Voice

Data

Internet

AltiView™ 4.5
User Guide

ALTIGEN
COMMUNICATIONS

AltiView™

for AltiWare Open Edition (OE) Release 4.5

Manual

Revised: 02/2002 4503-0001-4.5

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Toll fraud is committed when individuals unlawfully gain access to customer telecommunication systems. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. AltiGen Communications, Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although AltiGen Communications, Inc. has designed security features into its products, it is your sole responsibility to use the security features and to establish security practices within your company, including training, security awareness, and call auditing.

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Warranty

What The Warranty Covers

AltiGen Communications warrants its hardware products to be free from defects in material and workmanship during the warranty period. If a product proves to be defective in material or workmanship during the warranty period, AltiGen Communications will, at its sole option, repair, refund or replace the product with a like product.

How Long the Warranty Is Effective

All AltiGen Communications products are warranted for one (1) year for all parts from the date of the first end user purchase.

Whom the Warranty Protects

This warranty is valid only for the first end user purchaser.

What the Warranty Does Not Cover

1. Any product on which the serial number has been defaced, modified or removed.

2. Damage, deterioration or malfunction resulting from:

   a) Accident, misuse, neglect, fire, water, lightning, or other acts of nature, unauthorized product modification, or failure to follow instructions supplied with the product.

   b) Repair or attempted repair by anyone not authorized by AltiGen Communications.

   c) Any damage of the product due to shipment.

   d) Removal or installation of the product.

   e) Causes external to the product, such as electric power fluctuations or failure.

   f) Use of supplies or parts not meeting AltiGen Communications' specifications.

   g) Normal wear and tear.

   h) Any other cause which does not relate to a product defect.

3. Shipping, installation, set-up and removal service charges.

How to Obtain Service

End user customers should contact your Authorized AltiGen Dealer for service.

Authorized AltiGen Dealers must follow the steps below for service:

1. Take or ship the product (shipment prepaid) to your AltiGen distributor or to AltiGen Communications, Inc.

All materials being returned to AltiGen must have an associated RMA number. RMA numbers are issued by AltiGen Customer Service and can be obtained by calling 1-888-ALTIGEN (258-4436) or faxing an RMA form, available from the AltiGen website at http://www.altigen.com/partner/product.htm, to 510-252-9738, attention to Customer Service. AltiGen reserves the right to refuse return of any material that does not have an RMA number. The RMA number should be clearly marked on the outside of the box in which the material is being returned. For example:

> Attn.: RMA # 123
> AltiGen Communications, Inc.
> 47427 Fremont Blvd.
> Fremont, CA 94538

Upon authorization of return, AltiGen will decide whether the malfunctioning product will be repaired or replaced.

2. To obtain warranty service, you will be required to provide:

   a) the date and proof of purchase

   b) serial number of the product

   c) your name and company name

   d) your shipping address

   e) a description of the problem.

3. For additional information contact your AltiGen Dealer or AltiGen Communications, Inc. via e-mail at support@altigen.com.

Effect of State Law

This warranty gives you specific legal rights, and you may also have other rights which vary from state to state. Some states do not allow limitations on implied warranties and/or do not allow the exclusion of incidental or consequential damages, so the above limitations and exclusions may not apply to you.

Sales Outside the U.S.A.

For AltiGen Communications products sold outside of the U.S.A., contact your AltiGen Communications dealer for warranty information and services.

Installation

The following items are included in the AltiView 4.5 package:

- AltiView License Key

- AltiView 4.5 User Guide

If any of these items are missing or damaged, please contact your Authorized AltiGen dealer.

Client System Requirements

The client system must each meet the following minimum requirements. For server system requirements, see the *AltiWare OE System Installation and Administration Manual*.

- IBM/PC AT compatible system

- Intel 133 MHz Pentium

- Windows 98 (or higher), or Windows 2000, or Windows NT 4.0 or higher, Server or Workstation.

- 30 MB Hard Drive Disk Space

- 32 MB RAM

- SVGA monitor (800 x 600) with 256 color display, or better

- Keyboard and Mouse

- AltiWare OE Release 4.5 running on a server accessible to this client.

AltiView is call management software that runs with the AltiWare OE 4.5 system. The AltiView software can be installed on a Windows 95/98/2000 or Windows NT PC.

To install the AltiView client software, you can load AltiView client on a network server and then using your company's distribution software to deliver the AltiView client software to each desktop PC.

Most frequently, this means loading the software onto a shared network file server and copying the software to each desktop PC. Alternatively, you can use the AltiClient CD ROM to install the program on each desktop.

Session Licensing and License Upgrade Procedures

AltiWare OE (Release 4.5 or higher) comes with one free licensed connection to support an AltiView client.

You can upgrade to Contact Advantage (formerly Center), an application that includes AltiView as well as AltiAgent (for workgroup agents) and AltiSupervisor (for workgroup supervisors) by purchasing a Contact Advantage Server License and adding client sessions.

If you upgrade to Contact Advantage, session licenses can be added to the AltiWare server at any time and in discrete numbers: e.g. 4, 8, 16, and/or 32 simultaneous sessions.

- 8/14 Station/Session License
- 12/18 Station/Session License
- 24/30 Station/Session License
- 48/54 Station/Session License
- 72/78 Station/Session License
- Site (per Server)/Station Session License
- 8/14 Station/Session License

The AltiWare server does not need to be rebooted to activate these new connections.

Upgrading Licenses

To increase the number of simultaneous AltiView sessions, refer to the license activation and registration procedures in Chapter 2 - Software Installation of the *AltiWare OE System Installation and Administration Manual*.

You can verify the new number of extensions when you run AltiAdmin by selecting About **AltiWare…** on the **Help** menu, then clicking the **License Information** button to view a window that displays licenses and session information.

Installation and Setup

Pre-Installation Checklist

Before installing AltiView, please review the following checklist:

- Make sure that AltiWare OE 4.5 has been installed on the AltiServ system.

- Make sure that TCP/IP is enabled on both machines.

- Make sure the client is able to connect to the server on the network.

- Local administrator rights are required to install AltiView.

- Make sure License Key has been installed and activated.

Installing AltiView on a Client System

After completing the pre-installation checklist, proceed as follows on the client machine:

1. Exit any/all Windows applications.

2. Insert the AltiClient CD into the CD ROM drive.

3. Run the **Setup** program under AltiClient\ and follow the step-by-step installation instructions as they appear on the screen.

Uninstalling AltiView

1. From the Windows **Start** menu, select **Programs** → **AltiView** → **Uninstall AltiView.**

2. Click **OK** when the dialog box asks if you want to uninstall the program, and respond to any additional prompts.

Microsoft Outlook and Outlook Express Support

AltiViewsupports Microsoft Outlook 97, 98, and 2000, and Outlook Express 5.0, allowing you to obtain phone numbers to dial from a Microsoft Contact list. AltiViewalso lets you see the incoming calls that have a matching record in the Contact list.

