



**Center**<sup>TM</sup>

**AltiView**<sup>TM</sup>, **AltiAgent**<sup>TM</sup>, and **AltiSupervisor**<sup>TM</sup>

**for AltiWare Open Edition (OE) Release 4.0**

**User Guide**

Revised 09/2000 4504-0001-4.0

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# Warranty

## Coverage

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.

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## Who the Warranty Protects

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## 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:
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  - 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.
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Authorized AltiGen Dealers must follow the steps below for service:

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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 (See Appendix C) 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. Please see the example below:  
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 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. directly at 1-888-ALTIGEN (258-4436) or via e-mail at [service@altigen.com](mailto:service@altigen.com).

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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 Center 4.0 package:

- Center 4.0 CD ROM
- Center 4.0 User Guide
- Center 4.0 Server License Agreement

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 *Alteware Getting Started Manual*.

- IBM/PC AT compatible system
- Intel 133 MHz Pentium
- Windows 95 (with DCOM95 installed), or 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 4.0 running on a server accessible to this client.

Center is an optional software package that runs with the AltWare OE 4.0 system. To enable the features in this package, the Center 4.0 Server License must be installed in AltWare. Once the server license is installed, session licenses must also be installed to enable client sessions.

The Center software can be installed on a Windows 95/98/2000 or Windows NT PC.

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

## Session Licensing and License Upgrade Procedures

AltiWare OE (Release 4.0 or higher) comes with one free licensed connection to support an AltiView client. Center client sessions can be added to the AltiWare server at any time and in discrete numbers: e.g. 4, 8, 16 and/or 32 simultaneous sessions. For example, to provide 24 desktops with 24 simultaneous connections, the installer will enter two purchased license numbers; one for 8 licenses and one for 16 licenses using the upgrade installation procedures. The system will have a capacity of 25 total simultaneous connections.

Further, if the customer later wants an additional 6 more simultaneous connections, he would purchase another 8-user license (the closest number to 6). The installer would enter the license number and AltiWare will add this number to the system's total, providing this customer with a total of 33 (8+25) simultaneous connections.

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

Center 4.0 software is packaged in different simultaneous session licenses. Each package consists of the Center 4.0 installation CD, manual and licensing for a particular number of sessions.

Customers purchase one or more of these packages for the desired capacity of simultaneous Center users. For example, if purchasing the 16 sessions license for a group of 20 people, all 20 workstations can have Center installed, but only 16 workstations can use Center at the same time.

Software	Model Number	# of (Simultaneous) Sessions License
Center 4.0	ALTI-AVW200E-004	4 sessions license
Center 4.0	ALTI-AVW200E-008	8 sessions license
Center 4.0	ALTI-AVW200E-016	16 sessions license
Center 4.0	ALTI-AVW200E-032	32 sessions license

## Upgrading Licenses

To increase the number of simultaneous Center sessions, follow these steps:

1. Insert the AltiWare CD into the CD drive.
2. Run the **SETUP.EXE** in the AltiWare OE folder to run the setup program.
3. Select the **Upgrade Port License** option and click **OK**.
4. Enter the 20-digit software license key located on the **End User License Agreement** shipped with your upgrade package and click **Next**.
5. After the code is validated, the system will confirm that the upgrade was successful and ask if you wish to add additional licenses. You can add additional licenses now or at any point later by following this procedure.
6. 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 installation Center, please review the following checklist:

- Make sure that AltiWare OE 4.0 has been installed on the AltiServ system.
- Make sure that AltiView VM Service has been installed on the AltiServ system, as discussed in a subsequent subsection.
- Make sure that TCP/IP is enabled on both machines.
- Make sure the client is able to connect to the server on the network.

### Installing Center 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 AltiWare CD into the CD ROM drive.
3. Run the **Setup** program under Center\Center Client and follow the step by step installation instructions as they appear on the screen.

You are now ready to log onto Center as a Desktop User, AltiAgent or an AltiSupervisor. For more detailed information on each version, refer to subsequent chapters in this manual.

### Installing AltiView Voice Mail Service on AltiServ

AltiGen Switching Service must be installed first. AltiGen Switching Service is installed and run when you install AltiWare and anytime you run the AltiWare Administrator.

1. On the client system, locate AltiServ on the network.
2. Run **SETUP.EXE** under **AltiView\AltiView VM Service** directory and follow the prompts.
3. Access **Services** from the Control Panel on the NT or from **Programs** → **Administrative Tools** → **Component Services** on Windows 2000.
4. Highlight AltiView Voice Mail Service and click **Start**.

## Uninstalling Center

1. From the Windows **Start** menu, select **Programs** → **Center** → **Uninstall Center**.
2. Click **OK** when the dialog box asks if you want to uninstall the program, and respond to any additional prompts.

## Uninstalling AltiView Voice Mail Service at AltiServ

1. From the Windows **Start** menu, select **Programs** → **AltiView VM Service** → **Stop AltiView VM Service**.
2. In the Control Panel, select **Add/Remove Programs**.
3. Choose **AltiView VM Service** and click the **Add/Remove** or **Change/Remove** button, depending on which version of Windows you're running.
4. Click **OK** in the dialog box to confirm you want to remove the service, and respond to any additional prompts.

## Microsoft Outlook Support

Center supports Microsoft Outlook 97, 98, and 2000, permitting the Center user to obtain phone numbers to dial from Outlook's Contact Lists. Center also allows the user to see the incoming calls which have a matching record in the Outlook Contact Lists.

Center requires that you to set up the Microsoft Contacts list prior to using this feature in Center.

## ACT/GoldMine Support

Center supports ACT 2000 and GoldMine 5.0 contact management software, allowing the AltiView user to access contact lists from ACT or GoldMine contact records.

## Installation

# Getting Started

Center 4.0 is a suite of desktop applications for managing personal calls, workgroup calls and performing phone and supervisory functions from the PC. Center contains three applications:

- **AltiView** is the primary software application designed for general **desktop PC users** in an AltiServ environment. With AltiView you can access, configure and perform several of AltiServ's PBX functions directly from the desktop. These functions include call handling, call forwarding, voice messaging, extension monitoring, and One Number Access. In addition, AltiView integrates with contact management software including Microsoft Outlook, ACT and GoldMine.
- **AltiAgent** is a version of Center designed for **workgroup agents**. Through an AltiAgent windows, you can monitor workgroup related statistics, workgroup call pick up and member login/logout directly from the desktop.
- **AltiSupervisor** is a version of Center 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 trunk state. This information can be stored to an internal or external CDR database for future review and analysis.

