USING TELEVANTAGE

TELEVANTAGE 5

LIMITED WARRANTY ON SOFTWARE

Artisoft warrants that (a) the Software will perform substantially in accordance with the accompanying written materials for a period of (30) days from the date of receipt. Any implied warranties on the Software is limited to thirty (30) days. Some states/jurisdictions do not allow limitations on duration of an implied warranty, so the above information may not apply to you.

CUSTOMER REMEDIES: Artisoft's and its suppliers' entire liability and your exclusive remedy shall be, at Artisoft's option, either (a) return of the price paid, or (b) repair or replacement of the Software that does not meet Artisoft's Limited Warranty and which is returned to Artisoft with a copy of your receipt. This Limited Warranty is void if failure of the Software has resulted from accident, abuse, or misapplication. Any replacement Software will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer.

ARTISOFT AND ITS SUPPLIERS DISCLAIM ALL OTHER WARRANTIES, REPRESENTATIONS, PROMISES AND GUARANTEES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, ON THE SOFTWARE, MEDIA, DOCUMENTATION OR RELATED TECHNICAL SUPPORT INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF MERCHANTABILITY, PERFORMANCE AND FITNESS FOR A PARTICULAR PURPOSE. ARTISOFT WILL NOT BE LIABLE FOR ANY BUG, ERROR, OMISSION, DEFECT, DEFICIENCY OR NONCONFORMITY IN ANY SOFTWARE. AS A RESULT, THE SOFTWARE AND DOCUMENTATION IS LICENSED "AS IS", AND THE PURCHASER ASSUMES THE ENTIRE RISK AS TO ITS QUALITY AND PERFORMANCE.

IN NO EVENT WILL ARTISOFT OR ITS SUPPLIERS BE LIABLE FOR INDIRECT, SPECIAL, INCIDENTAL, CONTINGENT, CONSEQUENTIAL OR SIMILAR DAMAGES OF ANY KIND RESULTING FROM ANY DEFECT IN THE SOFTWARE OR DOCUMENTATION, INCLUDING, WITHOUT LIMITATION, ANY LOST PROFITS OR SAVINGS, DAMAGES FROM BUSINESS INTERRUPTION, LOSS OF OR TO DATA, COMPUTER PROGRAMS, BUSINESS, DOWNTIME, GOODWILL, DAMAGE TO OR REPLACEMENT OF EQUIPMENT OR PROPERTY, OR ANY COSTS OF RECOVERING, REPROGRAMMING OR REPRODUCING ANY PROGRAM OR DATA USED IN CONJUNCTION WITH THE PRODUCTS, EVEN IF ARTISOFT, ITS SUPPLIERS OR ANYONE ELSE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. YOU AGREE THAT ARTISOFT'S AND ITS SUPPLIERS' LIABILITY ARISING OUT OF CONTRACT, NEGLIGENCE, STRICT LIABILITY IN TORT OR WARRANTY SHALL NOT EXCEED THE AMOUNT PAID BY YOU FOR THIS PRODUCT. ANY WRITTEN OR ORAL INFORMATION OR ADVICE GIVEN BY ARTISOFT DEALERS, DISTRIBUTORS, AGENTS OR EMPLOYEES WILL IN NO WAY INCREASE THE SCOPE OF THIS WARRANTY, NOR MAY YOU RELY ON ANY SUCH WRITTEN OR ORAL COMMUNICATION. Some jurisdictions do not allow the limitation or exclusion of implied warranties or liability for incidental or consequential damages, and some jurisdictions have special statutory consumer protection provisions which may supersede this limitation, so the above limitation or exclusion may not apply to you. This warranty gives you specific legal rights, and you may also have other rights which vary from jurisdiction to jurisdiction.

This software and license may not be transferred or resold without authorization from Artisoft, Inc.

Artisoft, Inc.
5 Cambridge Center
Cambridge, MA 02142

#95-6603 Edition 5

CONTENTS

Getting Started

Using the Telephone

Using the Client

Advanced TeleVantage Features

Chapter 17. Using Call Rules 17-1

Appendices

Getting Started

CHAPTER 1

INTRODUCING TELEVANTAGE

CHAPTER CONTENTS

About TeleVantage

Artisoft's award-winning TeleVantage phone system integrates your telephone and computer to make your telephone a much more powerful tool. You can manage your calls and voice mail by using either your telephone or the TeleVantage Client program, which runs on your computer. TeleVantage dramatically expands the ways in which you can place and receive phone calls.

This manual describes how to use the TeleVantage telephone commands and the Client application. Most of the Client instructions also apply to using the Web Client.

For instructions on installing the TeleVantage Client, see *Installing TeleVantage*. For instructions on performing administrative TeleVantage functions, see *Administering TeleVantage*.

Accessing TeleVantage

You can access TeleVantage by:

- Using the telephone
- Using the TeleVantage Client application
- Using the TeleVantage Web Client
- Using the TAPI Service Provider and the CMA (Contact Manager Assistant)

Using the telephone

TeleVantage provides a sophisticated system of voice-guided menus that enable you to access most TeleVantage features by using the *telephone commands* on your telephone keypad. You can press **#** at the dial tone, log in, and then follow the voice prompts to listen to your voice mail, forward your calls, record greetings, and so on. When you are on a call, you can press **Flash** to put the call on hold and then follow the prompts to transfer calls, set up conference calls, and perform other call-handling tasks.

For details about how to use the telephone commands, see Chapter 3 through Chapter 6. For a summary of the telephone commands, see Appendix A.

Using the TeleVantage Client application

The TeleVantage Client gives you access to all of TeleVantage's features in an easy-to-use Windows interface. With the Client you can point and click to play voice messages, place and receive calls, manage multiple active calls, access contacts and users, and so on. You can install and run the Client on Windows 98, NT, ME, XP, and 2000 computers that are networked to the TeleVantage Server.

For details about how to use the Client, see Chapter 8 through Chapter 18.

Using the TeleVantage Web Client

If your TeleVantage system administrator has installed TeleVantage Web Services, you can access an HTML version of the Client—called the *Web Client*—by using your Web browser. The Web Client lets you use TeleVantage from any remote location that has Internet access and from Macintosh and UNIX computers. Most features of the TeleVantage Client are available in the Web Client. You can listen to your voice mail, manage contacts, check your Call Log, customize your TeleVantage account, and so forth.

To use the Web Client, ask your TeleVantage system administrator for the Web address to enter in your browser. In most cases, the instructions in this manual also apply to the Web Client. You can also use the Web Client's context-sensitive online Help for specific instructions about a Web Client view.

See "Accessing the Web Client" on page 8-2.

Using the TAPI Service Provider and the CMA

If you make extensive use of contact management applications or customer relationship management software such as Microsoft Outlook, GoldMine or GoldMine FrontOffice 2000, or Interact Commerce Corporation's Act!, you can install the TAPI Service Provider and place TeleVantage calls to contacts from those applications. You do not need to have the TeleVantage Client installed on your computer to use the TAPI Service Provider.

The TAPI Service Provider links your contact management applications to your TeleVantage phone, just as the TeleVantage Client is linked to your phone. After the TAPI Service Provider is installed, you can use your contact manager application's Place Call feature to call its contacts using your TeleVantage phone. Ask your TeleVantage system administrator to install the TeleVantage TAPI Service Provider, and then follow the instructions in your contact manager application for placing calls.

You can also install the TeleVantage CMA (Contact Manager Assistant) and receive screen-pops for calls that show the name, the Caller ID, and the time of day of the call.

You do not need to have the TeleVantage Client installed on your computer to use the CMA.

Note: With Act!, you can receive screen-pops without installing the CMA.

For instructions on how to use the TAPI Service Provider and the Contact Manager Assistant, see their online Help.

Feature comparison table

The following table shows the major features that are available in TeleVantage. If your TeleVantage system does not include some of these features, your TeleVantage system administrator might have made them unavailable to you.

Feature	Phone	Client	Web Client	CMA
Managing voice messages	Yes	Yes	Yes	No
Placing, receiving, and handling calls	Yes	Yes	Yes	Some
Managing contacts	No	Yes	Yes	Yes
Call announcing of contacts	Yes	Yes	Yes	No
Screen-pops for incoming calls	N/A	Yes	No	Yes
Managing workgroups	No	Yes	Yes	No
Viewing the Extensions list	No	Yes	Yes	No
Viewing the Call Log	No	Yes	Yes	No
Recording greetings	Yes	Yes	No	No
Forwarding calls	Yes	Yes	Yes	No
Managing routing lists	No	Yes	Yes	No
Managing call rules	No	Yes	Yes	No
Changing active greeting	Yes	Yes	Yes	No
Changing active routing list	No	Yes	Yes	No
Managing personal statuses	No	Yes	Yes	No
Changing personal status	Yes	Yes	Yes	No
Customizing options	Some	Yes	Yes	No

Where to get help

Contact your TeleVantage system administrator for technical support. For information on how to report problems, see Appendix F.

You can get help through TeleVantage documentation as described in the next section.

TeleVantage documentation

TeleVantage includes the following documentation:

- *Installing TeleVantage*—This manual guides you through the installation process for upgrades and fresh installations, and describes how to change hardware, configure your Server, and add licenses.
- *Administering TeleVantage*—This manual contains instructions for configuring and managing your TeleVantage system, including TeleVantage Administrator system settings, licenses, trunks and stations, users, dialing services, auto attendants, inbound and outbound call routing, and system prompts.
- *Using TeleVantage*—This manual describes how to use the TeleVantage Client, Web Client, Contact Manager Assistant, TAPI Service Provider, and telephone commands.
- *TeleVantage Call Center Administrator's Guide*—This manual contains complete instructions for setting up and maintaining a call center in which multiple agents answer calls to a single number, such as a sales or customer support department.
- *TeleVantage Developer's Guide*—This online reference describes how to extend TeleVantage's built-in features using the Client API, the IVR Plug-in API, and the Device Status API.
- *TeleVantage Pocket Reference Card*—This wallet-sized card is a convenient reference for the TeleVantage telephone commands.
- *TeleVantage QuickStart Guide*—This quick-start guide for new users describes basic TeleVantage commands for the telephone and the Client.
- *Online Help*—Context-sensitive help is available in all TeleVantage applications. In any dialog box, click the **Help** button or press F1 for help on that dialog box.

The following table shows the TeleVantage documentation set and the formats in which it is available.

Document	Printed	Online Book	Acrobat (PDF)
Installing TeleVantage	Yes	Yes	Yes
Administering TeleVantage	Yes	Yes	Yes
Using TeleVantage	Yes	Yes	Yes
TeleVantage Call Center Administrator's Guide	Yes	Yes	Yes
TeleVantage Developer's Guide	No	No	Yes
TeleVantage Pocket Reference Card	Yes	No	No
TeleVantage QuickStart Guide	Yes	No	Yes

Notes

- The online books are available in HTML-based format. To access an online book, click **Help > Online Books** in any TeleVantage application.
- The PDF-formatted books are available on the TeleVantage CD, in the `\manuals` directory. Use Adobe Acrobat Reader—also available on the TeleVantage CD in the \Adobe directory—to view and print these files.

CHAPTER 2

RECORDING YOUR VOICE TITLE AND VOICE-MAIL GREETING

CHAPTER CONTENTS

About creating your voice title and voice-mail greeting

This chapter explains how to create your voice title, create your voice-mail greeting, and manage your greetings using the phone.

When you first begin to use TeleVantage, create the following two recordings:

- Your voice title (your name)
- Your voice-mail greeting (what callers hear when they reach your voice mail)

You can rerecord these recordings at any time.

Note: Your TeleVantage system administrator may have created these recordings for you already, but you can create new ones in your own voice.

Recording your voice title

Your voice title is a short recording of your name only. TeleVantage plays it when the following events occur:

- Callers dial your extension or are transferred to you (callers hear "Transferring to" + <voice title>).
- Callers look you up in a name search in the dial-by-name directory (callers hear "For" + <voice title> + "press 1").
- You call another TeleVantage user (the user that you are calling hears "Call from" + <voice title>).
- You leave a voice message for another TeleVantage user (your voice title precedes the message).

If you do not record a voice title, you might be prompted to say your name when you call another TeleVantage user who has call announcing turned on (see "Call announcing" on page 4-2).

Important: Your voice title can contain other information, such as your company or title, but it should not be a long recording. TeleVantage plays your voice title in the middle of recorded sentences, so a long voice title can cause confusion.

To record a voice title on the phone

1. Pick up your phone and press **#**. Log in to your account by entering **<your extension> # <your password> #**.
2. Press **6 2** to manage your voice title.
3. Press **1** to record a new voice title. Say your name and then press **#** immediately afterwards to eliminate silence.

For instructions on how to record a voice title in the Client, see "Recording a voice title" on page 18-3.

