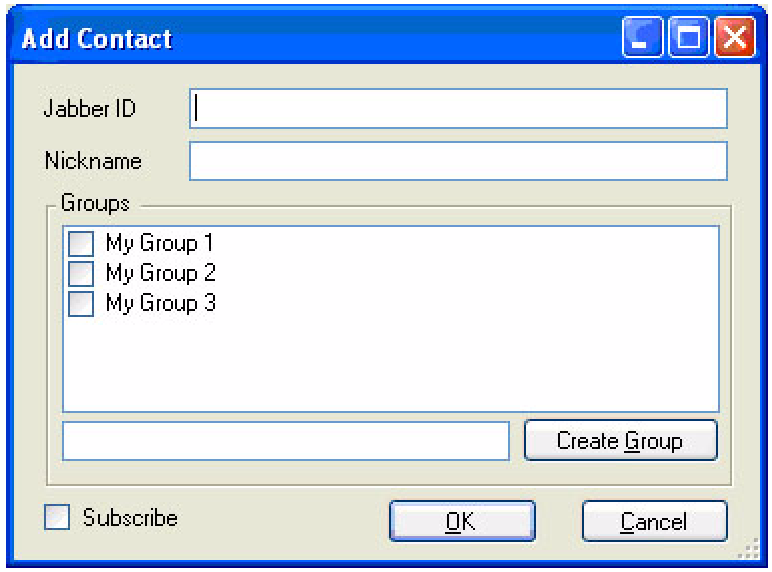
Rosters are contacts that user has added to their roster groups and/or subscribed.

Add Roster

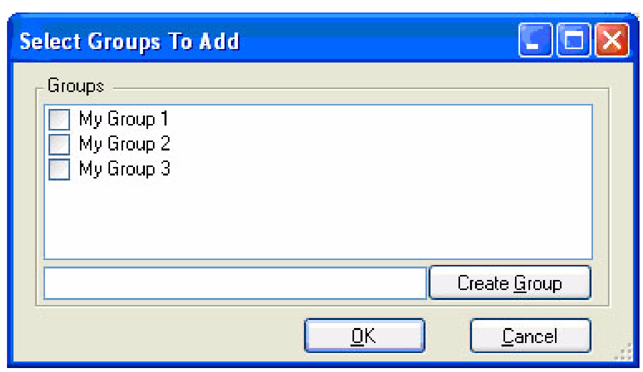
Adding a roster means putting the contact into a roster group. There are several ways to add roster:

1. From Group or Contact popup menu, select "Add Roster" option

2. Enter roster information in “Add Contact” dialog (shown below)



3. Check the Subscribe checkbox if you like to subscribe to his/her presence status.
4. From Contact popup menu, select “Add Roster to Groups…” option
5. Select existing contact.
6. Right click to bring up Contact pop up menu
7. Select Groups to add the contact into (shown below).



Update Roster

Updating a roster allows the user to change roster nickname or its group membership. To update the roster info:

1. In Contact List, select an existing contact
2. Right click to bring up Contact popup menu
3. Select “Update Roster”
4. Make the changes, then click OK.

Subscribe

This option sends a subscription request to the contact and adds the contact to "My Contacts" group.

To subscribe an existing contact:

1. Go to Contact List
2. Select contact(s) to subscribe
3. Right click to bring up Contact popup menu
4. Select "Subscribe."

To subscribe new contact:

Follow the "Add Roster" on page 121 procedure and check "Subscribe" checkbox.

Unsubscribe

This option removes any previous subscription to a contact and removes the contact from "My Contacts" group.

To Unsubscribe from Contact List:

1. Select contact(s) to unsubscribe
2. Right click to bring up Contact popup menu
3. Select "Unsubscribe" option

Alternative:

1. From Contact popup menu, select "Update Roster" option
2. In "Update Roster" dialog, unchecked "Subscribe" checkbox

Alternative:

Deleting Roster will automatically unsubscribe (if previously subscribe to the contact)

Delete Roster

This option removes any previous subscription to a contact and removes the contact from "My Contacts" group and any other roster groups. It does not remove from "Everyone" group if the contact belongs to "Everyone" group.

To delete Roster:

1. From Contact List, select roster to be deleted
2. Right click to bring up Contact popup menu
3. Select "Delete Roster"

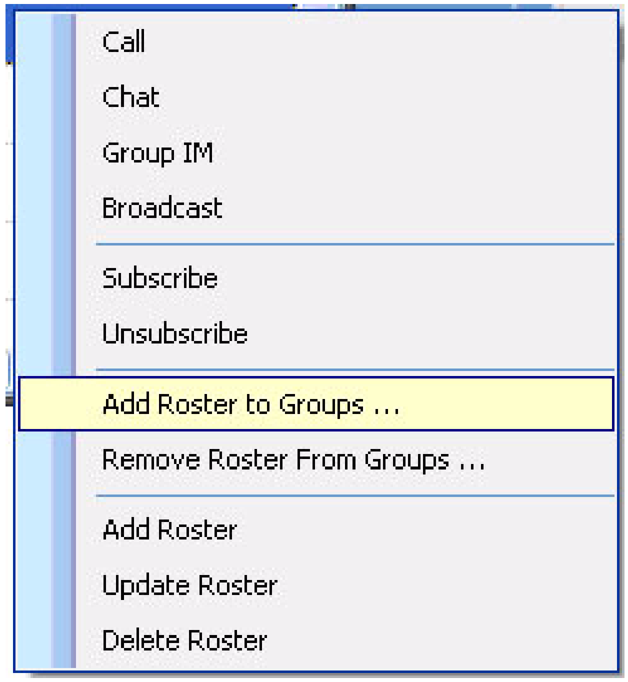
Add to Groups

This option allows you to add roster to different roster groups.

To Add to groups:

1. From Contact List:
2. Select roster(s) to be added to another groups

3. Right click to bring up Contact popup menu (shown below)



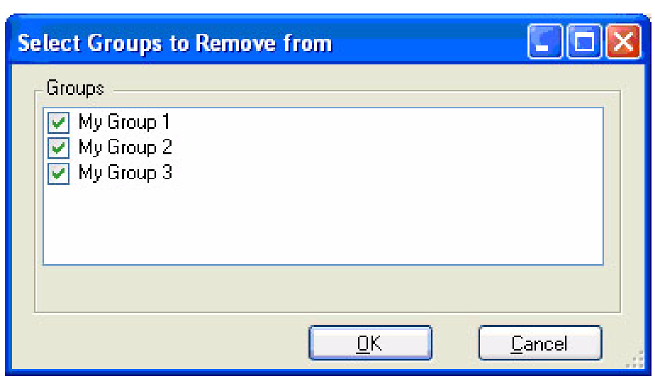
4. Select “Add to Groups…” option.
5. In “Select Groups to Add” dialog, check Groups to add the roster(s) into

Remove From Groups

This option allows user to remove roster from roster groups.

To remove from groups:

1. From Contact List, select roster(s) to remove from groups
2. Right click to bring up Contact popup menu
3. Select “Remove Roster from Groups…”
4. In “Select Groups to Remove from” dialog, checked groups where roster(s) will be removed (shown below).



Add Personal Directory Entry

This option allows user to add personal contact into Personal Directory Entry. The two ways to add new personal directory entry are:

-Click on “Add Personal Directory Entry” menu option in contact’s popup menu.

-Drag & drop new Outlook contact into Contact List tab

Update Personal Directory Entry

This option allows user to update personal contact in Personal Directory Entry.

Delete Personal Directory Entry

This option allows user to delete personal contacts in Personal Directory Entry.

Instant Messaging (IM)

Initiate IM from Contact List

To initiate IM from Contact List, select contact from Contact List and either click IM button or click IM from popup contact menu. IM conversation tab is created and user should be able send and receive IM messages to the selected contact.

Initiate IM from IM button in Toolbar

When IM button is clicked, if there is no selected contact in the contact list, a dialog window is opened for user to enter Jabber ID to initiate IM. Once user enters the Jabber ID, IM tab should be created for user to send and receive IM messages.

Response to incoming IM

When a new incoming IM message is received, Call Manager notifies the user based on the incoming message settings and opens IM tab for user to send and receive IM messages.

Group IM

Initiate Group IM from Contact List

User can initiate Group IM by selecting contacts in the contact list and click Group IM button or click on Group IM in popup contact menu. A dialog is opened for the user to enter his/her nickname and subject for the Group IM. Call Manager uses the subject as the reason for the invite. A Group IM tab is, then, created for user to send/receive messages.

Initiate Group IM from Group IM button in toolbar

User can initiate Group IM by clicking on Group IM button. A dialog is opened for user to enter his/her nickname and subject. A group IM tab is, then, created for user to send/receive messages. User can invite more attendees by clicking on Invite button in Group IM tab. A dialog is shown for user to select people to invite.

Response to Group IM Invite

When Call Manager receives Group IM invite, it shows a desktop alert to notify user. User can accept or decline the invitation. When the user accepts the invitation, Group IM tab is visible for user to send/receive Group IM messages. If the user declines the invitation, Group IM tab is closed.

Add Attendee

To add attendees, user can click invite button and select direct or indirect invite. The direct invite means the invitation shows the user as the sender of the invite in the invite message. For indirect invite, the invitation shows the room ID as the sender of the invite. User can use direct invite in the case where others set to block messages from unknown ID such as room ID.

Leave Group IM

To leave group IM, click on Leave button and the Group IM tab is closed. Another way to leave Group IM is to click on the close icon of the tab or Group IM form (when Group IM tab is fly out).

Broadcast Message

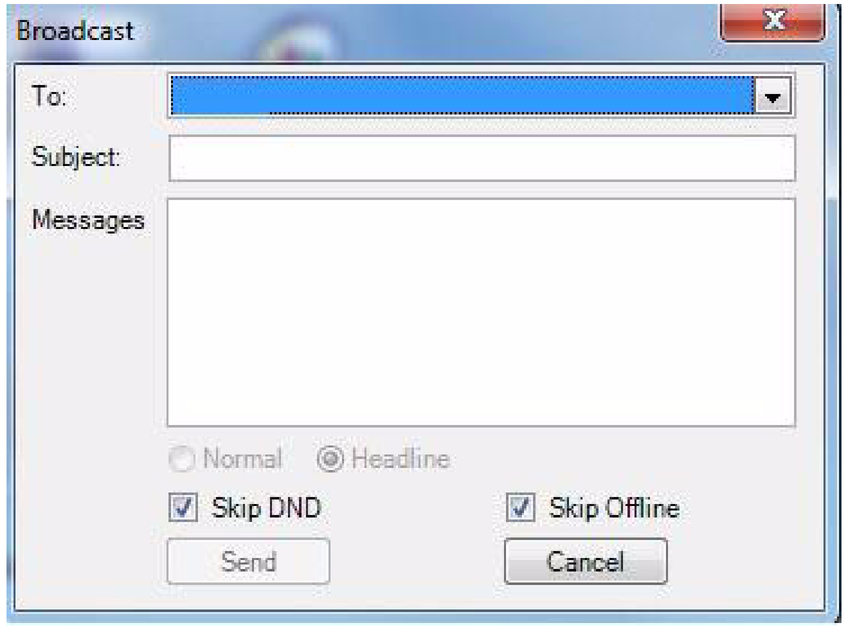
Broadcast messages can only be sent. Recipients cannot reply to broadcast messages.