## Logging In

### Before you log in

When you log in 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, Center 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 Center application and, if this is the first login to this Altiserv system, enter the servers IP address or name of the system you will be using. If this is not your first login, go on to the next step.

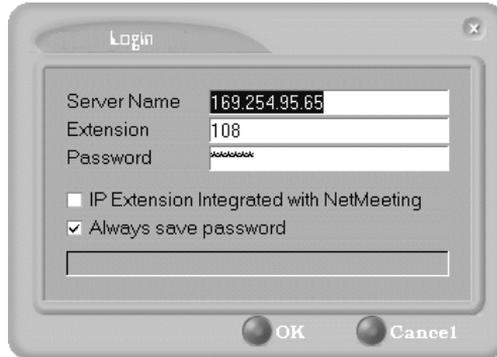


Figure 1. Logging In

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 Center.
3. If you're using an IP extension, select the **IP Extension Integrated with NetMeeting** check box to access Center through an IP extension. To do this, the extension must be set up as in IP extension in Altiserv and you must have Microsoft NetMeeting 3.01 or higher installed on your desktop. You cannot log in as a workgroup agent or supervisor using an IP extension. Refer to the discussion in the next subsection for more information on using IP extensions. If you're using an Internet Phone Jack or IP phone, **do not select** the **IP Extension Integrated with NetMeeting** check box.
4. Click **OK** to open the next login window.



Figure 2. Choosing the type of login

5. Select the usage—Desktop User (Altiview), Workgroup Agent (AltiAgent), or Workgroup Supervisor (AltiSupervisor)—and click **OK** to complete the login.

## Logging in from a Remote Location (IP Extension)

For desktop use, but not for workgroup agent or supervisor use, you can access Center 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.

In order to run Center remotely, if you connect to the Internet through a modem connection, first you need to establish a session connection to your Internet Service Provider.

To use Center remotely through an IP Extension, follow the steps below.

1. Check with your administrator to make sure the extension you're using has been set up as an IP extension in AltiAdmin.
2. If you are not already running NetMeeting 3.01 or higher, download and install it from Microsoft's web or FTP sites.
3. Leave the **IP Extension Integrated with NetMeeting** check box unchecked unless you specifically want to use that option. (See Figure 1 on page 8.)
4. Click **OK**.



Note for those using the **IP Extension Integrated with NetMeeting** option. Center 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.

## Troubleshooting IP Connectivity

If problems occur, they may be due to a failure to connect to your ISP provider or due to firewalls at your work preventing direct access to the AltiServ server. For firewall installation, see the *AltiWare Getting Started Manual* chapter on Software Installation.

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 form is 123.234.231.143

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

## Hiding or Exiting Center



Using Center as a desktop user or workgroup agent, when you minimize the Center 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 in a following subsection.

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

### Pop Up Center when You Get a Call

You can configure Center to pop up when you have incoming calls, when you're using center as a desktop user or workgroup agent. Pop ups work when Center is hidden (minimized) but *not* when you have exited. See "Screen Pop and Auto Close" on page 55.

## Using the Windows Tray Phone Icon

After you log in, the Center 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 little yellow envelope, as shown in the lower icon.



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

## Resizing the Display

You can re-size many AltiView windows in the normal 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

Center applications all 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, AltiView 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

## Error Messages

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

Error Message	Description	Solution
AltiServ connection limit has been exceeded	More than the allowed number of AltiView users have attempted to log on.	Maintain the number of AltiView users or add additional licensing.
Before using this program, please set up area code and external number	Area code and external number have not be established for Center.	Set area code and external number in the configuration channel BEFORE using Center.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to AltiServ.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of AltiServ (if using the DNS name in the server field)
Cannot get voice mail list right now because mail box is already being accessed.	Mail box is in use by AltiMail 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.

Error Message	Description	Solution
Please register CmdInterface.dll (regsver32 CmdInterface.dll)	AltiLink uses this dll to communicate with Altiserv. It should be registered in user system.	Re-register this file. Go to "Center 4.0" and type in command window, <b>regsver32 CmdInterface.dll</b>
Required Option Pack License. Please contact your local dealer.	A Center 4.0 license is required but not installed.	Install option pack license 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.

## Getting Started

# Using Center as a Desktop User

Once you log in as a **Desktop User** described beginning on page 7, the Altiview main window appears. This window provides tools to manage and monitor calls, to facilitate management of your personal contacts, and to configure your Altiserv phone and voice mail options. Configuration is described in Chapter 6.

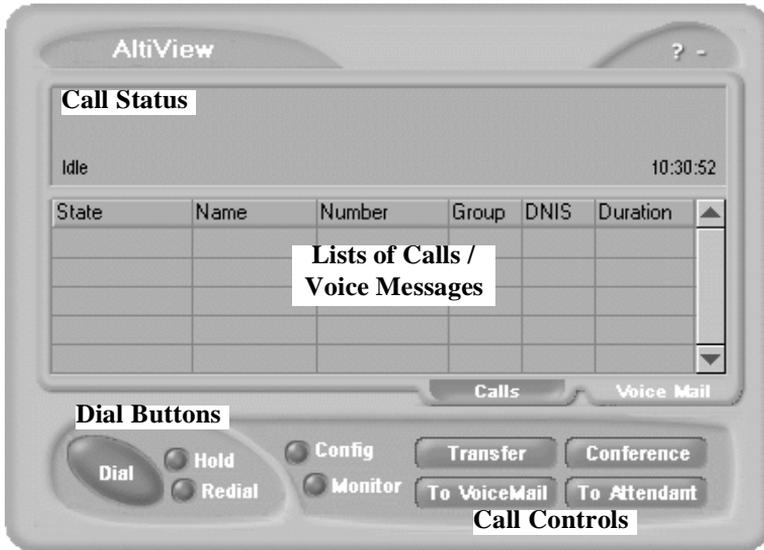


Figure 3. Altiview main window

## 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 log of current **calls**, the other showing a log of current and past **voice mails**.
- The **Dial** functions provide buttons to *place*, *hold* or *redial* calls
- The **Call Control** buttons provide call functions such as transferring the call or sending it to voice mail.

- The **Configuration** button allows you to customize your call handling and voice message settings. See “Configuring Your Station Settings” on page e53.
- The **Monitor** button provides a view into extension or workgroup activity and provides access to past call logs.