AltiView that you to set up the Outlook Contacts list prior to using this feature in AltiView.

ACT!/GoldMine® Support

AltiViewsupports ACT! 2000 and GoldMine® 5.0/5.5 contact management software, allowing you to obtain phone numbers to dial from the ACT! or GoldMine® contact database list. Contact Advantage also lets you see the matching record from the contact database list of the incoming calls.

QuickNet Integration

AltiView 4.5 can be used in conjuction with QuickNet's firmware and hardware. If QuickNet hardware (phoneJACK or phoneCARD) and driver is already installed on the local machine, upon AltiView installation and logon, AltiView will then enable functionality to control real-time voice compression/decompression functions through a GUI.

Getting Started

AltiView 4.5 is designed for general **desktop PC users** in an AltiServ environment. With AltiView you can access, configure, and perform several of AltiServ's PBX functions directly from the desktop. These functions include call handling, call forwarding, voice messaging, extension monitoring, and One Number Access. In addition, AltiView integrates with contact management software including Microsoft Outlook and Outlook Express, ACT!, and GoldMine® for caller screen pops and dialing out from these powerful applications. This information can be stored to an internal or external CDR database for future review and analysis.

Logging In

Before you log in

When you launch AltiClient for the first time, you need to know either the server name or the IP address of the server you'll be linking to. If you use the server name and not the IP address, AltiServ replaces the name with the IP address, eliminating the need of a DNS (Domain Naming System) search.

To obtain the AltiServ IP address, ask your IT administrator.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet Service Provider. If you're using a low-speed connection, the login may take some time as a large amount of data is transferred to your desktop.

To log in:

1. Run the AltiView application and, if this is the first login to this AltiServ system, enter the server's IP address or name of the system you will be using. If this is not your first login, go on to the next step.

Figure 1.   Logging in

2. Enter your **Extension** number and **Password** assigned to your phone.

    Optionally, you can check the **Always save password** check box to store your login password the next time you access AltiView.

3. (Optional, for AltiAgent or Desktop) **IP Extension Integrated with** option (grayed out if your extension is not set up as an IP extension.)

    a. **NetMeeting** Option

        If you do *not* have an Internet Phone Jack or an IP phone and you want your AltiView desktop to access AltiServ as an IP extension, select the **IP Extension Integrated with** check box and set the dropdown list to **NetMeeting**.

        To do this, your extension must be set up as an IP extension by your system administrator and you must have Microsoft NetMeeting 3.01 or higher installed on your desktop.

        Refer to the discussion in the next section for more information on using IP extensions.

    b. **QuickNet** Option

If you have a **QuickNet** card and your extension is set up as an IP extension, select the IP Extension Integrated with check box and set the dropdown list to **QuickNet**.

4. Click **OK** to complete the login.

Logging In Remotely Using an IP Extension

You can access AltiView from a remote location by using an IP extension. All the call handling functions are the same as logging in locally, with the exception of the ability to configure One Number Access. You can pick up voice mail, forward local business office phone calls to another site such as a home desktop PC, and even receive the phone calls as you would at the office.

To use an IP extension, you must meet the following requirements:

- Your extension must be configured to use IP extensions by your system administrator.

- You must have AltiGen-certified IP phone/adapter equipment (QuickNet), or you can use Microsoft NetMeeting version 3.01.

Consult your system administrator or authorized AltiGen dealer for details on obtaining and using any of these options. The NetMeeting option is discussed in the next section.

To log in from a remote location using an IP extension:

1. If you connect to the Internet through a modem connection, establish a connection to your Internet Service Provider.

2. Log in using your Extension and Password as usual.

3. (NetMeeting users *only*) Select the **IP Extension Integrated with** check box and choose **NetMeeting** or **QuickNet** from the dropdown list.

4. Click **OK.**

IP Extensions Using Microsoft NetMeeting 3.01

To use NetMeeting 3.01 as an IP extension, you need the following:

- **A sound card.**

- **A Plantronics LS1 headset** connected to the sound card. A microphone and speakers should *not* be used since the speaker's output would be fed back to the microphone and cause severe echoes.

- **NetMeeting 3.01,** which is automatically installed with Windows 2000. You can check your system to see if NetMeeting is installed by looking under **Programs>Accessories>Communication** from the Windows **Start** button. If not, it is available for download from the Microsoft website at http://www.microsoft.com/windows/netmeeting/download/default.asp.

- **Additional system requirements** as listed on the Microsoft website at http://www.microsoft.com/windows/NetMeeting/SystemRequirements/default.ASP.

Note: AltiServ uses conferencing features that require the same data channels as NetMeeting. If NetMeeting is running, you will see a prompt reminding you to close the program.

In addition, processor-intensive applications will affect voice quality.

To make and receive calls using NetMeeting:

- Connect your headset to your PC. Use the AltiView Dial and call accepting functions as usual to make and receive calls.

IP Extensions Using QuickNet

To use QuickNet as an IP extension, you need the following:

- A **QuickNet card** (Internet phoneCARD or Internet phoneJACK).

- A **QuickNet hardware** and **driver**.

- **A headset** or analog phone connected to the QuickNet card. A microphone and speakers should *not* be used since the speaker's output would be fed back to the microphone and cause severe echoes.

Troubleshooting IP Connectivity

If problems occur, they may be due to a failure to connect to your ISP or due to firewalls at your office preventing direct access to the AltiServ server.
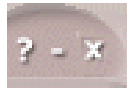
As a test, you can choose **Run** from the Windows **Start** menu, then enter

Ping *<IP address>* [ENTER]

where *<IP address>* is the AltiServ system you want to connect to. An example of the IP address format is 123.234.231.143

If you do not get a response, contact your LAN administrator for support.

Next, check to verify if ports are open.

Hiding or Exiting AltiView

When you minimize the AltiView desktop by clicking the **Minimize** symbol (the dash), it is hidden—it doesn't appear anywhere in the Windows desktop except as a phone icon in the tray in the lower right corner, as discussed below.

To exit AltiView entirely, right click the phone icon and select **Exit**.

Pop Up AltiView when You Get a Call

You can configure AltiView to pop up when you have incoming calls. Pop ups work when AltiView is hidden (minimized) but *not* when you have exited. See "Screen Pop, Audio Beep, and Auto Close" on page 39.

Using the Windows Tray Phone Icon

After you log in, the AltiView icon (a phone) is displayed on the Windows tray, normally at the bottom right of your screen. When you have new voice mail, the phone grows a small yellow envelope.