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, click on the Broadcast icon  .

2. The Broadcast dialog box displays (shown below).

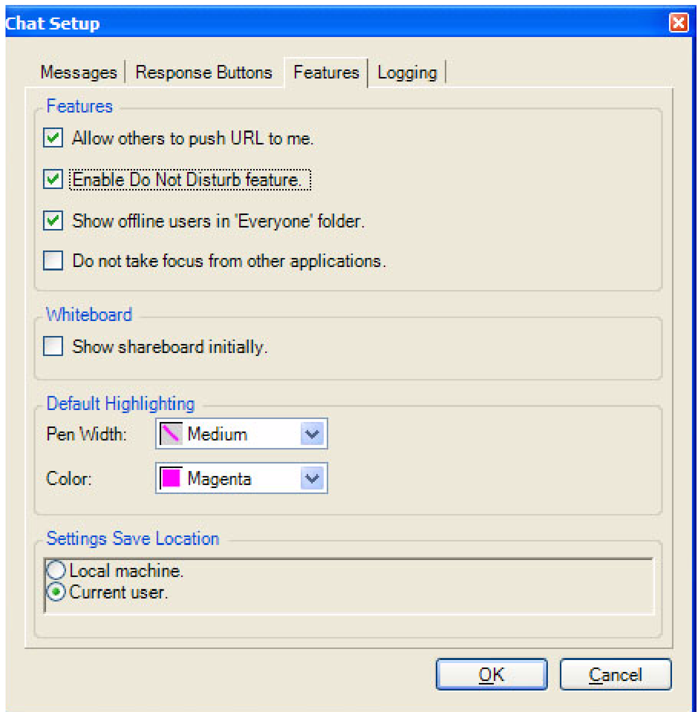


3. Select the recipients in the To field.
4. Enter the Subject text in the Subject field.
5. Type out the message.
6. Click Send.

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.



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 checkbox and/or entering text into the textbox 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 checkbox.

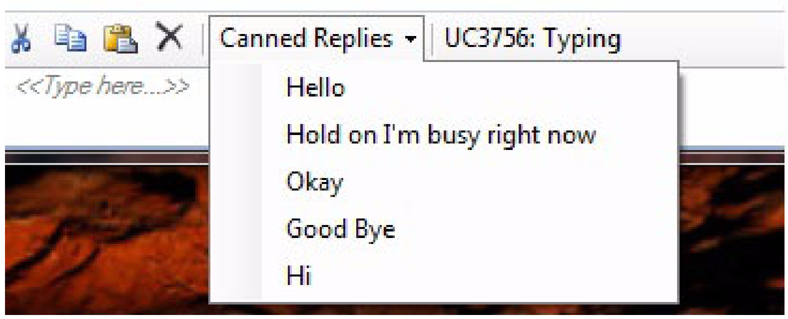
Canned Replies

You can created a list of canned responses for Instant Messaging. To view, create or change canned replies,

1. From the Contacts tab, click the Setup icon. The XMPP Client Setup screen displays.
2. Click on Canned Replies tab.
3. Enter a response, then click OK.

To use a canned reply:

When using chat, click on the Canned Replies drop down and select the appropriate response.



Configuring Chat

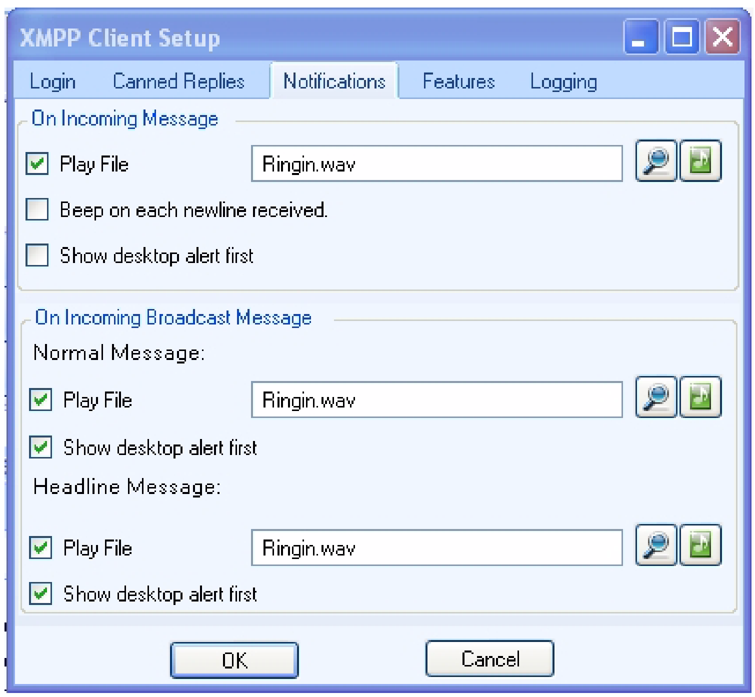
You configure Chat by making parameter choices in the Setup dialog box by clicking the Setup icon in the Contacts tab. You can make Chat integrate with other applications including your soft phone by using the DDE Interface commands. These are defined in the "Interfacing with Other Programs" on page 133 section later. Examples are provided for using these commands with Call Manager are also included.

Setup

To set up your preferences, click the Setup icon in the Contacts tab. 

Messages Tab

These settings define the arrival responses provided for incoming and broadcast messages.



On Incoming Message

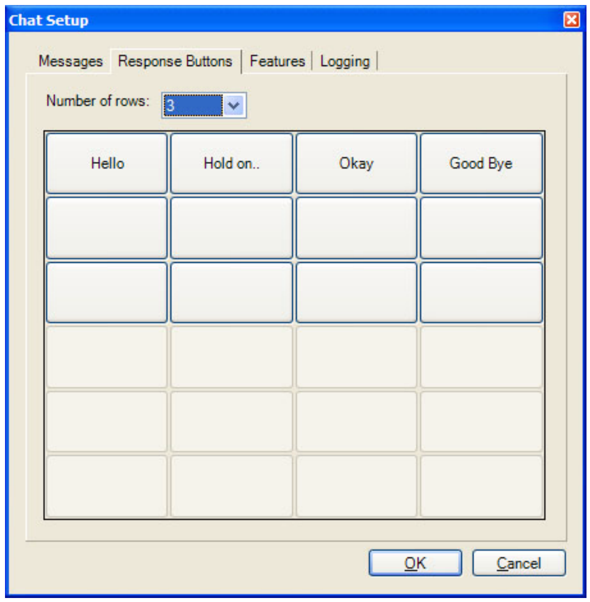
- **Dismiss new popup window** – Check the box and specify the time (in seconds) when no response is seen when a new message arrives. This will tell Chat to notify the caller of no response after a certain length of time. The response message returned is "User didn't respond."
- **Play Wave file** – 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.

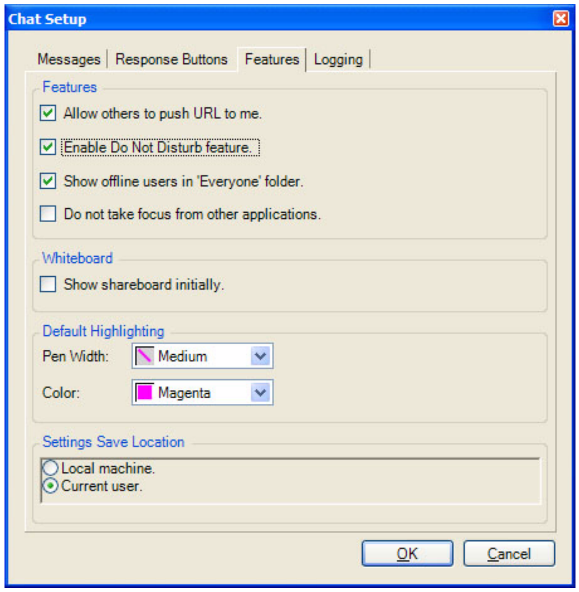
Response Buttons Tab

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.



Features Tab In the Features tab, two features can be enabled and the location where the settings will be saved is specified.



Features

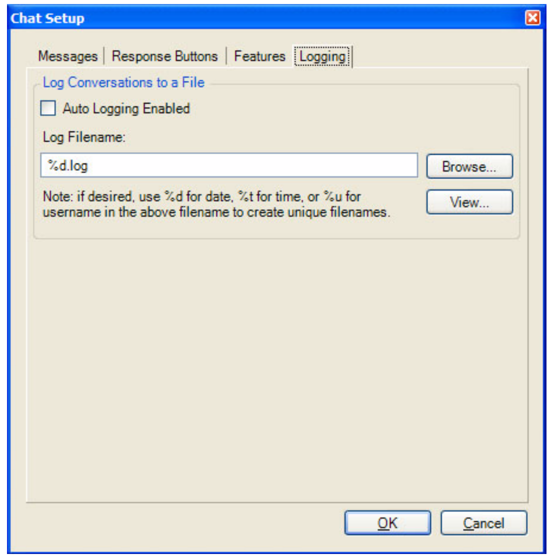
- **Allow Others to Push a URL to me** – Check to allow URL's to be pushed to this location by others. When disabled, other users cannot push a URL to open a browser window on your PC.
- **Enable Do-Not-Disturb Feature** – Enter a check mark in the box to enable the Do-Not-Disturb option. This option 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 checkmark 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 checkmark 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 when 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

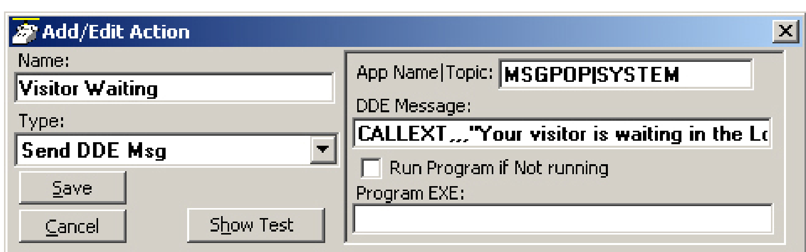
Example: The user sits at the front door and acts as the receptionist and needs to inform people when someone is waiting in the lobby.