Recording your voice-mail greeting

Your voice-mail greeting is a recording that callers hear when they reach your voice mail. For example, your voice-mail greeting might be similar to the following: “This is Miri Anatolia. I am out of the office right now, but leave me a message and I will get back to you soon.” You can also use your voice-mail greeting to tell callers about the following options that are available to them:

- Press # after leaving a message for more options. See “Voice Message Commands” on page 5-4.
- Press 7 at any time to leave a callback number. (The caller can choose to leave the Caller ID number, if available, or enter another number.)
- Press 0 at any time to transfer to the Operator. (By default, 0 transfers the caller to your company’s operator, but you can specify another extension instead. See “Changing your personal Operator” on page 18-7.)
- Press ***** during the greeting to skip the rest of the greeting and begin leaving a message.

Your TeleVantage account comes with an initial voice-mail greeting that callers hear until you record a new one. It says, “The person you have attempted to reach is unavailable. Please leave a message after the tone. When finished, hang up or press the pound key for more options. To leave a callback number, press 7. If you need immediate assistance, press 0.” To record your own greeting, you can record over the initial greeting or record a second greeting.

The active greeting

The *active greeting* is the greeting that TeleVantage plays when callers reach your voice mail. You can record and store multiple greetings for different occasions, but only one greeting can be the active greeting. You can designate a different greeting as your active greeting at any time. For example, you can have a greeting that you use under normal working circumstances and an extended-absence greeting that you use when you are on vacation. Before you go on vacation, you can designate the extended absence greeting as your active greeting.

For instructions on how to record greetings and change the active greeting in the Client, see “Managing greetings” on page 13-18.

Recording a new greeting

1. Pick up your phone and press **#**. Log in to your account by entering **<your extension> # <your password> #**.
2. Press **4** to manage your greetings. Your current active greeting plays.
3. Press **4** to rerecord that greeting or **6** to record a new greeting. Say your greeting, and then press **#**. The greeting you just recorded is played back.
4. Follow the prompts to accept, rerecord, or delete the greeting. If you recorded a new greeting, you can make it the active greeting by pressing **3**.

Recording a grab-and-hold greeting

TeleVantage also provides a special greeting called a grab-and-hold greeting that plays when you put incoming calls on hold without talking to the callers first. For more information about using and rerecording a grab-and-hold greeting in the Client, see “Putting an incoming call on hold” on page 11-7.

Managing your greetings

To manage your greetings by using the telephone commands, log in and press **4**. TeleVantage plays each of your greetings, beginning with the active greeting. You can use the commands shown in the following table either while you listen to a greeting or after a greeting has played.

Greeting Commands Use while or after a greeting plays	
1	Replay the greeting.
2	Skip to the next greeting.
3	Make this greeting active.
4	Rerecord the greeting.
6	Record a new greeting.
7	Delete the greeting.

When you record a new greeting by using the telephone commands, the greeting appears in the Client’s Greetings view with the name “Greeting.” You can give the greeting a name in the Client (see “Managing views and items” on page 8-12).

Note: When you make a greeting active using the telephone commands, that greeting also becomes the personal status default greeting. That is, that greeting will be used by all of your personal statuses unless you have set a personal status to use another greeting that you have recorded. For more information, see “Personal status defaults” on page 9-12.

Available space for greetings

Your TeleVantage system administrator has allocated a limited amount of disk space on the TeleVantage Server for your greetings and all of your voice files. If your existing greetings fill the space allocated to you, you cannot record a new greeting. Ask your TeleVantage system administrator for the amount of space you have been allocated and how much of it you have already used.

Using the Telephone

CHAPTER 3

PLACING CALLS ON THE PHONE

CHAPTER CONTENTS

About placing calls on the phone

You can pick up a TeleVantage phone and place a call in the same way that you place calls on other phones. But you can also do much more. For example, you can dial other TeleVantage users by name and use special key combinations to redial your last call or call back your last caller. Depending on your TeleVantage system, you can also place calls over Centrex lines or over the Internet.

This chapter explains the following aspects of placing TeleVantage calls on the phone:

- Dialing internal and external numbers
- Dialing by name
- Placing calls while you are already on a call
- Sending a Flash command to Centrex or another PBX
- Redialing the last number you called, returning the last call that arrived, and disabling call waiting for a call
- Placing calls to an IP address

For information about placing calls visually by using the TeleVantage Client, see Chapter 12.

Placing calls at a phone other than your own

If you use another user's phone to place calls, you are subject to that user's dialing restrictions, outgoing Caller ID information, and other settings, and your calls are logged as being from that user. To make sure that your calls are placed and logged as yourself, do the following:

1. Before placing calls at the other user's phone, log on to your account there. To do so, pick up the phone and enter **# <your extension> # <your password> #.** (Your office may use a logon key other than #). Then press **5 1** to forward your calls to that phone.
2. When you are finished placing calls at the other user's phone, log off from that phone by pressing ***0 0**.

Dialing internal and external numbers

Internal calls are calls to other TeleVantage extensions. External calls are calls to outside numbers, including calls to another PBX, a Centrex extension, another TeleVantage system such as a branch office, and an Internet address.

To dial an internal number

1. Pick up your phone.
2. Do one of the following:
   - Dial the extension number.
   - Press **411** or ***93** for the dial-by-name directory.

To dial an external number

You must dial an access code to start dialing an external number. Ask your TeleVantage system administrator what types of external calls you can place and what access codes you must use. See “Placing calls to an IP address” on page 3-6 for information about entering the IP address.

1. Pick up your phone.
2. Enter **<access code><phone number or IP address>**.

   Note: See “Placing calls to an IP address” on page 3-6 for information about entering the IP address.

Example: In the U.S. if you want to call the external phone number **555 1212**, you must dial **9** (the usual access code) before you dial **555 1212**. To place a call over the Internet, you must dial a different access code.

When you dial an external number, you may notice a delay before you hear the number ringing. To eliminate this delay, press **#** after dialing the number.

Entering account codes when placing calls

Depending on your office’s configuration of TeleVantage, you may be prompted to enter an account code when you place an external call. Even if you are not prompted for an account code by the system, your office may require you to enter one. Your TeleVantage system administrator can tell you what account codes, if any, you must use.

You can also enter account codes using the Client. See “Entering an account code for a call” on page 11-13.

If you are prompted to enter an account code

If you are prompted to enter an account code when you place a call, you will hear one of the following prompts:

- A beep.
- “Please enter account code.”
- A double beep. This indicates that you are dialing a contact who has an associated account code, so that you do not need to enter one. See “To enter a contact's name and basic information” on page 16-5.

If you hear the account code prompt, enter the account code followed by **#**. If you hear the double beep, you can press # to use the contact’s associated account code, or you can enter a different account code and press **#**.

Note: If you enter the wrong account code, press **Flash** before pressing **#** and the system will let you re-enter it.

Depending on how your TeleVantage system administrator configured your system, the prompt may occur either after you dial the access code or after you dial the phone number. If the prompt occurs after you dial the access code, enter the account code followed by **#**, and then continue entering the phone number. For example:

9 [prompt] **8812 # 212 123 4567**

where **9** is the access code, **8812** is the account code, and the numbers after **#** are the area code and phone number.

Entering an account code during or before a call

During a call you can enter an account code or revise an account code already entered.

To enter an account code

1. Press **Flash *11**.
2. Enter the account code followed by **#**. After pressing # you are returned to the call.

You can also enter an account code before dialing the call. Press ***11** at a dial tone, and then enter the account code followed by **#**. When you hear the dial tone, dial the phone number.

Dialing by name

You can dial another TeleVantage user by name if you do not know the user's extension. To dial by name, press **411** or ***93**. The dial-by-name directory prompts you to enter the first few letters of the user's first or last name, depending on your system settings. If TeleVantage finds several possible matches, it presents a menu from which you can choose the name of the person you want to call. If it finds one match, it transfers you to that extension. Your TeleVantage system may be configured to ask you to confirm your choice or try again. For example, you might hear, "For Cecilia St. John, press 1. To try again, press *."

Using the Client, you can remove yourself from the dial-by-name directory, so that only callers who know your extension can dial you. See "Customizing your listing in the dial-by-name directory" on page 18-7. If you do not have a Client, your TeleVantage system administrator can remove you from the dial-by-name directory.

Placing calls while you are already on a call

You can put calls on hold and place a new call, pick up another call on hold, and end a call without losing other calls on hold.

Putting your current call on hold and placing a new call

1. Press **Flash #**. Your current call is now on hold and you have a dial tone.
2. Dial your call.

Switching between calls

To switch from your current call to a call that is on hold, press **Flash 4**. If you have multiple calls on hold, you will hear a menu from which you can pick the call to which you want to connect.

Ending a call without losing calls on hold

You can hang up the phone to end a call without losing your calls on hold.

1. Hang up the phone or press **Flash 3** to end the current call.
2. If you hung up, pick up the phone.
3. Press **Flash 4**. You are connected to the call on hold. If you have multiple calls on hold, you will hear a menu from which you can pick the call to which you want to connect.

Sending a Flash command to Centrex or another PBX

Press **Flash 8** when you want to send a Flash command to your Centrex or other PBX system instead of to TeleVantage.

Use this command if you are using TeleVantage with Centrex phone lines or with a remote PBX. For example, on a Centrex system you must press **Flash 8** before you can access Centrex features such as transferring within the Centrex group.

You can also use the **Flash 8** command to respond to a call waiting tone from your telephone company. This tone is different than a call waiting tone sent by TeleVantage, to which you respond by pressing **Flash** only.

Placing calls with * options

When you press ***** at a dial tone, the system offers you a menu of quick call commands. See page A-3 for a table that lists all available commands.

Redialing the last call

To redial the last call you placed, press ***66**.

Returning the last call

To return a call to your last identified caller, press ***69**. (You cannot return unidentified calls.) TeleVantage reads the number it will dial and prompts you to approve it before it dials the call.

Disabling call waiting for a call

Disabling call waiting is useful if you are using your extension to send faxes or to connect to the Internet. In both cases, a call waiting tone disrupts the data flow.

To disable call waiting for a call, press ***70** and dial the number. You do not hear the call waiting tone during that call. Incoming calls while you are on that call are sent directly to your voice mail. After the call ends, call waiting is enabled again.

Note: You can enter ***70** as part of your fax dial string. For example, your fax dial string might be ***70 9 1 617 555 7744**.

Placing calls to an IP address

If your TeleVantage system supports placing calls over the Internet, you can dial an IP address directly from your phone. In this way you can connect to an H.323 terminal such as NetMeeting.

To dial an IP address, first dial your office's access code for Internet calls. If you do not know the access code, ask your TeleVantage system administrator. Then dial the IP address, entering stars (*****) instead of periods. For example, if your office's access code for dialing IP calls is 7, dial the IP address 255.75.119.49 as **7 255*75*119*49**.

Placing a page or intercom call

You can use the ***15** telephone command to page a group of users or place an intercom call to a single user. When you create an intercom or page connection, you hear a beep, after which you can speak over the receiving users' speakerphone. The receiving user hears a beep before the audio connection is made.

You can use this feature in two ways:

- **Page multiple users.** A page creates a one-way audio connection with all the users in a workgroup. When you speak, your voice comes over each user's speakerphone simultaneously, but you cannot hear the other users. To make this type of connection, dial ***15** followed by a workgroup's extension.
- **Place an intercom call to a user.** An intercom call creates a two-way audio connection with a single user's speakerphone, so you can both speak and hear. To place an intercom call, dial ***15** followed by a user's extension.

Note: When you dial a workgroup's extension, a one-way page always results, even if there is only one user in the workgroup.

Requirements for receiving a page or intercom call

In order to receive a page or intercom call, the receiving user must have the following:

- A Cybiolink, Aastra Powertouch, or Toshiba digital phone, with that phone type selected in the Client under **Tools > Options** on the Phone tab. Regular phones will also receive intercom connections and pages if they are in hands-free mode (see “Using hands-free answering” on page 4-4).
- The phone on-hook with no active call.

If one or more of these requirements are not met (for example, if the user is on a call), the page or intercom connection is not made.

Note: If you have a Cybiolink or Aastra Powertouch phone, receiving an intercom or page causes the message waiting light to blink for the duration of the call, even though you have no new voice messages. The same is true for receiving calls with voice-first answering.

Blocking pages and intercom with Do Not Disturb

Users who have the personal status Do Not Disturb selected do not receive pages or intercom calls. See “Sending your calls straight to voice mail with Do Not Disturb” on page 4-11. With shared stations, the personal status of the user currently logged in is the one used. With all other personal statuses you can receive pages and intercom connections, even if the **Taking Calls** field is set to **No**.

