



Shaping the Future of Converged Communications



Contact Advantage 4.5 Manual



Contact Advantage™

AltiView™, AltiAgent™, and AltiSupervisor™

for AltiWare Open Edition (OE) Release 4.5

Manual

Revised 02/2002 4504-0011-4.5

WARNING!

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.

NOTICE

While every effort has been made to ensure accuracy, AltiGen Communications, Inc. will not be liable for technical or editorial errors or omissions contained within the documentation. The information contained in this documentation is subject to change without notice.

This documentation may be used only in accordance with the terms of the AltiGen Communications, Inc. License Agreement.

AltiGen Communications, Inc.
47427 Fremont Blvd.
Fremont, CA 94538
Telephone: 510-252-9712
Fax: 510-252-9738
E-mail: info@altigen.com
Web site: www.altigen.com

TRADEMARKS

AltiGen, AltiServ, AltiWare, AltiSpan, AltiReach, AltiLink, AltiConsole, AltiAdmin, Zoomerang and Dynamic Messaging are trademarks or registered trademarks of AltiGen Communications, Inc.

All other brand names mentioned are trademarks or registered trademarks of their respective manufacturers.

Copyright © AltiGen Communications, Inc. 2000. All rights reserved.
Printed in U.S.A.02/2002 Part Number 4504-0011-4.5

Contents

Warranty	v
-----------------------	----------

CHAPTER 1

Installation	1
Client System Requirements	1
Session Licensing and License Upgrade Procedures	2
Installation and Setup	3
Pre-Installation Checklist	3
Installing Contact Advantage on a Client System	3
Uninstalling Contact Advantage	3
Microsoft Outlook and Outlook Express Support	3
ACT!/GoldMine® Support	4
QuickNet Integration	4

CHAPTER 2

Getting Started	5
Logging In	5
Logging In Remotely Using an IP Extension	7
IP Extensions Using Microsoft NetMeeting 3.01	8
IP Extensions Using QuickNet	8
Troubleshooting IP Connectivity	9
Hiding or Exiting Contact Advantage	9
Using the Windows Tray Phone Icon	9
Resizing the Display	10
Call States	10
Error Messages	11

CHAPTER 3

Using Contact Advantage as a Desktop User	15
About the Main Window	16

About the Calls List	18
Handling Calls	18
Dialing	18
Placing Calls on Hold.....	21
Using Call Waiting.....	22
Transferring Calls.....	22
Conferencing Calls.....	24
Using Account Codes.....	25
Using Voice Mail	26
About the Voice Mail Window	26
Listening to Your Voice Mail	27
Monitoring	33
Choosing Workgroups to Monitor	34
Viewing the Call History	36

CHAPTER 4

Using Contact Advantage as a Workgroup Agent	39
Workgroup Login	40
Logging Out or Changing Workgroups	40
About the Main Window	41
Call Handling	42
Setting Status to Ready or Not Ready	43
Viewing, Sharing, or Pushing Data	43
Monitoring	45
Choosing Workgroups to Monitor	45
Viewing the Call History	47
Viewing Workgroup Statistics.....	48
Viewing Queues.....	49

CHAPTER 5

Using Contact Advantage as a Supervisor	51
Logging In	51
Viewing Group Statistics	53
Viewing Agent Statistics	55
Viewing a History of Agent Activity.....	56

Viewing Agent Current Status	57
Monitoring—Listening in and Barging In	58
Viewing the Queues	59
Workgroup CDR Search.	60
Workgroup Statistics Search.	62
Search Results.	63

CHAPTER 6

Configuring Your Station Settings	65
Apply Button and OK Button	65
General Information	66
Default Trunk Access	66
Voice Mail Play Options	67
Screen Pop, Audio Beep, and Auto Close	67
Accessing Databases.	67
Call Handling	69
One Number Access (ONA)	70
Message Notification	73
Station Speed Dialing Setup	75
Adding or Editing Station Speed Entries	75
System Speed Dialing	76
Index	77

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 Contact Advantage 4.5 package:

- Contact Advantage 4.5 User Guide
- Contact Advantage License Key

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

Contact Advantage is an optional software package that runs with the AltWare OE 4.5 system. To enable the features in this package, the Contact Advantage 4.5 License Key must be installed in AltWare. Once the license key is installed, session licenses must also be installed to enable client sessions.

To install the Contact Advantage client software, you can load Contact Advantage client on a network server and then using your company's distribution software to deliver the Contact Advantage 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. Contact Advantage client sessions can be added to the AltiWare server at any time and in discrete numbers, based on the package purchased:

- 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 Contact Advantage 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 Contact Advantage, 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 and AltiAgent.
- Make sure License Key has been installed and activated.

Installing Contact Advantage 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 Contact Advantage

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

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

Contact Advantage requires that you to set up the Outlook Contacts list prior to using this feature in Contact Advantage.

ACT!/GoldMine® Support

Contact Advantage supports 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 conjunction 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

Contact Advantage 4.5 is a suite of desktop applications for managing personal calls and workgroup calls, and performing phone and supervisory functions from the PC. Contact Advantage contains four (4) applications:

AltiView is the primary software application designed for general desktop PC users in an AltiServ environment. With Contact Advantage, 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, Contact Advantage integrates with contact management software including Microsoft Outlook, ACT!, and GoldMine® for caller screen pops and dialing out from these powerful applications.

AltiAgent is a version of Contact Advantage designed for workgroup agents. Through an AltiAgent window, you can monitor workgroup-related statistics, workgroup call pickup, and member login/logout directly from the desktop. Also, the AltiView functionality can be accessed from AltiAgent.

AltiSupervisor is a version of Contact Advantage designed for supervisors of workgroup agents. Through AltiSupervisor you can monitor the status and performance of a workgroup, including AltiAgent calls, real time workgroup statistics, and agent state. This information can be stored in an internal or external CDR database for future review and analysis.

Workgroup Statistics is a CDR Search tool to allow call center and workgroup managers to run historical reporting on workgroup, agents per workgroup and agents statistics.

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 Contact Advantage 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 Contact Advantage.
3. (Optional, for AltAgent 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 AltView 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. Select how you want to log in and click **OK**.

Logging In Remotely Using an IP Extension

For desktop use, agent use, or supervisor use, you can access Contact Advantage from a remote location 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/adaptor 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: If you run two instances of AltiView—one for desktop use integrated with NetMeeting and one as a workgroup agent—be sure to launch the AltiAgent instance first, and the desktop instance second; otherwise, the NetMeeting launch will fail.

Note also that 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 Contact Advantage



When you minimize the Contact Advantage 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 Contact Advantage entirely, right click the phone icon and select **Exit**.

Pop Up when You Get a Call

You can configure 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 67.

