



# **AltiClient™**

AltiAgent™ and AltiSupervisor™

for AltiWare Open Edition (OE) Release 4.6

and AltiContact Manager (ACM) Release 4.6

## **Manual**

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# Warranty

## What The Warranty Covers

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

## How Long the Warranty Is Effective

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

## Whom the Warranty Protects

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

## What the Warranty Does Not Cover

1. Any product on which the serial number has been defaced, modified or removed.
2. Damage, deterioration or malfunction resulting from:
  - a) Accident, misuse, neglect, fire, water, lightning, or other acts of nature, unauthorized product modification, or failure to follow instructions supplied with the product.
  - b) Repair or attempted repair by anyone not authorized by AltiGen Communications.
  - c) Any damage of the product due to shipment.
  - d) Removal or installation of the product.
  - e) Causes external to the product, such as electric power fluctuations or failure.
  - f) Use of supplies or parts not meeting AltiGen Communications' specifications.
  - g) Normal wear and tear.
  - h) Any other cause which does not relate to a product defect.

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

## How to Obtain Service

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

Authorized AltiGen Dealers must follow the steps below for service:

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

All materials being returned to AltiGen must have an associated RMA number. RMA numbers are issued by AltiGen Customer Service and can be obtained by calling 1-888-ALTIGEN (258-4436) or faxing an RMA form 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](mailto: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.



# Overview

AltiClient is an optional software package that includes AltiAgent and AltiSupervisor, and runs with the AltiWare OE or AltiContact Manager system. AltiAgent Session licenses and AltiSupervisor Session licenses must be installed and registered to enable client sessions.

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

## Installation

The following items are included in the AltiClient 4.6 package:

- AltiClient 4.6 Manual
- AltiClient Session License

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

## Client System Requirements

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

- IBM/PC AT compatible system
- Intel 133 MHz Pentium
- Windows 98 (or higher), or Windows 2000, or Windows NT 4.0 or higher, Server or Workstation.
- 30 MB Hard Drive Disk Space

- 32 MB RAM
- SVGA monitor (800 x 600) with 256 color display, or better
- Keyboard and Mouse
- AltiWare OE/AltiContact Manager 4.6 running on a server accessible to this client.

## Session Licensing and License Upgrade Procedures

### AltiAgent Session License

The AltiAgent Session license enables a per concurrent session of AltiAgent. It includes a Desktop Connect/SDK client license. Up to 150 concurrent AltiAgent sessions are supported.

### AltiSupervisor Session License

The AltiSupervisor Session license enables a per concurrent session of AltiSupervisor. It includes a Desktop Connect/SDK client license. Up to 20 concurrent AltiSupervisor sessions are supported.

### Upgrading Licenses

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

You can verify the licenses when you run AltiAdmin/ACM Admin by selecting About **AltiWare...**/**About ACM Admin...** 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 AltiClient, please review the following checklist:

- Make sure that AltiWare OE/AltiContact Manager 4.6 has been installed on the server 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 AltiClient.
- Make sure License has been installed and activated.

## Installing AltiClient 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 AltiClient

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

AltiClient 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. AltiClient also lets you see the incoming calls that have a matching record in the Contact list.

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

In OE 4.6, a Country Code field can be configured (in **General Info**) by the local user to help convert standard international phone numbers in Outlook to correct digit strings for AltiWare.

## **ACT!/GoldMine® Support**

AltiClient 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. AltiClient also lets you see the matching record from the contact database list of the incoming calls.

## **QuickNet Integration**

AltiClient 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 AltiClient installation and logon, AltiClient will then enable functionality to control real-time voice compression/decompression functions through a GUI.

# Getting Started

AltiClient is a suite of desktop applications for managing personal calls and workgroup calls, and performing phone and supervisory functions from the PC. AltiClient contains the following applications:

**AltiAgent** is a version of AltiView 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 AltiView 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.

## Logging In

### Before you log in

When you launch AltiClient — as an AltiAgent or AltiSupervisor — 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, AltiWare/AltiContact Manager replaces the name with the IP address, eliminating the need of a DNS (Domain Naming System) search.

To obtain the AltiWare/AltiContact Manager 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 AltiClient application and, if this is the first login to this AltiWare/AltiContact Manager 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.

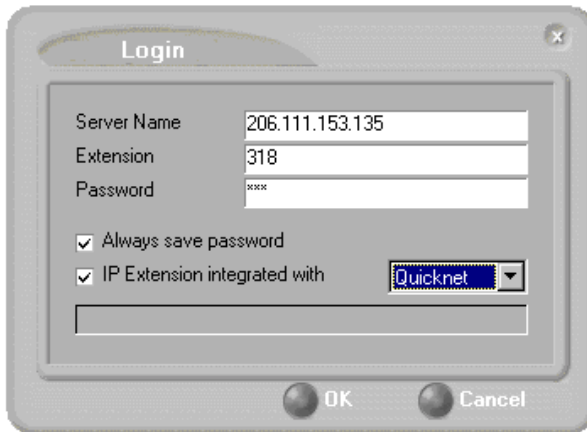


Figure 1. Logging in

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 AltClient.

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 AltAgent desktop to access AltWare/AltContact Manager 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 agent use or supervisor use, you can access AltIClient 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 AltClient—one for desktop use integrated with NetMeeting and one as a workgroup agent—be sure to launch the AltAgent instance first, and the desktop instance second; otherwise, the NetMeeting launch will fail.