Considerations with call forwarding

Pages and intercom calls always connect to the receiving user’s default station, even if the user has forwarded his or her calls elsewhere. Users with a station ID of 0 cannot receive pages or intercom calls.

Considerations with the TeleVantage Client

Pages and intercom connections do not show up in the TeleVantage Client’s Call Monitor view (see Chapter 11), or the Call Log (see Chapter 14).

Considerations when placing a page

When you place a page, there is a delay before you can begin speaking, and a limit to how long you can speak for.

Delay before speaking

After dialing ***15** and the workgroup extension, it can take some time for the system to take each Cybiolink or Aastra Powertouch speakerphone offhook, causing a slight delay before you hear the connection beep and can begin speaking. The bigger the workgroup being paged, the greater the potential delay.

Note: It is possible that the page will not connect to all paged phones. If you find that people who should have received your page did not, speak to your system administrator about increasing the PageRequestTimeout time.

Time limit for speaking

After you hear the beep, you have 30 seconds to speak before the page terminates automatically. Your system administrator can also adjust this time limit.

CHAPTER 4

ANSWERING AND HANDLING CALLS ON THE PHONE

CHAPTER CONTENTS

About answering and handling calls on the phone

This chapter explains how to answer calls at your TeleVantage phone, including putting calls on hold, transferring calls, sending calls to voice mail, and other actions. For the features you can use when answering and handling TeleVantage calls at a remote phone, see Chapter 6.

Using the Flash button on your phone

When you use TeleVantage on the phone, you use your phone's Flash button to access many commands. If your phone does not have a Flash button, press and release the hook quickly once to send a Flash command.

Note: On some phones, the Flash button is labelled Link or Call Wait.

Answering TeleVantage calls

This section explains the following aspects of answering TeleVantage calls on the phone:

- Call announcing
- Call waiting
- Answering a call at another ringing phone

Call announcing

Call announcing enables you to screen incoming calls verbally. With call announcing, when you answer your phone you are not connected immediately to the caller. Instead, you hear, "Call from" followed by a recording of the caller's name. You can then choose whether to accept the call or send it to voice mail.

Note: You can also screen your calls visually by using the TeleVantage Client's Call Monitor, which displays the caller's name when you receive a call (see Chapter 11). Another way to screen your calls is by using a phone with a Caller ID display.

Answering a call using call announcing

After answering a call and hearing the caller's name, you can do one of the following:

- **Press 1 to accept the call.** You are connected with the caller.
- **Press 2 to send the call to voice mail.** The call is sent to your voice mail.
- **Hang up.** The call proceeds to the next step on your routing list. By default, the next step your voice mail, so hanging up is a quick way of pressing **2**. If you have customized your routing list, however, the next step might be something different. See "Using routing lists" on page 15-7.
- **Press 3 to send the call to voice mail and monitor the message being left.** The call is sent to your voice mail, and you can listen to the message as it is recorded and pick up the call at any time.

  When you choose this option, you hear your voice mail greeting and the caller's message as it is being left. The caller cannot hear you.

To talk to the caller at any time during this process, press **Flash 1**. If you do not want to continue to listen to the message while it is being left, hang up the phone.

- **Press 4 to conference.** This option is available only when call waiting is turned on and you are on a call when the new call arrives. The new call is conferenced with you and your current call or calls.

Note: For a description of how call announcing works if you share a station with another user, including how to announce who the call is for, see “The “call for” announcing prompt” on page 7-3.

How TeleVantage gets the recording of the caller’s name

When you have call announcing turned on, callers who dial your extension hear a prompt that says, “Please say your name.” TeleVantage records what the caller says and uses that recording to announce the call.

Callers who have voice titles recorded do not hear this prompt, because TeleVantage uses their voice titles to announce the call. This applies to both TeleVantage users and contacts. For more information about contacts, see Chapter 16.

You can also turn this prompt off for all callers (see “Customizing or turning off call announcing” on page 18-4).

Call waiting

When you are on a call and another call for you arrives, you hear the call waiting tone (two short beeps). Press **Flash** to switch to the incoming call. The current call is put on hold.

If call announcing is turned off, you are connected to the incoming call immediately. If call announcing is turned on, you hear the call announcing prompt. See “Answering a call using call announcing” on page 4-2.

Note: Call waiting is not available when you receive TeleVantage calls at a remote phone. Therefore, if your calls are forwarded to an external number, or if a call is sent to an external number as a step in a routing list, the call waiting feature is not available. For more about using TeleVantage with remote phones, see Chapter 6.

Call waiting options

The following options can be set in the Client. If you do not have a Client, your TeleVantage system administrator can set them for you.

- Turning call waiting off
- Disabling the call waiting beep when you are using the Client
- Displaying Caller ID on your phone on call waiting

For more information, see “Customizing or turning off call waiting” on page 18-6.

Receiving a call waiting tone from your telephone company

If you receive a call waiting tone from your telephone company, as opposed to a tone from TeleVantage, you must press **Flash 8** to answer the call.

Answering a call at another ringing phone

You can easily answer another ringing phone from your own phone, if your TeleVantage administrator has given you permission to pick up a ringing phone. If you do not have permission, you will hear, “You do not have permission to use this feature.”

To answer any ringing phone

1. Pick up your phone and press ***91#**. If only one phone is ringing, you are connected immediately to that phone.
2. If more than one phone is ringing, you are prompted to enter the extension of the phone that you want to answer. Enter the number followed by **#** and you will be connected to that phone.

To answer a ringing phone within your workgroup

To answer a ringing phone within your workgroup, press ***99**. This command can be handy if several other phones are ringing, but only one of them is within your workgroup. This command only works within public workgroups, and only if the workgroup has an extension.

For more information about workgroups, see “Using workgroups” on page 16-14.

Using hands-free answering

Hands-free answering is an aid for headset and speakerphone users.

Using hands-free answering, you can receive or place calls while the phone is off-hook. Although the phone is off-hook, the dial tone does not play, and the phone does not ring. When an incoming call arrives, a zip tone (a beep) notifies you and TeleVantage connects you based on your settings for call announcing.

Notes

- Hands-free answering is available only at TeleVantage stations in your office.
- When you enable hands-free answering, it is enabled for the station. If you are sharing the station with another user, hands-free answering is enabled for the other user too. If you log in at another workstation, your hands-free setting does not follow you.
- If you are using hands-free answering, call announcing is automatically used if you are called as a member of a workgroup, or if you are sharing a station and the other user is currently logged in to the station.
- Use of hands-free answering does not use a dedicated voice resource, unless the TeleVantage system administrator has checked **Allow dialing in hands-free mode** in the Administrator, on the Other tab of the User dialog box.

Enabling and disabling hands-free answering

To enable hands-free answering, press ***10** at the dial tone. You hear, "Hands-free answering is on." The station is now off-hook and waiting for a call. With hands-free answering enabled, your other telephone commands remain the same. For example, call forwarding and transferring commands do not change.

To disable hands-free answering, press ***10** at the dial tone. You hear "Hands-free answering is off."

Placing, receiving and ending calls with hands-free answering

To place a call using hands-free answering, press **Flash** for a dial tone and then dial the number.

To receive a call, wait for a zip tone (a beep) to notify you of the incoming call. TeleVantage connects you based on your call announcing settings (see "Call announcing" on page 4-2). If call announcing is turned off, you are connected to the caller immediately after the zip tone.

To end a call while you are using hands-free answering, press **Flash** and then press **3** to hang up. (If the other party hangs up, that will also end the call.) After the call ends, you may hear dial tone for a brief period of time before you return to off-hook status.

You can cut short the dial tone and return to silent off-hook status by pressing **Flash**.

Hands-free answering and routing lists

When you are in hands-free mode, your phone is automatically picked up whenever an incoming call arrives, so normally calls will never proceed to subsequent steps on your routing list (such as voice mail). However, callers can be sent to the next step on your routing list in either of the following ways:

- **Manually by you with call announcing.** If you are using call announcing, you can send a call directly to voice mail by pressing **2** at the call announcing prompt, or to the next step on your routing list by pressing **Flash 3**. See "Call announcing" on page 4-2.
- **Manually by the caller without call announcing.** If you are not using call announcing, the caller has a 10-second window after the call is connected in which they can press **#** to go to the next step on your routing list.

For more information about routing lists, see "Using routing lists" on page 15-7.

Creating an overhead paging system with hands-free answering

You can create a paging system by connecting a hands-free extension (at which hands-free answering is enabled) to an overhead speaker. To broadcast an announcement over the paging system, dial the extension. With hands-free answering, the call is connected without the need to lift a receiver, so you are connected immediately to the speaker. The zip tone plays over the speaker to signal the beginning of your announcement.

Receiving internal intercom calls with voice-first answering

If you use a supported Cybiolink or Aastra PowerTouch ADSI phone, or a Toshiba digital phone, as your TeleVantage station, you can use voice-first answering, which turns your speakerphone into an intercom for internal callers.

When you receive an internal call with voice-first answering enabled, the system automatically takes your phone off-hook and turns on your phone speaker. A zip tone (a beep) plays to alert you to the incoming call, and the call is connected based on your settings for call announcing (see "Call announcing" on page 4-2). If you have call announcing turned off, the caller can begin speaking over your speakerphone immediately after the zip tone, and you can answer without needing to touch your phone at all. When the call ends, the phone speaker is automatically turned off and your phone is returned to on-hook status.

Note: If you have a Cybiolink or Aastra Powertouch phone receiving a call in voice-first mode causes the message waiting light to blink for the duration of the call, even though you have no new voice messages. The same is true for receiving intercom calls and pages.

Unlike with hands-free answering (see the previous section), voice-first answering occurs only for internal callers. All external calls ring your phone as normal, including external callers transferred to you by other users.

You can place intercom calls to other users even if they don't have voice-first answering turned on, provided they have the correct type of phone. See "Placing a page or intercom call" on page 3-6.

Note: If you are using voice-first answering, call announcing is automatically used if you are called as a member of a workgroup, or if you are sharing a station and the other user is currently logged in to the station.

Enabling voice-first answering

Note: To use voice-first answering, it must be enabled at the system level. Ask your system administrator whether your system is using voice-first answering.

To turn voice-first answering on or off, press ***12** at the dial tone. You hear, "Voice-first answering is on" or "voice-first answering is off."

You can also turn voice-first answering on and off using the Client, as follows:

1. Choose **Tools > Options.**
2. On the General tab, check or uncheck **Voice-first answering**.
3. Click **OK**.

Handling calls with the phone

The remaining sections in this chapter describe how to perform the following tasks using the call-handling commands:

- Putting a call on hold
- Transferring a call
- Sending a call to voice mail
- Disconnecting from a call and remaining on the line
- Creating a conference call
- Parking a call
- Unparking a call
- Putting a call on silent hold
- Getting a dial tone to start another call
- Entering an account code for a call

For information about how to use the Client's Call Monitor to handle calls visually, see Chapter 11.

Call-handling commands

When you press **Flash** to put a call on hold, you hear a menu of call-handling commands (see the next table). The caller does not hear this verbal menu.

Call-handling Commands	
1	Transfer the call.
2	Send the call to voice mail.
3	Disconnect from the call.
4	Reconnect to the call.
5	Create a conference call.
6	Park the call.
7	Use silent hold (mutes menu until next keypress).
#	Get a dial tone (start another call).
Flash	Reconnect to the call.

The remainder of this chapter explains these call-handling commands in detail.

Putting a call on hold

After you answer a call, you can put it on hold by pressing **Flash**. To return to the call, press **Flash** again or press **4**.

Important: You cannot put a call to a queue, auto attendant, or IVR Plug-in on hold. If you do, the call is disconnected.

Notes

- If you hang up and have a call on hold, the ringback feature in TeleVantage rings your phone.
- Use the Flash button rather than the Hold button on your phone. With Flash, callers hear music (if your system has music-on-hold set up). If you use your phone's Hold button, callers hear nothing.

Transferring a call

You can transfer a call to another TeleVantage extension in one of the following ways:

- **Blind transfer.** Transfer a call without talking to the recipient.
- **Supervised transfer.** Transfer a call if the recipient agrees to accept it.

Note: You can also transfer a call back to the auto attendant (your company's main menu). Ask your TeleVantage system administrator for the auto attendant's extension or view it in the Client's Place Call To dialog box.

To perform a blind transfer

1. Press **Flash 1**.
2. Enter the extension to which you want to transfer the call. If you do not know the extension, press **411** and select the recipient by name.
3. Hang up. The call is transferred.

To perform a supervised transfer

1. Press **Flash 1**.
2. Enter the extension to which you want to transfer the call. If you do not know the extension, press **411** and select the recipient by name.
3. Wait for an answer. If the recipient answers, introduce the call. The caller remains on hold.
4. Do one of the following:
   - **To complete the transfer** when the recipient agrees to accept the call, hang up or press **Flash 2**. The call is transferred to the recipient.
   - **To cancel the transfer**, press **Flash 1**. You are disconnected from the recipient and reconnected to the caller. Use this command if the recipient declines the call or does not answer.