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

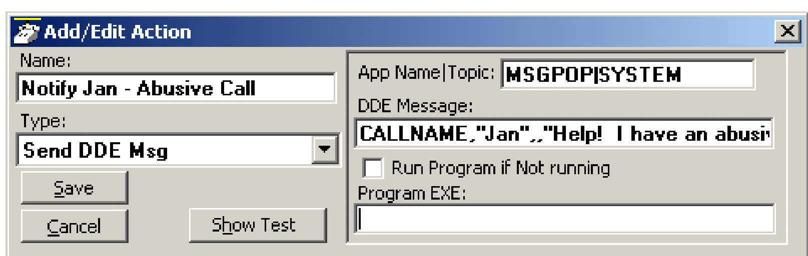
•C (or blank) – type message into user buffer but wait for user to press SEND

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:

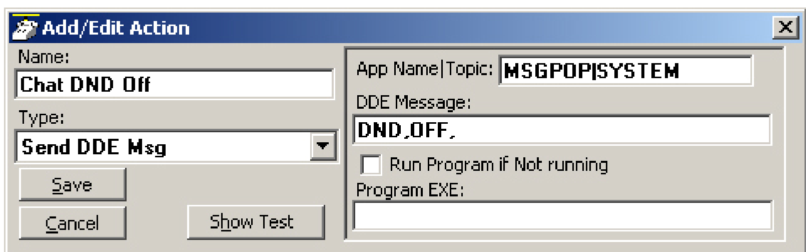
- DND = The command name.
- DND_State = Enter "ON" for turning on DND or "OFF" when turning off DND.
- "Message" = Enter the text message to be sent to callers reaching this station. If the message is left blank (opening and closing quotes only), then the message previously used will be displayed without 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,

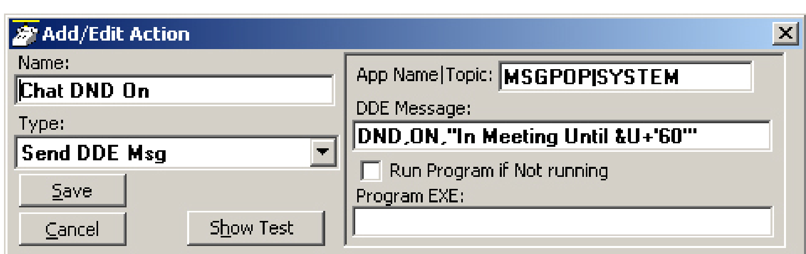


2. In Call Manager create another User Defined Action using the type Send DDE Msg and name it appropriately.

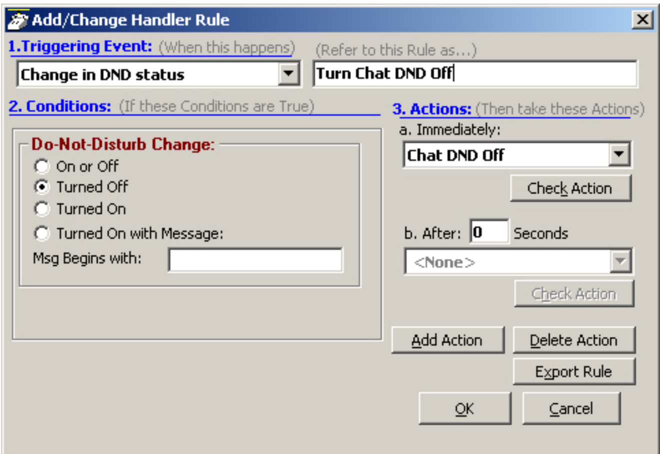
   In App Name|Topic enter: MSGPOP|SYSTEM

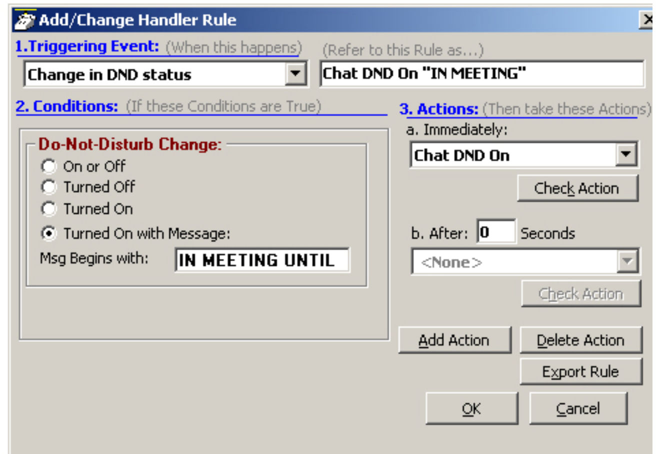
   In DDE Message enter: DND,ON,"In Meeting Until &U+'60""

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 = "*

NoteThe broadcast group names must contain the < and > or << and >> characters as part of the name.

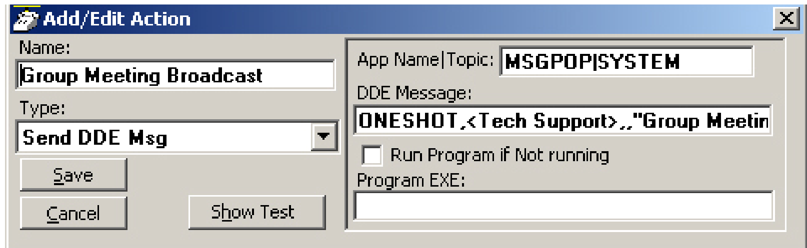
- Urgency = enter H if urgent message and leave blank if normal message.
- "Message" = The text message to be sent.
- Timeout = The number of seconds for popup to expire. If left blank it will be set to the default of 60 seconds.

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.

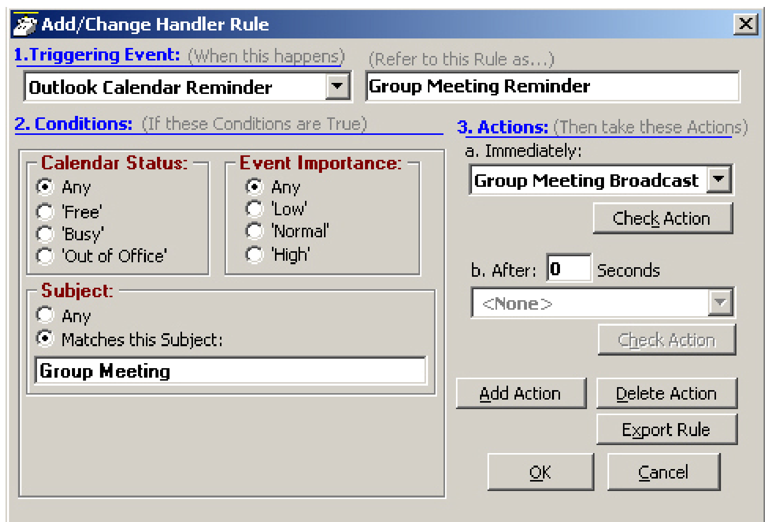
1. In Chat a Personal Group is created containing the members of <Tech Support>.
2. In Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name|Topic enter: MSGPOP|SYSTEM

In DDE Message enter: ONESHOT,”<Tech Support>”,H,”Group Meeting at &U+’15’”,60



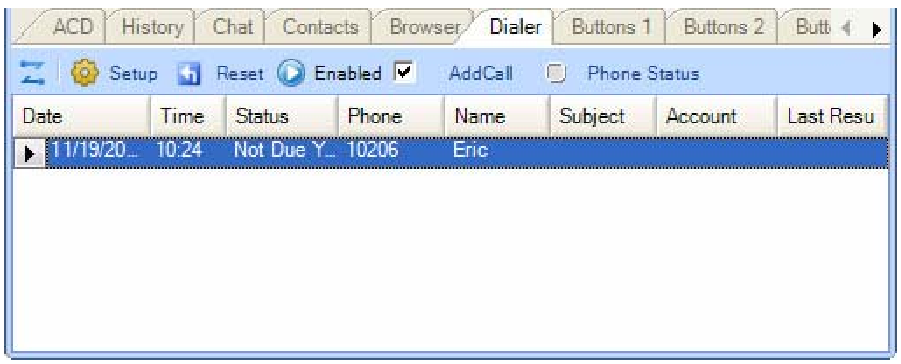
3. In Call Manager creates a Personal Call Handler Rule to trigger when a Calendar Reminder event occurs and the Subject matches Group Meeting. This trigger will result in the action Group Meeting Broadcast to be taken. The assumption is the Outlook meeting reminder is provided 15 minutes prior to the 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 Checkbox** – This is the checkbox 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 (i.e. “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 by importing.
- **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.

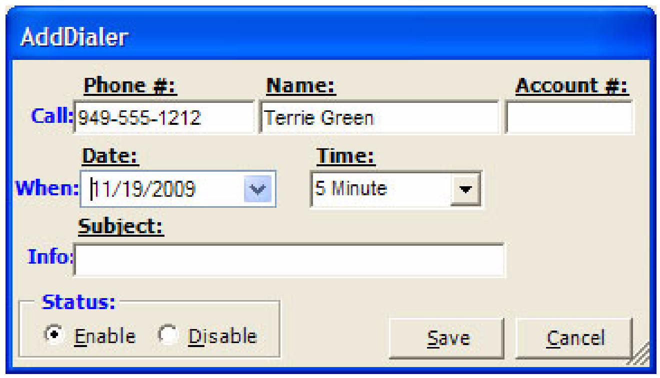
Sorting Entries

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.

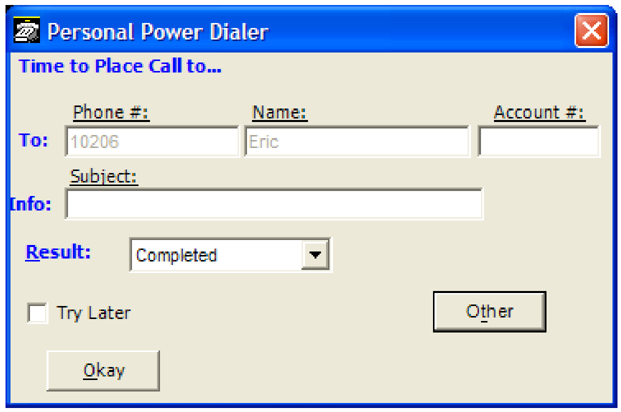


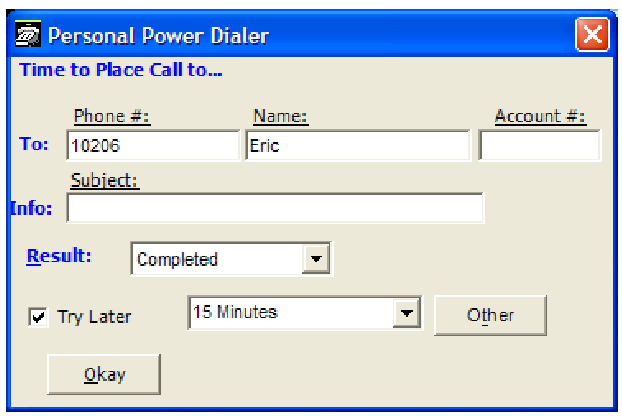
In the Date and Time drop down are used to set the date and time of your call. You also have a choice of selecting Today and Now to place a call immediately.

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.