Using the Windows Tray Phone Icon

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

Resizing the Display

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

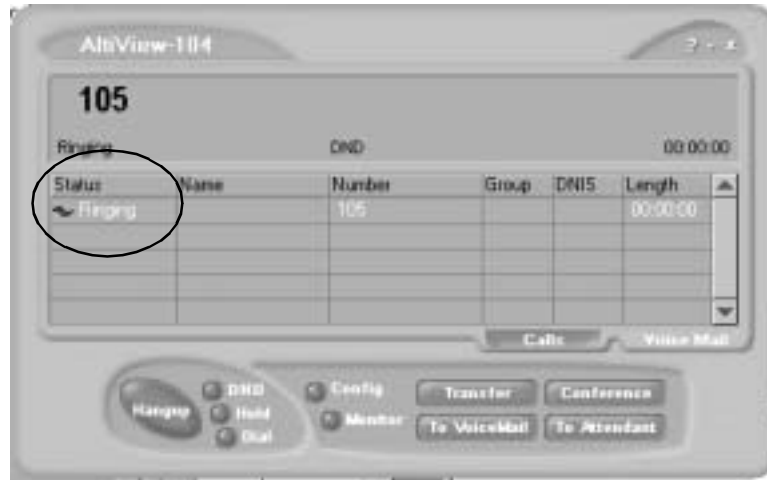
Also, the field size for any field can be increased or decreased by pointing the cursor to either side of the field's main column. The cursor changes to a movable double bar (||) that can be moved to resize the column.

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, Altiserv 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



Getting Started

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 Contact Advantage license was found OR more than allowed number of AltiView users have attempted to log on.	Maintain the number of Contact Advantage 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).

Error Message	Description	Solution
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.
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 NetMeeting.		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 Contact Advantage as a Desktop User



Figure 1. Desktop User logon

Once you log in as a **Desktop User** 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 “Configuring Your Station Settings” on page 67.

Using Contact Adv
as a Desktop User

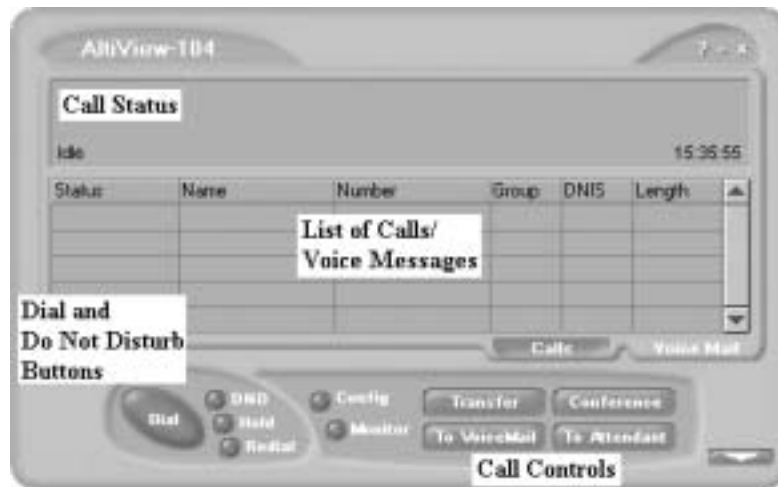


Figure 2. AltiView main window

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. “Configuring Your Station Settings” on page 67.

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 “Configuring Your Station Settings” on page 67.
- 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 3. AltiView main window with QuickNet integration

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

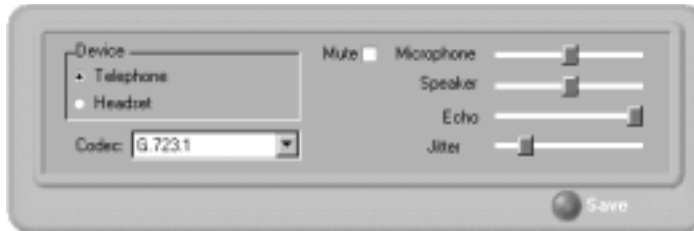


Figure 4. QuickNet call control window

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

Using Contact Adv
as a Desktop User

About the Calls List



Figure 5. 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 Contact Advantage call handling functions include dialing out, using voice mail, and monitoring other extensions.

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 6. 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.

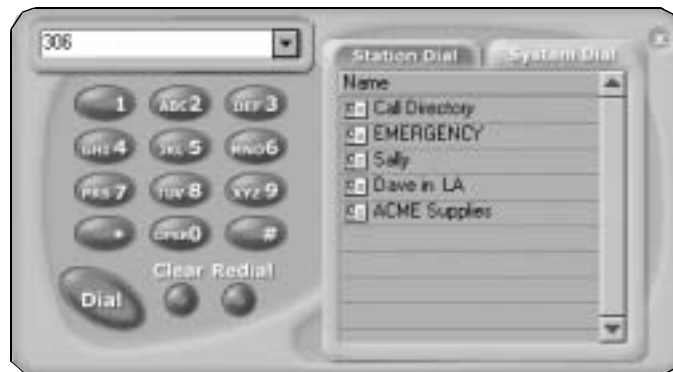


Figure 7. Dialing pad, also known as the Dialing window

Using Contact Adv
as a Desktop User

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 8. 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 “Configuring Your Station Settings” on page 67 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.

Note: When you place a call on hold, workgroup calls may still ring your extension. To prevent this, click the **Wait** button. See “Setting Status to Ready or Not Ready” on page 43.

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

Altiview 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 9. 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 10. 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 "Configuring Your Station Settings" on page 67.

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



Figure 11. *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.

- 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.

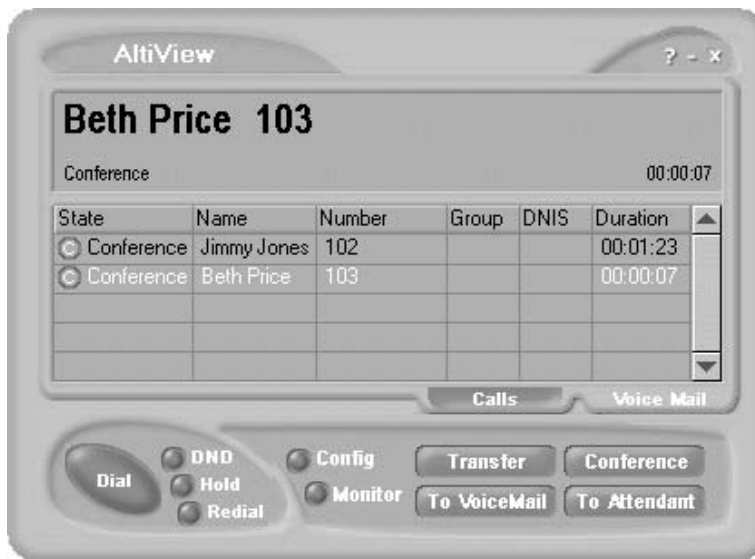


Figure 12. Conference Calls Displayed in Call List

- 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 13. 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 “Configuring Your Station Settings” on page 67. 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 14. 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 15. 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.