If the AltiView interface is not on your Windows desktop, but this icon appears in the Windows tray, you double-click it to open the AltiView main window, or you can right click it to pop up a menu, then select the AltiView window you want to open.

Resizing the Display

You can resize many AltiView windows using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.

Also, the field size for any field can be increased or decreased by pointing the cursor to either side of the field's main column. The cursor changes to a movable double bar (‖) that can be moved to resize the column.

Call States

AltiServ applications report the status of calls. A list of the states includes the following:

- *AA* - the call is being transferred to an Auto Attendant
- *Busy* - callee is busy or not available
- *Call Pending* - the call is placed into a workgroup queue
- *Conference* - the call is in conference
- *Connect* - the call is connected
- *Dial Tone* - a dial tone is present, AltiAgent is ready to dial out
- *Error* - receipt of an error tone
- *Hold* - the call is on hold
- *Hold Pending* - the call is being transferred or conferenced
- *Idle* - the extension is not in use
- *Music on Hold* - an extension user placed the call on hold to take another call
- *Park* - the call is parked
- *Play* - playing voice mail
- *Proceeding* - the outgoing call is in progress
- *Record* - recording an introductory message
- *Ringback* - caller receives this state while callee is ringing
- *Ringing* - there is an incoming call
- *Voice mail* - the call is in voice mail

Figure 2.   Status Field - AltiView main window

Error Messages

The following errors may be displayed as login or connectivity errors.

Error Message	Description	Solution
AltiServ connection limit has been exceeded.	No license was found OR more than allowed number of AltiView users have attempted to log on.	Maintain the number of AltiView license keys or add additional session licensing.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to AltiServ.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of AltiServ (if using the DNS name in the server field).
Cannot access voice mail list while mail box in use.	Mail box is in use by the AltiGen Voice Mail System and is temporarily unavailable.	Wait a while, then try again.

Error Message	Description	Solution
Mail service is unavailable. Please check with your administrator.	Voice mail service is not enabled on AltiServ.	Make sure voice mail service is started.
NetMeeting is already used by another application, so you cannot enable IP Extension Integrated with Net-Meeting.		Check for conf.exe in your computer's memory. If it's there, terminate it. Then retry logging in with the IP extension option.
Please register AlpInterface.dll (regsver32 AlpInterface.dll).	AltiLink uses this dll to communicate with AltiServ. It should be registered in user system.	Re-register this file. Type in DOS command window, **regsver32 AlpInterface.dll** Change directory to AltiClient directory, type **regsver32 AlpInterface.dll**
Required Option Pack License. Please contact your local dealer.	A Contact Advantage 4.5 license key is required but not installed.	Install Content Advantage license key in AltiServ system.
You have entered an invalid password. Please try again.	The password and confirmation box entries do not match.	Make sure you are entering the password correctly in both boxes.
You need to install NetMeeting to use "IP Extension integrated with NetMeeting."	You tried to log in with the IP extension option without an installed version of NetMeeting.	Install NetMeeting 3.01 or higher from Microsoft's web or FTP sites.
Cannot use "IP Extension integrated with Netmeeting."	You tried to log in with the IP extension option without an installed version of NetMeeting.	Confirm that your extension is set up as an IP extension and that Microsoft NetMeeting 3.01 or higher installed on your desktop

Error Message	Description	Solution
This version is not compatible with the version of AltiWare that is running. This can lead to inconsistent or no functionality. Please install the correct version before proceeding.	The installed version of AltiClient is outdated from AltiWare release.	Upgrade AltiClient to version 4.5 (install matching version of AltiClient).

Getting Started

Using AltiView

Once you log in as described in "Logging In" on page 5, the AltiView main window appears. This window provides tools to manage and monitor calls, to facilitate management of your personal contacts, and to configure your AltiServ phone and voice mail options. Configuration is described in *Chapter 4, Configuring Your Station Settings*.
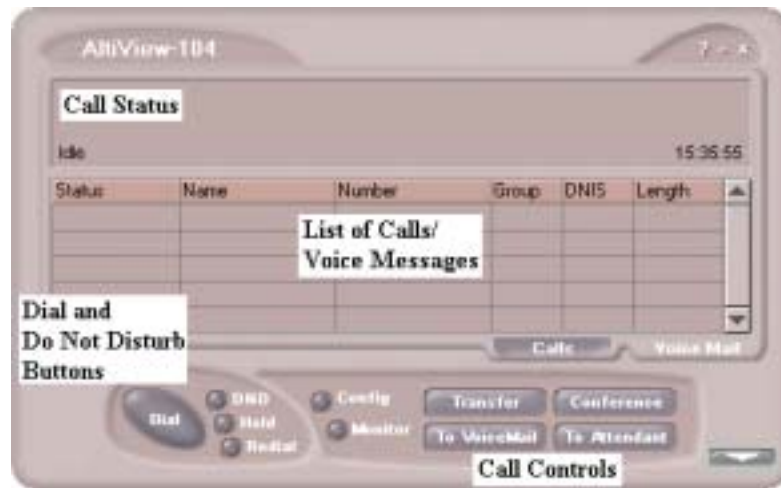

Figure 1.   AltiView main window

About the Main Window

The window consists of the following displays and buttons:

- The **Call Status** panel displays the status of the currently active call, a list of any calls on hold, and the current time.

- The Directory panel has two tabs: one showing a current **List of Calls,** the other showing a log of current and past **Voice Messages.**

- The **Dial** and **Do Not Disturb** functions provide buttons to *place, hold,* or *redial* calls, and to set your system to *DND* (Do Not Disturb). This turns off ringing and forwards all incoming calls according to your "Enable Busy Call Handling" settings. See "Busy Call Handling and No Answer Handling" on page 47.

> **Note:** Clicking **DND** here has the same effect as selecting **Enable Do Not Disturb** on the Call Handling tab of the Config window.

- The **Call Controls** provide call functions such as transferring the call or sending it to voice mail.

- The **Config** button lets you customize your call handling and voice message settings. See *Chapter 4, Configuring Your Station Settings*.

- The **Monitor** button provides a view into extension or workgroup activity and provides access to past call logs.