## About the Calls List

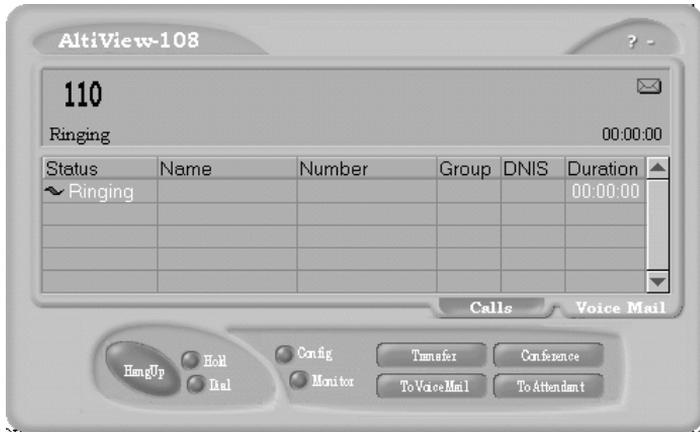


Figure 4. Calls List

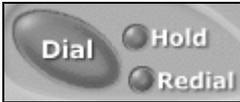
The calls list displays the call status for each call as described on page 11. The list also displays the name of the caller if available from extension information or from an external database, the number, workgroup pilot extension number, DNIS digits if available, and call duration.

# Handling Calls

## 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.**



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 tensions 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

### 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.

### 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.

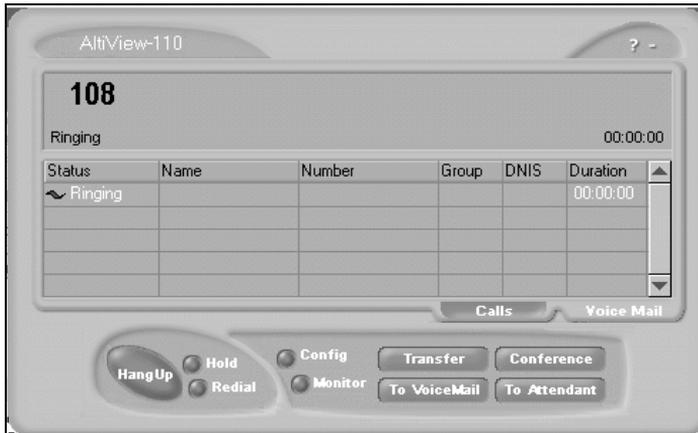


Figure 6. Call status displays in Calls list as well as status panel

## 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.

## Searching 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 “Adding or Editing Station Speed Entries” on page 64 for details on setting up speed dial numbers.

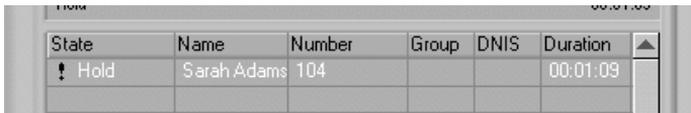
1. Depending on which type of speed dial number you want to call, click the **Station Dial** tab or the **System Dial** tab.
2. Choose the speed dial entry from the list.
3. Click the **Dial** button to place the call.

## Redialing

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

## Placing Calls on Hold

During a phone conversation, click the **Hold** button in the AltiView main OR press the **FLASH** 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.



State	Name	Number	Group	DNIS	Duration
Hold	Sarah Adams	104			00:01:09

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

## Using Call Waiting

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

1. Click the **Calls** tab on the Altiview main window to view the directory of current calls.
2. Find and click the row displaying the incoming call.  
This places the current call on hold and connects the incoming call.
3. When you are finished, click **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 which 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.

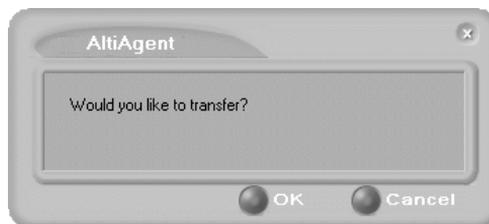


Figure 7. Confirming call transfers

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, by closing the dialog box, or by pressing your phone's **FLASH** button.

If the transfer is cancelled, Altiview 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 call, click **To Voice Mail** on the main window. When the dial pad appears, choose the extension number to which you want to send the call, then click **OK**.