About the transfer ring delay

When you transfer a call using the telephone commands and don't hang up immediately, TeleVantage provides a brief delay before ringing the recipient's phone. This provides time for you to hang up to do a blind transfer. System administrators can adjust the length of this delay by adjusting the advanced system setting TUITransferRingDelay.

Transferring one of multiple calls

To transfer one of multiple calls that are on hold and then return to the other calls, do the following:

1. Press **Flash 1**.
2. The system prompts you to choose the call that you want to transfer. Press the appropriate number.
3. Enter the extension to which you want to transfer the call. If you do not know the extension, press **411** and select the user by name.
4. Complete the transfer in one of the following ways:
   - **Blind transfer.** Hang up the phone to complete the transfer. Wait a few seconds, and then pick up the phone again and press **Flash 4** to return to your calls on hold.
   - **Supervised transfer.** Speak to the recipient as necessary to announce the transfer. To complete the transfer, press **Flash 2**, and then press **4** to return to any calls on hold.

Sending a call to voice mail

You can send a call directly to your voice mail or the voice mail of any user.

1. Press **Flash 2**.
2. Enter the extension of the voice mailbox to which you want to send the call.
3. Hang up.

Disconnecting from a call and remaining on the line

You can disconnect from a call and remain on the line. This capability is useful if you are calling into TeleVantage from a remote phone and making a series of outgoing calls through TeleVantage. By disconnecting from your current outgoing call only, you do not have to repeatedly dial into TeleVantage. Your connection with TeleVantage continues, and you can proceed to make more outgoing calls.

To disconnect from your current call, press **Flash 3**. Note that from a remote phone you would press **** 3**.

For more about working at a remote phone, see Chapter 6.

Creating a conference call

You can create a conference call in the following ways:

- By adding parties
- By connecting separate calls

To create a conference call by adding parties

1. Dial the first party and wait for an answer.
2. Press **Flash #** for a dial tone to start another call.
3. Dial the second party and wait for an answer.
4. Press **Flash 5**. You and the two parties you called are now conferenced in a single call.
5. Press **Flash #** for a dial tone to start another call. The conference is put on hold, and the parties already in it can continue to talk to each other.
6. Dial another party and wait for an answer.
7. Press **Flash 5** to add the new call to the existing conference call.
8. Repeat steps 5-7 to add more parties to the conference call.

To create a conference call from separate calls

You can also create a conference call from separate, individual calls by pressing **Flash 5**.

When you hear the call waiting beep for an incoming call, you can conference that call with your current call. After the call waiting beep, press **Flash 4**.

Notes

- Depending on how your administrator has configured your TeleVantage Server, up to 4, 7, 12, or 60 parties can participate in a conference call.
- You cannot conference two conference calls together.
- When you hang up on an ongoing conference call, the conference continues without you. The other participants can continue to talk, even if you started the conference and your company is paying for the outgoing calls used to create it. To terminate the call, each participant must hang up.

To create conference calls in the Client, see “Creating conference calls” on page 12-9.

Parking a call

Parking a call lets you put a call on hold and pick it up at any TeleVantage extension.

1. Press **Flash 6**. TeleVantage tells you the call's orbit number. Make a note of it.
2. Hang up.

Unparking a call

1. To retrieve a call, pick up any TeleVantage extension and dial ***92**.
2. Enter the orbit number. You are connected to the parked call.

Putting a call on silent hold

Press **Flash 7** to put a caller on "silent hold." With silent hold, you do not hear the cycling menu prompts. The caller still hears hold music. Silent hold is useful for headset or speakerphone users.

Press any key to resume the menu prompts. From there, you can return to the caller by pressing **4** or **Flash**.

Getting a dial tone to start another call

To put your current call on hold and get a dial tone, press **Flash #**. In this way you can place new calls without disconnecting from your current call.

Entering an account code for a call

While on a call, you can press **Flash # *11** at any time to enter an account code for the call or change the one already entered. See "Entering account codes when placing calls" on page 3-3 for more information, including what to do if the system prompts you to enter an account code for an outgoing call.

Sending your calls straight to voice mail with Do Not Disturb

You can use send all your incoming calls directly to voice mail without ringing your phone. To do so, select the personal status Do Not Disturb as follows:

1. Log in to your account by picking up your phone and entering **# <your extension> # <your password> #**.
2. Press **6 1 2**.

To begin receiving calls again, set your personal status to Available as follows:

1. Log in to your account.
2. Press **6 1 1**.

For more information about personal statuses, see "Selecting a personal status on the phone" on page 5-8 and Chapter 9.

Forwarding your calls

You can use the telephone commands to forward your calls, so that your incoming calls ring another phone. You can forward your calls to another extension or an external number.

You can also forward your calls using the Client. See Chapter 15.

To turn on call forwarding

1. Log in to your account by picking up your phone and entering **# <your extension> # <your password> #**.
2. Press **5**.
3. Do one of the following:
   - To forward calls to another extension, press **2** and enter the extension.
   - To forward calls to an external number, press **3** and enter the number, including the access code for the dialing service that you want to use and any prefixes that apply, such as the “1” for long-distance numbers in North America. For example, to forward your calls to a long-distance number by using a standard outside phone number dialing service, you can enter **9 1 212 123 4567**. (The spaces are shown for clarity.)

     Note: You can enter * to force a 2-second pause in dialing, for example, between the number and an extension.
4. Follow the prompts to confirm the number you entered.

Note: You can use a shortcut to forward your calls to the phone where you are. Log in to your account from that phone, and then press **5 1.**

To turn call forwarding off on the phone

1. Log in to your account.
2. Press **5 4**.

To check your call forwarding number

When you log in to your account while your calls are forwarded, TeleVantage reminds you that call forwarding is on and tells you the external number to which your calls are being forwarded. After you log in, you can check the external number again at any time by pressing **5 5.**

CHAPTER 5

MANAGING VOICE MESSAGES WITH THE PHONE

CHAPTER CONTENTS

About managing voice messages with the phone

This chapter describes the following aspects of managing your voice messages on the phone using the telephone commands:

- Using new message indicators
- Listening to your voice messages
- Replying to a message
- Forwarding a message
- Calling back a message
- Sending a message directly to a user's voice mail
- Voice mail from the caller's point of view
- Selecting a personal status on the phone

For instructions on how to manage voice messages in the Client, see Chapter 13.

Using new message indicators

TeleVantage can alert you in the following ways when you have new (unheard) voice messages:

- **Stutter dial tone.** When you pick up your phone, the dial tone begins with several short tones, and then changes into a regular dial tone. The stutter dial tone indicates that you have new voice messages.

  You or your TeleVantage system administrator can turn stutter dial tone off using the Client. See "Turning off stutter dial tone" on page 18-12.
- **Message-waiting light**. If your phone has a CLASS message-waiting light, you can have it flash to indicate new voice messages.

  To use a message waiting light, you or your TeleVantage administrator must enable it using the TeleVantage Client. See "Enabling a message waiting light" on page 18-12.
- **E-mail pager, and call notification**. TeleVantage can send you an e-mail message, page you, or call you whenever you receive a new voice message. You can choose to be notified only for Urgent messages, and you can schedule notification to occur only during the times you want.

  You can set up notification in the Client. See "E-mail, pager, and call notifications" on page 13-12. If you do not have a Client, your TeleVantage system administrator can set up e-mail and pager notification for you.

Note: If multiple users share a phone, the message-waiting light and stutter dial tone occur if there are new messages for any of the users assigned to that phone.

Listening to your voice messages

To listen to your voice messages, you must log in to your TeleVantage account. You can log in from any TeleVantage phone. To log in, pick up your phone and enter:

 # <your extension> # <your password> #

After you log in, press **1** to hear your voice messages.

Quick-dial to hear your voice mail

At your own TeleVantage phone, you can enter:

 # # <your password> # 1

Customizing voice message playback order

You can specify in the Client the order in which you hear new and old voice messages when listening by phone. See “Setting voice message playback order” on page 18-12 for more information. If you do not have a Client, your TeleVantage system administrator can set this option for you.

Deleting and undeleting messages

To delete a message, press **3** during or after the message.

You can undelete messages as long as you remain in the current voice messages session. If you hang up or back out of the voice messages menu, all messages that you have deleted are deleted permanently.

Do one of the following to undelete messages while you are in a voice messages session:

- **Press 3 to undelete the current message.** To undelete a previous message, press **5** until you hear the message and then press **3** to undelete it.
- **Press 8 to undelete all deleted messages.** Doing this changes all deleted messages to heard messages in your Inbox.

Voice message telephone commands

You can use the telephone commands in the following table while you listen to a message or after the message has played.

Voice Message Commands Use while or after a message plays		
1		Replay the message.
2		Skip to the next message.
3		Delete or undelete the message.
4	**1**	Reply to the message.
	2	Forward the message.
	3	Call back the person who left the message.
	4	Call back the person who left the message and delete the message.
5		Skip to the previous message.
6		Save this message to the Saved folder.
7		Skip back 4 seconds in the current message.
8		Undelete all deleted messages.
9		Skip ahead 4 seconds in the current message.
#		(During message-received preamble) Skip to the beginning of the message.
#		(During message) Skip rest of the message.

Replying to a message

When you reply to a message, you are sending a message of your own to a user who sent you voice mail. Your reply message does not include the original message.

To reply to a message

1. Press **4 1** while or after a message plays.
2. If the message was sent to multiple recipients, you can reply to the sender only or to the sender and all recipients. To reply to the sender only, press **1**. To reply to the sender and all recipients, press **2**.
3. At the tone, record your reply message. Press **#** when you are done.
4. Press **1** to send your reply. See the table on page 5-4 for other options.

Forwarding a message

When you forward a message, you are sending a copy of a voice message to the voice mail of one or more users, preceded by a new message that you record. Your message can introduce the forwarded message to users, for example, it might say, “I just received this message about our new product, and I thought the three of you ought to hear it.”

To forward a message

1. Press **4 2** while or after a message plays.
2. At the tone, record your message. Press **#** when you are done.
3. Press **1** to accept your recorded message. See the table on page 5-7 for other options.
4. Enter the extension to which you want to forward the message followed by **#**. If you do not know a user’s extension, press **411** and select the user by name. Enter multiple extensions in the following format:

   ext1 # ext2 # ext3 # #

Calling back a message

When you call back a voice message, TeleVantage places a call to the extension or external phone number of the person who left you the voice message. In cases where multiple numbers are available for the person—for example, a callback number and a Caller ID number—TeleVantage prompts you to choose which one to dial.

Note: If the system cannot dial the callback number, see your TeleVantage system administrator. The call dialing rules set up by your TeleVantage system administrator may need to be changed.

To call back a voice message

1. Press **4 3** or **4 4** while or after a message plays (**4 4** deletes the message in addition to calling the person back).
2. If you are calling back a message that was forwarded to you, TeleVantage prompts you to choose whom to call back—the person who forwarded the message or the original caller.
3. TeleVantage offers you a default number to call. To dial that number, press **1**. To choose from a list of other numbers associated with the caller, press **2**. If the caller is a TeleVantage contact, the list includes all the contact's numbers. See "Managing contacts" on page 16-4.

After talking to the caller, if you remain on the phone you will be returned to the voice message menu so that you can delete the message or move on to the next message. To end a call and remain on the phone, bypassing the voice message menu, press **Flash 3** or wait for the other party to hang up.

Sending a message directly to a user's voice mail

You can record a message and send it directly to the voice mail of one or more TeleVantage users with the telephone commands.

1. Pick up your phone and press **# <your extension> # <your password> #** to log in to your account.
2. Press **3** to send a message.
3. Record your message and press **#** when you are done.
4. Press **1** to accept the recorded message. See the following table for other options.
5. Enter the extension to which you want to send the message and then press **#**. Enter multiple extensions in the following format:

   ext1 # ext2 # ext3 # #

After you record a message, you can use the commands shown in the next table.

Commands for Recorded Messages Use after recording a message	
1	Accept the recording.
2	Review the recording.
3	Rerecord the recording.
4	Append to the end of the recording.
5	Mark the message as Urgent.
6	Mark the message as Private.
7	Enter a callback number (external number only).
*****	Cancel the message.

Note: If you mark a message as Private, the recipient cannot forward it and users who share the recipient's voice mailbox cannot play the message.

Voice mail from the caller's point of view

When callers reach your voice mail, they hear your active greeting followed by a beep that signals the start of the recording. The following options are available to callers, but you must tell callers about them in your greeting if you want callers to use them:

- Press **#** to skip the greeting and go directly to the beep.
- Press **0** to transfer to your office's Operator.
- Press **7** to leave a callback number.
- Press **#** for more options after the greeting starts.