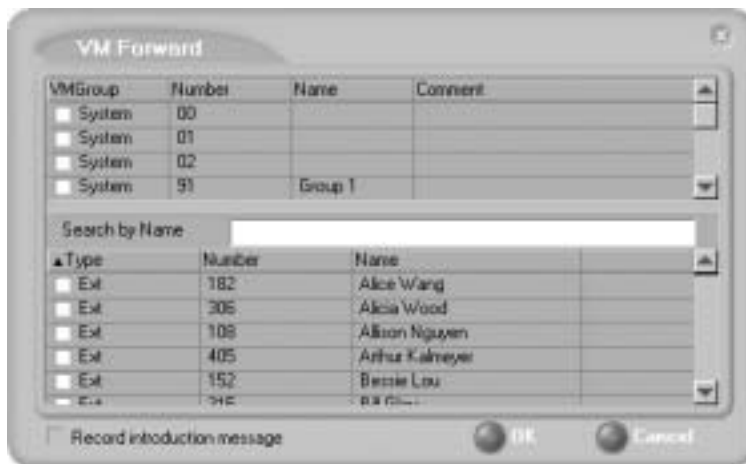


Figure 16. VM Forward window

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 AltAgent 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.



Using Contact Adv
as a Desktop User

Figure 17. 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.

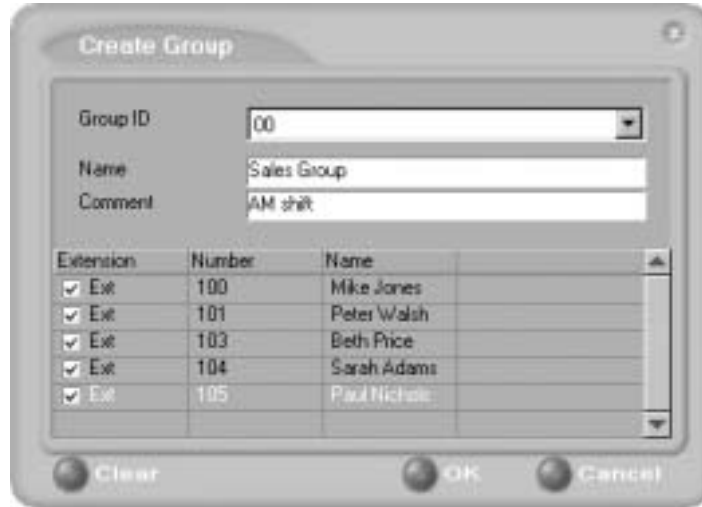


Figure 18. Create Group window

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 31.
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 31.
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

If your system administrator has configured your extension for monitoring, you can monitor the activity on the other extensions in your workgroup, view call history, view workgroup statistics, and view calls in queue.

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.

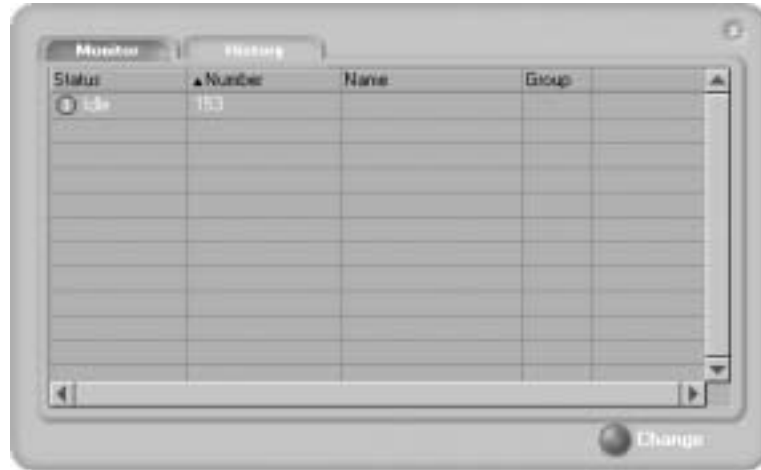


Figure 19. The Monitor Window

Choosing Workgroups to Monitor

1. Open the Monitor window by clicking the **Monitor** button in the AltAgent 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, in addition to any workgroups to which you belong.

3. Select the check boxes next to the individual extensions (**Type** "Ext.") or workgroups (**Type** "WG Ext.") you want to monitor, and click **OK**.

The extensions in the selected workgroups are now listed in the Monitor window, in addition to any individual extensions you selected.

Note: If you selected individual extensions to monitor, you will be able to pick up *personal* calls to these extensions, but not workgroup calls.

In addition, if you selected a workgroup extension, the Monitor list shows *all* the extensions in the workgroup, even for agents who are currently logged out.

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
- **Ring**ing—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
- **Hold**ing—the extension is on hold
- **Hold Pending**—the extension is awaiting hold

Calling or Picking Up Calls

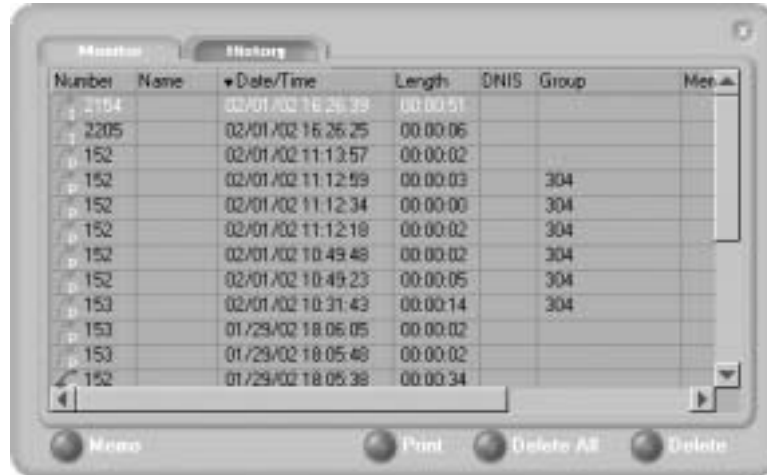
If a monitored extension is *Idle*, clicking its **Status** field rings the extension.

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

Note: If a call is coming in to a workgroup to which you are not currently logged in, 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.