Note also that AltWare/AltContact Manager 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 AltAgent 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 AltWare/AltContact Manager server.

As a test, you can choose **Run** from the Windows **Start** menu, then enter  
Ping <IP address> [ENTER]

where <IP address> is the AltiWare/AltiContact Manager 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 AltiClient



When you minimize the AltiClient 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 AltiClient 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 AltiAgent is hidden (minimized) but *not* when you have exited. See “Screen Pop, Audio Beep, and Auto Close” on page 53.

## Using the Windows Tray Phone Icon

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

## Resizing the Display

You can resize many AltiClient 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

AltiWare/AltiContact Manager applications report the status of calls. A list of the states includes the following:

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

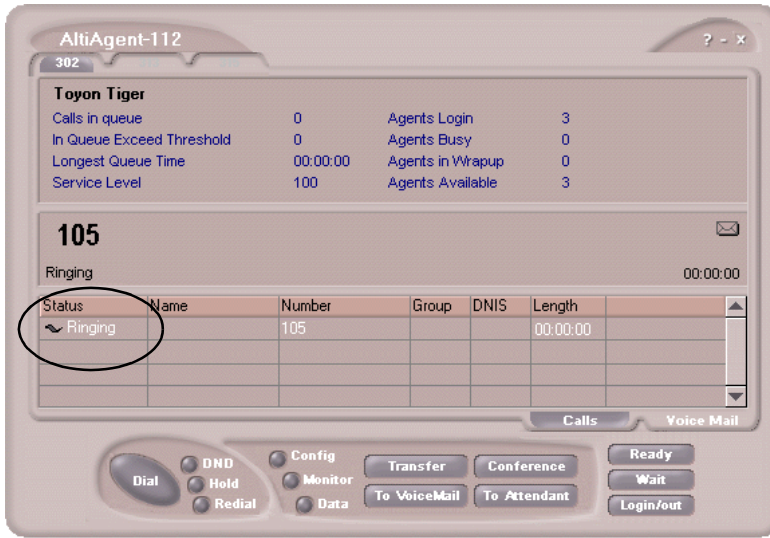


Figure 2. Status Field - AltClient main window

## Error Messages

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

Error Message	Description	Solution
AltiWare connection limit has been exceeded.	No AltClient was found OR more than allowed number of AltClient users have attempted to log on.	Maintain the number of AltClient license keys or add additional session licensing.
Cannot connect to AltLink. Please check server name or network connection.	You are not connected to AltWare.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of AltWare (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 AltiWare.	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).	AltiClient uses this dll to communicate with AltiWare. It should be registered in user system.	Re-register this file. Type in DOS command window, <b>regsver32 AlpInterface.dll</b> Change directory to AltiClient directory, type <b>regsver32 AlpInterface.dll</b>
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

<b>Error Message</b>	<b>Description</b>	<b>Solution</b>
<p>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.</p>	<p>The installed version of AltiClient is outdated from AltiWare release.</p>	<p>Upgrade AltiClient to version 4.6 (install matching version of AltiClient).</p>





# Using AltClient as a Workgroup Agent

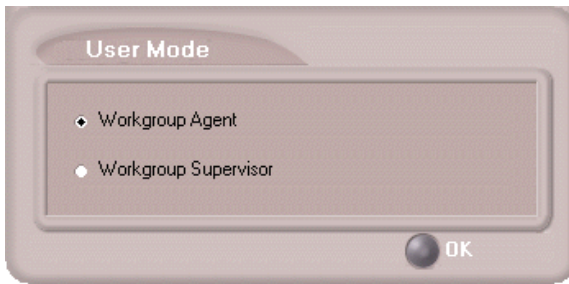


Figure 1. Workgroup Agent login

AltAgent is a desktop call control application for workgroup agents to manage their workgroup calls from the PC. AltAgent 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...** 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.

# 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.

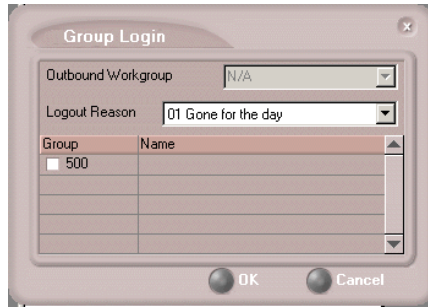


Figure 2. Group Login window

Select the workgroup or workgroups you want to log in to, then click **OK**. AltClient 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.