Selecting a personal status on the phone

TeleVantage makes it easy to select a personal status by using only the telephone commands.Your personal status lets your colleagues know where you are and what you are doing. It also specifies how you want your calls to be handled under specific circumstances.

Example: When you leave the office for an off-site event, you can select the personal status Out of the Office. This predefined TeleVantage personal status changes your **Where I Am** setting to forward your calls to the number that you specify. It also changes your **Greeting**, so that callers who reach your voice mail hear a special greeting that you recorded ("I am out of the office this morning. Please leave a message, or you can try me again later, as my calls are forwarded to where I can be reached"). See Chapter 9 for detailed information about personal statuses.

To select a personal status on the telephone

1. Press **#** and log in.
2. Press **6 1**, and then press:
   - **1** for Available
   - **2** for Do Not Disturb
   - **3** for In a Meeting
   - **4** for Out of the Office
   - **5** for On Vacation
   - **6** for Available (Queue Only)
   - **7** for Available (Non-Queue)
   - **8** for On Break
   - **9** for custom personal statuses (followed by **1** to select the first custom status, **2** for the second, and so forth).

Note: Call center agents can select a call center personal status by picking up the phone and pressing ***50**, ***51**, ***52**, or ***53**. See "Starting and ending your shift, and taking breaks" on page B-2.

CHAPTER 6

USING TELEVANTAGE AT A REMOTE PHONE

CHAPTER CONTENTS

About using TeleVantage at a remote phone

You can access most TeleVantage features from a remote phone (an external, non-TeleVantage phone). By logging in to your account, you can check your voice messages, manage your account, and, if you have permission, place new outgoing calls through TeleVantage. When on a call that originated from or was placed through TeleVantage, you can use the full range of call-handling telephone commands (see Chapter 4). By forwarding your calls, you can receive all your TeleVantage calls at the remote location. You can even have TeleVantage automatically call you when you receive new voice messages.

Important: At a remote phone, press ****** instead of **Flash**, for example, to put calls on hold or use call-handling commands such as transfer or conference.

See Appendix A for a complete list of telephone commands that you can use from a remote phone.

If your remote phone is "stuck" on a TeleVantage connection

If you are trying to dial a number from your remote phone, and you find your call treated as if it were an internal TeleVantage call (for example, you reach a user at your office), the likely cause is that you did not log out from a TeleVantage session immediately beforehand. To end the TeleVantage connection, dial ***96**, wait for a dial tone, and then dial your call. Alternately, you can hang up and wait for a short period before trying your call again, to give TeleVantage time to drop the connection. See "Using *96 to log out" on page 6-3.

Receiving TeleVantage calls at a remote phone

To receive your TeleVantage calls at a remote phone, forward your calls to that phone. See "Forwarding your calls" on page 4-12. You can set up call forwarding either from within the office or from the remote phone by logging into your account.

If you're at a remote phone and you want to forward your calls to that phone, log into your account from it and press **5 1**. Your calls are forwarded to the phone you're using.

Notes

- Using the Client, you can password-protect your forwarded calls so that you must enter your TeleVantage password to be connected to the call. This ensures that only you receive your forwarded calls. See "Forwarding calls in the Client" on page 15-3.
- TeleVantage call waiting is not available at remote phones.
- Hands-free answering is not available at remote phones.

Logging into your TeleVantage account from a remote phone

To log into TeleVantage at a remote phone, do the following:

1. Call your office.
2. When the system prompts you to enter an extension, enter **# <your extension> # <your password> #**.

Note: The key that you to use to log in might not be **#** on your TeleVantage system. Ask your TeleVantage system administrator if your system uses a different key.

After you log in, you can use the telephone commands as if you were in your office at your desk phone. For example, you can listen to your voice messages, manage your greetings, forward your calls, and perform other tasks. For a full description of the telephone commands, see Chapter 2 through Chapter 5 and Appendix A.

When you are logged into TeleVantage at a remote phone, however, you must do the following:

- Use ****** instead of Flash
- Use ***96** to log off

Using ** instead of Flash

When you are on a TeleVantage call at a remote phone, press ****** instead of **Flash** to put your caller on hold and use the telephone commands.

Using *96 to log out

When you are ready to end your TeleVantage session, press ***96** at a dial tone before you hang up your phone. Doing this logs you completely off the system. If you do not log off completely, TeleVantage waits a short period of time before ending the session. If you pick up your phone again before that period is over, TeleVantage still controls the line and assumes that you are calling from within the system. Therefore, any number you dial will be treated as if it were an extension within TeleVantage.

Logging in to your account from a voicemail greeting

When you call a TeleVantage extension and get voicemail, you may be able to press **9** during the voicemail greeting to log in to your account. Check with your system administrator to see if this feature has been enabled for you.

Using the redial command when remote

After logging in from a remote phone, you can use the ***66** command to redial your last number dialed. The number dialed is that of the last call you placed while remote, either manually or by using the voice message callback feature. It is *not* the number of the last call you placed locally.

Example: On Monday, you call into your office from a remote location and place a call to (617) 123-9876. For the rest of the week, you work in your office and place many calls. On Saturday, you call into your office from a remote phone and use the ***66** command. The system dials (617) 123-9876 because that was the last call you placed while remote.

Placing calls through TeleVantage from a remote phone

To place outgoing calls at a remote phone through TeleVantage, you must have the required permission. For more information, see your TeleVantage system administrator.

When you are working remotely and use TeleVantage to place outgoing calls, you enjoy the following benefits:

- Your calls are added to your TeleVantage Client's Call Log view, so that you have a complete record of the calls you place.
- You can put callers on hold, transfer calls, create conference calls, and perform other actions as if you were using your office phone, except that you must substitute ****** for the Flash command. For instructions on performing these and other actions, see Chapter 3 through Chapter 5.

The procedures that follow show you how to place calls and end placed calls.

To place a call through TeleVantage

1. Call your office.
2. When the system prompts you to enter an extension, enter **# <your extension> # <your password> #**.
3. Press **#** for a dial tone and dial the call.

To end calls placed at a remote phone

Press ****3** to end each call instead of hanging up the phone.

If you hang up, you must call your office and log in again if you want to place more outgoing calls through TeleVantage. Pressing ****3** eliminates the need to call your office again, because you remain connected to TeleVantage when you end a call by using ****3**.

Answering TeleVantage calls at a remote phone

When you receive a call from TeleVantage while you are at a remote phone—for example, when you receive a work call that is forwarded to your home phone—you can use the TeleVantage telephone commands just as if your home phone were a TeleVantage station. Be sure to substitute ****** for Flash when using the telephone commands at a remote phone.

Receiving your voice messages at a remote phone

You can have TeleVantage automatically place a call to you when you receive a new voice message, so that you can hear the message as soon as it arrives. For instructions on setting up call notification of new voice messages, see "Setting up call notifications" on page 13-14.

If you are using call notifications, you can log in remotely and change the phone number to which notification calls are sent, so that continue to you receive them wherever you go. To change the call notification number, log in to your account and press **6 4**.

Using the TeleVantage Web Client

If your office has set up the TeleVantage Web Services, you can access a version of the TeleVantage Client using a web browser, from any computer with an Internet connection. Simply type the address of the Web Client into your browser window. Your TeleVantage system administrator can tell you the address of your Web Client.

Once you are connected to the Web Client, click **Help** for instructions. You can also use the part of this manual that describes the TeleVantage Client, as the Web Client is very similar in most respects.

Using the TeleVantage Client remotely

If your office's network is set up so you can log in remotely via a VPN (Virtual Private Network) connection, you can use the TeleVantage Client as if you were on the network at your office. Contact your network administrator to see if you have VPN support and how to start VPN from your remote computer before launching the Client.

When you run the TeleVantage Client remotely, it is still associated with your TeleVantage station, not your remote phone. Therefore, if you want to place and receive calls, use the following guidelines:

- To receive calls, forward your calls to your remote phone.
- Answer incoming calls by picking up the phone. Do not use the **Actions > Take Call** command in the Call Monitor view, because that command connects the caller to your office phone.
- Place calls by picking up the phone and dialing. Do not use the Client's **Actions > New Call** command, because that command rings your office phone. If you have permission to do so, you can also place calls through TeleVantage by calling your office and logging in. See "Placing calls through TeleVantage from a remote phone" on page 6-4.

CHAPTER 7

SHARING STATIONS

CHAPTER CONTENTS

About sharing stations

In TeleVantage you can share your station (telephone) with one or more other users, and still use your individual settings such as personal status and dialing permissions. You might share a station for a number of reasons, including the following:

- Your office uses shifts, and you and another person use the same desk at different times of the day.
- Your office does not have assigned desks, and you might work at a different phone every day.
- You frequently move from phone to phone during the day, placing and receiving calls wherever it's most convenient.
- The station you're using is a phone in a conference room, lab, or other shared location.

This chapter covers procedures you should use if you share a station for these or any other reasons.

Placing outbound calls from shared stations

How TeleVantage handles outbound calls from a station depends on which user is currently logged in at that station. Only one user at a time can be logged in at a station. When someone places an outbound call from the station, TeleVantage assumes it's the user who is logged in, and handles the call as follows:

- The call is subject to that user's dialing permissions and restrictions.
- The call is logged in the Call Log as placed by that user.

If you are using a shared station, before placing calls you should make sure that you are logged in to the station. To log in, do the following:

1. Pick up the station and enter **# <your extension> # <your password> #.** (Your office may use a logon key other than #). This logs you in to the station until you hang up.
2. Optionally, press **5 1** to forward your calls to the station. This logs you in to the station persistently, and you remain logged in until one of the following things happens:
   - You log off from the station by picking up the phone and pressing ***0 0**. The station reverts to its default user. (If you are one of the station's default users, this command has no effect.)
   - You exit the TeleVantage Client.
   - An amount of time passes with no activity on the station. The station reverts to its default user. Your system administrator can tell how much time must pass before the station reverts.
   - Another user logs in at the station.

Note: You can also log on to a station by logging on to the TeleVantage Client at the station's computer. For instructions, see "Logging on to the Client" on page 8-3.

Finding out who is currently logged in at a station

To find out who is currently logged in at a station, pick up the station and dial ***0**.

Note: You can also see who is currently logged in by looking at the status bar of the TeleVantage Client. See “The status bar” on page 8-8.

Distinguishing incoming calls to a shared station

When you share a station with another user and the phone rings, you may want to know which user the call is for. You can use any of the following methods to distinguish incoming calls to a station.

The TeleVantage Client Call Monitor

As soon as the phone starts ringing, the User column in the TeleVantage Client’s Call Monitor shows which user the caller dialed. The User column is hidden by default. For instructions on showing columns, see “Showing and hiding columns” on page 18-15.

The “call for” announcing prompt

With “call for” announcing turned on, when you pick up the phone you hear a recorded message that says “Call for,” followed by the name of the user whom the call is for. You can then accept or decline the call using the standard call announcing commands (see “Answering a call using call announcing” on page 4-2).

Note that pressing **2** or **3** sends the call to the voice mailbox of the user it is for.

To turn on “call for” announcing

1. In the TeleVantage Client, choose **Tools > Options**.
2. In the Options dialog box, click the Incoming Calls tab.
3. Check **Announce who the call is for**.
4. Click **OK**.

Distinct ring patterns

You and the user(s) who share your station can agree to set different ring patterns for your incoming calls. For instructions, see “Changing ring patterns” on page 18-9.

Shared stations and personal status

Your personal status affects incoming calls to your extension only. It does not affect calls to other users who share your station. For example, if you select the Do Not Disturb personal status, calls to your extension will not ring the phone, but the phone will still ring for calls to other users. This includes users who have forwarded their calls to your extension.

Using the Client

CHAPTER 8

USING THE TELEVANTAGE CLIENT

CHAPTER CONTENTS

About the TeleVantage Client

The TeleVantage Client application offers access to all TeleVantage commands in an easy-to-use, graphical Windows interface. In the Client you can quickly and easily manage calls, voice messages, contacts, and more.

See your TeleVantage system administrator about installing the Client on your computer.

Without the Client, you can still access many TeleVantage functions by using the telephone commands. For details, see Chapter 3 through Chapter 6 and the “Telephone Commands Quick Reference” in Appendix A.

This chapter explains the following aspects of working in the TeleVantage Client:

TeleVantage Client language

You can have the TeleVantage Client interface display in Spanish or German. To do so, set your Windows Regional Settings to Spanish or German. You will need to restart the Client if it was open.

Accessing the Web Client

The Web Client is a version of the TeleVantage Client that you can access through your Web browser. If your office has the Web Client set up, you can use it to access your account from any location on the Internet.