AltiView with QuickNet Integration

When logged in as an IP Extension integrated with QuickNet, AltiView displays an arrow button in the bottom right of the main window.
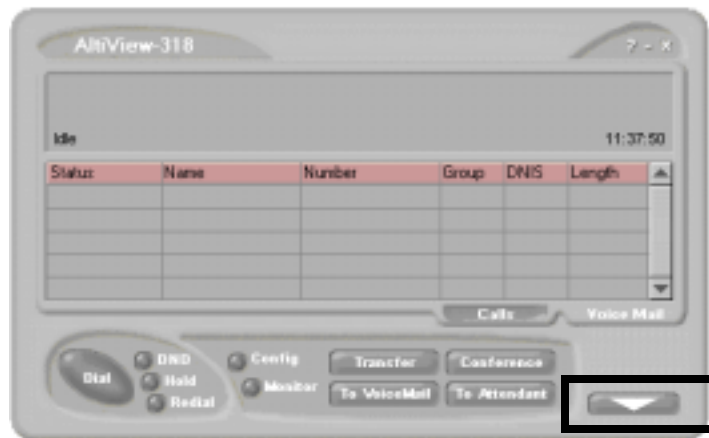

Figure 2.   AltiView main window with QuickNet integration

Clicking this button opens another window directly under the AltiView main window.
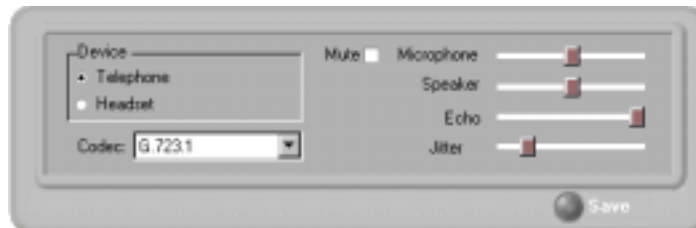

Figure 3.   QuickNet call control window

Use this window to modify the following call control functions:

- **Device** - select **Telephone** or **Headset**

- **Codec** - select **G.723.1** or **G.711**

- **Mute -** check or uncheck

- **Microphone/Speaker/Echo/Jitter -** slide left to decrease, slide right to increase

- **Save -** select to save settings

About the Calls List

Figure 4.   Calls List

The calls list displays the call status for each call as described in "Call States" on page 10. The list also displays the name of the caller if available from extension information or from an external database, the number, workgroup pilot extension number, DNIS digits if available, and call duration.

Handling Calls

The AltiView call handling functions include dialing out and using voicemail.

Dialing

You can dial out in a number of ways; using the numeric keyboard or using the mouse, and by name or extension, number, or speed dial number.

Initiate dialing by clicking the dial button in the main window

Figure 5.   The Dial button

Clicking the **Dial** button opens the dialing window. The scroll list box in the upper left is actually a combination text- and list- box. As a text box, it displays numbers that you enter from the dialing pad or from the keyboard number keys. You can also use it to search for names.

As a list, it displays extensions and the names associated with extensions as well as names and numbers imported from MS Outlook, GoldMine®, or ACT!. You can select extensions or names using the scroll list.

The list can display up to 2000 entries. If you are working with more than 2000 entries, you can find the entry by name search even if the entry is not one of the first 2000 that are displayed.

Figure 6.   Dialing pad, also known as the Dialing window

Dialing By Number

To dial using the keyboard number keys:

1. In the dialing window, enter the numbers you wish to dial using the standard numeric keys or the numeric keypad.

    The numbers appear in the box above the dialing pad.

2. Press **Enter** or click the **Dial** button to place the call.

To dial using the mouse:

1. Using the dialing pad in the Dialing window, click the digits for the phone number.

    As you enter the numbers, they appear in the list box above the dialing pad.

2. Click the **Dial** button to place the call.

The main window displays the status of the call, and once the call is initiated, the **Dial** button in the main window becomes a **Hang Up** button.

Figure 7.   Call status displays in Calls list as well as status panel

Dialing By Name or Extension

1. Use the scroll list box above the dialing pad to select the name or extension.

2. Click the **Dial** button to place the call.

To search by name:

1. Click anywhere in the text box above the dialing pad, then begin to type the name of the person you want to call.

   The dialing pad transforms into a list that displays matching names.

2. Click the name you want.

   The extension or number appears in the list box, selected for dialing.

3. Click the **Dial** button to place the call.

Dialing Speed Dial Numbers

You can use either your own *Station Speed* Dial numbers or the *System Speed* Dial numbers.

See *Chapter 4, Configuring Your Station Settings* for details on setting up speed dial numbers.

1. Depending on which type of speed dial number you want to call, click the **Station Dial** tab or the **System Dial** tab.

2. Choose the speed dial entry from the list.

3. Click the **Dial** button to place the call.

Redialing

To redial the last number called, click the **Redial** button.

Placing Calls on Hold

During a phone call, click the **Hold** button in the AltiView main window OR press the **Hold Pending** button on your phone, if available. The state of the call is changed from *connected* to a *hold* state and you will hear the dial tone.

Offhook					
Status	Name	Number	Group	DNIS	Length
! Hold	Nancy Levine	105			00:09:00

In the row displaying the call, the **State** column shows the call on hold. Click the **Hold** state cell to release the hold and reconnect the call.

Using Call Waiting

During a call, you may hear a beep indicating that you have another incoming call. To answer the call:

1. Click the **Calls** tab on the AltiView main window to view the directory of current calls.

2. Find and click the row displaying the incoming call.

    This places the current call on hold and connects the incoming call.

3. When you are finished, click the **Hold** state cell for the call on hold to reconnect.

Transferring Calls

AltiAgent supports both supervised transfer, in which you confirm the transfer, and blind transfer.

1. While connected to a call, click the **Transfer** button.

    This pops up the dial pad.

2. On the dial pad, enter the extension or phone number to transfer the call to, then click **Dial**.

3. While AltiView dials the new number, you're asked to confirm your decision by clicking the **OK** button in a confirmation dialog box.

    You can click **OK** before the party answers to do a blind transfer, or you can wait for the person to answer and then confirm or cancel the transfer.

Figure 8. Confirming call transfers

    At any time before or after the person you're transferring to answers the phone, you can cancel the transfer by clicking the **Cancel** button or by closing the dialog box.

    If the transfer is cancelled, AltiView reconnects the call to your exten-

sion. The call is also reconnected if the third party doesn't answer.

Sending Calls to Voice Mail

While connected to a call, click **To Voice Mail** on the main window. When the dial pad appears, choose the extension number you want to send the call to, then click **OK**.

You can also transfer a call to voice mail before you answer it.

Transferring to Attendant

While connected to a call, click **To Attendant** on the main window. Select the operator or an Auto Attendant to transfer to using the drop-down list.

You can also transfer a call to an Attendant before you answer it

Figure 9.   Transfer to Auto Attendant

Forwarding Calls Using Do Not Disturb

Click the **DND** button to forward all incoming calls according to your "Enable Busy Call Handling" settings. See "Busy Call Handling and No Answer Handling" on page 47.