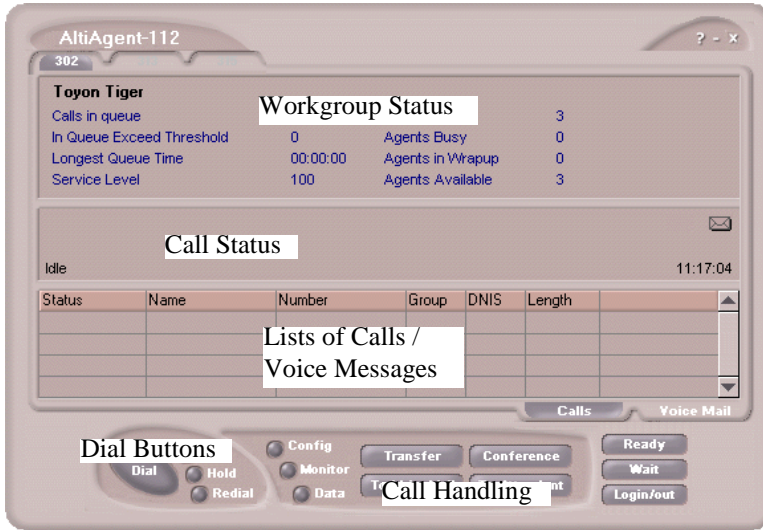


Figure 3. AltiAgent main window

The window consists of the following displays and buttons:

Parameter	Description
<b>Workgroup Status</b>	Displays statistical information about the current workgroup. Tabs above the panel allow you to switch views between the workgroups you're logged in to.  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.
<b>Call Status</b>	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.
<b>Directory</b>	Two tabs show a log of current calls, or a log of current and past voice mails.

<b>Dial</b>	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.
<b>Call Handling</b>	Provides call functions, including transferring calls, conferencing, sending calls to voice mail or an attendant, and recording calls.
<b>Configuration</b>	Lets you customize AltiAgent settings. See “Configuring Your Station Settings” on page 51.
<b>Monitor</b>	Provides a view into extension or workgroup activity and provides access to past call logs.
<b>Data</b>	Lets you display data associated with the calls, send web pages or URLs to the user, or share web pages.
<b>Ready</b>	Tells the system you are ready to receive workgroup calls.
<b>Wait</b>	Tells the system not to send workgroup calls to your extension.
<b>Login/Logout</b>	The button allows you to login in to different workgroups and/or log out of current workgroups.

## Call Handling

The AltiAgent 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 4. 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 5. Dialing pad, also known as the Dialing window

## Dialing By Number

### To dial using the keyboard number keys:

1. In the dialing window, enter the numbers you wish to dial using the standard numeric keys or the numeric keypad.  
The numbers appear in the box above the dialing pad.
2. Press **Enter** or click the **Dial** button to place the call.

### To dial using the mouse:

1. Using the dialing pad in the Dialing window, click the digits for the phone number.  
As you enter the numbers, they appear in the list box above the dialing pad.
2. Click the **Dial** button to place the call.

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

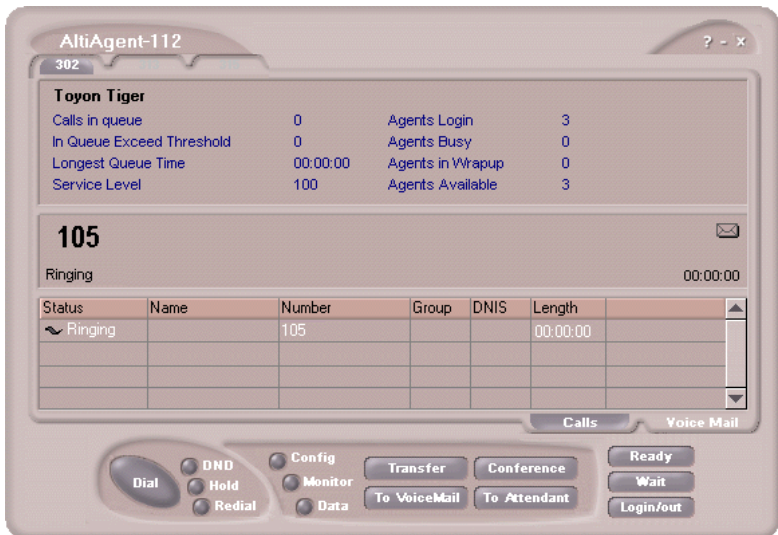


Figure 6. Call status displays in Calls list as well as status panel

## 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 51 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 AltAgent main window. 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 a call is put on hold using the **Hold** button in AltAgent, if the user does not pick up the call after the two-minute hold time, the system will ring the user. If the call is still on hold after two minutes, the system will ring the user again.

**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 30.

## 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 AltAgent 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

AltAgent 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 AltAgent 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.



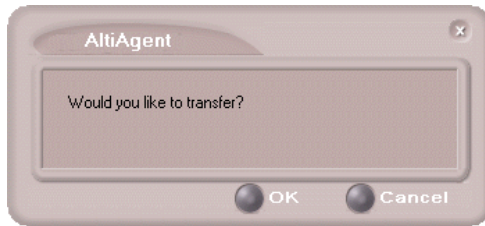


Figure 7. Confirming call transfers

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, AltAgent reconnects the call to your extension. 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

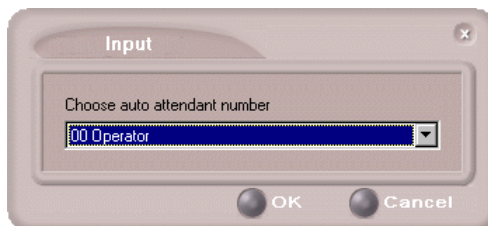


Figure 8. Transfer to Auto Attendant

## 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 51.

## Centrex Transfer

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

### To perform a Centrex transfer:

1. Press **Transfer**.
2. Dial the prefix for trunk-line access (such as **9**).
3. Dial the second party’s number and either hang up or announce the call.
4. Answer **Yes** in the popup.