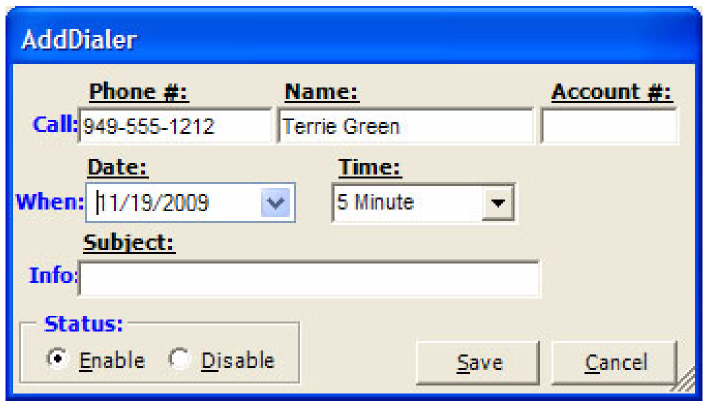




Adding Calls to the Dialer

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

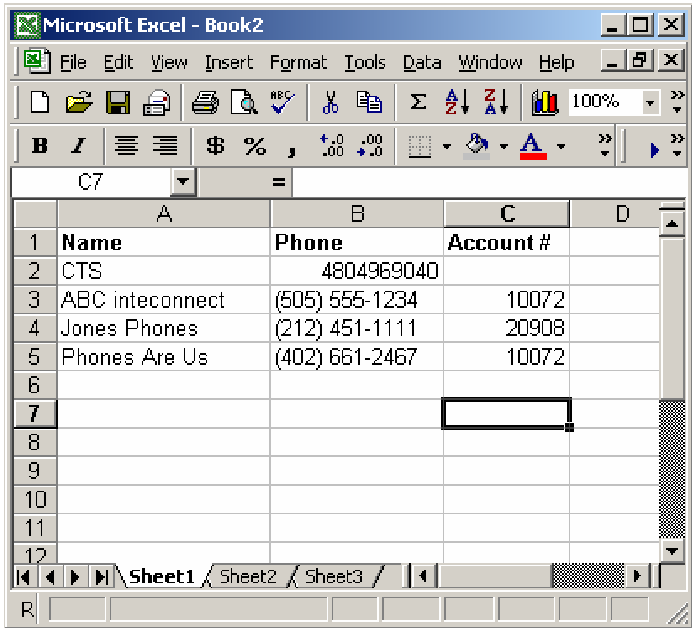
If you are using Microsoft Outlook, you can simply select one or more of your contacts in your Outlook Contacts database and simple use the mouse to drag them over and drop them on the power dials “Calls Window”. Each contact will then be individually added to the power dialer allowing you to specify the date/time of each call to be placed.

Drag-and-Drop from Call Manager Call History

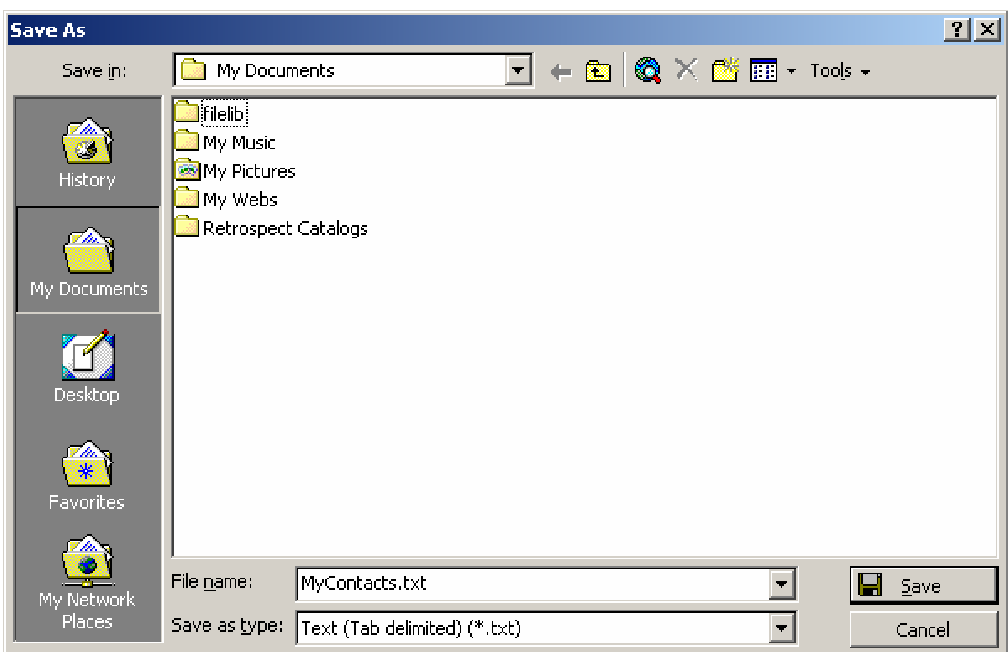
Often times you may want to place a call to someone you’ve called (or who called you) in the past.   Since the Call Manager call history provides a complete list of all calls placed and received, you can simply find the desired call in the call history and use the mouse to drag-and-drop a copy over to 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

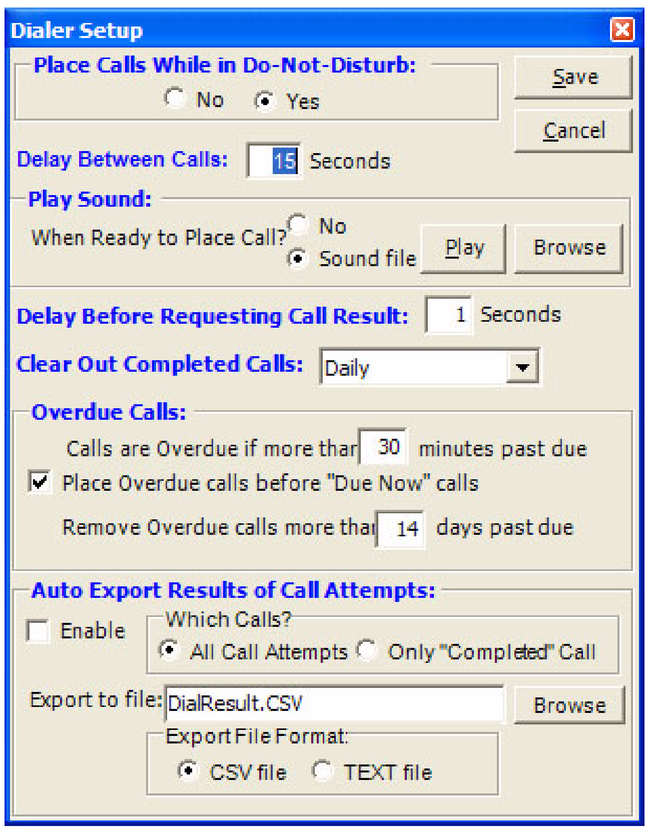
Any program that can export contacts into a "tab-delimited" or "comma-delimited" text file format can operate with the Dialer. Similar to the MS Excel file, those files can then be dragged/dropped or automatically imported into the power dialer.

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.

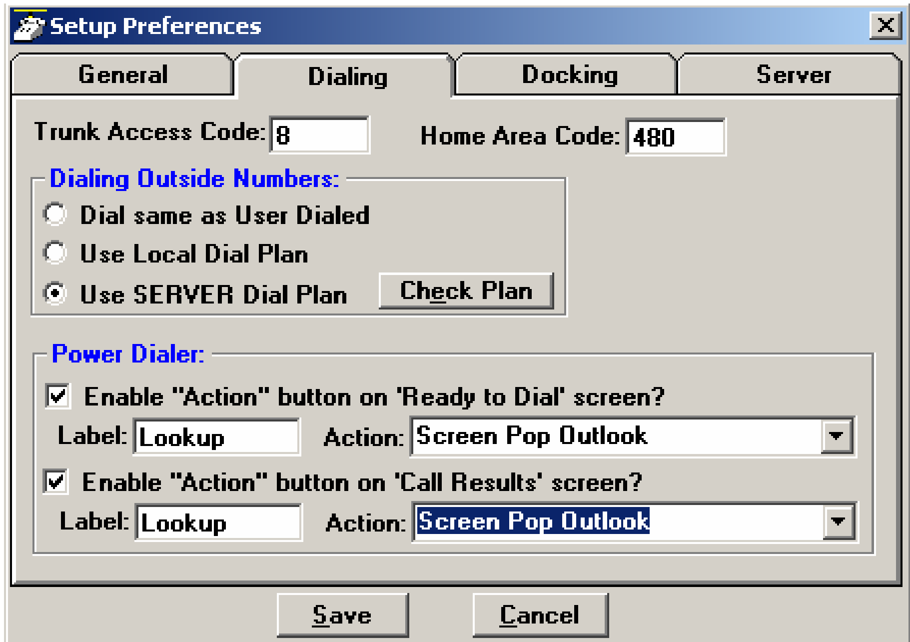
Note: The Call Manager provides a "Call History" feature for more permanent storage of calls placed and received. The settings options are as follows:

- 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:

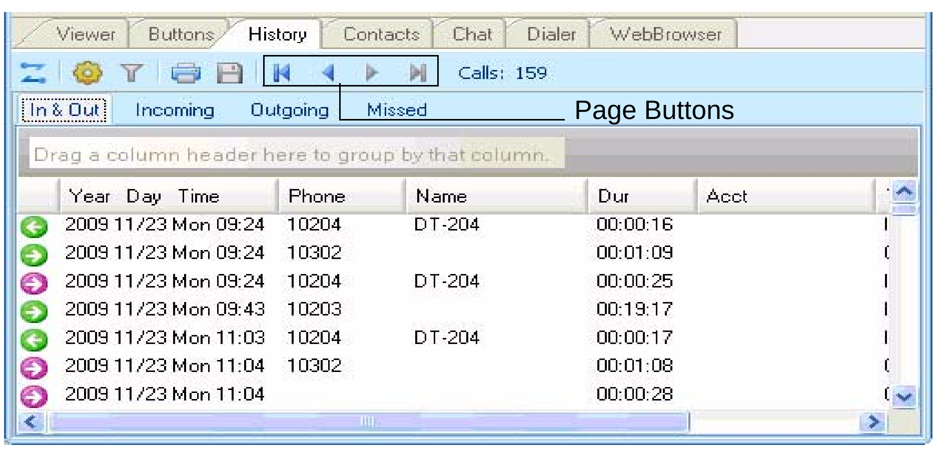
- One record per line with the following fields:
    - Name – Required – must be non-blank
    - Phone – Required – must have a minimum of 4 digits – can have punctuation {i.e. (480)496-9040}
    - Account code – Optional
    - Subject – Optional
    - Date – Optional – if not provided "Today" is assumed
    - 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.

History

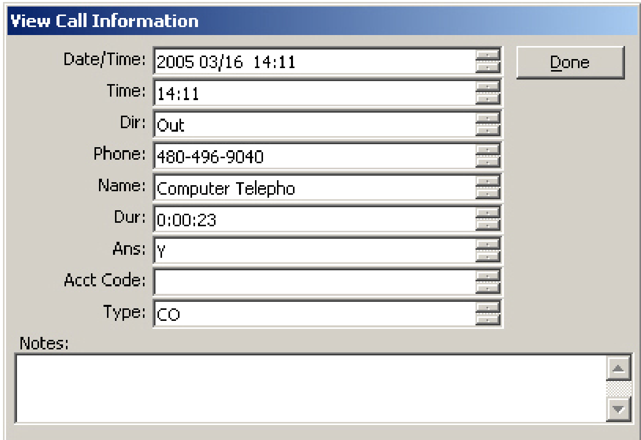
Call Manager automatically creates a log of calls dialed and received on the local telephone extension. This Call History provides the user with a valuable log of his or her phone calls.



- 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 (i.e. “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 (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”.