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

## Transfer to Attendant

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

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

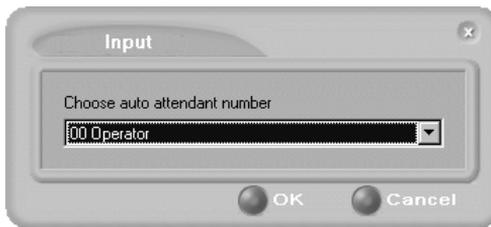


Figure 8. Transfer to Auto Attendant

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



Figure 9. Confirming Conference Calls

## Handling Calls

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

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

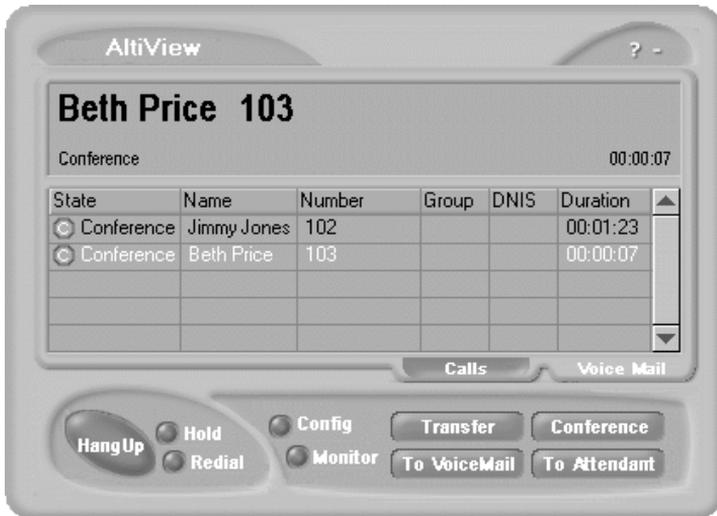


Figure 10. Conference Calls Displayed in Call List

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

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

# Using Voice Mail

## About the Voice Mail Window

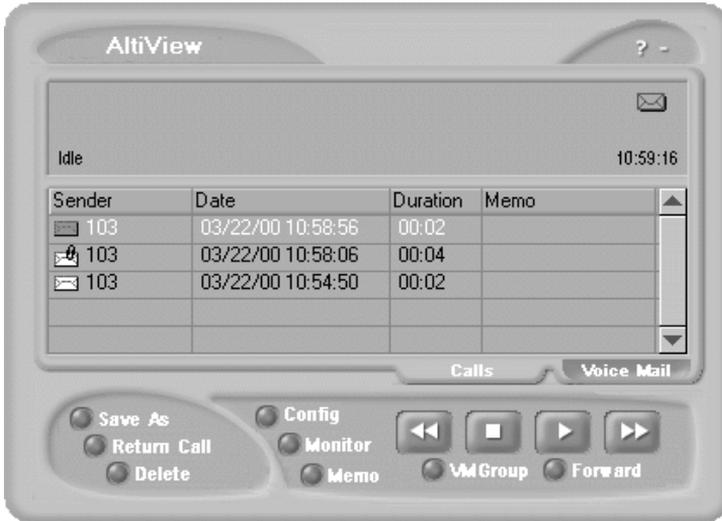


Figure 11. Voice Mail window

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

- New voice mail messages are indicated by a white, closed envelope icon in the status window of AltiView.
- 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 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 have several listening options which you configure as described in “General Information” on page 54. 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*.

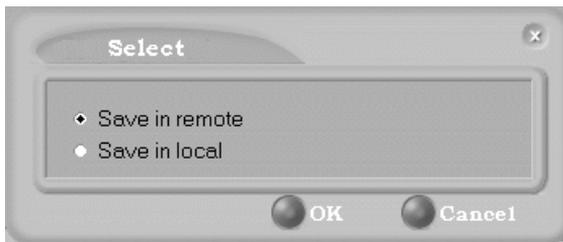
Use the tape player type buttons to play the message.



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

## Saving Remotely or Locally

You can click the **Save As** button 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.



- **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

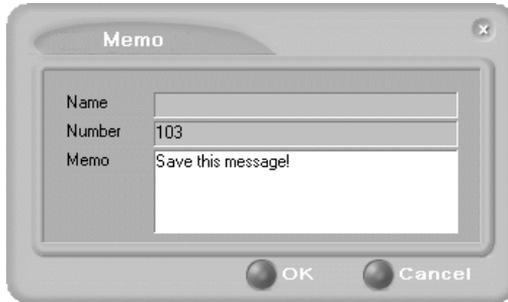
To delete the message, select it and click the **Delete** key.

## Returning the Call

Click the **Return Call** button to call back the sender.

## Attaching a Memo

To add a note to accompany a voice mail, click the **Memo** button to invoke the Memo window.



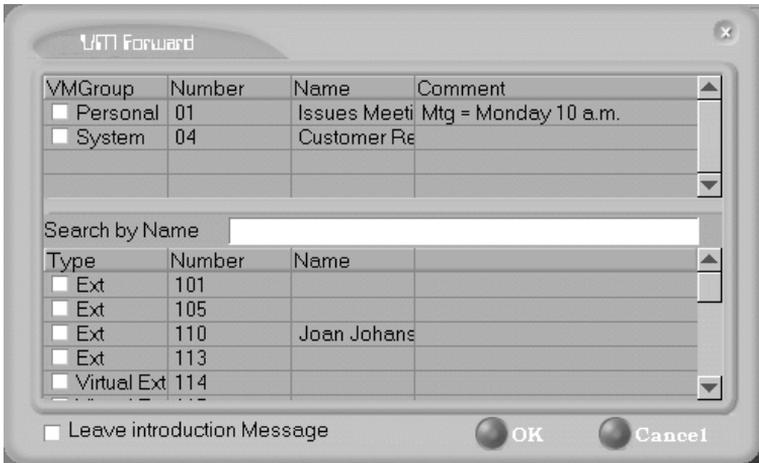
*Figure 12. Attaching a memo to a voice message*

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 message to an extension or to a Voice Mail Group:

1. Select the voice mail in the Voice Mail view of the Altiview main window.
2. Click the **Forward** button to invoke the VM Forward pop up 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 the matching names display in the list as you type. To select a name, select the check box next to it.
4. Optionally, you can leave an introductory message. Select the **Record Introductory Message** check box and follow the simple steps below.
5. Click **OK** to complete the forwarding.

### Recording an Introductory Message

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. After recording the message and pressing the pound key (#), a confirmation appears on screen. 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.



*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 AltiView.
- **Personal groups** are set up and modified in AltiView or in your AltiMail voice mail system.

### Accessing Voice Mail Group Lists

To work on your personal voice mail groups:

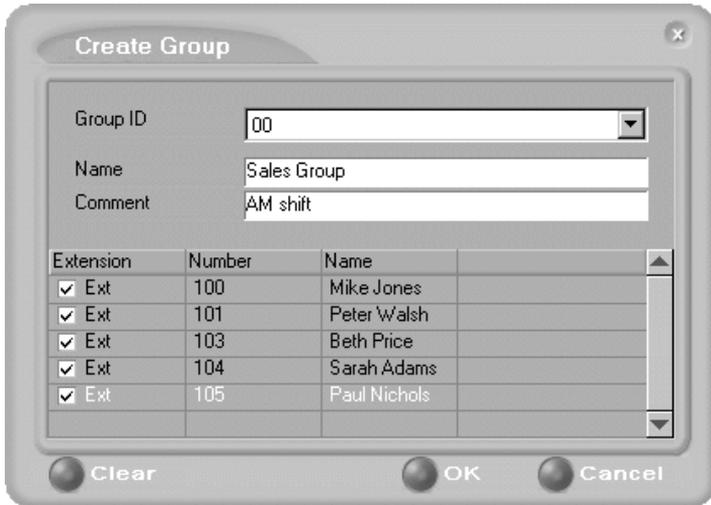
1. In the AltiView main window, click the **Voice Mail** tab to display the Voice Mail version of the window.
2. Click **VM Group** button in the Voice Mail list window to invoke the VM Group Edit window.



Figure 13. 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.



1. Use the scroll bar to select a desired **Group ID**.
2. Enter the VM Group **Name** and any **Comments**. These are optional but may help you identify the group.
3. Select the member extensions by selecting the check box next to each extension.
4. 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 removing extensions, or change name or comments associated with a group:

1. Access the VM Group window as described on page 27.
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 on page 27.
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.



Selecting a group entry displays all the workgroup members in the monitoring window. Deselecting a group entry takes all workgroup member extensions out of the display.