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

## Conferencing Calls

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

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

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

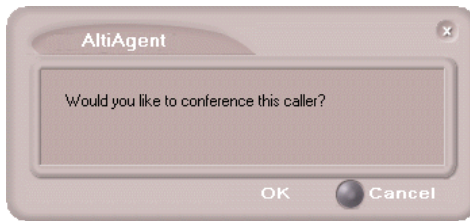


Figure 9. Confirming Conference Calls

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 10. 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.

# Recording Calls

The voice recording feature in AltiAgent allows a user to record conversations. Recorded conversations can then be played back through voicemail or accessed at a centralized location.

**Note:** The voice recording feature is only available for extensions on Triton Resource boards.

For each *extension*, the options for voice recording are enabled in the system's **General** page of **Extension Configuration**. Settings in the **Personal Call Recording Options** field allow the administrator to:

- Disable call recording
- Record all calls to a central location (AltiContact Manager only)
- Record on demand to a central location (AltiContact Manager only)
- Record on demand to agent VM

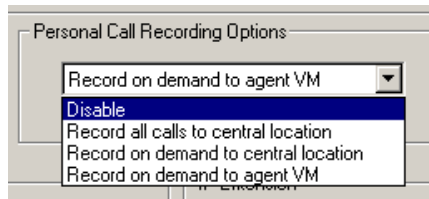


Figure 11. *Personal Call Recording Options Field (General Page of Extension Configuration)*

For each *workgroup*, the options for voice recording (centralized workgroup recording) are enabled in the system's **General** page of **Workgroup Configuration**. Settings in the **Centralized Workgroup Recording** field allow the administrator to:

- Disable workgroup recording
- Record all calls to central location (AltiContact Manager only)
- Record on demand to central location (AltiContact Manager only)

- Record on demand to agent VM

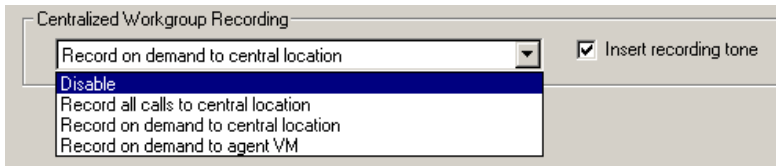


Figure 12. Centralized Workgroup Recording Field (General Page of Workgroup Configuration)

Playback of recorded calls requires a third-party message management tool.

**Note:** When voice recording is enabled at both the extension and workgroup level, the workgroup voice recording settings override extension voice recording settings.

**WARNING!**

*Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws.*

## All Calls Recorded (AltiContact Manager only)

When the extension is set to have all calls recorded (to a central location), any time the AltiAgent user answers a call, the call will be recorded. This is indicated by a small, red cassette tape icon in the top right AltiAgent window.

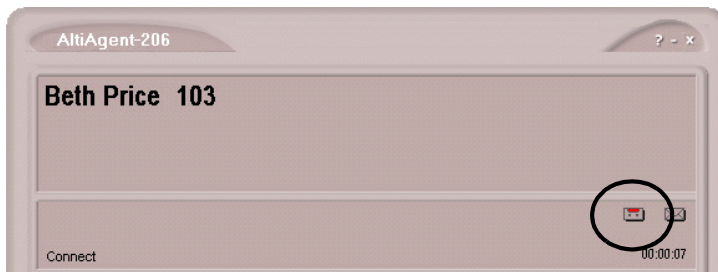


Figure 13. All Calls Recorded Icon

## Recording on Demand

When the extension is set to record on demand (to a central location or user VM), the user can use AltiAgent to initiate the recording.

### To record a call:

1. While connected to a call, right-click on the conversation to open a drop-down list.

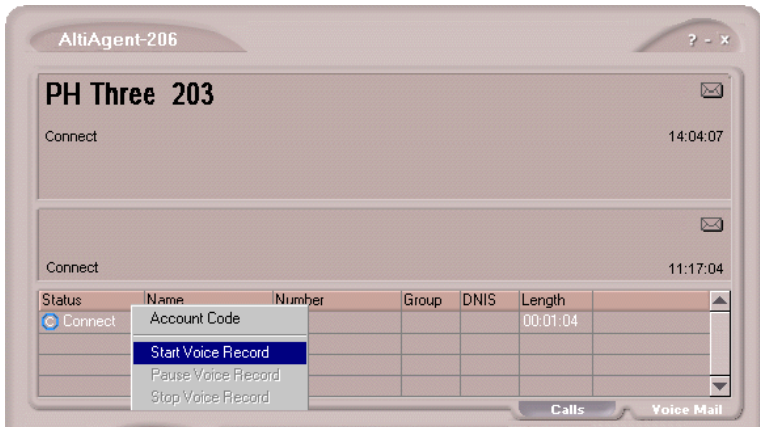


Figure 14. Right-click Drop-Down List

2. Scroll to **Start Voice Record**. The recording will be indicated by a small, red cassette tape icon in the top right AltiAgent window. If the **Insert Recording Tone** option is set, both parties will hear a beep when the recording begins.
3. To pause recording, right-click on the conversation and scroll to **Pause Voice Record**.
4. To end recording, right-click on the conversation and scroll to **Stop Voice Record**. If the administrator has set to record to a centralized location, contact your administrator for the location. If the system is set to save the recording as the user's voicemail, the recording can be heard through the AltiGen Voice Mail System.