Buttons

All buttons in the Call Manager are created equal so that any button can be programmed as any other button. 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
- DSS Extension Key
- Web Key
- Run Program

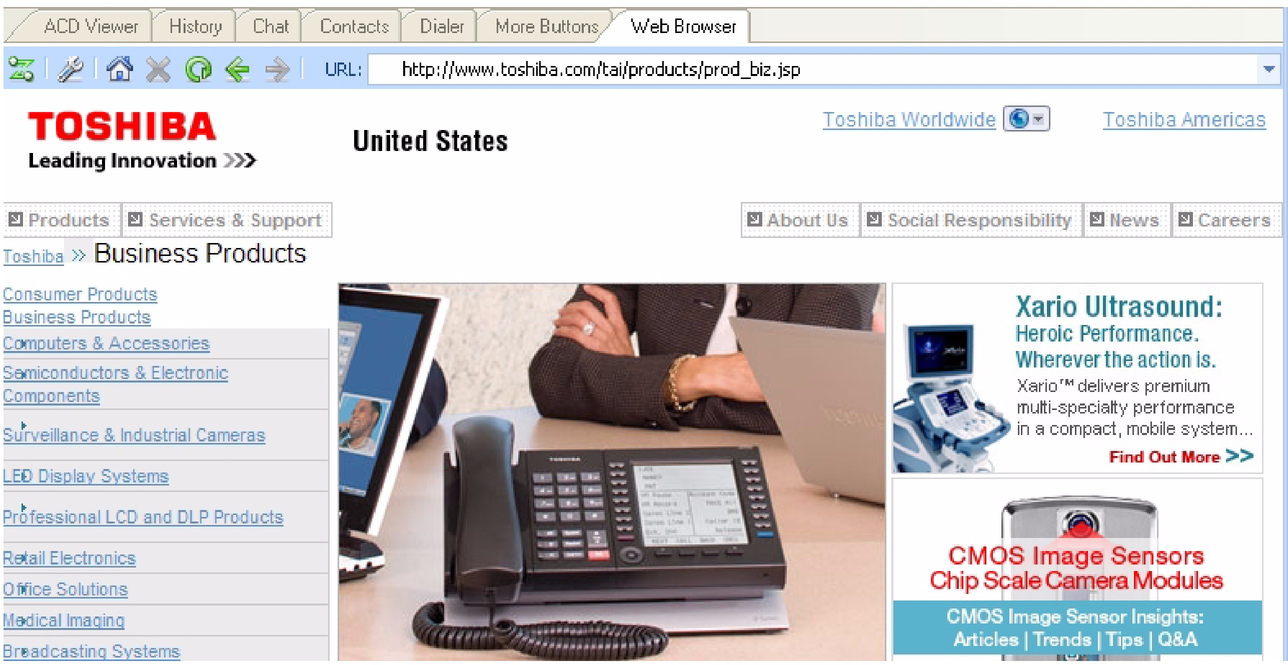
For more information, refer to Chapter 7 – Buttons.

Web Browser

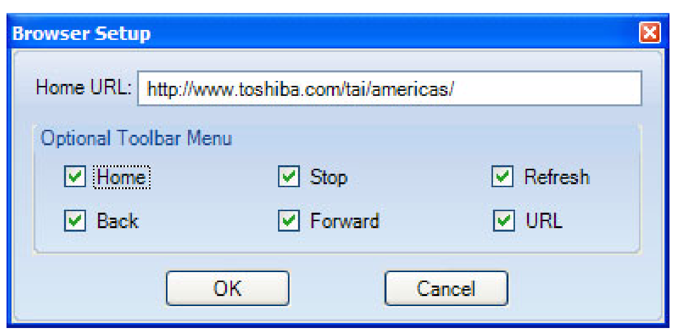
Call Manager provides an integrated web browser window for access to Internet or Intranet locations, or direct access to local HTML files. In addition to basic browsing, you can create custom web applications to extend the functionality of Call Manager for your business.

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.



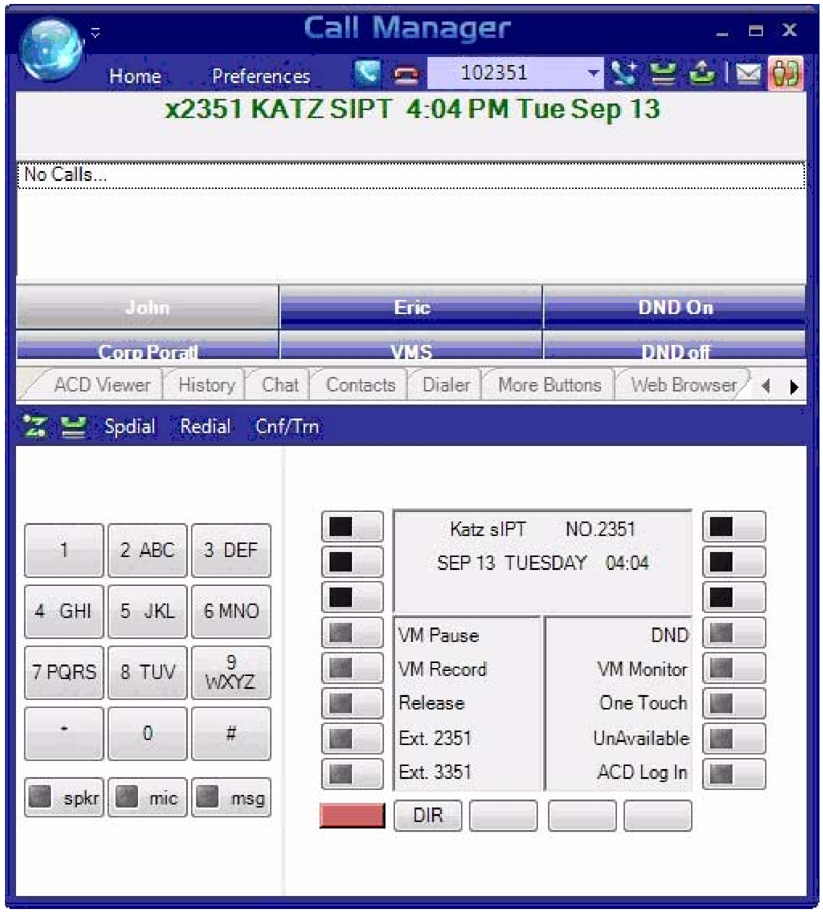
Click the setup icon to set Home URL and the tools to display in the toolbar (home, stop, refresh, go back, go forward, URL).



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, Programmbale 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 Enterprise Manager, and the SHIFT button must be disabled.



UCedge Client 12

This chapter covers the Toshiba UCedge unified communication application for Android and iOS devices. UCedge enables users to collaborate with others through communications such as Instant Message (IM) and phone calls with the capability by using Toshiba's Business/Telecommunications Systems – IPedge, VIPedge and Strata CIX.

This chapter includes user instructions on the following key features of UCedge that are available on an Android phone or tablet.

Important! Screen captures shown in this chapter are representations and may vary depending on the size and type of smartphone or tablet.

- UCedge Application Installation
- Login – phone and softphone
- My Profile
- Screen Rotation
- Calling – Incoming calls, Outgoing calls, and Call thru
- Contacts/Presence
- Instant Messaging
- Group Instant Messaging
- Broadcast
- History
- Settings
- Voice Mail

The UCedge Application installation procedures are based on the assumption that the user already has an account set up by the System Administrator.

Prerequisites

- Cellular data plan and/or Wi-FI access

Application Installation

The UCedge app requires internet access to the host system – VIPedge, IPedge or Strata CIX.

Note: Mobile devices require a data plan with an option to enable Wi-Fi access for locations with poor cell network service

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

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

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

Login

To get the UCedge application working on your phone, please obtain the following information from your System Administrator:

- Your user ID for UCedge
- Initial login password
- UCedge server Domain Name – Example: ax20140918.VIPedge.com
- SoftPhone Extension Number (if Softphone is used)
- SoftPhone Password (if Softphone is used)
- Voicemail DID call thru number
- Voicemail Pilot DN

When you have obtained this information, follow the steps outlined below:

1. Launch the UCedge client.

.

2. The main login screen displays (shown below).z

3. Enter your user ID and password.
4. Tap the Advanced Setup down arrow. The following screen displays.
5. Enter the FQDN of the UCedge server.

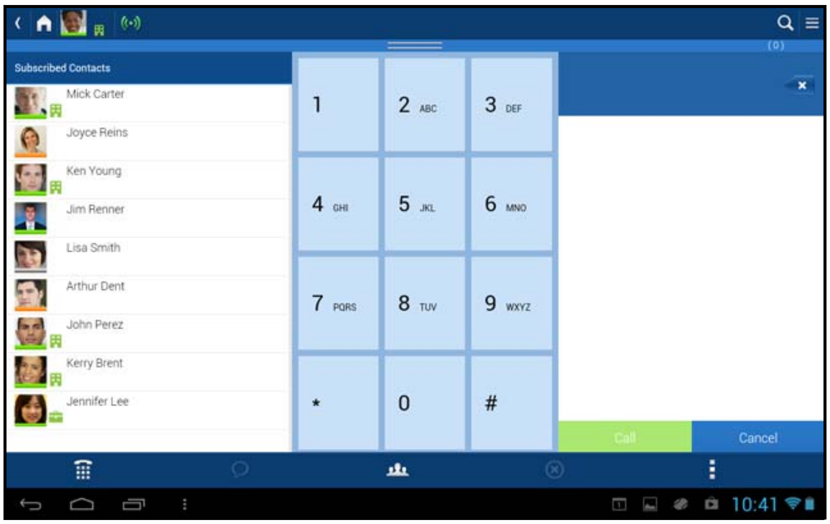
Figure 1 – App Login

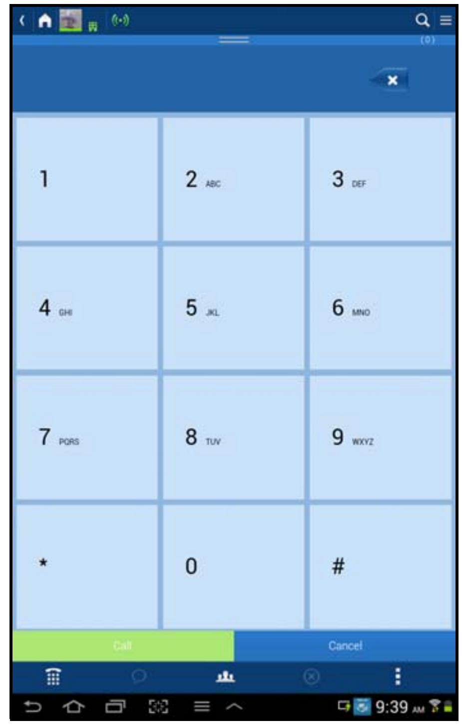
6. Tap **Preferred Device** and select SoftPhone or PBX phone. When PBX phone is selected, phone audio is provided on the desktop phone or other softphone, but not on this device.

Note: Pairing is when the UCedge client will use your desktop telephone as your telephone device. For Pairing, use PBX phone as the Preferred device.

7. If Softphone is selected, enter the IP Telephone / SoftPhone if programmed password. If your device is connected to Strata CIX, please enter the FQDN or IP address of MIPU card. Tap the **Login** icon. The following screen displays.