Number	Name	Date/Time	Length	DNIS	Group	Mes
2154		02/01/02 16:26:39	00:00:51			
2205		02/01/02 16:26:25	00:00:06			
152		02/01/02 11:13:57	00:00:02			
152		02/01/02 11:12:59	00:00:03		304	
152		02/01/02 11:12:34	00:00:00		304	
152		02/01/02 11:12:18	00:00:02		304	
152		02/01/02 10:49:48	00:00:02		304	
152		02/01/02 10:49:23	00:00:05		304	
153		02/01/02 10:31:43	00:00:14		304	
153		01/29/02 18:05:05	00:00:02			
153		01/29/02 18:05:48	00:00:02			
152		01/29/02 18:05:38	00:00:34			

Figure 20. 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 AltıServ. 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 Contact Adv
as a Desktop User

Using Contact Advantage as a Workgroup Agent



Figure 1. Workgroup Agent login

AltiAgent is a desktop call control application for workgroup agents to manage their workgroup calls from the PC. AltiAgent allows direct access to call handling as well as configuration functions including the following. You can also log in as a workgroup agent using the **IP Extension integrated with NetMeeting** option.

- View caller data (e.g., IP address, account number, credit card number, name, etc.) sent with an incoming call.
- Pushing or sending a URL or web page to a web-based call.
- Logging off one or more workgroups using a two-digit reason code that corresponds to a particular course of action, if logoff reason codes are used in your workgroup.
- Viewing and printing workgroup call data.

Note: The basic call handling and voice mail features and functions available in AltiAgent are described in *Chapter 3, Using Contact Advantage as a Desktop User*. This chapter covers workgroup-specific activities.

Workgroup Login

After you complete your initial login and choose to login as a **Workgroup Agent** as described in “Logging In” on page 5, you see a Group Login window.



Figure 2. Group Login window

Select the workgroup or workgroups you want to log in to, then click **OK**. Contact Advantage supports login on up to eight workgroups simultaneously.

Note: If you are set up to change your **Outbound Workgroup**, you can select another extension from the dropdown.

Logging Out or Changing Workgroups

After you’ve logged in, you can log out or change the workgroups you’re logged in as follows:

Click the **Login/Logout** button in the main window to open the Group Login window, an example of which is shown on the previous page.

To log out or change workgroups, deselect the check box(es) next to the workgroup(s) you’re logging out from. If **Logout Reason Codes** are required in your system, select one in the drop down list. If you want to log in to other workgroups, select their check boxes. Then click **OK**.

About the Main Window

The AltiAgent main window is your window into your workgroup environment and facilitates the management of workgroup calls.

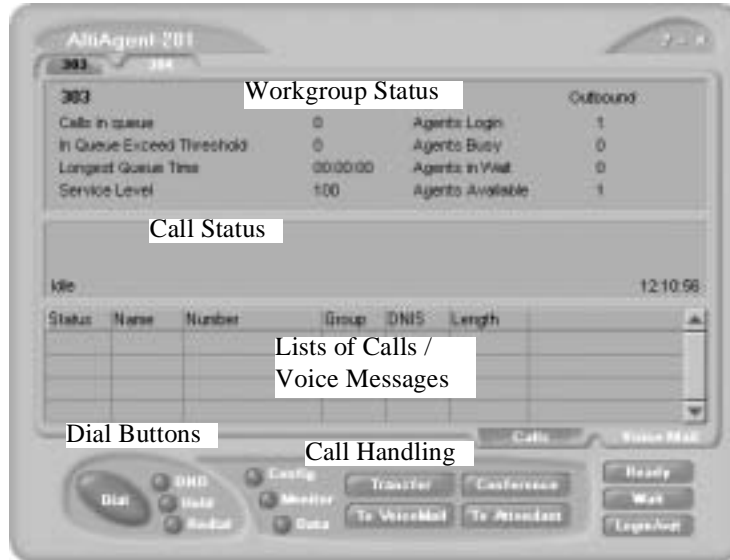


Figure 3. AltiAgent main window

The window consists of the following displays and buttons:

Parameter	Description
Workgroup Status	<p>Displays statistical information about the current workgroup. Tabs above the panel allow you to switch views between the workgroups you're logged in to.</p> <p>The statistics are largely self-explanatory, but it may be noted that the <i>Service Level</i> represents the percentage of workgroup calls taken out of queue before the <i>Threshold</i> time has expired.</p>
Call Status	<p>Displays the status of the currently active call, a list of any calls on hold, and the current time. The states are described in "Call States" on page 10.</p>

Directory	Two tabs show a log of current calls, or a log of current and past voice mails.
Dial	Let you place, hold, or redial calls, and 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.
Call Handling	Provides call functions such as transferring the call or sending it to voice mail.
Configuration	Lets you customize AltiAgent settings. See “Configuring Your Station Settings” on page 67.
Monitor	Provides a view into extension or workgroup activity and provides access to past call logs.
Data	Lets you display data associated with the calls, send web pages or URLs to the user, or share web pages.
Ready	Tells the system you are ready to receive workgroup calls.
Wait	Tells the system not to send workgroup calls to your extension.
Login/Logout	The button allows you to login in to different workgroups and/or log out of current workgroups.

Call Handling

The basic call handling features and functions are the same for workgroup agents as they are for the desktop user. See “Handling Calls” on page 18 for further information.

This section discusses workgroup member options that are not available to the desktop user.

Setting Status to Ready or Not Ready

Click the **Wait** button to tell the system not to send workgroup calls to your extension.

Click the **Ready** button to tell the system you are ready to receive workgroup calls.

The Log button allows you to log into or out of one or more workgroups.

Viewing, Sharing, or Pushing Data

Pushing a web page or URL is sending the page or URL as a link that the other person views in their web browser.

Sharing the URL is pushing the link to the other user and simultaneously opening the page in your own browser in such a way that when you scroll or otherwise act on the page, the other user sees the results in their own browser. Sharing allows you to guide the web-based caller through a site.

To work with web data when connected with a web-based caller, click the **Data** button in the main window to open the Caller Data window.



Figure 4. Caller Data window

Viewing Caller Data

The Source/Contact panel displays data collected in various ways:

- From an Auto Attendant if the caller has input data there in either a PTSN or web call situation.
- From Supplemental Caller Data, including user data tagged to the call, and data included by using the AltAgent **Memo** button, DDR, ActiveX I/F, or Agent ActiveX I/F.

- From caller data collected from the web page form.
- From web URL paths—a URL history.
- From or input by the caller, such as IP address, name, account numbers, etc. including data from your external database such as Outlook, if available.

Sharing or Sending a URL or Page

The URL Sharing panel in the Caller Data window displays the addresses of pages or sites you've added to the list. Pushing a web site or a web page is a two step process: first you add it to your share list to make it available, then you send it.

1. In the Caller Data window, click **Add** to open an Add URL dialog box.



Figure 5. Add URL dialog box

2. Type in the URL or web page specification and click **OK**.
The URL now appears in your URL Sharing list.



Figure 6. Caller Data window

3. To share or push the URL, select the URL you want to share by clicking it, then click **Push** to send it or **Share** to share it.
4. When you're done, click **Release** to disconnect the web call.