### Notes:

- Depending on the size and number of recorded calls, this may affect the system's resources.
- Do not use an account code entry to stop recording on demand; doing so will disconnect the call.

## 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.

## AltAgent Options

The basic call handling features and functions are the same for workgroup agents as they are for AltView user.

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

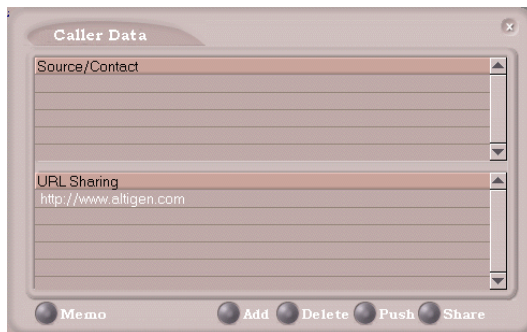


Figure 15. Caller Data window

## 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 AltiAgent **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 16. 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 17. 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.



**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 19. 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 AltiWare/AltiContact Manager. 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
	<b>Agent Performance Summary since Midnight</b>	
	-- Total Calls Answered	0
	-- Total Outgoing Calls	0
	-- Total Talk Time	00:00:00
	-- Total Wrapup Time	00:00:00
200	<b>Workgroup Name</b>	sales
	<b>Agent Performance since Midnight</b>	
	-- Calls Answered	0
	-- Outgoing Calls	0
	-- Total Talk Time	00:00:00
	-- Average Talk Time	00:00:00
	<b>Current Workgroup Status</b>	
	-- 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
	<b>Workgroup Performance</b>	
	-- Calls in Queue	0
	-- Calls Answered	0
	-- Outgoing Calls	0
	-- Calls Abandoned	0
	-- Calls Transferred to Voice-Mail	0

Using AltAgent

Figure 20. 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.



# Using ActiveX Control with Third Party Applications

The AltiAgent ActiveX Control Object is an ActiveX Object. It works with AltiAgent by getting call-related information from AltiAgent, which acts as a server. Based on the call information, AltiAgent will implement corresponding actions, such as popping up corresponding customer information and logging Caller ID into a database.

For more information on using ActiveX with AltiAgent, refer to the “AltiClient ActiveX Programmer’s Guide” document available from AltiGen’s web site.





# Using AltIClient as a Supervisor

Logging in to AltIClient 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 can also use AltISupervisor when logging in with the **IP Extension Integrated with...** option.

## Logging In

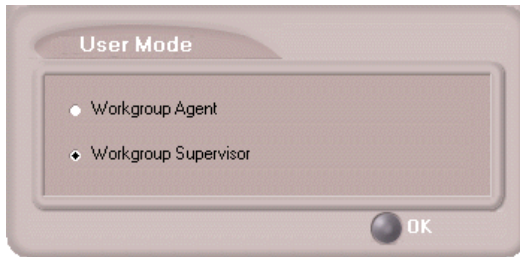


Figure 1. Workgroup Supervisor login

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

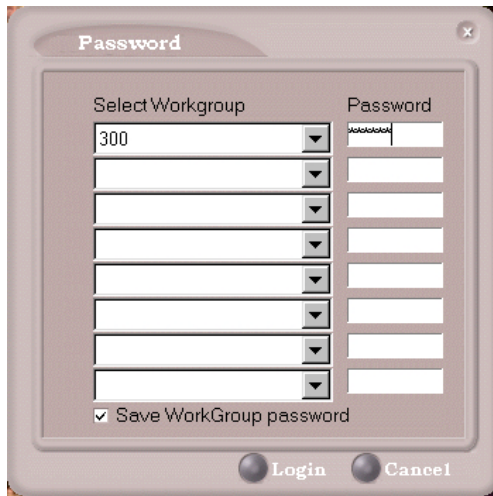


Figure 2. Password window for workgroup supervisor login

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**.

AltiSupervisor supports logging in on up to eight workgroups simultaneously.



- **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

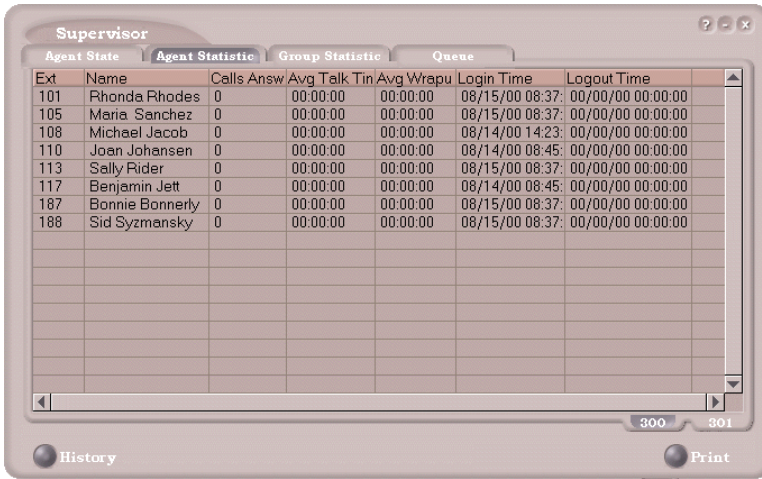
Click the workgroup extension tab at the bottom of the panel to view statistics for another workgroup.