To access the Web Client, type its Internet address in your Web browser. See your TeleVantage system administrator for the address.

In most cases, the instructions in this manual also apply to the Web Client. You can also use the Web Client’s context-sensitive online Help for specific instructions about a Web Client view.

Logging on to the Client

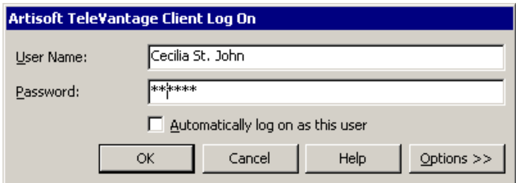
You can log on to the TeleVantage Client in the following ways:

- Using your name and password at your desk, either manually or automatically
- At someone else's desk
- As another user at your desk
- Using command line switches

Important: Each Client program must be licensed. If you see a message stating that your Client program is not licensed, you cannot log on. See your TeleVantage system administrator for help if such a message appears.

To log on manually or automatically to the Client

1. Choose **Start > Programs > Artisoft TeleVantage > TeleVantage Client**. The Client Log On dialog box opens.



2. Type your user name in the **User Name** field. If you do not know your user name, ask your TeleVantage system administrator.
3. Type your numeric password in the **Password** field. Use the same password that you use to log on to TeleVantage on the phone.
4. If you want to skip the process of logging on to the TeleVantage Client in future sessions, check **Automatically log on as this user**.

   Note: If you check **Automatically log on as this user**, anyone at your computer can open your Client program and listen to your voice messages, because the Client will open without requiring a password.

5. Optionally, click **Options** to specify your station ID and the TeleVantage Server to which you are connecting. See the next section, "Changing the TeleVantage Server and station ID."
6. Click **OK**. The Client starts.

To reset TeleVantage so that a password is required

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, uncheck **Log on automatically**.
3. Click **OK**.

Changing the TeleVantage Server and station ID

When the Client is installed, your computer is configured so that the Client uses:

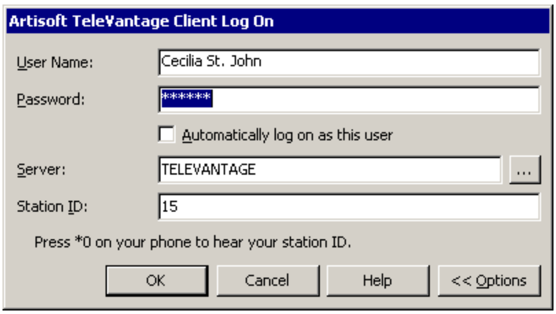
- A specific TeleVantage Server
- A specific telephone represented by a number (the *station ID* number)

You can change these settings whenever you log on. You would need to do so in the following circumstances:

- You are running the Client for the first time.
- You want to connect to a different TeleVantage Server on your network.
- Your computer needs to be connected to a different phone (for example, it has moved to a different office).
- The network computer name of the TeleVantage Server has changed.

To change the TeleVantage Server or station ID

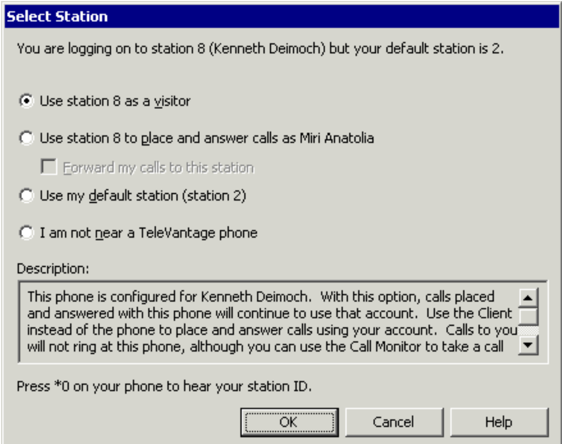
1. Start the Client program. If your system logs you on automatically, choose **File > Log on as a different user** after you start the Client.
2. Click **Options** in the Client Log On dialog box to view the expanded Client Log On dialog box.



3. In **Server**, type the network name of a TeleVantage Server computer on your network, or click  to select one.
4. Enter a valid station ID in the **Station ID** field. Press ***0** on a TeleVantage phone to determine that phone's station ID.
5. Click **OK**.

Logging on at another workstation

You can log on to the Client at someone else's workstation using your user name and password, and access your TeleVantage account there. When you do so, the Select Station dialog box opens so that you can decide how to treat the other user's phone.



1. Choose one of the following options:

   - **Log on as a visitor.** The phone remains set for the workstation's normal user. Calls that you place and receive on that phone use the normal user's account (for example, the dialing permissions and call announcing settings) and appear in the normal user's Call Log. Choose this option if you do not intend to use the phone extensively while working at that location.

   - **Log on as yourself.** The phone is temporarily reset with you as the user. Calls that you place and receive on that phone use your account and show up in your Call Log. Choose this option if you will be using the phone extensively while working at that location.

     For how to log off from the station, see "Placing outbound calls from shared stations" on page 7-2.

     If you choose this option, you can also select **Forward my calls to this station** to receive calls to your own extension here. For more information about call forwarding, see "Forwarding calls" on page 15-3.

   - **Use your default station.** The workstation is reset to associate this computer with your physical TeleVantage phone. Whenever the Client on this computer uses the phone—for example, to play a voice message—it uses your TeleVantage phone. Choose this option only if this is your workstation and your phone is physically nearby.

     Note: This change is equivalent to resetting the station ID as described in the previous section, "Changing the TeleVantage Server and station ID."

- **I am not near a TeleVantage phone.** You log on with station ID 0, meaning the computer is not associated with a TeleVantage phone. Commands that require a phone—for example, placing a call—are unavailable.

  Note: When you run the Client without an associated phone, the Call Monitor view title bar displays “No associated phone” as a reminder.

2. Click **OK**. The Client opens with the station selection you made.

Logging on as a different user

You can log on as a different user without exiting and restarting the Client program. This feature makes it easy to log on to another user’s account from your Client. You must know the other user’s password to log on to that account.

1. Choose **File > Log on as a different user**. The TeleVantage Client Log On dialog box opens.
2. Enter the user name under which you want to log on, and then enter the password.
3. Click **OK**.

Changing your password

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click **Change Password**. The Change Password dialog box opens.
3. Enter your current password under **Old password**, enter your new password under **New password**, and then retype your new password in the **Verify new password** field.
4. Click **OK** to close the Change Password dialog box, and then click **OK** to close the Options dialog box.

Logging on with command-line switches

You can add switches to the Windows shortcut command line that starts the Client. The command line switches enable you to run the Client using two phones at your desk, turn on debugging data, and perform other tasks. See Appendix E for more information.

Exiting the Client

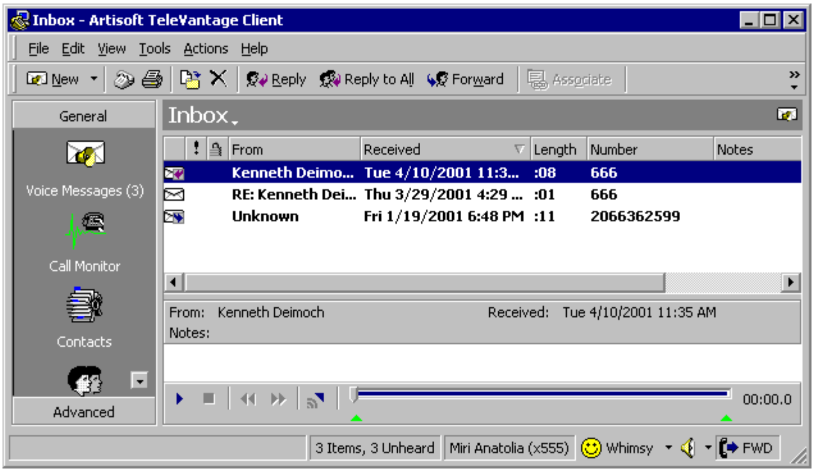
To exit the Client, choose **File > Exit**.

If you are at another user’s desk, exiting logs you off from the station associated with the PC, returning the station to its default user. You can log off from the station without exiting the Client by picking up the phone and dialing ***00**.

Exiting and logging off

You can also exit the Client by choosing **File > Exit and Log off**. This command closes all Client views that you have opened in a new window by right-clicking the view bar and choosing **Open in new window**. Note that it does not close multiple instances of the Client opened by using the /allowmultiple command line argument (see Appendix E).

Elements of the Client window



The Client window contains the following elements:

- The menu bar
- The toolbar
- The view bar
- The Folder List
- The status bar
- The Client view that is currently displayed (see “The Client views” on page 8-9)

The menu bar

The *menu bar*, at the top of the Client, provides access to TeleVantage commands. Click each menu to see the commands that menu contains. Menu commands are referenced in this manual in the format **File > New > Contact**.

The toolbar

The *toolbar*, directly under the menu bar in each view, provides single-click access to frequently used TeleVantage commands. Some views contain toolbar buttons that are not found in other views. The following illustration shows the toolbar for the Voice Messages view.

In any view, clicking the left-most toolbar button creates a new item for that view. For example, in the Call Monitor view, clicking the left-most button lets you place a new call: 

You can also click the small arrow to the right of that button for a menu that lets you create any new Client item. The arrow is available in every view.

You can hide or show toolbar buttons. See “Hiding and showing toolbar buttons in a view” on page 18-17.

The view bar

The *view bar*, the vertical pane on the left side of the Client, provides single-click access to the Client views. See “The Client views” on page 8-9.

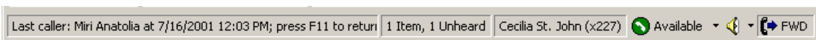
You can customize the look and organization of the view bar. See “Customizing the view bar” on page 18-14.

The Folder List

The *Folder List* is an optional vertical pane next to the view bar. It provides access to the Client views and their associated folders, public TeleVantage folders in your office, and folders that other users have shared with you. When you first start the Client, the Folder List is hidden. To show it, choose **View > Folder List**. See “Using the Folder List” on page 8-17.

The status bar

The *status bar* is located at the bottom of the Client window.



The status bar gives you quick access to the following information:

- **Last caller.** Lists the name (if available) and Caller ID of your last incoming call. You can press **F11** to place a call to that number.
- **Number of items.** Number of items in the current view. For example, if you have 18 contacts, the Contacts view status bar displays “18 Items.” In the Voice Messages view, the status bar also indicates the number of unheard messages.
- **Name and extension.** The name and extension of the user logged on to the Client on this computer.

  If your name and extension are followed by a vertical bar (|) and the name of a call center queue, you are calling as that queue, meaning your outbound calls are being logged as coming from the queue. To restore outbound call logging to yourself, pick up your phone and press ***14#**. See “Placing calls from a queue” on page B-8.

- **Phone.** If you see a Phone pane showing the name of another user, it indicates that that user is logged in to your station. While that user is logged in, calls you place using the phone will be subject to that user’s dialing restrictions, and logged as coming from that user. To restore the station to yourself, pick up the phone and dial ***00**.
- **Personal Status.** The current personal status of the user logged on to the Client. Click the personal status button to choose a different personal status. See Chapter 9 for information on personal statuses.
- **Audio output.** You can click these buttons to switch the Client's audio output between your computer speakers and your phone. Audio output includes playing your voice messages. Click the arrow to the right of the button to switch your audio output.
- **Call forwarding.** The FWD button appears as a reminder when you have forwarded your calls. Double-click the button to open the Call Forwarding dialog box, in which you can change or turn off call forwarding. See “Forwarding calls” on page 15-3.

Hiding and showing Client window elements

You can hide or show each of the Client window elements except the menu bar. Use the **View** menu commands to toggle an element between hidden and shown. For example, to hide or show the status bar choose **View > Status bar**.

Customizing the Client display

You can further customize the appearance and features of the Client. See “Customizing the Client display” on page 18-14 for more information.

The Client views

The TeleVantage Client contains *views*, which appear in the main part of the Client window and give you access to specific TeleVantage functions.

Important: Some views may not be available to you. Your TeleVantage system administrator controls which views your Client program displays.

To open a view

1. Click **General** or **Advanced** in the view bar and locate the view that you want to open.
2. Click the view’s button.

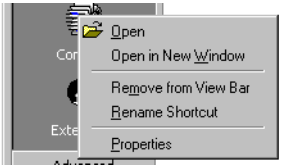
Note: You can also open a view by clicking its icon in the Folder List.

For an overview of each view, see the following table.