Monitoring

If your system administrator has configured your extension for monitoring, you can monitor the activity on the other extensions in your workgroup, view call history, view workgroup statistics, and view calls in queue.

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 7. Workgroup Agent Monitor Window

Choosing Workgroups to Monitor

1. Open the Monitor window by clicking the **Monitor** button in the AltAgent 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, in addition to any workgroups to which you belong.

3. Select the check boxes next to the individual extensions (**Type** "Ext.") or workgroups (**Type** "WG Ext.") you want to monitor, and click **OK**.

The extensions in the selected workgroups are now listed in the Monitor window, in addition to any individual extensions you selected.

Note: If you selected individual extensions to monitor, you will be able to pick up *personal* calls to these extensions, but not workgroup calls.

In addition, if you selected a workgroup extension, the Monitor list shows *all* the extensions in the workgroup, even for agents who are currently logged out.

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
- **Ringling**—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 *Ringling*, clicking its **Status** field picks up the call.

Note: If a call is coming in to a workgroup to which you are not currently logged in, 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 8. Workgroup Agent 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.

Viewing Workgroup Statistics

Click the **Workgroup** tab to open the Workgroup window and view statistics on workgroup activity for the monitored workgroups.]

Group	Information	Value
	Agent Performance Summary since Midnight	
	- Total Calls Answered	0
	- Total Outgoing Calls	0
	- Total Talk Time	00:00:00
	- Total Wrapup Time	00:00:00
200	Workgroup Name	sales
	Agent Performance since Midnight	
	- Calls Answered	0
	- Outgoing Calls	0
	- Total Talk Time	00:00:00
	- Average Talk Time	00:00:00
	Current Workgroup Status	
	- Calls in Queue	0
	- Calls Exceeding Wait Time Threshold	0
	- Service Level	100
	- Login Time	01/14/02 17:52:34
	- Number of Agents Login	2
	- Number of Agents Busy	0
	Workgroup Performance	
	- Calls in Queue	0
	- Calls Answered	0
	- Outgoing Calls	0
	- Calls Abandoned	0
	- Calls Transferred to Voice Mail	0

Figure 9. Workgroup Agent Workgroup Window displaying workgroup statistics

Most of the data is self-explanatory, but you might note the following:

- The *Service Level* represents the percentage of workgroup calls that have been taken out of queue before the *Threshold* time has expired.

If you have been removed from a workgroup by the system administrator, all your statistics related to that workgroup will also be removed from the Workgroup window.

- The *Login Time* is the time you logged into the workgroup.

Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed in "Viewing Group Statistics" on page 53.

These statistics clear if the system is reset.

Click the Export button to export the statistics.

Click the **Print** button to print the statistics.

Viewing Queues

Click the Queue tab to open the Queue window to view the calls in queue for the monitored workgroups. The call data includes the Caller ID and caller name, if available, as well as the workgroup and amount of time the call has been in queue.



Figure 10. Workgroup Agent queue window

Using Contact Adv
as Workgroup Agent

Using Contact Advantage as a Supervisor

Logging in to Contact Advantage as a Supervisor allows you to view workgroup and agent performance statistics and a history of calls. You can print this statistical data or export it to a CSF (Call Summary Format) file.

Further, you can view call data for calls in queue. You can listen to and, if your system is set up for it, barge in to agent phone calls.

You cannot use AltSupervisor when logging in with the **IP Extension Integrated with...** option.

Logging In



Figure 11. Workgroup Supervisor login

After initial login as a Supervisor (described in “Logging In” on page 5), you are asked to specify which workgroups you want to monitor.



Figure 12. Password window for workgroup supervisor login

Select the workgroups using the drop-down lists, and type the password for each workgroup pilot extension. If you want the software to remember the passwords, select the **Save workgroup password** check box. When you're ready, click **Login**.

Contact Advantage supports logging in on up to eight workgroups simultaneously.

Viewing Group Statistics

Group Name	Group Statistics	Value
Real Time	Workgroup Performance	
	Current Calls in Queue	0
	Calls Exceeding Service Level Threshold	0
	Service Level	100
	Calls in Queue	0
	Maximum Number of Calls in Queue	0
	Outgoing Connected Calls	2
	Calls Answered	0
	Calls Transferred to Voice Mail	0
	Calls Abandoned from Queue	0
Since Midnight	Calls Abandoned during Ring	0
	Calls Abandoned during VM	0
	Calls Queue Overflow	0
	Total Talk Time	00:00:17
	Maximum Wait Time	00:00:00
	Average Wait Time for Answered Calls	00:00:00
	Average Wait Time for Abandoned Calls	00:00:00
	Average Talk Time	00:00:00
	Configured	1
	Agents	
Agents	Logged	1
	Busy	0
	Wait	0

The **Group Statistics** window displays—for *each* workgroup—real time workgroup activity and performance, workgroup performance since midnight, and a summary of agent data. The statistics displayed are for workgroup calls only.

These statistics are reset every night at midnight.

Most of the statistics are self-explanatory, but you may wish to note the following:

- **Wrapup**—whether or not to allow wrapup time, and the duration that can be used to wrap up after hanging up a workgroup call, are determined in the AltıWare Administrator. The statistic shows the number of agents that are currently in the wait state. The Agent Statistics window displays the average wrapup time per agent.
- **Calls exceeding service level threshold**—the *service level threshold* is the maximum amount of time that is acceptable for a caller to wait before the call is answered. This statistic represents the number of calls exceeding that time limit.

- **Service level**—the percentage of queued calls exceeding the service level threshold.
- **Average wait time for answered calls**—the average amount of time a caller is in queue before being answered.
- **Average wait time for abandoned calls**—the average amount of time calls were in queue before they were abandoned. *Abandoned* means that the caller has hung up before the call was answered.
- **Calls abandoned**—the number of calls abandoned since midnight.
- **Calls abandoned during ring**—includes calls that were automatically forwarded from the workgroup extension number.
- **Average talk time**—the average amount of time workgroup agents are actually talking to callers. The average time *per agent* is shown in the Agent Statistics window.
- **Busy**—the number of agents whose phones are off hook, or the extension is in the **Forward All Calls** or **Do Not Disturb** state.

Switching Workgroup Views

Click the workgroup extension tab at the bottom of the panel to view statistics for another workgroup.

Exporting or Printing Statistics

Use the **Export** button and then specify a directory and file name to save records to a CSF (Call Summary Format) file, or use the **Print** button to print the records.

Important: These statistics are reset every night at midnight. If you do not exports or print records before the reset, you cannot recover the data.