## 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 "Supervisor" with four tabs: "Agent State", "Agent Statistic", "Group Statistic", and "Queue". The "Agent Statistic" tab is active, displaying a table with the following data:

Ext	Name	Calls Answ	Avg Talk Tin	Avg Wrapu	Login Time	Logout Time
101	Rhonda Rhodes	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00 00:00:00
105	Merla Sanchez	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00 00:00:00
108	Michael Jacob	0	00:00:00	00:00:00	08/14/00 14:23	00/00/00 00:00:00
110	Joan Johansen	0	00:00:00	00:00:00	08/14/00 08:45	00/00/00 00:00:00
113	Sally Rider	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00 00:00:00
117	Benjamin Jett	0	00:00:00	00:00:00	08/14/00 08:45	00/00/00 00:00:00
187	Bonnie Bonnerly	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00 00:00:00
188	Sid Szymansky	0	00:00:00	00:00:00	08/15/00 08:37	00/00/00 00:00:00

At the bottom of the window, there are "History" and "Print" buttons, and a status bar showing "300" and "301".

Figure 3. 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.

## 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.

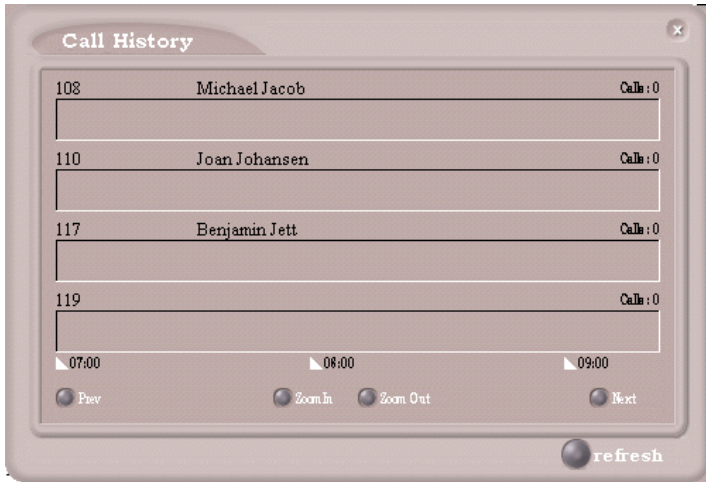


Figure 4. Agent Call History window

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 5. 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.

## Notes

- 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
- For an agent’s outbound workgroup call to another agent in the workgroup, the **Caller ID** field (see Figure 6) will show the direction of the call ( $\Rightarrow$  means an outgoing call,  $\Leftarrow$  means an incoming call) and the caller ID of the incoming caller/outgoing call.

Supervisor							
Agent State		Agent Statistics		Group Statistics		Queue	
Readiness	Status	Extension	Name	Caller ID	Caller Name	Length	Logo
●	Busy	129	Agent OneTwoNine	$\Rightarrow$ 562(WG422)		00:08:55	-
●	Idle	333	Three Three			-	-
●	Busy	566		$\Leftarrow$ 129(WG562)		00:08:55	-

Figure 6. Caller ID field

- For *outgoing* workgroup calls, the Caller ID field additionally shows the calling agent’s workgroup number in parentheses.
- For *incoming* workgroup calls, the Caller ID field additionally shows the workgroup number receiving the call in parentheses.

**Example:** For  $\Rightarrow$ 562(WG422), this is an outgoing call where 562 is the target extension and WG422 is the workgroup number that Extension 129 (the caller) is a member of; for  $\Leftarrow$ 129(WG562), this is an incoming call where 129 is the incoming call’s extension and WG562 is the workgroup number of the member (Extension 566) receiving the 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 AltisWare/AltisContact Manager 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 an agent's incoming/outgoing calls for the workgroup which belongs to your supervisor, regardless of the agent's login/logout status.

You can monitor and barge-in on an agent's personal call through AltisSupervisor only; monitoring and barge-in is not supported from the phone interface.

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

### **WARNING!**

*Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws*

## 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**.



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.

## Operation Notes

- When using silent monitoring to monitor a workgroup's conversation, the Agent state of Altisupervisor shows the caller ID of the extension that is being monitored, instead of leaving the caller ID blank.