The TeleVantage Client Views		
	General	
	Voice Messages	Hear, manage, and archive your voice messages. See Chapter 13.
	Call Monitor	Visually place and handle calls (transfer, create conference calls, listen to voice mail as it is being left). See Chapter 12.
	Contacts	Manage an online phone book of your telephone contacts. See Chapter 16.
	Extensions	View all TeleVantage extensions, their personal statuses, and who is on the phone now. See Chapter 10.
	Call Log	View a record of all your phone calls and perform other actions. See Chapter 14.
	Advanced	
	Greetings	Record your voice-mail greetings and change the active greeting. See Chapter 13.
	Routing Lists	Set up “follow me” call forwarding and send calls to workgroups or other extensions. See Chapter 15.
	Personal Statuses	Set up a personal status that indicates your availability and location to others. Personal statuses also govern the greetings used, the routing lists used, and whether your phone does or does not ring. See Chapter 9.
	Call Rules	Set up custom call handling for individual callers or for specific dates or times. See Chapter 17.
	Workgroups	Define groups of users and contacts for common call-handling purposes and for quick access when transferring calls. See Chapter 16.
	Queue Monitor	View up-to-date statistics for call center queues. Available only for call center agents with permission to use it.

Working in multiple views

You can have several views open at once by opening each view in its own window. To open a view in its own window, right-click a view button in the view bar and then choose **Open in New Window** on the shortcut menu.



When you want to shut down the Client, you can close all Client windows at the same time by choosing **File > Exit and Log Off** on the main menu.

Adding the Calls Pane to any open view

The Calls Pane contains the same information that appears in the Call Monitor view. You can display the Calls Pane in any Client view and see and act on your incoming calls.

To add the Calls Pane to a view, do the following:

1. Open the view to which you want to add the Calls Pane.
2. Choose **View > Calls Pane**.
3. Select a location from the menu to place the Calls Pane.

To remove the Calls Pane from a view, choose **View > Calls Pane > None.**

Adding the Extensions Pane to the Call Monitor view

The Extensions Pane contains the same information that appears in the Extensions view. Adding the Extensions Pane to the Call Monitor view lets you see whether users are available before you place or transfer calls to them. You can also perform drag-and-drop call handling operations in the Call Monitor when the Extensions Pane is open. See “Dragging and dropping items” on page 8-14.

To add the Extensions Pane to the Call Monitor view, choose **View > Extensions Pane**, and then select a location on the menu.

To remove the Extensions Pane from the Call Monitor view, choose **View > Extensions Pane > None**.

Managing views and items

Items are individual greetings, contacts, routing lists, personal statuses, workgroups, and call rules that you create in TeleVantage. One item appears on each row in a view. For example, one contact appears on each row in the Contacts view.

This section explains the following:

- Using commands in the views
- Managing items in the views
- Printing items in the views

Using commands in the views

TeleVantage‘s commands appear in each Client view as follows:

- **Choose a command on the view’s menu bar.** For example, in the Inbox folder of the Voice Messages view, choose the **Actions** menu and click a command.
- **Click a toolbar button.** Position the mouse pointer over a button to see its action.
- **Right-click an item and choose a command on the shortcut menu**.

Commands affect only the item or items selected. Right-clicking an item selects it and opens a shortcut menu that contains commands, so it is often the fastest way to perform an action.

Managing items in the views

This section is a guide to managing individual items in a view:

- Creating items
- Deleting voice messages and other items
- Renaming items
- Cutting and pasting items
- Copying and pasting items
- Dragging and dropping items

You may not be able to perform these actions if you do not have the required permission.

Creating items

You can create all types of TeleVantage items, such as greetings and call rules, in any view. You can create a completely new item, or you can copy an existing item and enter only the information that is new for that item.

To create an item, choose **File > New** and choose the type of item that you want to create, such as a contact or a greeting. Enter the information about the new item in the dialog box that opens. Click **OK** to create the item. You cannot create extensions.

To create an item by copying an existing item

1. Select the item on which you want to base a new item, such as a contact in the Contacts view.
2. Choose **Edit > Copy**.
3. Choose **Edit > Paste**. A Contact dialog box opens. **Copy of <item that you copied>** appears in the title bar of the dialog box. The dialog box contains a duplicate of the selected item's information, such as name, phone number, and so forth. You can use this information as a basis for creating a new item.
4. Enter the information about the new item in the dialog box.
5. Click **OK** to save the changes as a new item.

Deleting voice messages and other items

To delete a voice message from your Inbox, select it and then press DELETE. The voice message moves to your Deleted folder.

To permanently delete a voice message from your Inbox

1. Select the voice message. To select more than one voice message, press CTRL and select them.
2. Press SHIFT+DEL. A confirmation dialog box opens.
3. Do one of the following:
   - Click **Yes** if you want the selected voice message to be permanently removed from your computer.
   - Click **No** to keep the voice message in your Inbox.

To delete other items

1. In the view in which the item appears, select the item. To select more than one item, press CTRL and click each item that you want to delete.
2. Right-click the selected item and choose **Delete** on the shortcut menu. A confirmation dialog box opens.

   Note: When you delete an item that is not a voice message, such as a greeting or a call rule, the item is permanently and irretrievably removed from your computer. You cannot recover it after you delete it.

3. Click **OK** to permanently delete the item.

Renaming items

You can easily rename items in TeleVantage, but you cannot rename some types of items, such as default personal statuses or the Standard routing list. Use the following procedure to rename an item.

To rename an item

1. Double-click the item. The item's dialog box opens.
2. In the **Name** field, type a new name for the item.
3. Click **OK**.

Cutting and pasting items

Cutting a row in the Contacts, Greetings, Routing Lists, Personal Statuses, Call Rules, and Workgroups views deletes the item on that row and places it on the clipboard.

To create a new item based on an existing item and delete the existing item

1. Select the item that you want to delete and on which you want to base a new item, such as a contact in the Contacts view.
2. Choose **Edit > Cut**.
3. In the Folder List, select the folder into which you want to paste the copy of the item. See "Using the Folder List" on page 8-17.
4. Choose **Edit > Paste**. A new dialog box opens, containing a duplicate of the selected item's information, such as name, phone number, and so forth. You can use this information as a basis for creating a new item.
5. Enter the information about the new item in the dialog box.
6. Click **OK** to save the changes as a new item.

Copying and pasting items

Copying a row in the Contacts, Greetings, Routing Lists, Personal Statuses, Call Rules, and Workgroups views places a copy of the item in that row on the clipboard as text. This information can be pasted into other applications, such as a text program.

Choose **Edit > Copy** to place a copy of selected items on your clipboard. Choose **Edit > Paste** to paste the items. Use this method to paste Call Log entries and voice message information into the Problem Report Wizard (See "Using the Problem Report Wizard" on page F-2).

For information about creating a new item by copying an existing item, see page 8-12.

Dragging and dropping items

You can drag and drop one item onto another item to perform actions such as making a call, transferring a call, and adding a call to a conference. You can also move an item to a folder or a view.

For example, if you drag an active call in your Call Monitor view onto a user in the Extensions Pane, the call transfers to that user. Conversely, you can drag a user from the Extensions Pane to the Call Monitor view to call that user.

The following table lists the drag-and-drop actions you can perform in the TeleVantage Client. The From column shows the items you can click and drag. The To column shows the destination items. The remaining columns show the actions that result when you drag and drop an item or use the SHIFT and CTRL keys in conjunction with dragging and dropping.

Note: The Web Client does not support drag-and-drop actions.

From	To	Drag	SHIFT + Drag	CTRL + Drag
Call	**Call**	No action	Opens the Conference dialog box	Conferences the calls
	Extension, Contact, Call Log, Voice Message	Performs a blind transfer	Opens the Transfer dialog box	Performs a supervised transfer
		Note: **ALT+Drag** of a call to an extension transfers the call directly to that extension’s voicemail.		
Call Log	**Call**	Conferences the Call Log party with the call	Opens the Conference dialog box	
	Empty Call Monitor	Places a call to the Call Log party	Opens the Place Call To dialog box	
Contact	**Call**	Conferences the contact’s default number with the call	Opens the Conference dialog box	
	Empty Call Monitor	Places a call to the default phone number	Opens the Place Call To dialog box	
	Folder	Moves the contact to the folder	Opens the Move Item dialog box	Copies the folder

From	To	Drag	SHIFT + Drag	CTRL + Drag
Folder	**Folder**	Moves the folder to another folder	Opens the Move Folder dialog box	
	Contact	Moves the folder to the Contacts folder	Opens the Move Folder dialog box	
	Voice Messages	Moves the folder to the voice Message folder	Opens the Move Folder dialog box	
Voice Message	**Call**	Conferences the message sender with the call	Opens the Conference dialog box	
	Empty Call Monitor	Places a call to the message Caller ID	Opens the Place Call To dialog box	
	Folder	Moves the message to a folder	Opens the Move Item dialog box	Copies the message
Extension (User, Auto Attendant, Queue, or IVR Plug-in)	**Call**	Conferences the call	Opens the Conference dialog box	
	Empty Call Monitor	Places the call	Opens the Place Call To dialog box	

Printing items in the views

To print the contents of a view, choose **File > Print**. When you print a view that contains several columns, you may need to change the orientation of the page to “landscape” so that all columns that appear in the view are printed.

Organizing the contents of a view in folders

A *folder* is a subdivision of a view that lets you organize the contents of that view. For example, in the Contacts view you can create a Business folder and a Personal folder, and then organize your contacts in these folders. You can then click the Personal folder to view only your personal contacts in the Contacts view.

You can create folders within the Voice Messages and Contacts views. You can create as many folders as you want, and you can nest folders within other folders.

The Voice Messages view contains one folder already created, the Saved folder. When you listen to a voice message on the telephone and save it, the message is moved into the Saved folder.

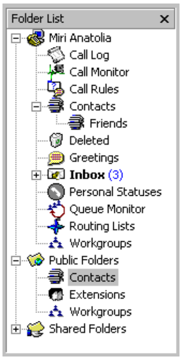
Private and public folders

The Client displays the following types of folders in the Folder List:

- **Private folders.** Folders that you create and that appear in your Client only, unless you share them with other users. See “Sharing views and folders” on page 8-20.
- **Public folders.** Folders that are visible to all TeleVantage users. See “Viewing public folders” on page 8-19.

Using the Folder List

Use the Folder List to view folders. If the Folder List is not visible, choose **View > Folder List**.



Folders that contain other folders are marked by an expansion symbol (a plus or minus sign). Click the symbol to hide or show the folders within the selected folder.

You can use the Folder List to select folders to display and views to display. When you click a view in the Folder List, the view opens in the Client window.

Note: The folder for the Extensions view appears under **Public Folders** in the Folder List.

Viewing the Folder List temporarily

You can display the Folder List temporarily by clicking the folder title at the top of the view.

The Folder List remains open in the Client window until you click elsewhere in the window. To keep the Folder List open, click the push-pin button in the upper right corner of the Folder List.

Managing folders

This section is a guide to basic actions you can perform on folders. The views that support folders are the Voice Messages view and the Contacts view.

Creating folders

1. Choose **File > Folder > New Folder**. The Create New Folder dialog box opens.
2. Under **Name**, type a name for the new folder.
3. Under **Select where to place the folder**, click the view or folder within which you want to place the new folder. The views that support folders are the Voice Messages view and the Contacts view.
4. Click **OK**. The folder appears in the Folder List.

Deleting folders

1. In the Folder List, click the folder that you want to delete.
2. Choose **File > Folder > Delete**. The folder and its contents is moved to the Deleted folder. To delete a folder permanently, you must delete it from the Deleted folder or empty the Deleted folder by choosing **Tools > Empty Deleted Folder**.

Renaming folders

1. In the Folder List, click the folder that you want to rename.
2. Type a new name for the folder.
3. Press ENTER to complete the name change.

Adding folders to the view bar

You can add a folder to the view bar for easier access.

1. In the Folder List, click the folder that you want to add to the view bar.
2. Choose **File > Folder > Add to View Bar**.

Moving items between folders

1. In the Folder List, select the folder that contains the items you want to move to another folder. The contents of the folder appears in the Client window.
2. Select one or more items that you want to move.
3. Drag the selected items to the target folder in the Folder List.

Viewing public folders

Public folders contain items that all TeleVantage users can view and use. For example, any user can view a public contact's information or place a call to that contact.

Example: Your company defines its departments as public workgroups. All users in the company can view the members of those workgroups.

To view public folders, click Public Folders in the Folder List.

Note: Items in public folders are not generally available for editing or deleting. You must have special permission to edit a public item.

Managing the Deleted folder

The Deleted folder contains voice messages that you have deleted from the Voice Messages view or a folder. Items in the Deleted folder continue to be stored in the limited space that has been allocated to you for your voice files. To regain space for more voice messages or other voice files, empty your Deleted folder.

To view the contents of the Deleted folder, click it in the Folder List.

Emptying the Deleted folder

You can delete an item from the Deleted folder just as you would from any view or folder. When items are deleted from the Deleted folder, they are deleted permanently.