Viewing Agent Statistics

The screenshot shows a window titled "Superstar" with a tab labeled "Agent Statistics". The window contains a table with the following data:

Ext	Name	Calls Answered	Avg Talk Time	Avg Wrapup	Login Time	Logout Time
101	Phoebé Rhodes	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00:00:00
105	Mavis Sanchez	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00:00:00
108	Michael Jacob	0	00:00:00	00:00:00	08/14/00 14:23	00/00/00:00:00
110	Jose Johnson	0	00:00:00	00:00:00	08/14/00 08:45	00/00/00:00:00
113	Sally Fisher	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00:00:00
117	Denise Jeff	0	00:00:00	00:00:00	08/14/00 08:45	00/00/00:00:00
107	Bonnie Bonnelly	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00:00:00
188	Sid Symonsky	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00:00:00

Figure 13. Agent Statistics window

The **Agent Statistics** window displays statistics for each agent, including the number of calls answered, the average talk time (average amount of time spent on the phone per call), and the average time spent in wrap up.

The table also displays the login and logout times.

Click the workgroup extension tab at the bottom of the panel to view statistics for agents in another workgroup.

Using Contact Adv
as Workgroup Supervisor

Viewing a History of Agent Activity

Click the **History** button in the Agent Statistics window to view a history of agent activity for the currently selected workgroup's agents.



Figure 14. Agent Call History window

The Call History displays a data panel, showing you the number of calls for each agent in the work group. The default view is for the current two hour period.

The data covered is from midnight to the current time, and the data is cleared and refreshed at midnight.

To change the display:

- Click the **Zoom In** and **Zoom Out** buttons to change the length of time displayed. Zoom In takes the display down to 1/2 hour increments. Zoom Out takes the display up to as much as 4 hour increments.
- Click the **Prev** button to view previous time periods and click the **Next** button to return toward the current time period.
- Click the **Refresh** button to update the window data.

Note: Clicking **Refresh** can result in the transfer of a large amount of data and can be time consuming. It is recommended that you do not use this feature frequently.

Viewing Agent Current Status

Click the **Agent State** button to view the current status of the agents for the selected workgroup.



Figure 15. Agent State window

This window displays information about the agent's logon readiness state and the agent's status (either *idle* or *busy*). If the agent is connected to a caller, call data and Caller ID data are displayed, indicating whether the call is incoming or outgoing, Personal or Workgroup.

Note: A Logout Reason of "00" appears in one of two situations:

- Agents in this workgroup are not required to provide a Logout Reason,
- or
- "00" is used to indicate a Logout Reason of "other."

The green light will turn red if the extension is:

- off hook
- in the **Forward All Calls (FWD)** state

- in the **Do Not Disturb (DND)** state
- in **wait** after a call

To change views and print data:

Click the workgroup pilot extension tab at the bottom of the panel to view data for agents in another workgroup.

Click **Print** to print the current window data.

Monitoring—Listening in and Barging In

If your system and extension are configured to provide these functions, you can listen to (silent monitor) agent's calls and, if necessary, intervene and enter the conversation in progress, sometimes called barging into the call. Essentially, barging in is to create a conference call with the agent, the caller, and yourself.

Note: These features not only require the appropriate extension permissions, but also a Triton Resource Board to be installed in the Altiserv system. If you attempt to make use of these features when there is no board present, you'll get a fast busy signal.

You can monitor only incoming/outgoing calls for the workgroup which belongs to your supervisor. Outgoing or incoming personal calls (to the agent's extension, not through the workgroup pilot extension) cannot be monitored.

Also, you cannot use listen or barge in on parked calls, calls on hold, or calls in conference.

Listening In

When you listen in to a call, you cannot be heard.

To listen in to a call:

1. In the Agent State window, click to select an agent connected to an incoming workgroup call.
2. Click the **Listen** button to ring your extension, then listen in by phone or headset.

Alternatively, using the handset, press # **59** + <agent extension> + <workgroup password> + **1**.

3. When you are finished monitoring, click the **Hang Up** button.

The **Hang Up** button appears in the window after you click **Listen** or **Barge In**.

Barging In

You can barge into a workgroup agent call and enter the conversation in progress.

To barge in to a call:

1. In the Agent State window, click to select an agent connected to an incoming workgroup call.
2. Click the **Barge In** button to ring your extension, then speak to the agent and caller through the handset.

Alternatively, using the handset, press **# 59** + **<workgroup extension>** + **<workgroup password>** + **<agent extension>** + **2**.

3. To exit the call, click the **Hang Up** button.

Viewing the Queues

Click the **Queue** button to view the queue for the selected workgroup.



The screenshot shows a window titled "Supervisor" with a table of call data. The table has five columns: ID, Wait Time, Caller ID, Caller Name, and Queue. There are four rows of data.

ID	Wait Time	Caller ID	Caller Name	Queue
1	00:00:37	650 555-1212	Gradd Gravers	
2	00:00:31	408 555-1212	Marcy Levine	
3	00:00:27	510 272-9712	Franklin Wilson	
4	00:00:22	800 555-1212	Alan Shute	

Figure 16. Queue window

Using Contact Adv
as Workgroup Supervisor

For each call in queue, the **Queue** window displays the ID, the wait time, Caller ID, and Caller Name if available.

The maximum number of calls in queue, at any one time, is 34.

Exporting or Printing Statistics

Use the **Export** button and then specify a directory and file name to save the queue data to a CSF (Call Summary Format) file, or use the **Print** button to print the records.

Workgroup CDR Search

Workgroup CDR search lets you specify a search by workgroup. To perform this search, you can log in as the administrator or as a workgroup supervisor.



Figure 17. WG CDR tab of the CDR Search window

To run a WG CDR search:

1. Select the time range for the search:
 - **User Define**—the From/To fields default to a range that includes the ten previous days. Edit the date and time for a custom range.