# Configuring Your Station Settings

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

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

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

## Apply Button and OK Button

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

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

# General Information

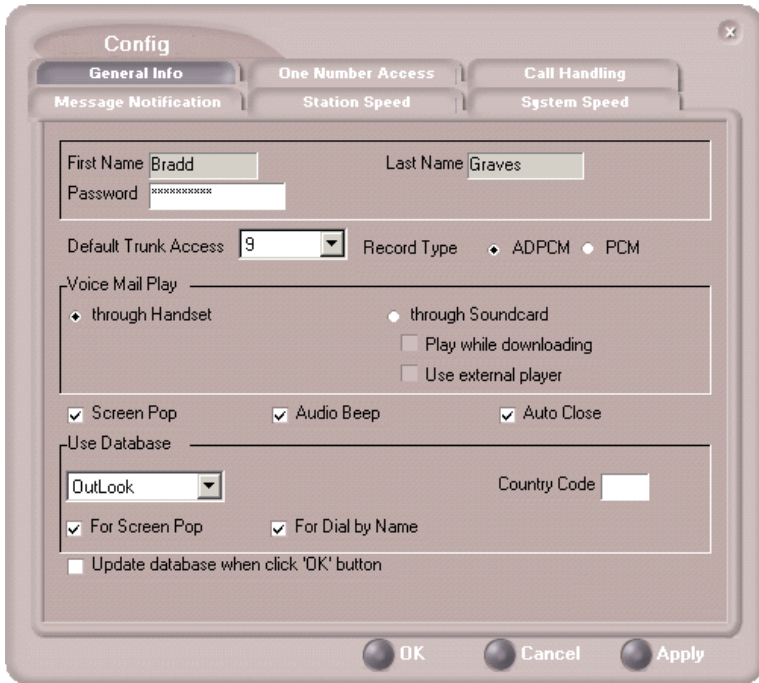


Figure 8. General Info configuration

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

In this window, you can edit your password, the default trunk access code, voice mail settings, AltIClient 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.

## Record Type

You can select the type of speech coding method to be used when recording conversations:

- **ADPCM** - (recommended) Adaptive Differential Pulse Code Modulation, allows an analog voice conversation to be carried within a 32-Kbps digital channel, encodes voice signals in half the space PCM allows.
- **PCM** - Pulse Code Modulation, the most common method of encoding an analog voice signal into a digital bit stream; the amplitude of the voice conversation is sampled, then coded into a binary number, which can then be switched, transmitted and stored digitally.

## Voice Mail Play Options

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

## Screen Pop, Audio Beep, and Auto Close

Select the **Screen Pop** check box if you want an AltiClient window to pop up on your screen when you have a call. You can then click a call to take it or perform other AltiClient actions. For AltiClient 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 54 for details.

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

## Accessing Databases

AltiClient 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 **For 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 **For 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** check box to refresh the data AltiClient accesses from the database.
- If you select Outlook, AltiWare 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.
- **Country Code** - for international use. Enter the country code of the local AltiAgent user; US country code is “1”. This field helps to convert the standard international phone numbers used in Outlook to correct digit strings for AltiWare.

## 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.



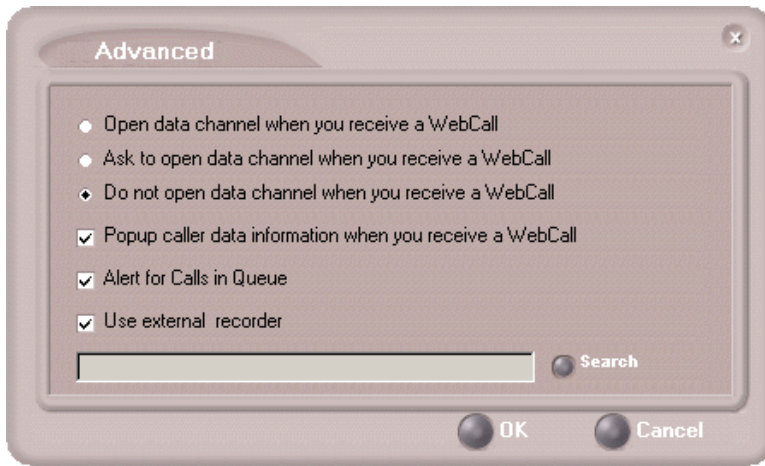


Figure 9. Advanced database options

- 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 AltiClient query you on each webrtcall 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 30.
- Select **Alert when new calls come into queue** to have AltiClient 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.

# Call Handling

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

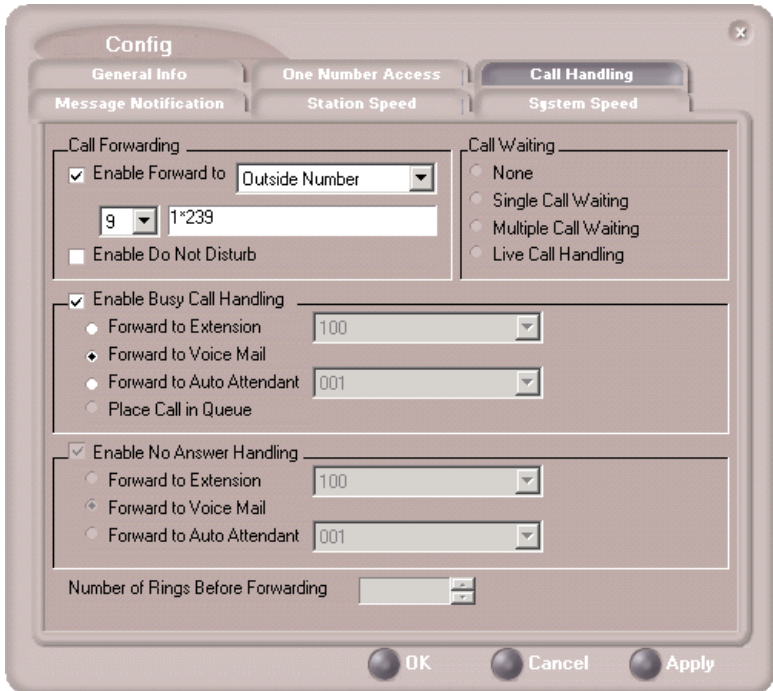


Figure 10. Call Handling configuration

## 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 queuing 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 56 for details on these settings.