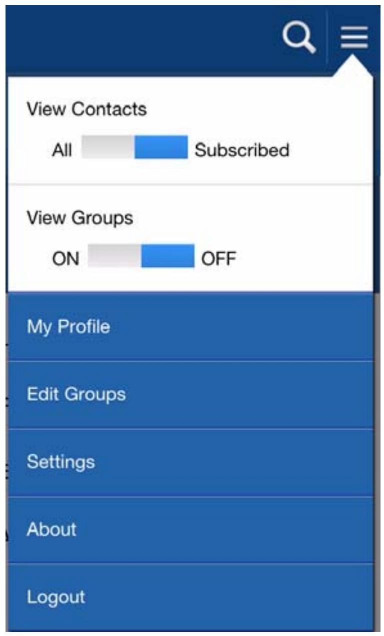
Note: The orientation of the screen can change based on the device (tablet or smartphone) and the rotation of the screen (shown below).



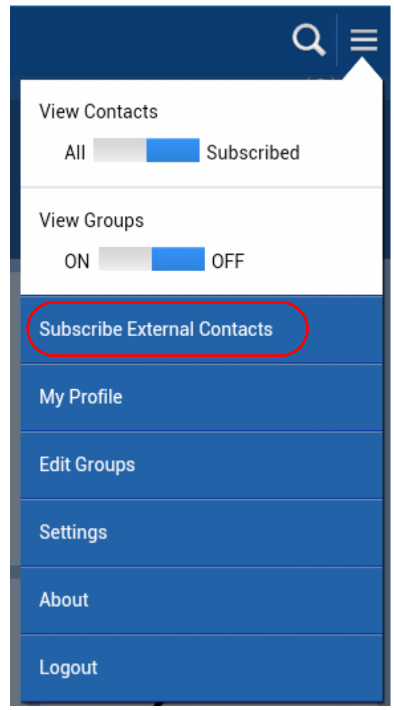


SETTINGS

Access various menus by tapping the Settings icon. Shown below are menus when connected to a VIPedge and IPedge system. The IPedge system supports Federation and therefore has the “Subscribe External Contacts” menu.



VIPedge



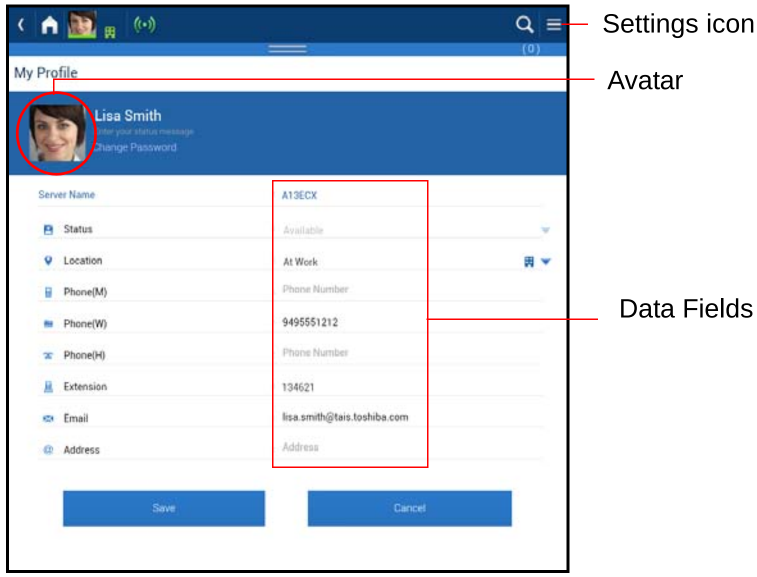
IPedge

MY PROFILE

The UCedge Profile screen is used to personalize your contact information. The My Profile is where you place your picture or have an avatar or any other appropriate picture placed.

To access the Profile Screen

Tap the Settings icon on the right corner, then select My Profile. The Profile screen displays (shown below).



Tap on the data field to enable editing of any parameter.

Edit Your Profile

Avatar Picture

1. Make sure you have a picture of yourself available on your phone or tablet. Or you can take a picture within the app with your phone. However, this picture is not stored in your picture gallery.
2. Tap the settings icon. Tap **My profile**. Tap the avatar icon .
3. In the dialog box navigate to the picture on your phone.

Note: You can take a photo with your phone or tablet from this screen. Follow the prompts to take then use the photo.

Edit Your Screen Name

1. Tap your profile name, the name next to the avatar.
2. Your device keyboard should appear. Enter your name.
3. Enter your phone number by tapping the Phone number field. You cannot save your profile if the phone number is empty.
4. Tap Save.

Edit Your Email Address

1. Tap your profile name, the name next to the avatar.
2. Your device keyboard should appear.

3. Enter your email address by tapping the Email field. You cannot save your profile if the email address is empty.
4. Tap Save.

Edit Phone Number

Tap the on Phone (W) data field to enter the correct work phone number or extension.

DEVICE SETUP

1. Login to the UCedge client. Tap the settings icon in the top right corner.

Figure 2 – Settings Menu Icon

2. Select Settings.

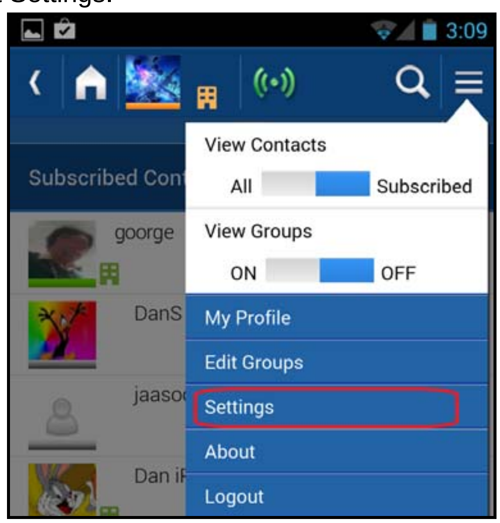


Figure 3 – Settings Menu

Voicemail Setup

3. To use the visual voice mail or Callback/Callthru feature, Voicemail information must be configured. Select Voicemail Settings.
4. Enter voicemail Mailbox number, mailbox password, VM DID call thru number (a DID Number that will ring into the voicemail), VM Pilot Number, the Cell Phone No. of this phone.
   Leave the Cell Phone No. blank if you're using a tablet without a cellphone.
5. Tap the Save icon.

6. The UCedge Client App is ready to use. The menu icon, three vertical dots, is in the lower right corner.

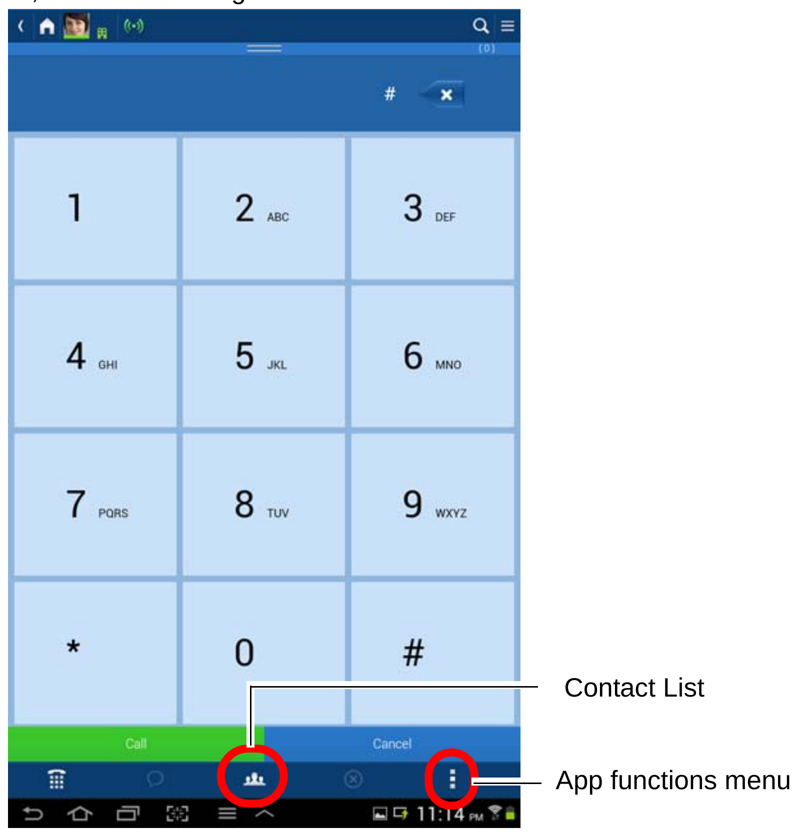


Figure 4 – UCedge App Menu

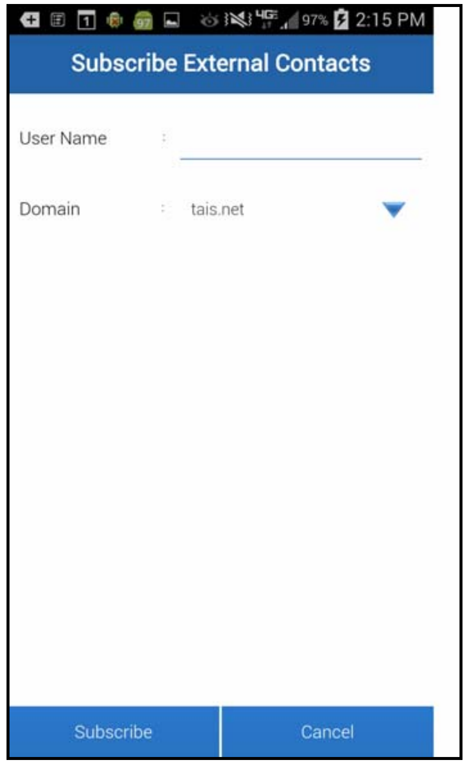
7. Tap the menu icon and you will see icons for Contact List, Voicemail, Call, Broadcast, IM, History and Close functions.

8. Tap this  icon to display the Contact List.

SUBSCRIBE EXTERNAL CONTACTS

This feature is available to users connected to an IPedge system.

1. Tap Settings icon, then select Subscribe External Contacts .
2. Enter the User ID of the person that you would like to connect/network with. This ID is called Jabber ID and this must be obtained from the person on the external server.



3. Select the external server from the Domain drop down. Consult your System Administrator if you do not see the appropriate server.
4. Tap Subscribe. The contact that you are trying to connect with must accept your subscription in order for Presence and IM to work.

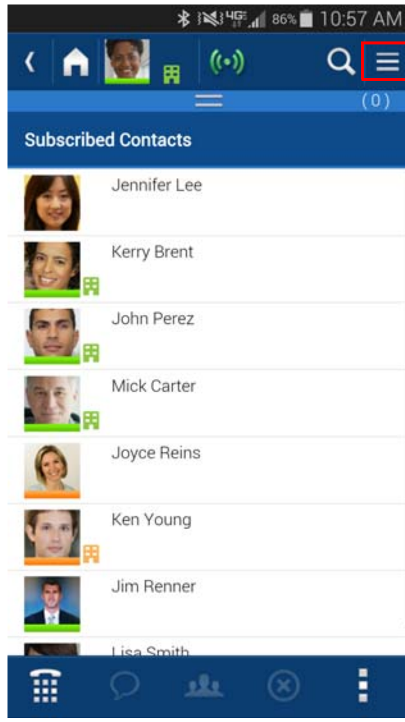
LOCATION

See “Location” on page 174.