- **Today**—sets the From/To fields to the current date
 - **Last 7 Days**—sets the From/To range to the previous seven days
2. Select the Type of search:
 - **All Calls**—calls involving: Auto Attendant, Ring No Answer, Queue, Voice Mail (no VM recorded or VM recorded), Connect, Logon, Logoff, All Trunks Busy, No session, VM Access, Forward, Transfer, VM Notify, WG Abandoned, Park, System Park, Conference, Call Monitor, Transfer Cancel, Call Redirect, Call Pick Up, Dial Cancel
 - **Connected Calls & Messages**—“Connected Calls” plus “Messages” (see below)
 - **Connected Calls**—incoming calls answered by a person, and outgoing calls that entered “Connected” state
 - Note:** For CDR records, Connected Calls refer to calls in these states: connected, transfer, park, system park, conference call and transfer cancel.
 - **Messages**—incoming calls directed to voicemail
 - **Unanswered Calls**—incoming or outgoing calls not answered by a person
 - Note:** For CDR records, Unanswered calls refer to calls abandoned while in these states: AA, forward, RNA, queue, voicemail, WG abandoned, call redirect, no more session, pick up by and dial cancel.
 - **All Trunks Busy**—outgoing calls aborted due to busy signals
 - **Agent Login/out**—calls sorted by the login/out times of workgroup member extension numbers
 3. Select the **Workgroup** whose call records you want to search.
 4. In the search criteria fields, enter data for **Caller, Target, DNIS, Tenant, or Acct Code** as desired. Select **Exact match** for an exact match. Otherwise, CDR Search will retrieve every record that contains the number(s) you enter.
 5. Select to **Sort by:**
 - **Date/Time**—sorts day-by-day (or hour-by-hour if you select Today as the time range for the search)
 - **Agent**—sorts by agent

- **Workgroup**—sorts by workgroup
 - **Trunk**—sorts by trunk
 - **N/A**—search without sorting
6. Click **Search**. During the search, a progress window appears. To cancel the search, click **Cancel**.

Search results appear in the Summary window. Refer to “Search Results” on page 63 for details on working with search results.

Workgroup Statistics Search

Workgroup Statistics lets you search workgroup call data (rtmData.mdb records) captured from the real-time monitoring function in the Workgroup Statistics tab of the Altisupervisor client. To perform this search, you can log in as the administrator or as a workgroup supervisor.

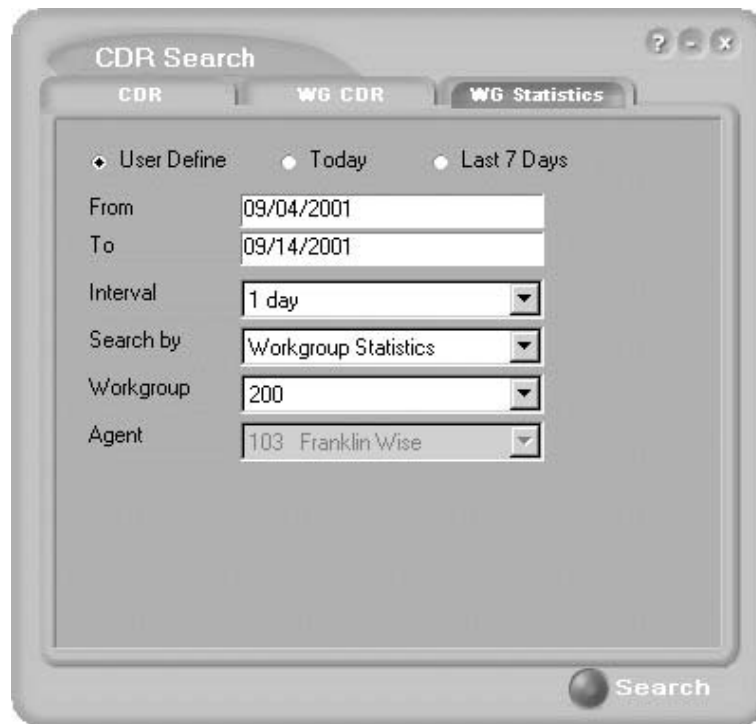


Figure 18. WG Statistics tab of the CDR Search window

To run a WG Statistics search:

1. Select the time range for the search:
 - **User Define**—the From/To fields default to a range that includes the ten previous days. Edit the date and time for a custom range
 - **Today**—sets the From/To fields to the current date
 - **Last 7 Days**—sets the From/To range to the previous seven days
2. Select the **Interval** (1 day, 1 hour, or 15 minutes) to specify the granularity of your search results.

Note: This selection is overridden by the interval setting in AltAdmin. If your search results produce greater intervals than you specified, consult your system administrator.
3. Select the type of search:
 - **Workgroup Statistics**—statistics on a specific workgroup
 - **Agent Statistics per Workgroup**—statistics on a specific agent for a specific workgroup
 - **Agent Statistics**—statistics on a specific agent for every workgroup to which he/she belongs
4. Depending on the type of search you selected, specify a **Workgroup** and/or **Agent** to search on.
5. Click **Search**. During the search, a progress window appears. To cancel the search, click **Cancel**.

Search results appear in the Statistics window. Refer to the *CDR Manual* for details on working with search results.

Search Results

The type of search you perform determines the type of results you see: **Summary**, which also enables drilldown to call **Details** and **Records** windows, or **Statistics**.

All Results windows have the following buttons:

- **Export** - exports selected calls to a csv file. Refer to the *CDR Manual* for details.
- **Print** - prints the selected calls. Refer to the *CDR Manual* for details.

All Statistics windows (WG, Agent Statistics Per WG, Agent) also have a **Stop** button.

For explanations of records and database schema, refer to the *CDR Manual*.

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 AltAdmin 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.

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 Contact Advantage main window to open the Config window.

In this window, you can edit your password, the default trunk access code, voice mail settings, Contact Advantage 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 a Contact Advantage window to pop up on your screen when you have a call. You can then click a call to take it or perform other Contact Advantage actions. For Contact Advantage to pop up, you cannot have closed the application entirely, but it can be minimized.

Note: The Screen Pop and Audio Beep selections on this screen differ from the Alert option you can select in the Advanced window, which alerts you when a call goes into your workgroup's queue. See "Advanced Options for Web-based and Workgroup Calls" on page 68 for details.

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

Accessing Databases

Contact Advantage 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 Contact Advantage 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.

Advanced Options for Web-based and Workgroup Calls

This option is available if you are logged in as a workgroup agent but not as a desktop user. Click the **Advanced** button to select advanced options.