Centrex Transfer

If you have a Centrex line, you can use this feature to transfer an external call to an outside number without having to tie up two trunk lines. Once the transfer is complete, the external caller's line connects directly to the outside number. Since there are no longer any connections to internal users, internal trunk lines are then dropped, freeing up system trunk line resources for other calls.

To perform a Centrex transfer:

1. Press **Transfer.**

2. Dial the prefix for trunk-line access (such as **9**).

3. Dial the second party's number and either hang up or announce the call.

4. Answer **Yes** in the popup.

Once you place the handset back on-hook, the trunk line also drops and Centrex completes the transfer.

Conferencing Calls

Any internal user is able to add parties to a conference call. While connected to the first party:

1. Click the **Conference** button.

2. When the dial pad pops up, enter the extension or phone number you want to conference with, then click **Dial**.

   While AltiAgent dials the new number, the first party goes into *Hold Pending* state, and you see a confirmation dialog box.

Figure 10.   Confirming Conference Calls

   You can cancel the conference at any time by clicking the **Cancel** button, closing the dialog box, or by pressing your phone's **FLASH** button. Normally, after cancelling you will be reconnected automatically to the initial call. If you are not automatically reconnected and want to reconnect to the first call, click the *Hold Pending* status representing the call.

3. After the third party connects, you can announce the conference by clicking **OK** in the dialog box. If the third party does not answer, click the **Cancel** button.
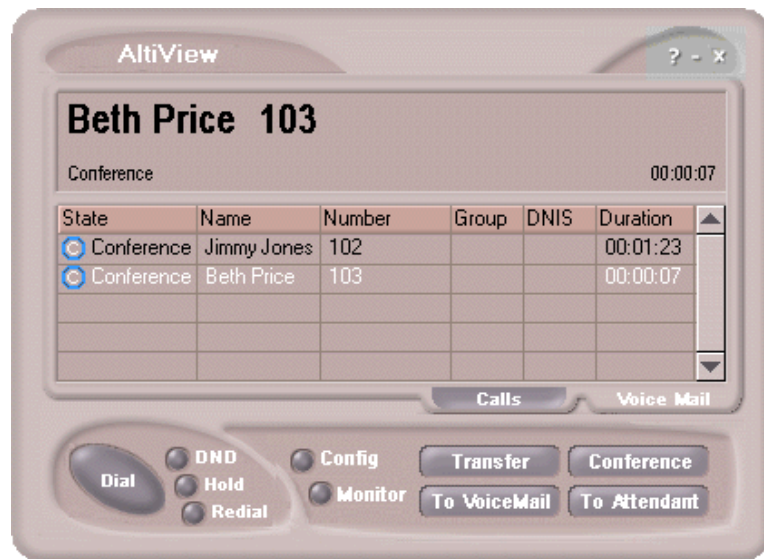

Figure 11.   Conference Calls Displayed in Call List

4. Click the **Conference** button again to initiate the three-way conference. Both calls will be displayed as *Conference* state.

To add another party, click the **Conference** button and repeat steps 2-4.

The maximum number of conferenced parties is 6.

Using Account Codes

If your system is set up to use account codes, you can associate calls to specific codes for billing or tracking purposes.

Required account codes—If your extension has been configured for required account codes, the system will prompt you to select an account code from a popup window for all outbound calls.

Bypassing required account codes— If your extension has been configured to bypass account code validation, you can enter a different account code in the box at the bottom of the popup window or enter # to bypass the account code altogether.

Optional account codes

To associate a call in progress to an account code:

1.   Right-click the number in the Calls List.

2.   Choose **Account Code.**

3.   In the Account Code popup window, select an account code from the scrollbox.

Note: If your extension is configured to bypass account code validation, you can enter an account code in the box at the bottom of the popup window.

4.   Click **OK.**

To change the account code for a call in progress, repeat the steps above, entering the new account code to assign the call to.

Using Voice Mail

About the Voice Mail Window

Figure 12.   Voice Mail window

When you click the **Voice Mail** tab in the main window, you see the voice mail list.

Note: Click on the column headings to sort the data. Right-click on a message row to perform any of the actions (listening to, saving, or returning messages, etc.) described in this section.

- New voice mail messages are indicated by a white, closed envelope icon in the status window of AltiView/AltiAgent.

- If the new message is urgent, a red envelope icon is displayed.

- Heard voice mail messages are indicated by a white, open envelope icon.

- If the message is saved, a blue, open envelope icon is displayed.

- A paperclip symbol on the envelope indicates an attachment—a voice mail message forwarded from another extension.

Listening to Your Voice Mail

In the Voice Mail list, select the message and use the voice mail controls at the bottom right of the window to play it, rewind, or fast forward. You can also use these commands on the right-click popup menu.

You have several listening options which you configure as described in "General Information" on page 38. You can listen using the sound card on your PC or your phone. You can play the message while its downloading or wait until it's completely downloaded to play it.

If this is a new message, the envelope icon changes from closed to open, indicating that the message has been heard. As the message is played, the status window displays *Play*.

Use the tape player type buttons to play the message.

Rewind   Stop   Play   Fast Forward

If you click another message in the list, the current message stops playing.

Saving Remotely or Locally

You can click the **Save As** button or use the right-click popup menu to save the message as a .wav file that you can play back later. **Save As** opens a dialog box that lets you choose how you want to save the file.

Figure 13.   Save As dialog box

- **Save in remote** allows you to save local drive space, but to play the saved message, of course, you have to access on the remote server.

- **Save in local** opens a dialog in which you choose a directory and file name for the .wav file, which you can then play on a media player.

Deleting the Message

To delete the message, select it and click the **Delete** key, or use the right-click popup menu.

Returning the Call

Click the **Return Call** button to call back the sender, or use the right-click popup menu.

Attaching a Memo

To add a note to accompany a voice mail, click the **Memo** button to invoke the Memo window or use the right-click popup menu.

Figure 14.   Attaching a memo to a voice message

Type in the memo in the area provided and click **OK**. The entry will be displayed in **Memo** field of the voice mail.

Forwarding Voice Mail

To forward a voice mail to an extension or a VM Group:

1.   Select the voice mail in the Voice Mail view of the AltiView main window.

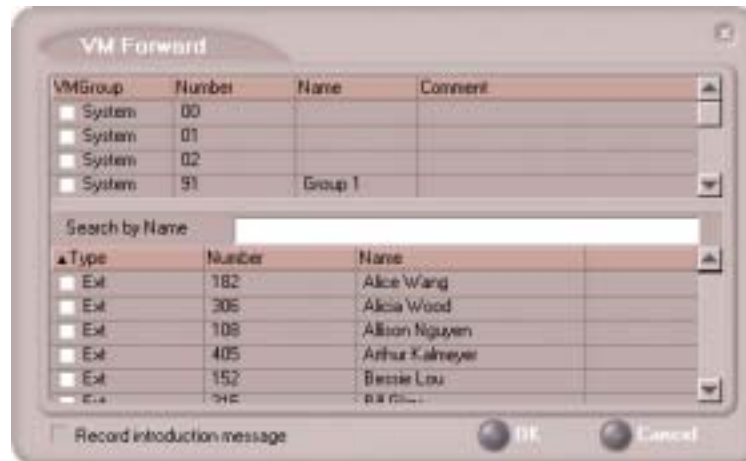2.   Click the **Forward** button or use the right-click popup menu to invoke the VM Forward window.