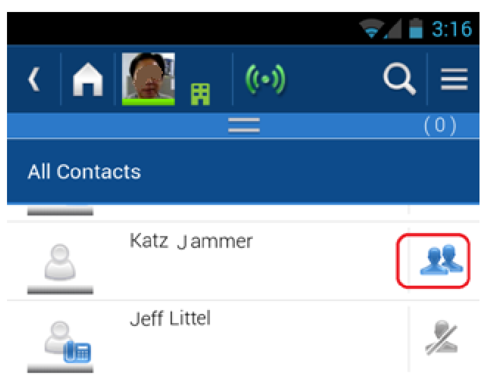
CREATE the SUBSCRIBER / CONTACTS LIST

The subscribed contacts list (shown below) is a subset of the phone system and personal contact list on your device. This allows you to find users easily and see their presence data. The Contacts can be sorted. Device contacts are sorted by email ID, therefore Contacts without an email are not incorporated.

1. Create a subscriber list, or add to your list, by tapping the setting icon.



2. In View Contacts select All.
3. In the All Contacts list tap the blue contacts icon to add the user to your Subscribers List.



Notes:

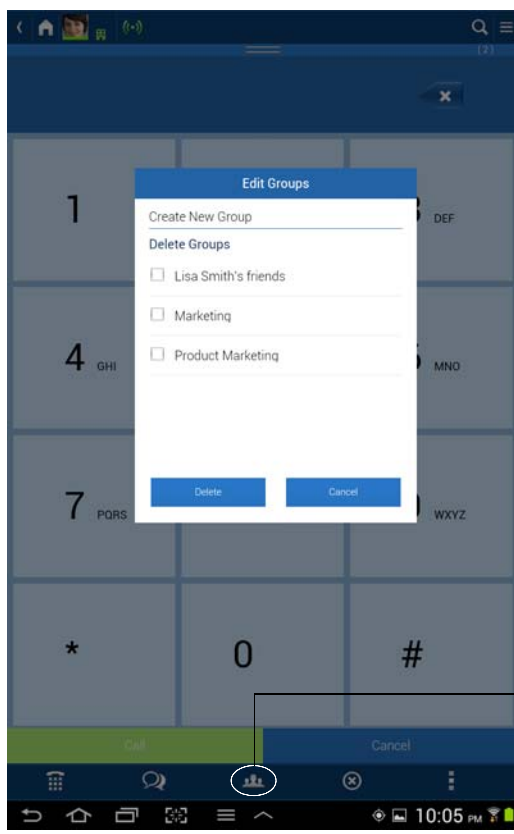
- Device contact displays entries that have the email address. Add the email address to the contact from Android/iOS contact app to use the device contact from UCedge app.

- Use Grouping to browse contacts. Sorting with no grouping mixes up the device contacts and Corp contacts, and as the result, it may seem disorganized.
- Subscribing external contacts can be initiated by an IPedge user and accepted by the external user. However, this kind of subscription cannot be initiated by a VIPedge user.
- Extension information is not available for external subscribing users. Therefore, if IPedge and VIPedge users subscribe to each other, the extension number should be manually configured in one of phone number fields.
- When using multiple devices, you must accept the subscription from each device.

GROUPING

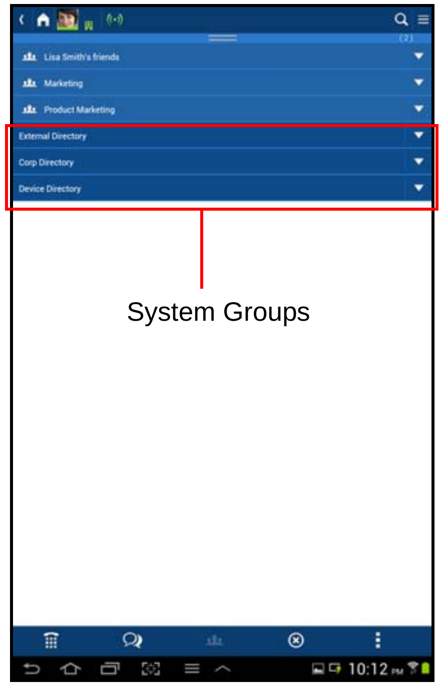
To group contacts or to edit groups:

1. Tap the Settings icon.
2. Select Edit Groups.
3. Tap Create New Group.
4. Type in the name of the group (shown below).
5. Select the contacts to be grouped.
6. Tap the Create button.



Tap Contact List icon to view groups

View Groups Tap the Contact List icon (shown previous). The following screen displays.



Notes:

- The External Directory, Corp Directory and Device Directory are system groups that cannot be changed.

ANSWER A CALL

When a call rings the display will show the caller ID.

Tap the Answer icon to connect:

Notes:

- Answer and hang up using the UCedge application. The Answer/ hang up button on the Bluetooth device will not work for the softphone, and the headset will get disconnected.
- When receiving two calls simultaneously from the softphone and cell phone, reject the second call. Do not talk on both softphone and cell phone at the same time.
  If you need to answer the softphone call while on the cell phone call, hang up the cell phone and answer the softphone call or place it on hold to talk on the cell phone call. The cell phone takes over the Bluetooth device when it starts ringing, and the softphone switches to the earpiece from the Bluetooth automatically if you are on the softphone call with the Bluetooth device.
- When the app uses the PBX Phone mode (pairing mode), there is no ringing tone/vibration is provided. In iOS, there is no Call Window pop up while Android app pops up the Call Window.

Answer a Call on a Locked Screen

When the device screen is locked; for an incoming call a call window will pop up. Accept or reject the call.

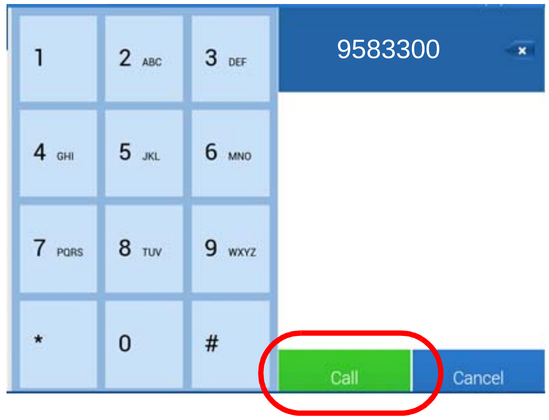
Note: When an incoming call arrives when the screen is locked, the call window is presented so that you can answer or reject the call. The user may see the app screen instead of the password entry screen when the user wakes up the device. In this case, the user can tap the device Home button to go to the password entry screen to unlock it.

MAKE A CALL

To place a call:

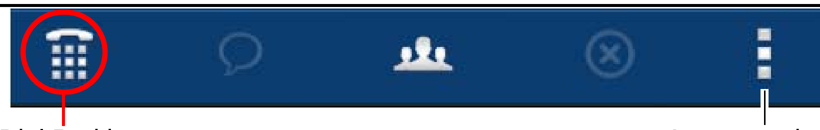
Dial a Number

Dial the number using the telephone dial pad then tap the Call icon.



Use the Subscriber List

If the subscriber list is not visible tap the App function menu icon. Tap the Contact List icon. Refer to Figure 4. Tap to highlight an entry then tap the Dial Pad icon.



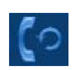
Go to the Settings icon and toggle the “View Contacts” slider to switch between the full users list and your subscriber’s list.

Transfer a Call

There are two types of transfers: Conference / Transfer (screened) and Unscreened Transfer. This procedure below can be used to form a conference or perform a screened transfer.

1. While on a call tap the Add user icon  .
2. Select a contact or dial the number of the next person.

   When calling from the Subscribers list the first person will go on hold.

   When calling from dial pad the first person goes on hold when the call button is tapped.
3. To drop the called line and return to the held party, (for example: busy or voice mail) tap the  icon. If the disconnect icon  is tapped the held party will be transferred to the call person.

Conference

4. When the called party answers tap the Join key  to form the conference.

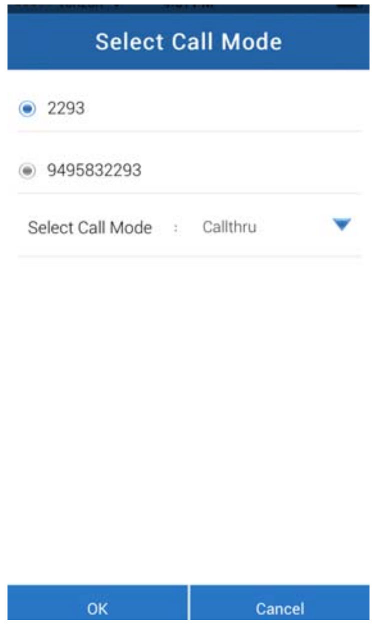
Notes:

- Feature access code may not be supported from the softphone when the total number of digits exceeds 6 digits.
- Phantom DN, GCO, Pooled line is not supported by the softphone or paring mode. Please remove these settings from the phone.

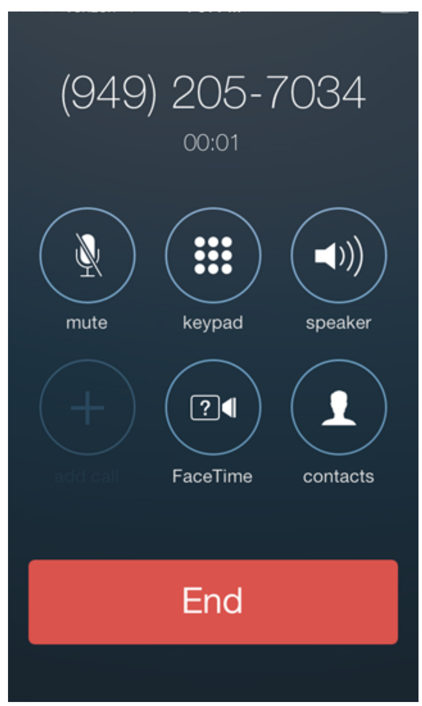
Callback/Callthru

To make a Callback/callthru using a cell phone, folow these steps:

1. Tap the contact (it will turn blue).
2. Tap the phone tab or call icon to call.
3. Select a number to dial.

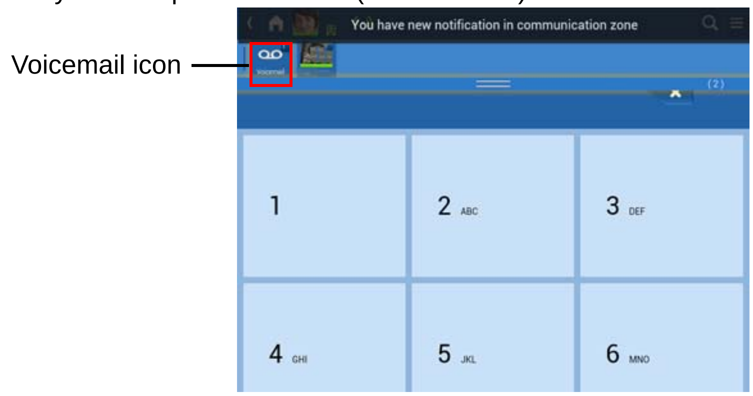


4. When Call thru is selected, the operation is transparent to the user, and the system will connect the cell phone to the destination. When Call Back is selected, the system will call the cell phone first, and the user needs to press 1 to initiate the call to the destination.