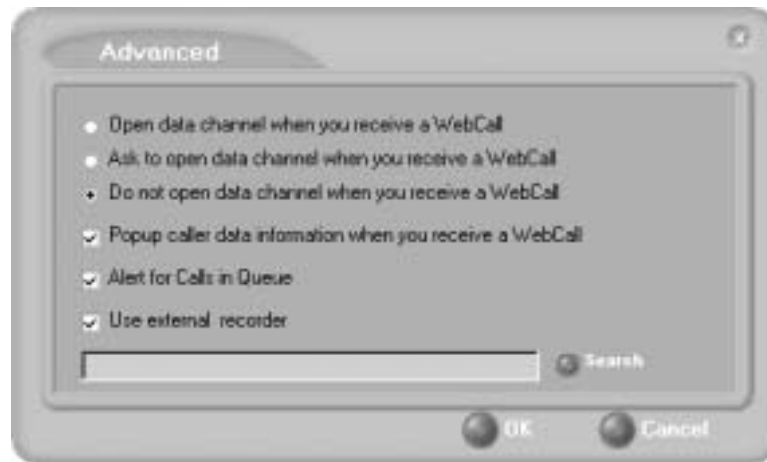


Figure 2. Advanced database options

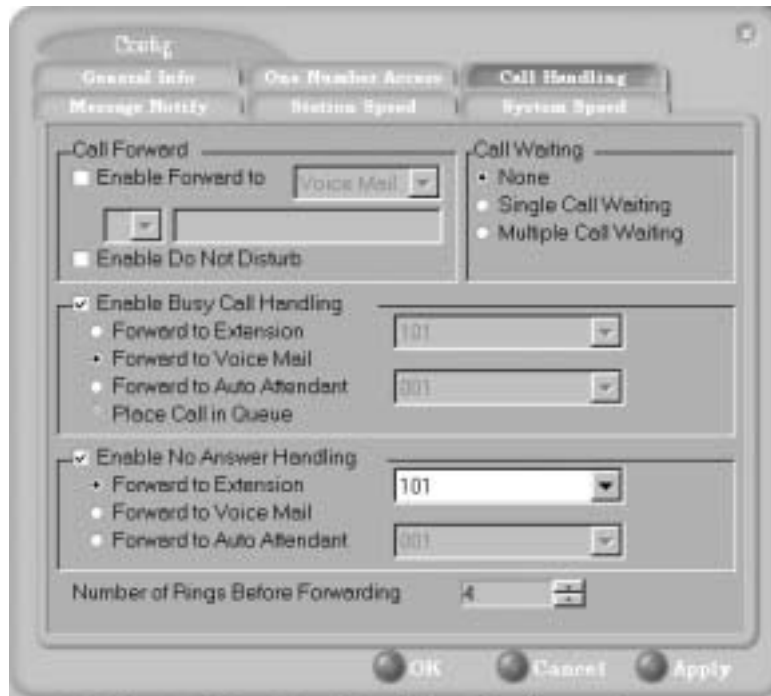
- The first three radio buttons provide choices for when to open a text chat session during web-based calls—that is, whether to open NetMeeting in coordination with the calls. You can choose always, never, or to have Contact Advantage query you on each webcall as to whether to open a chat session.
- Select the **Popup extra call information...** check box to have the Caller Data window pop up automatically when you connect to a web-based call. See “Viewing Caller Data” on page 43.
- Select **Alert when new calls come into queue** to have Contact Advantage alert you via a screen pop and audio beep when a new call enters the workgroup queue.

- Select **Use external recorder** to use any client voice recording system you have installed. Use the **Search** button to browse to the .exe file (such as NovoPlaybackOE.exe).

Note: For information on NOVO software and hardware installation and configuration with Contact Advantage, please contact NOVO Technical Support.

Call Handling

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



Configuration

Figure 3. 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 or your workgroup.

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 69 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.



Configuration

Figure 4. One Number Access window

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 5. 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 voice mail 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.

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 6. Message Notification options

Use this window to set the notification options:

- **The types of messages** on which you want to be alerted: N/A, 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.



Configuration

Figure 7. 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 8. 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 AltAdmin, the AltWare Administrator. In Contact Advantage, 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 8 on page 76. 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.

Index

A

- AA state 10
- Account Codes 25
- ACT 3, 67
- address
 - AltiGen Communications, Inc. ii
- advanced database option 68
- agent statistics 55
- AltiAgent
 - configuration 65
 - main window 41
- AltiGen Communications, Inc.
 - address ii
 - phone numbers ii
- AltiSupervisor 51
- AltiView
 - configuration 65
- Apply button 65
- auto attendant 23

B

- barge in 59
- busy call handling 70
- Busy state 10

C

- call handling 18–25
 - Centrex transfer 23
 - configuration 69
- call handling, workgroup 42
- call history 36, 47
- call holding 21
- Call Pending state 10
- call states, defined 10
- call transfer 22
- call waiting 22
- calls list 18
- Center configuration 65–76
- Centrex transfer 23

- conference call 24
- Conference state 10
- configuration 65, 65–76
 - call handling 69
 - general 66
 - message notification 73
 - One Number Access 70
 - station speed dialing 75
- connected 10
- CSF (Call Summary Format) 54, 60
- current agent status 58

D

- databases 3
 - advanced options 68
- dial-by-name 68
- dialing
 - by name 20
 - by name search 21
 - by number 19
 - keyboard dialing pad 20
 - speed dial 21
 - using the mouse 20
- dialing window (dial pad) 19
- dialtone 10
- distribution lists 30
- Do Not Disturb 70

E

- Error call state 10
- error messages 11
- exit 9
- Export button 54, 60
- external databases 3

F

- flash button 21
- forwarding all calls 69
- forwarding voice mail 29

G

- general configuration 66
- GoldMine 3, 67

Index

group statistics, viewing 53
group view 53

H

handling calls 18–25
hiding Center 9
history logs 36, 47
history window 36, 47
hold 10
hold button 21
hold pending 10, 35, 46

I

Idle state 10
installation requirements 1
IP extension, troubleshooting 9

L

licenses 2
listening in 58

M

Main window 15
Microsoft Outlook 3, 67
minimize 9
monitor window 34, 45
monitoring 33, 37, 45
monitoring, as supervisor 58
mouse dialing 20
Music on Hold state 10

N

NetMeeting 68
no answer handling 70
Not Ready status 43
notifications 73
NOVO 69

O

OK button 65
One Number Access
password 72

One Number Access
configuration 70
One Number Access Setup 71

P

pager, and forwarding 70
Park state 10
password
One Number Access 72
phone icon 9
ping 9
Play state 10
pop-up windows 9
Print button 54, 60
proceeding state 10
pushing web data 43

Q

queue window 59
queues 59
QuickNet 4, 7, 8, 16

R

Ready status 43
Record state 10
Ringback state 11
ringing 11

S

saving changes 65
screen pop 9, 68
search by name 21
service level 41
session licensing 2
sharing web data 43
speed dial 21
state column 21
station speed dialing
configuration 75
status, agent 58
system requirements 1
system speed dialing 76

T

- TCP socket 9
- threshold time 41
- transfer
 - Centrex 23
- transfer calls 22
- transfer to auto attendant 23
- transfer to voice mail 22
- transferring calls to voice mail 23
- Troubleshooting IP Connectivity 9

U

- uninstall 3
- uninterruptible power supply (UPS) 53
- upgrade 2
- UPS (uninterruptible power supply) 53
- URL sharing 43
- URLs 43

V

- viewing agent status 58
- viewing queues 59
- voice mail 22, 26–33
 - forwarding 29
 - playing 27
- voice mail group 30
- voice mail state 11

W

- warranty v
 - how to get service vi
- web button 43
- web pages 43
- web-based calls 68
- Windows tray 9
- workgroup 33, 45
 - queues 59
- workgroup agent
 - call handling 42