Figure 15.   VM Forward window

3.   Select the check boxes next to the extensions and/or voice mail groups to which you want to forward the message.

If you need to search for a person by name, type the first letters of the name into the **Search by Name** box. The matching names display in the list as you type. To select a name, select the check box next to it.

Note: Click on the column headings below the Search by Name window to sort the data.

4. Optionally, you can leave an introductory message. Select the **Record Introduction Message** check box and follow the steps below.

5. Click **OK** to complete the forwarding.

To record an introductory message:

1. If you selected the **Record Introductory Message** check box, when you click OK to complete the forward, pick up the phone hand set and you'll hear a prompt to record the message.

2. Record the message and press the pound key (#). A confirmation appears on screen.

3. Click **OK** to confirm and complete the action.

Working with Voice Mail Groups (Distribution Lists)

You can set up voice mail (VM) groups to forward messages to multiple recipients at the same time. You can set up to 100 personal voice mail groups, each with 64 members. Group members can be any extension or another voice mail group.

Note: *Voice Mail Groups* are also known as *Distribution Lists* in other AltiWare interfaces.

There are two types of voice mail groups you can use:

• **System-based groups** are set up in the AltiWare Administrator. You can use but not edit these lists in AltiAgent.

• **Personal groups** are set up and modified in AltiView/AltiAgent or in your AltiGen Voice Mail System.

Accessing Voice Mail Group Lists

To work on your personal voice mail groups:

1. In the AltiAgent main window, click the **Voice Mail** tab to display the Voice Mail version of the window.

2. Click **VM Group** button in the Voice Mail list window to invoke the VM Group Edit window.

Figure 16.   Voice Mail Edit window

Creating a VM Group

1. To create a VM group after opening the VM Group Edit window, click
    the **New** button, which invokes the Create Group window.

Figure 17. Create Group window

2. Use the scroll bar to select a desired **Group ID**.

3. Enter the VM Group **Name** and any **Comments**. These are optional
    but may help you identify the group.

4. Select the member extensions by selecting the check box next to each
    extension.

5. When finished, click **OK**. Click the **Clear** button to deselect all
    extensions or click **Cancel** to exit without saving your edits.

Changing a VM Group

To add or remove extensions, or to change name or comment associated
with a group:

1. Access the VM Group window as described in "Accessing Voice Mail
    Group Lists" on page 30.

2. Click the **Change** button in the VM Group Edit window to open the
    Change Group window, similar to the Create Group window above.

3. Make any changes you need to make for the group name, comments, or members. To add or remove a member, select or deselect the check box next to the extension.

Deleting a Group

To delete a Voice Mail Group:

1. Access the VM Group window as described "Accessing Voice Mail Group Lists" on page 30.

2. Click the **Change** button in the VM Group Edit window to open the Change Group window.

3. Click the **Clear** button to deselect all extensions.

4. Click **OK** to save and exit.

When you empty a group of members, the group is deleted.

Monitoring Extension Activity

If your system administrator has configured your extension for monitoring, you can monitor the activity on the other extensions or view call history.

If you're a manager, for example, you might monitor to determine whether you need more resources in a busy environment. Or you might use monitoring capability to cover calls for a co-worker, since you can click the ringing phone icon in the monitor list and take the co-worker's call.

Figure 18.   The Monitor Window
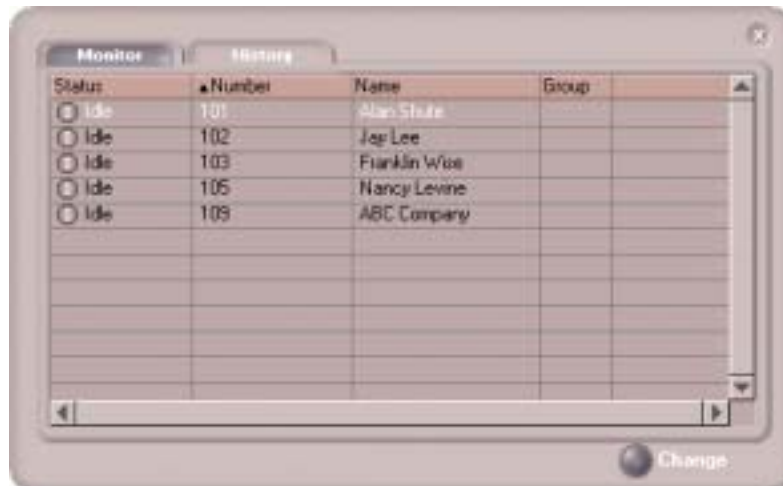
Choosing Extensions to Monitor

1. Open the Monitor window by clicking the **Monitor** button in the AltiView main window.

2. Click the **Change** button in the Monitor window to open the Change Monitor window.

   Extensions to which your system administrator has given you monitoring rights are listed here.

3. Select the check boxes next to the extensions you want to monitor, and click **OK.**

   The extensions are now listed in the Monitor window.

Reading the Monitor List

In the monitor list, each extension is listed along with its **Status, Number**, **Name**, and **Group**—workgroup, if applicable.

The state can be one of the following:

- **Idle**—the extension is not in use; you can click the **Status** field to ring that extension

- **Connected**—the extension is in use

- **Ringing**—the phone on the extension is ringing; you can click the **Status** field to pick up the call at your own extension

- **Conference**—the extension is on a conference call

- **Voice Mail**—the extension is in voice mail

- **Auto Attendant**—the extension is connected to an Auto Attendant

- **Holding**—the extension is on hold

- **Hold Pending**—the extension is awaiting hold

Calling or Picking Up Calls

If a monitored extension is *Idle,* clicking its **Status** field rings the extension.

If a monitored extension is *Ringing,* clicking its **Status** field picks up the call.

Note: If the call is coming in to a workgroup, as shown in the **Group** information, you cannot pick up the call.

Viewing the Call History

Click the **History** tab in the Monitor window to view an informational history of handled calls.

Figure 19.   History window

Note: Click on the column headings in the **History** window to sort the data.