Retrieve Voice Messages

When a voicemail message is received on your device a new message alert will appear briefly at the top of the screen (shown below).



1. Tap the voicemail icon to listen to your messages.
2. Or Tap the App Menu icon .
3. Tap the voicemail icon .
4. List of voicemail messages will display. Tap expand icon on the right to show the messages in each category.
5. Tap a message in the list to high-light then tap the Play button on the message to play the message.

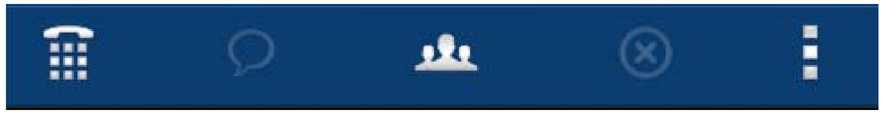
Delete a Message

To delete a voicemail:

1. Tap to highlight the message you want to delete.
2. Tap the apps menu icon.
3. Tap the delete (trash can) icon.

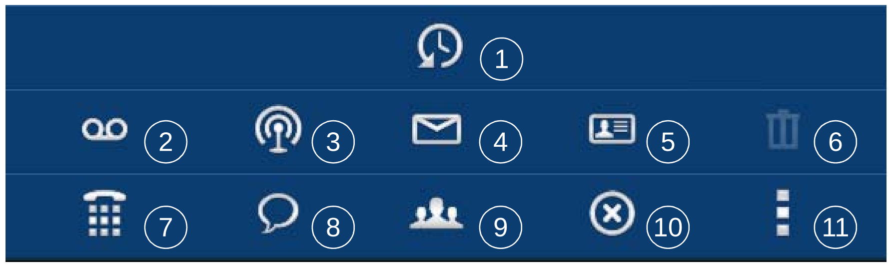
APP MENU

While the UCedge app is idle the menu bar across the bottom of the screen will be viable below the telephone dial pad.



Tap to dial the selected user	Tap to open the User List	Tap to open the App Menu

Opening the App Menu displays the features available based on the context of the UCedge device when opened.



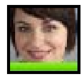
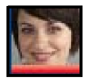
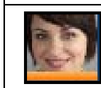
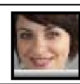
1. **History** – Displays the call and IM history.
2. **Voicemail** – Tap this icon to retrieve your voicemail messages.
3. **Broadcast** – Instant Message (IM) paging. Select the users then tap this icon to send an IM text message. This is a one-way message. Users cannot reply.
4. **Email** – Select a user then tap this icon to open an email message to the selected user.
5. **User Profile** – Select a user then tap this icon to view that user's profile information. If the user has saved a custom location it can be displayed here.
6. **Delete** – When an item that can be deleted has been selected this icon will highlight.
7. **Call** – Select a user then tap this icon to call that user.
8. **Instant Message** – Select one or more users, tap this icon to start an IM session. This icon toggles between a Chat icon and Group Chat icon
9. **Contact** – Tap this icon to display the list of users. The display will be all users or only your subscribed users. Select which list by open your settings. Refer to Figure 2.
10. **Remove** – Remove the selected party or end the communication.
11. **App Menu** – Tap this icon to open the App Menu, tap again to compress the menu.

PRESENCE

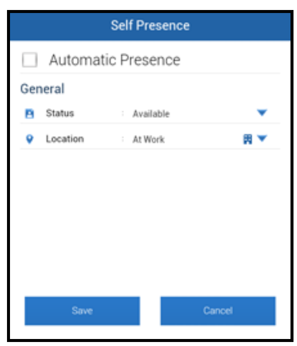
A user's presence consists of the following:

General Presence (Status), Location, Activity, and Comments

By default, general presence is changed automatically based on activity. You can set your general status manually or System (Auto) to any of the following:

Icon	Color	Status	Description
	Green	Available	On-line and can be contacted.
	Red	Busy DND	On a call or some activity. Do Not Disturb – When this status is selected, all communication is automatically blocked.
	Yellow	Away	Not at desk.
	Grey	Off-line	Signed out, network failure or intentionally set by user.
		Reset	

To change your Self Presence, uncheck the Automatic Presence checkbox (shown below), then change your Status and Location.



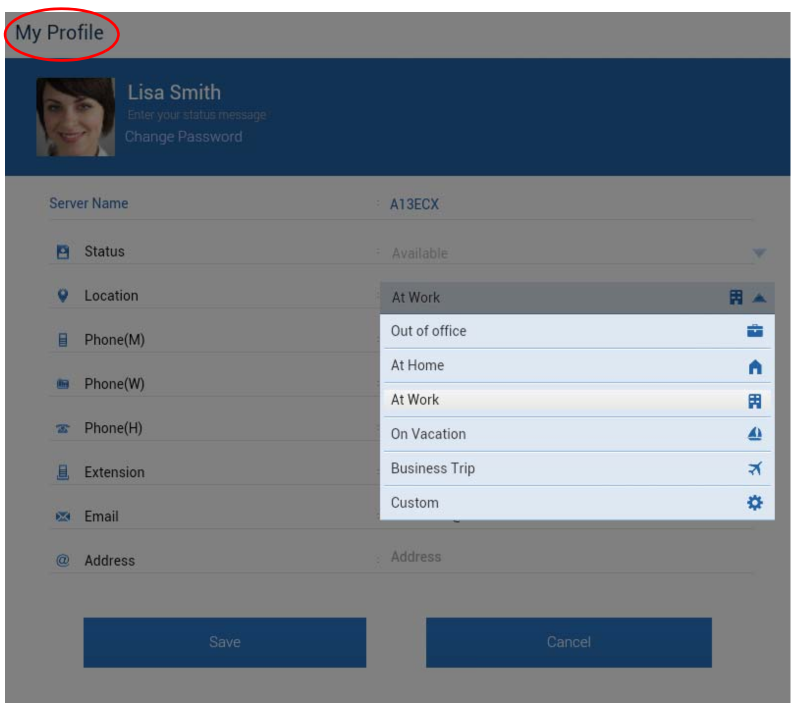
Notes:

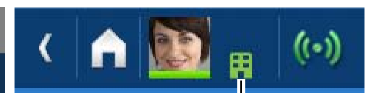
- If the device sleeps while on a call, the presence status may get stuck in DND. Wake up the device to correct the Presence.
- Multiple Devices:
  - When using multiple devices, set the same manual presence status on each device. Otherwise, the presence may be updated by another device with a different presence status. Therefore, when changing status, ensure that all devices are set to the same status. For example, to set the Auto Presence, change all devices to Auto Presence.
  - When all the devices are set to Auto, each device may detect a different status such as Away or Available. In this case, other users will see the last updated presence.

- Call history may show the same call history entries twice when multiple devices are used.
- Upgrade the software or login from one device at a time and wait for the completion before upgrading or logging in from another device.

Location The location indicator shows other users whether you are in, out, busy or away from the office. The default location is ‘office.’ The location selected remains set until you change it or you login to the UCedge app. At login the location will reset to office.

1. Changing the status of your Presence can be accessed from Settings menu > My Profile. Or tap the presence icon at the top left corner of the screen (shown below).
2. Tap to select your location from the pull-down list.

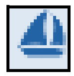
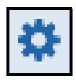




Presence Icon

3. Click on the **Save** icon.

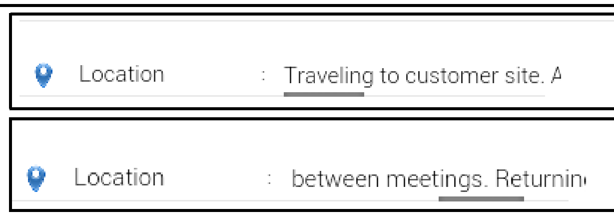
You can set any of the following locations. The color of these icons change depending on the Presence Status set.

Icon	Status	Usage
	Out of Office	On a customer visit, etc.
	At Home	At Home – May or maynot be working from home.
	At Work	When working at your office.
	On Vacation	Signed out, network failure or intentionally set by user.
	Business Trip	Travelling on work.
	Custom	For anyother message.

The custom setting allows you to enter any location information. The custom location can be up to 128 characters in length. The custom location icon will be displayed.

Note: The text entered into the custom field is deleted when the location is changed, resets to default, or you change the custom entry.

To see the text of a custom location select the user then tap the V-card icon in the app menu. The location display is approximately 20 characters wide. If more characters were entered swipe the location field to scroll.



Swipe finger to scroll.

Full text reads:
Traveling to customer site. Available only between meetings. Returning Tuesday.

HISTORY

To view your call history tap the history icon.

To place a call from history list find the call in the history list then tap the call icon.

Instant Message (Chat)

Instant Messaging allows you to send a message to one of the users. To start a chat session:

1. Display the Users list.
2. Tap a user.
3. Tap the Chat icon .
4. Tap in the ‘Type your message here’ box to call up your keyboard.
5. Tap the **Send** icon to send your chat message.

When a chat message is received at your device a new message alert will appear briefly at the top of the screen. Tap the pulsing bar at the top of the screen to open the chat message.

Instant Replies

Sorry, I cannot take your call right now.

This page is intentionally left blank.

I will call you in a few minutes,

I’m in a meeting. call you later.

I’m busy right now. please text me.

I’m busy right now. please email me.

GROUP CHAT

The Group Chat allows you to send the Chat message to two or more users at the same time.

1. Display the Users list.
2. Tap all of the users.
3. Tap the Chat icon changes to a group chat icon .
4. Tap in the ‘Type your message here’ box to call up the keyboard.
5. Type your message.
6. Tap the **Send** icon to send your chat message.

Notes:

- If the person sent the chat message is not logged into the system the message may not be delivered. There will be no error message.
- If you have exited the chat when a chat message is returned it will be treated as a new message.

BROADCAST

The broadcast function is a one-way broadcast message.

1. Display the users list.
2. Tap to highlight the users to which you wish to send the message.
3. Tap the Broadcast icon.
4. Type your message.
5. Tap the **Broadcast** icon  .

Follow Me Configuration

1. Login to EMPA by following the URL provided by the Administrator to configure Follow Me.
2. In the Login page:

   Username: Ext Num (ex. 3351)

   Password: Ext Num (ex. 3351)
3. Tap Submit
4. From EMPA Main Page, select Application > Messaging > Mailboxes > Schedule > Personal Schedule.
5. Select New Schedule > Time Handle = Always
6. Tap Destination Box, Destination =1+Cell number

Note: VIPedge only supports 7 and 11 digit dialing.
10 digit dialing is not supported.
Priority =20, Time out =32
If multiple destinations have the same priority, they are called simultaneously. If the priority is different, each destination will be called sequentially. One of the destinations can be the user's cell phone.

7. Tap Save.

   Follow Me Active = D. and auto attendant.
8. Tap Save to save personal call handling assignment.

Follow Me call may be routed to the cell phone based on the Follow Me configuration.

Receiving / Making a Call

When receiving a Follow Me call, press **1** to accept the call.

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