## Accessing One Number Access Setup

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

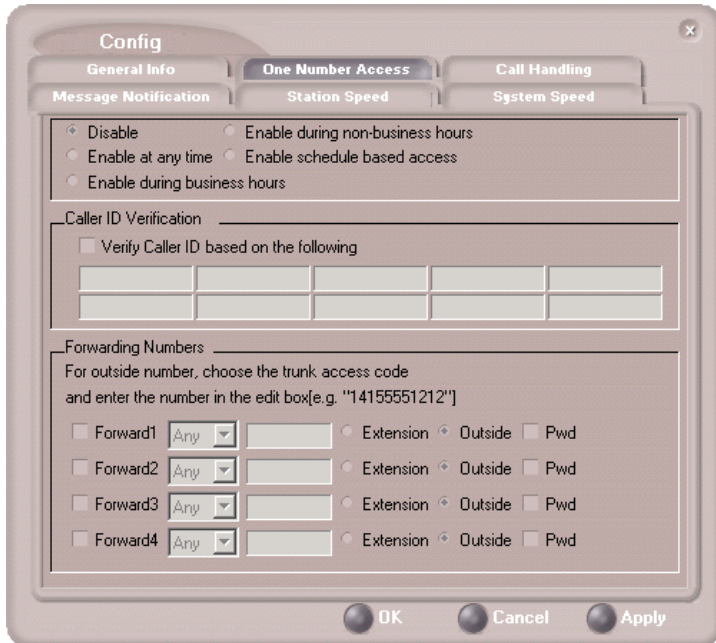


Figure 11. One Number Access window

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.

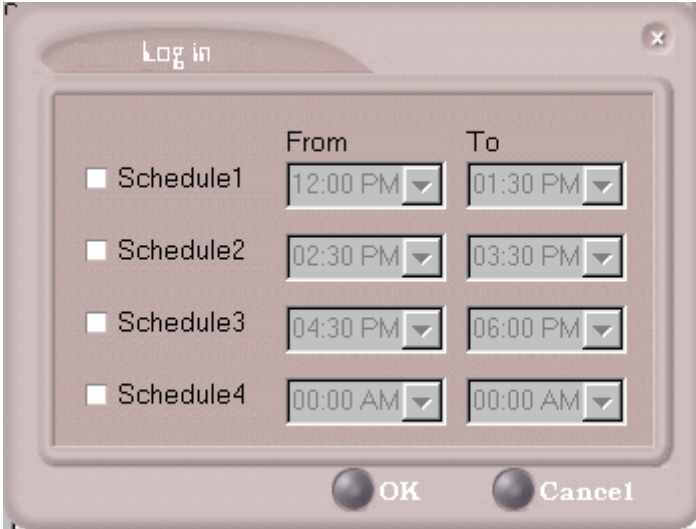


Figure 12. Enable Schedule Based Access dialog box

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 the *AltiServ User Guide* 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.

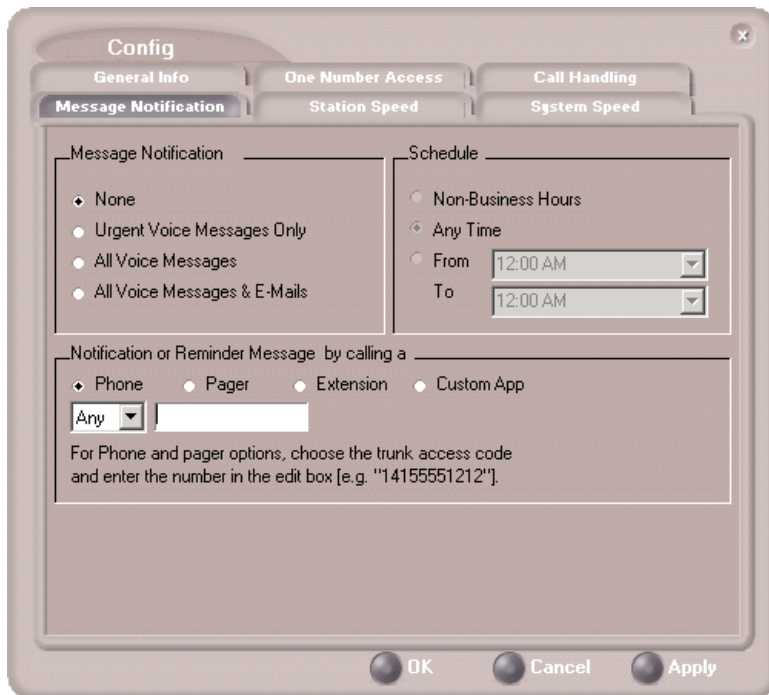


Figure 13. Message Notification options

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 the *AltiServ User Guide*.

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



Figure 14. 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 15. Dial Setting dialog box, for Speed Dial Numbers

#### 4. Click **OK**.

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

## Deleting Station Speed Entries

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

## System Speed Dialing

Click the **System Speed** tab in the Config window to view the System Speed Dial entries. System speed dial numbers are set up in AltiAdmin, the AltiWare Administrator. In AltiClient, 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 15 on page 63). Modify the **Name** or **Comment**, then click **OK**.

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



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