The list in the **History** window displays the following fields:

*   **Number**—the extension or phone number. *Upward arrow* icons indicate outgoing calls; *downward arrows* indicate incoming calls Clicking the **Number** field dials that number.

*   **Name**—Caller ID information, if available, or *Unknown.*

*   **Date/Time**—the call's date and time.

    Note: This history data is sorted by last disconnected and not in the order the call was received. It is therefore possible to have a record with an earlier timestamp followed by a record with a later timestamp.

    Also, the timestamp for call data is based on the client system, while the timestamp for voice mail messages is from AltiServ. Thus, the times displayed here may not match those in the voice mail view in the main window.

*   **Length**—the length of time of each call.

- **DNIS**—DNIS digits collected, if available

- **Memo**—a note attached to the call. Use the **Memo** button to open a window to create a note.

Using AltiView

Configuring Your Station Settings

You can configure the following settings and options by clicking the
Config button in the main window to open the Config window.

- **General Info**—password, default trunk access, and other settings.
- **One Number Access (ONA)**—forwarding of specific incoming calls.
  This is available only when your extension configuration is set up to
  allow ONA.
- **Call Handling**—forwarding, busy call, and no-answer call handling.
- **Message Notify**—how and when to notify yourself about incoming
  voice messages.
- **Station Speed**—your personal speed dial numbers.
- **System Speed**—you can view and edit the name and comments, but
  not the number itself, of system speed dial numbers.

Note: Options are disabled if they are not available. For example, One
Number Access must be enabled in the AltiAdmin application.
Further, if you don't enable ONA as a Call Handling option, you
can't set up and use ONA.

Apply Button and OK Button

In the Configuration windows, you'll see two buttons that save your
changes:

- The **Apply** button saves your changes and *lets you continue* in the
  current window.
- The **OK** button saves your changes and *closes* the current window.

Configuration

General Information
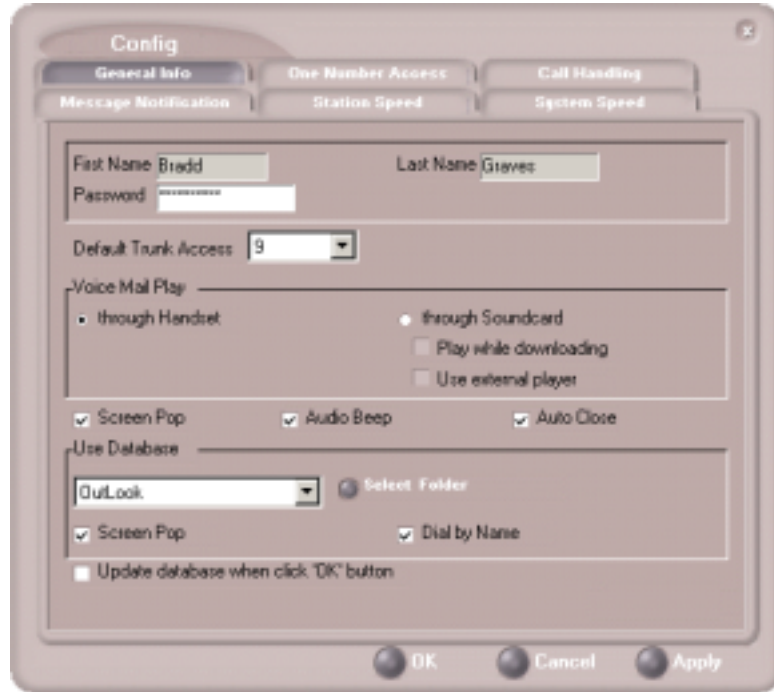
Figure 1.   General Info configuration

The General Info tab is the window you see when you first click the **Config** button in the AltiView main window to open the Config window.

In this window, you can edit your password, the default trunk access code, voice mail settings, audio and video behavior, and external database access options.

Default Trunk Access

The trunk access codes are defined in the AltiWare Administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.

Voice Mail Play Options

You can choose to play your messages on your phone set, or play them on your sound card and speakers. If you choose to play them on your sound card, you have another choice: you can choose to play the message as it downloads, or to download it completely and play it on an external media player.

Screen Pop, Audio Beep, and Auto Close

Select the **Screen Pop** check box if you want an AltiView window to pop up on your screen when you have a call. You can then click a call to take it or perform other AltiView actions. For AltiView to pop up, you cannot have closed the application entirely, but it can be minimized.

Select the **Audio Beep** check box if you want your PC to beep you when you have a call.

Select the **Auto Close** check box to have AltiView close the pop up window once you have finished with the call.

Accessing Databases

AltiView can access phone numbers from your Microsoft Outlook, Outlook Express, ACT!, or GoldMine® database. During installation, the install program reads which applications you have installed on your PC.

In the drop down list under **Use Database**, select the database you want to use. You have these additional options:

- Select the **Screen Pop** check box to have a database contact window pop up when you receive a call from someone for whom you have a record in the database contact directory.

- Select the **Dial-by-Name** check box enable access to the names in the database directory when you dial. With this option enabled, the names and their associated numbers in your Outlook, ACT!, or GoldMine® directory are added to the contact list in the dial pad window.

- Select the **Update database right now** check box to refresh the data AltiView accesses from the database.

- If you select Outlook, AltiServ will load all the subfolders and data in your main Contacts folder, which will take a few moments. Once the data is loaded, you can close the Configuration window, reopen it, and click the **Select Folder** button that now appears to choose which Contacts subfolders you want to use.

Call Handling

Click the **Call Handling** tab in the Config window to configure incoming call handling for your extension.
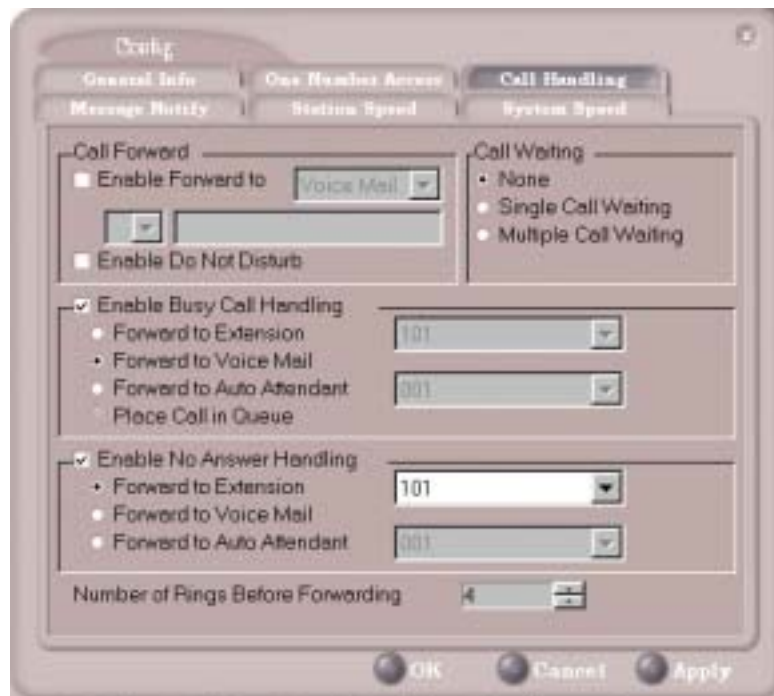
Figure 2.   Call Handling configuration

Forwarding All Calls

If you want to forward calls to an external number, select a trunk access code in the drop-down list, then begin with the outside trunk or route access digit and any long distance prefix digits such as **1** and area code.