## Reading the Monitor List

In the monitor list, each selected extension is listed along with its **State**, **Number**, **Name**, and **Group** (workgroup), which shows only if the call is coming into to a workgroup.

The state can be one of the following:

- **Idle**—the extension is not in use. You can click the **State** field of an idle extension to have AltView connect you to that extension.
- **Connected**—the extension is in use.
- **Ringng**—the phone on the extension is ringing. You can click the status box of that extension to answer a call from your own extension.
- **Conference**—the extension in 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

## Calling or Picking Up Calls

If a monitored extension is in an *idle* state, click the extension's **State** field to ring that extension.

If the monitored extension is in a *ringng* state, click the **State** field to pick up that call.

## Viewing the Call History

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



Figure 15. History window

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, *Caller Unknown*.
- **Time**—the call's date and time.



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.

- **Duration**—the length of time of each call.
- **DNIS**—displays DNIS digits collected, if available.
- **Group**—the extension's workgroup number, if available.
- **Memo**—a note attached to the call. You can add memos by selecting Use the **Memo** button to open a window to create a note.

## Deleting Logs

To delete a specific call log entry, click the entry to select it, then click **Delete**. Or, right click the entry and select **Delete**.

To clear the entire call log, click **Delete All**, or right click any entry and select **Delete All**.

## Placing Calls from the History List

To call a number or extension in the list, click the number.

## Attaching a Memo to an Entry

To attach a memo to a history list entry, click the entry to select it, then click the **Memo** button to open a Memo dialog box. Create the memo in the Memo text box, then click **OK**.

## Printing a History Log

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

## Monitoring Extension Activity

# Using Center as a Workgroup Agent

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 cannot 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 selecting 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.



*The basic call handling and voice mail features and functions available in AltiAgent are described in the chapter, “Using Center as a Desktop User,” which begins on page 15. Please refer to that chapter for basic call handling procedures. This chapter covers workgroup-specific activities.*

## Logging In

After you complete your initial login and choosing to login as a **Workgroup Agent** as described beginning on page 7, you see a Group Login window.

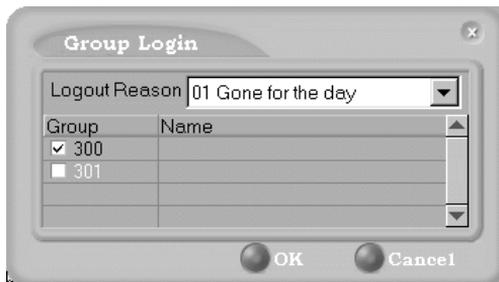


Figure 16. Group Login window

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

## 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.

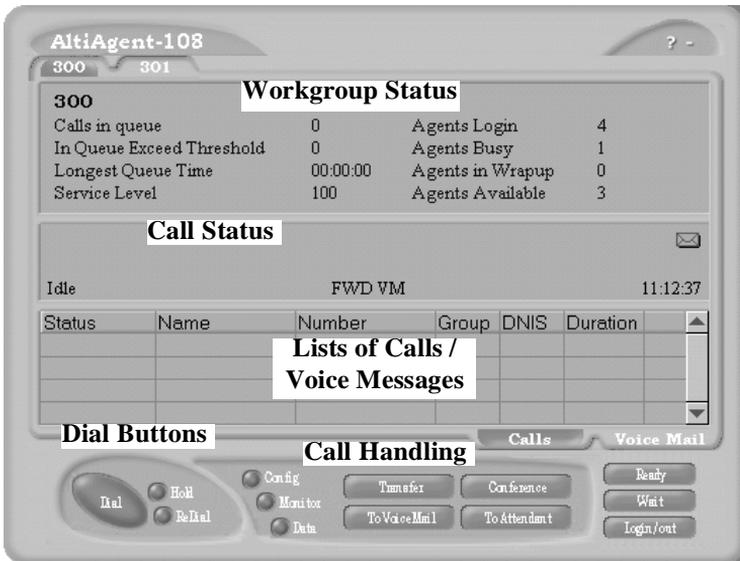


Figure 17. AltiAgent main window

The window consists of the following displays and buttons:

- The **Workgroup Status** panel displays statistical information about the current workgroup. Above the panel are tabs that allow you to switch the view between the workgroups you're logged in to.  
The statistics are self-explanatory, except perhaps it needs to be noted that the *Service Level* represents the percentage of workgroup calls taken out of queue before the *Threshold* time has expired.
- The **Call Status** panel displays the status of the currently active call, a list of any calls on hold, and the current time. The states are described on page 11.
- The **Directory** panel has two tabs: one showing a log of current **calls**, the other showing a log of current and past **voice mails**.
- The **Dial** functions provide buttons to *place*, *hold* or *redial* calls
- The **Call Handling** buttons provide call functions such as transferring the call or sending it to voice mail.
- The **Configuration** button allows you to customize AltiAgent settings. See “Configuring Your Station Settings” on page 53.
- The **Monitor** button provides a view into extension or workgroup activity and provides access to past call logs.
- The **Data** button allows you to display data associated with the calls, to send web pages or URLs to the user, or to share web pages.
- The **Ready** button tells the system you are ready to receive workgroup calls.
- The **Wait** button tells the system not to send workgroup calls to your extension.
- The **Login/Logout** 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 agent as they are for the desktop user. See “Handling Calls” on page 17 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 view 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 18. The 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.



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



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 the **Release** button to disconnect the web call.

## Using Voice Mail

The Voice Mail features and functions are the same as those for the desktop user. Please see "Using Voice Mail" on page 23.

## Monitoring

If your extension's configuration in the AltiWare Administrator provides for it, you can monitor the activity on other workgroup extensions, view a 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, for another example, 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.

Click the **Monitor** button in the main window to open the Monitor window.



Figure 19. Monitor window

## selecting the Workgroups to Monitor

1. Click the **Change** button in the Monitor window to open the Change Monitor window.
2. Select the check boxes next to the workgroups you want to monitor, and click **OK**.  
The extensions in the selected work groups are now listed in the Monitor window.

## Reading the Monitor List

In the monitor list, each selected extension is listed along with its **State**, **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 **State** field of an idle extension to have Altiview connect you to that extension.
- **Connected**—the extension is in use.
- **Ringng**—the phone on the extension is ringing. You can click the status box of that extension to answer a call from your own extension.
- **Conference**—the extension in 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

## Calling or Picking Up Calls

If a monitored extension is in an *idle* state, clicking the **State** field of an extension rings that extension.

If the monitored extension is in a *ringng* state, clicking the **State** field picks up that call.

## Viewing a Call History

Click the **History** tab to view a history of calls for the workgroup extensions you're monitoring. The features and functions of this window are described beginning on page 32.

## Viewing Workgroup Statistics

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

Most of the data is self-explanatory, but you might note that the *Service Level* represents the percentage of workgroup calls that have been taken out of queue before the *Threshold* time has expired.

Also, note that the *Login Time* is the time you logged in to the workgroup.

Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed on page 46.

These statistics clear if the system is reset.

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

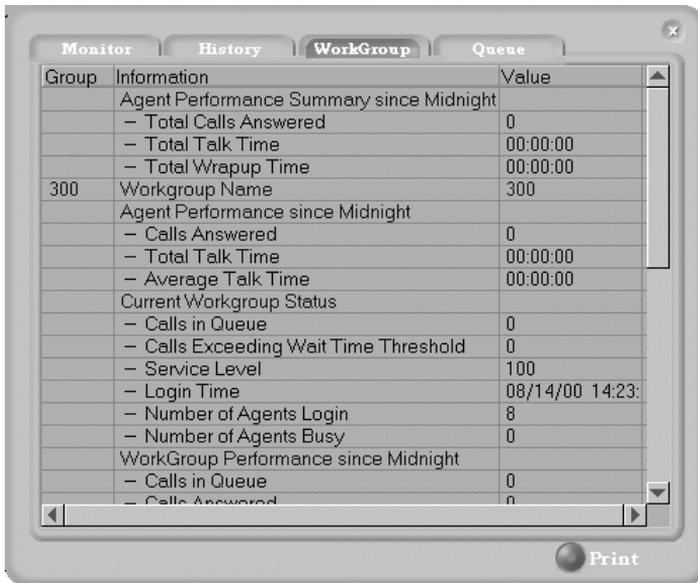


Figure 20. Workgroup window displaying workgroup statistics



## Using Center as a Workgroup Agent

## CHAPTER 5

# Using Center as a Supervisor

Logging in to Center 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 logging in with the **IP Extension Integrated with NetMeeting** option.

## Logging In

After initial login as a Supervisor described as described on “Logging In” on page 7, you are asked to specify which workgroups you want to monitor.

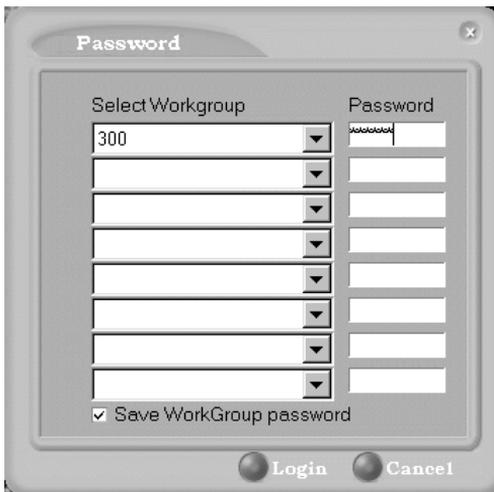


Figure 22. Password window for workgroup supervisor login

Select the workgroups using the drop-down lists, and type in 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 to go, click **Login**.

Center supports logging in on up to eight workgroups simultaneously.

## Viewing Group Statistics

WorkGroup Performance		Value
Real Time	Current Calls in Queue	0
	Calls Exceeding Service Level Threshold	0
	Service Level	100
Since Midnight	Calls in Queue	0
	Maximum Number of Calls in Queue	0
	Calls Answered	0
	Calls Transferred to Voice Mail	0
	Calls Abandoned	0
	Total Talk Time	00:00:00
	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
Agents	Configured	8
	Login	8
	Busy	0
	Wrapup	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 wrapup 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.
- **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.



*Because 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 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 24. 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.

You can change the display as follows:

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.



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

## Viewing Agent Current Status

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

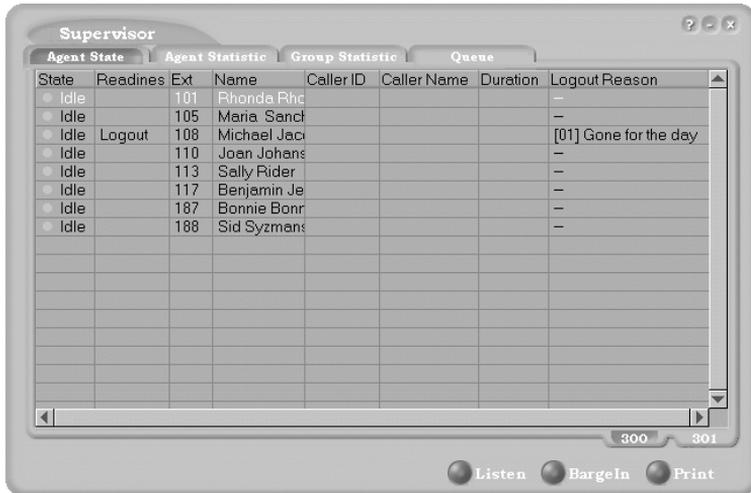


Figure 25. Agent State window

This window displays information about the agent's logon status and the extension state, described on page 11. If the agent is connected to a caller, Caller ID and call data is displayed.

The green light will turn red if:

- the extension is off hook.
- the extension is in the **Forward All Calls (FWD)** state.
- the extension is in the **Do Not Disturb (DND)** state.
- the extension is in **wrapup** after a call.

The Readiness column describes these states: **Logout**, **FWD**, **DND**, **Wait**.

### Changing Views and Printing Data

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

Click the **Print** button 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.



These features not only require the appropriate extension permissions, 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 calls coming in to the workgroup extension.

Outgoing calls 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 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 **# 5 9** + **<workgroup extension>** + **<workgroup password>** + **<agent extension>** + **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

To barge into a workgroup agent call and enter the conversation in progress:

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 **# 5 9** + **<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.



Figure 26. Queue window

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.

# Configuring Your Station Settings

Desktop users and workgroup agents 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 you're logged in as a desktop user and 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.



Options are disabled if they are not available. For example, One Number Access must be enabled in the AltWare Administrator. 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 and the OK button.