Forwarding to a Pager Not Recommended

Forwarding calls to a pager is possible but **not recommended** since callers will only hear what is heard when calling a pager and might not know to enter a return phone number unless instructed.

Do Not Disturb

If you select **Enable Do Not Disturb**, all incoming calls are forwarded according to your "Enable Busy Call Handling" settings, described immediately below.

Note: Selecting **Enable Do Not Disturb** here has the same effect as clicking the **DND** button on the dial pad.

Busy Call Handling and No Answer Handling

You can use these options to specify how you want to handle incoming calls when you're already on the phone or when you can't answer the phone, for example, when you've enabled Do Not Disturb.

If you want to use the Auto Attendant and you don't know the number of the phrase or menu you want to use, check with your system administrator.

Place call in queue is available only if your system administrator has enabled queueing for you.

Number of Rings Before Forwarding

This setting pertains to almost all the options in this window: the number of times the phone should ring before the system decides to forward the call to an extension, voice mail, or the Auto Attendant.

One Number Access (ONA)

If you are expecting calls that you want to receive regardless of where you are, you can have the system forward those calls to you. You must enter the Caller IDs for the calls you want forwarded, and the numbers where you can be reached.

If the system is unable to connect the call (i.e., can't identify a Caller ID or can't reach you at *any* of the numbers you specify), the call is sent to your voice mail.

Before You Set Up ONA

- ONA must be enabled by your system administrator.

- Your Call Handling settings must not conflict with ONA. Specifically:

  — **Do Not Disturb** must be disabled. Otherwise, if your line is busy, all calls will go into voice mail and not to the ONA forwarding numbers you specify.

  — **Enable Call Forward** must be disabled. Otherwise, all calls will be forwarded according to this setting.

  See "Call Handling" on page 40 for details on these settings.

Accessing One Number Access Setup

After you set the call handling options, click the **One Number Access** tab in the Config window to open the One Number Access window.

Figure 3.   One Number Access window

Configuration

1. Select the times you want to be available to ONA callers.

   If you choose **Enable based on the following schedule,** you can set up to four different schedules in the dialog that pops up.

Figure 4.   Enable Schedule Based Access dialog box

2. Enable the **Caller ID Verification** check box and then specify the incoming phone numbers for ONA. If ONA finds one of these numbers on an incoming call, it will forward the call to you.

   You can enter up to ten phone numbers in the **Caller ID Verification** fields. For local numbers, use 7 digits (5555555). For long distance numbers, use 10 digits—area code + local number.

   Note: If you enter no numbers in the Caller ID Verification fields and ONA is enabled, ONA is made available to every caller.

Using a Password

You can use a Caller ID Verification field to enter a password number such as "5555" so that *a caller who knows this password can use ONA to find you*, *regardless of where they are calling from.* Tell the caller to dial **1** during your personal greeting and then enter the password.

3. Select the **Forwarding Numbers** to be used by the system to find you when ONA is active. You can set up to four different numbers—

extensions or outside numbers. For outside numbers, use the drop-down list to select the trunk access code you want to use.

When ONA is active, the system dials the forwarding number(s) in the order from Forwarding Number 1 through Forwarding Number 4. Note that this number order does *not* correspond to the Schedule order—Forward Number 2 is *not* used first during Schedule Number 2.

Note: If your system administrator has disabled the Check Password option for your ONA settings, a call forwarded via ONA that is picked up by a voicemail box, fax machine, or answering machine will connect, and will not try any subsequent Forwarding Numbers. Therefore, if you want ONA to use such an option as a "last resort," it should be Forwarding Number 4.

Configuration

Message Notification

Message Notification lets you set up how you'd like to be alerted to new messages when you're away from your desk. You can also set up Message Notification through the AltiGen Voice Mail System. See "Using Message Notification" on page 11 for more information on this feature.

Click the **Message Notification** tab in the Config window to establish how and when you want to be notified about incoming voice messages.

Figure 5. Message Notification options

Use this window to set the notification options:

- **The types of messages** on which you want to be alerted: none, urgent voice messages only, all voice messages, or all voice messages and email too.

- **How and where to notify you**—in the **Message Notification or Reminder Message by calling a…** options, if you want to use an outside number, use the drop-down list to select the trunk access you want to use.

- **Schedule**—during what hours you want to be alerted.

Station Speed Dialing Setup

The Speed Dial Setup page, accessed by clicking **Station Speed** on the main menu, lets you set up to 20 station speed dial numbers. When you add an outside number, all *relevant* prefix digits such as trunk or route access number, the long distance prefix **1** and area codes must precede the phone number. Station speed dial numbers are also set up by using the **#25** feature code on your phone set, as described in "Other Features" on page 42.

Click the **Station Speed** tab in the Config window.

Figure 6.   Station Speed Dialing setup

Adding or Editing Station Speed Entries

1. Click a **Station ID** to select it.

2. Click the **Edit** button.

3. When the Dial Setting dialog box appears, add or edit the **Number**.

    Optionally, to aid your memory, add or edit the **Name** and **Comment**.

Figure 7. Dial Setting dialog box, for Speed Dial Numbers

4. Click **OK**.

After you have entered and saved the speed dial number, the number is also displayed and can be used in the Dialing Pad window in the Station Speed panel.

Deleting Station Speed Entries

To delete a speed dial number, click the **Station ID** and click **Edit** to open the Dial Setting dialog box. Click **Clear** and then click **OK**.

System Speed Dialing

Click the **System Speed** tab in the Config window to view the System Speed Dial entries. System speed dial numbers are set up in AltiAdmin, the AltiWare Administrator. In AltiView, you can view and edit the names and comments in order to make the numbers more familiar, but not the number itself.

To edit the name or comment, select the **Station ID** and click **Edit** to open a Dial Setting dialog box (see Figure 7 on page 49. Modify the **Name** or **Comment**, then click OK.

The number is also displayed and can be used in the Dialing Pad window in the System Speed panel.

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