- 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

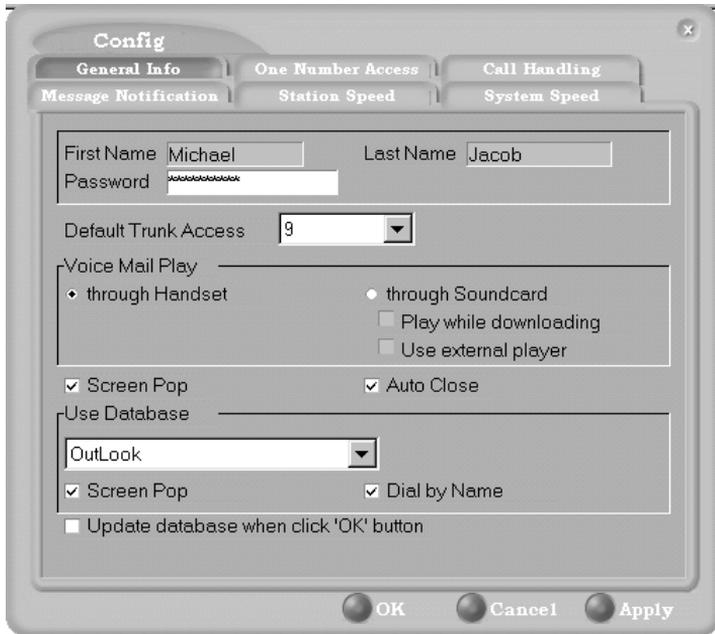


Figure 27. General Info configuration

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

In this window, you can edit your password, the default trunk access code, voice mail settings, Center 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 choices: 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 and Auto Close

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

Select the **Auto Close** check box to have Center close the popup window once you have finished with the call.

## Accessing Databases

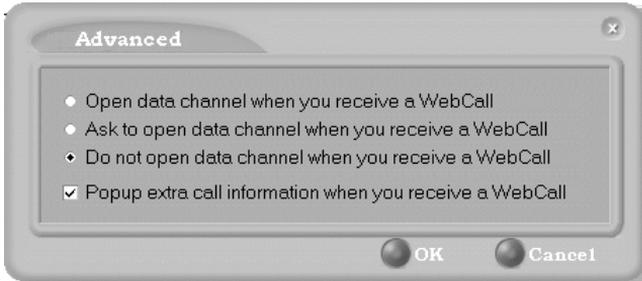
Center can access phone numbers from your Microsoft Outlook, ACT or Goldmine database. During installation, the install program read which applications you have installed on your PC.

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 Center accesses from the database.

## Advanced Database Options for Web-based 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 database options.



*Figure 28. 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 Center 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 page38.

## Call Handling

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

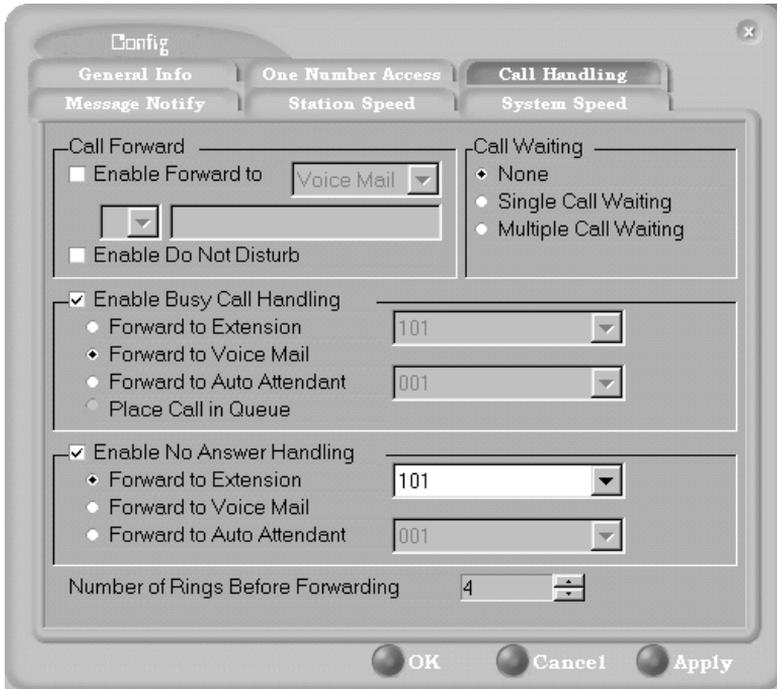


Figure 29. Call Handling configuration

### 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.

If you want to use One Number Access, see page 59.

*There is a “1-hop” limit to call forwarding.* For example, ext. 101 forwards to ext. 102, and Ext. 102 forwards to ext. 103. A call to ext. 101 will ring ext.102 but will not re-forward to ext. 103 because of the 1-hop limit. Instead, if ext.102 does not answer, the call is sent to ext.101’s voice mail.

## **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 will 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 to voice mail.

## **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 the Do Not Disturb state.

If 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.

One busy-call handling option, **Place call in queue** is available only if queueing is enabled for you or for your workgroup.

## **Number of Rings Before Forwarding**

This setting is pertains to almost all the options on this page: 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

If you are expecting calls that you want to receive regardless of where you are, you can have the system send the call to you by dialing pre-determined numbers based on a pre-determined schedule.

When One Number Access (ONA) is active and a call comes in to your extension, the system checks to see if the number represents a call you want to receive. If it finds a match, it calls you at the number you specified.

ONA depends on the ability to identify the incoming call by the Caller ID. If the system can't identify the call, it can't make a match.

If the system is unable to connect the call, the caller is sent into the user's voice mail.

### Before You Set Up One Number Access

Before you use ONA, you need to make sure your call handling settings are appropriate (see page 62). You need to be logged in as a Desktop user.

Also, ONA it must be enabled in the AltWare Administrator. Also, to use ONA to forward to outside lines, that must also be enabled as an Extension Configuration restriction in the Administrator. Check with your system administrator if you have questions about these settings.

All system and extension call restrictions apply for One Number Access. For example, if **Do Not Disturb** is enabled, the call will go into voice mail and not to the ONA number you specified. So if you want to use ONA, make sure Do Not Disturb is disabled. Or if the line is *busy*, the call will be handled according to the extension's **Busy Call Handling** configuration.

## 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 in which you set ONA options:

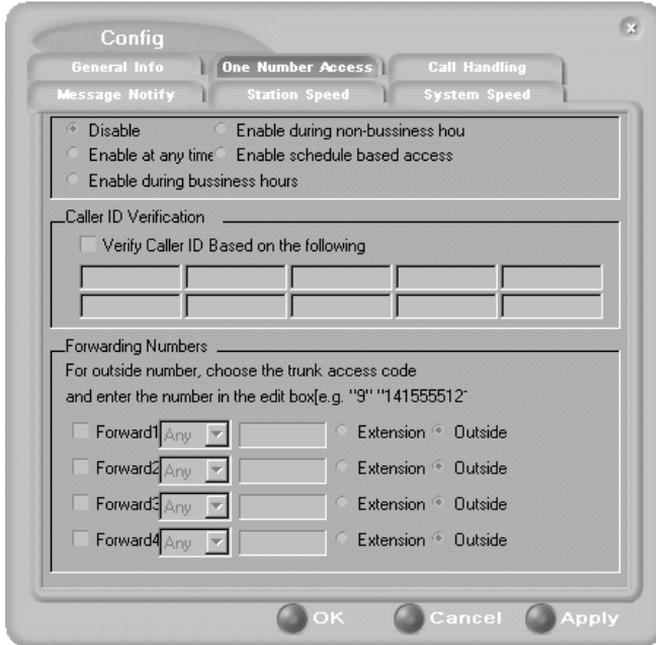
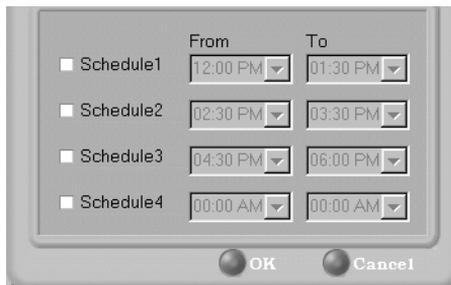


Figure 30. One Number Access window

- Determine the times you want to be available to ONA callers. This can be at all times, during business hours, during non-business hours, or during schedule-based access. If you select the **Enable schedule based access** option, a dialog box pops up so that you can set the schedule:



Using this dialog box, you can set up to four different schedules. You can enable or disable each schedule by selecting or deselecting its check box.

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

**Caution:** *If no numbers are entered in the Caller ID verification fields and ONA is enabled, it is made available to every caller.*

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

### Using a Password

You can also 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 the caller to dial **1** during your personal greeting and then enter the password.

- 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. (This number order does *not* correspond to the Schedule order—Forward Number 2 is *not* used first during Schedule Number 2.)

## Message Notifications

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

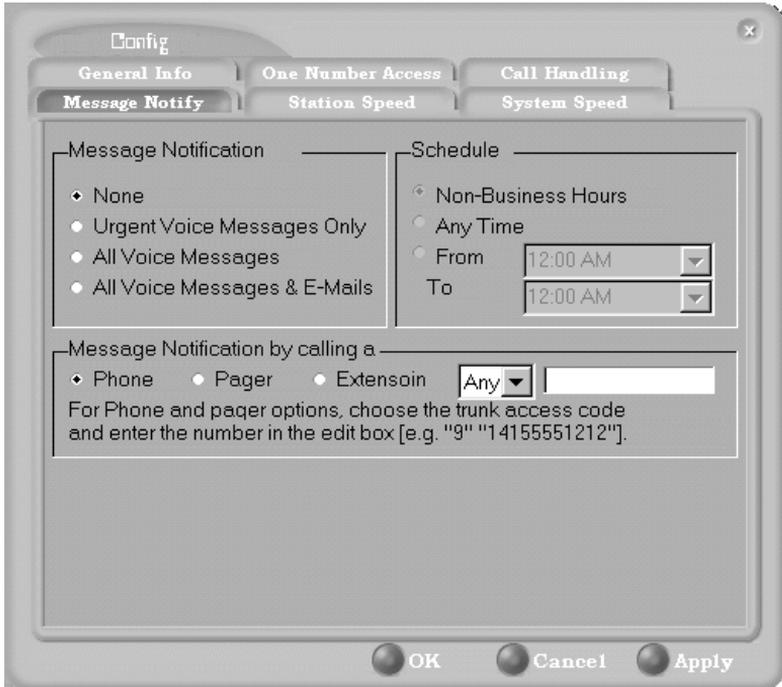


Figure 31. Message Notification options

Use this window to set the notification options:

- **The types of messages** on which you want to be alerted: none, urgent messages only, all voice messages, or all voice messages and email too.
- **Schedule**—during what hours you want to be alerted.
- **How and where to notify you**—in the **Message Notification by Calling a...** options, if you chose to use an outside number, use the drop-down list to select the trunk access you want to use.

## Station Speed Dialing Setup

Click the **Station Speed** tab in the Config window to assign and store up to 20 **Station IDs**—speed dial entries.

When you add a number, all *relevant* prefix digits such as trunk or route access number, the long distance prefix **1** and area codes must precede an outside phone number. Station speed dial numbers are also set up by using the **#25** feature code on your phone set.

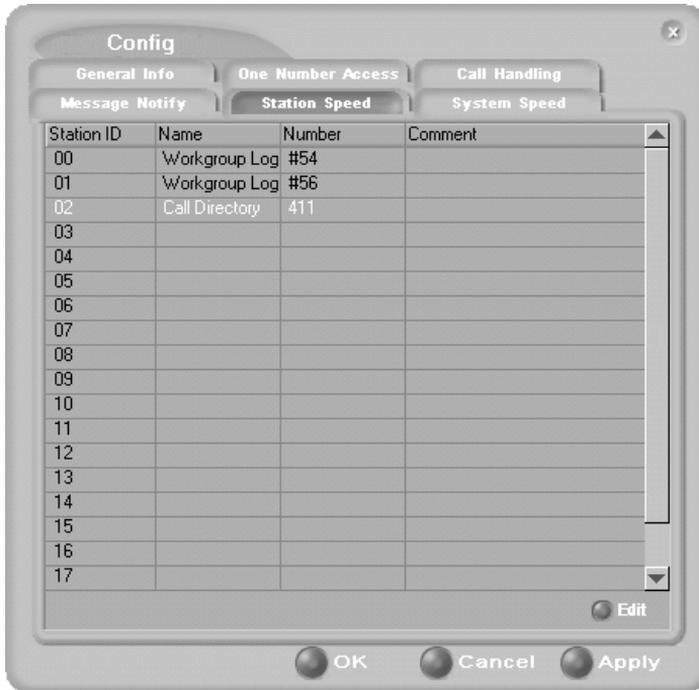


Figure 32. Station Speed Dialing setup

## 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 33. 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, as shown in Figure 5 on page 17.

## 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 Center, 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 as shown in Figure 33. 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, as shown in Figure 5 on page 17.

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