To empty the Deleted folder, choose **Tools > Empty Deleted Folder**.

To empty the Deleted folder automatically

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. Choose one of the following options:
   - To delete all messages in the Deleted folder now, click **Remove all items now**. The messages are deleted when you click **OK** to close the Options dialog box.
   - To empty the Deleted folder automatically whenever you exit the Client, check **Remove all items when exiting**.
   - To remove old items automatically from the Deleted folder, check **Periodically remove old items**, and then enter the age in days at which an item is automatically

removed. For example, if you enter 3, items are automatically removed after they have been in the Deleted folder for three days.

4. Click **OK**.

Sharing views and folders

You can share the following views, and any folders within them, with other TeleVantage users that you specify:

- The Call Monitor view
- The Voice Messages view
- The Contacts view

Those users can access the views or folders that you share with them from their Client programs according to access levels that you specify. You can grant individual users specific levels of access to your shared views and folders.

Example: If you and two coworkers are working on the Gould project, you can create a Contacts folder called “Gould” in which you keep important contacts at the Gould office. You can share the Gould folder with your two coworkers, so that all three of you have access to Gould contacts’ phone numbers.

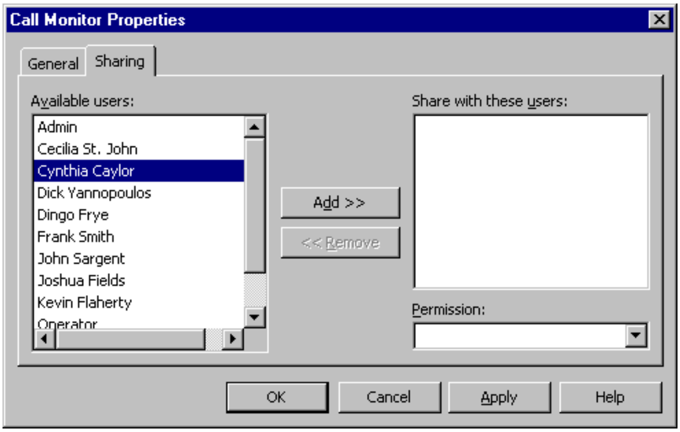
Notes

- Voice messages marked Private do not appear in a shared folder.
- Calls from a call center queue do not appear in a shared Call Monitor.

To share a view or folder

1. In the Folder List, click the view or folder that you want to share. In the remainder of this procedure, “folder” refers to both views and folders.

2. Choose **File > Folder > Share Folder**. The folder’s Properties dialog box opens at the Sharing tab.



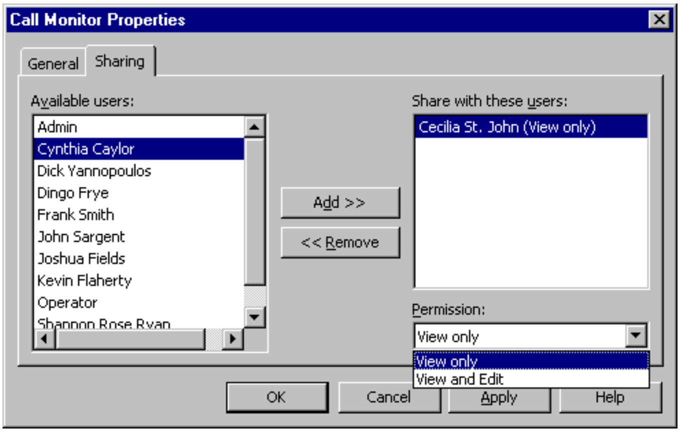
3. Select the users in the **Available Users** list with whom you want to share the folder. To select multiple users, press CTRL as you select users.

4. Click **Add**. The selected users are moved to the **Share with these users** list.

5. To change the access level for a user, select the user in the **Share with these users** list, and then select one of the following from the **Permission** drop-down list:

   - **View only.** The user can view or listen to items in this folder, but cannot edit or delete them.

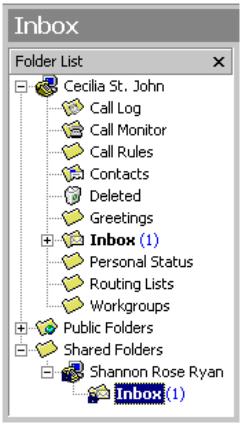
   - **View and Edit.** The user can view, listen to, edit, delete, and move items in this folder.



6. Click **Apply** to save your changes and continue to work on the Sharing tab. When you are done, click **OK**. The folder is now shared with the users in the **Share with these users** list at the specified permission level.

Viewing shared folders

To view folders or views that another user has shared with you, open **Shared Folders** at the bottom of the Folder List and then select the folder of the other user.

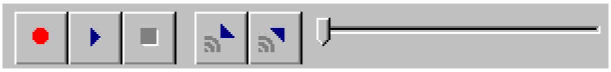


Deleting shared items

If you have permission to do so, you can delete voice messages from folders that other users have shared with you. If those users also shared their Deleted folders with you, the message moves to their Deleted folders. If not, the message is permanently removed.

Using the audio controls

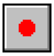
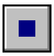
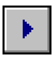
TeleVantage's audio controls make it easy to create recordings and listen to recordings and voice messages.



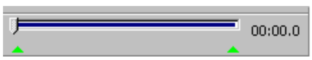
These audio controls appear throughout the Client in dialog boxes in which you can create recordings and listen to voice messages.

Creating recordings and playing voice messages

You create recordings by speaking into your phone.

	**Record**	When you are ready to record, pick up your phone, and then click the button. A beep signals that recording has begun.
	**Stop**	When you are finished recording, you can either hang up or click the button.
	**Play**	Click the button to listen to the recording or voice message. Click it again to pause playback.

To move forward and backward within the recording or voice message, drag the slider bar:

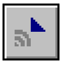


Using voice message bookmarks

You can set bookmarks in voice messages by dragging the arrows that appear under the slider bar. When you play a message you have bookmarked, only the portion of the file between the bookmarks plays. This capability can be useful when you want to mark the location of an important phone number in a voice message.

Importing and exporting voice files

To import or export a voice file, use the buttons on the recording control:

	**Import**	You can import a voice file in .WAV or .VOX format to use for any Client recording (greetings, voice titles, and so on). TeleVantage can import .WAV files with a frequency of 8Khz, 11.025 Khz, 22.05 Khz, or 44.1 Khz. You can also import an 8 kHz PCM .VOX file (MULaw format for North America and Japan, ALaw format for other countries).
	**Export**	You can export any of your Client recordings, including voice messages and recorded conversations, to a .WAV file on your hard disk.

Importing and exporting TeleVantage items

You can import contacts into TeleVantage from a .CSV (comma-separated value) file, and you can export contacts to a .CSV file. You can also export extensions and the Call Log to .CSV files. Click **File > Import and Export** to open the Import and Export Wizard.

Importing and exporting contacts

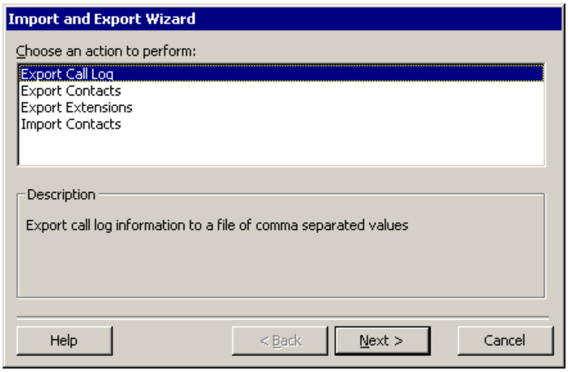
You can import contacts into TeleVantage:

- From a .CSV file generated from TeleVantage
- From a .CSV file generated from another contact manager such as Microsoft Outlook

You can export contacts from TeleVantage to a .CSV file that you can import into another TeleVantage Client, Outlook, GoldMine, FrontOffice 2000, Act!, or other contact management software.

To import contacts from a .CSV file

1. Choose **File > Import and Export**. The Import and Export Wizard opens.

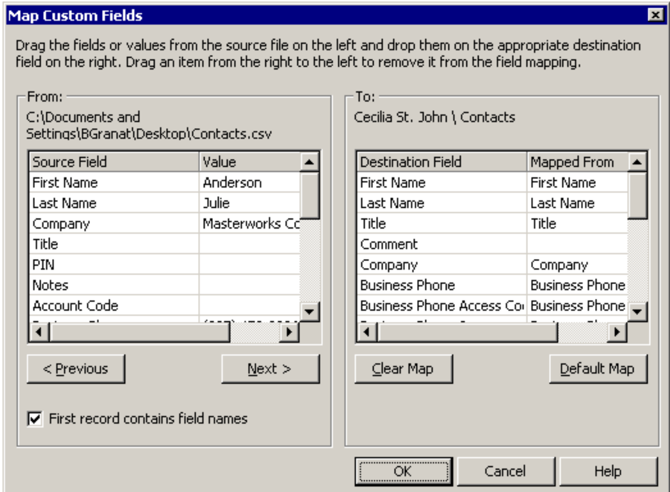


2. Select **Import Contacts**, and then click **Next**.

3. In **File to Import**, click **Browse** and select the .CSV file that you want to import.
4. In **Destination folder**, select the TeleVantage Contact folder into which you want to import the contacts in the .CSV file.
5. Under **Options**, select one of the following:
   - **Replace duplicates with items imported.** If TeleVantage finds a duplicate contact in the .CSV file, the contact from the file will replace the existing TeleVantage contact.
   - **Allow duplicates to be created.** If TeleVantage finds a duplicate contact in the .CSV file, it will import all contacts, even those that are duplicates of TeleVantage contacts.
   - **Do not import duplicate items.** If TeleVantage finds duplicate contacts in the .CSV file, it will not import them.
6. Select **Use phone numbers as caller identification for these contacts** to add the imported contacts' phone numbers to TeleVantage's list of Caller ID numbers so that

contacts can be identified when they call. For more information, see “Teaching TeleVantage to recognize your contacts” on page 16-7.

7. If you are importing a .CSV file that was created by TeleVantage, go to step 10.
8. If you are importing contacts from another application, click **Map Custom Fields**.



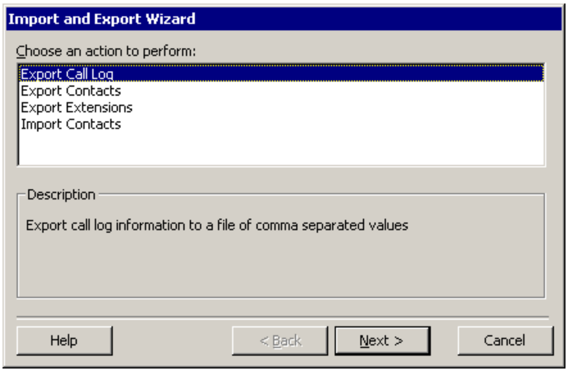
9. Map the fields as follows:
   - Check **First record contains field names** at the bottom of the dialog box if the .CSV file’s first record consists of the names of fields. Then drag fields or values from the left pane (the .CSV file) to the fields in the right pane (TeleVantage contacts) in which you want the values to appear. Drag unwanted default field mapping from the right pane to the left pane.
   - Click **Previous** or **Next** to view other records in the .CSV file.
   - Click **Clear Map** to remove all mapping from the right pane.
   - Click **Default Map** to restore the default mapping.

   When you are finished mapping fields, click **OK**.
10. Click **Next** in the Import and Export Wizard, and then click **Finish**. The contacts in the .CSV file are imported.

Note: When text is imported from a .CSV file, a comma in the text breaks the text between fields unless the text is within quotation marks.

To export contacts to a .CSV file

1. Choose **File > Import and Export**. The Import and Export Wizard opens.



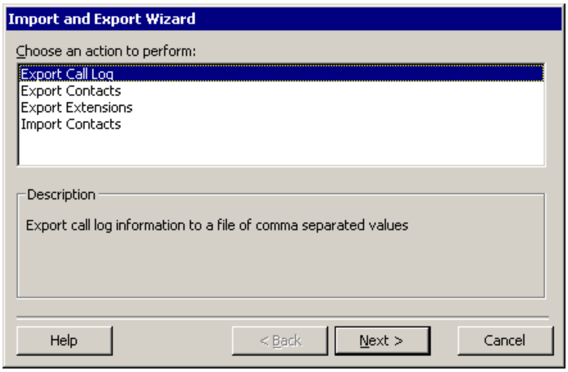
2. Under **Choose an action to perform,** select **Export Contacts**, and then click **Next**.

3. In **Save exported file as,** browse to the folder in which you want to save the .CSV file.
4. In **Source folder**, choose the Contacts file that you want to export, and then click **Next**.
5. Click **Finish**. The .CSV file is exported.

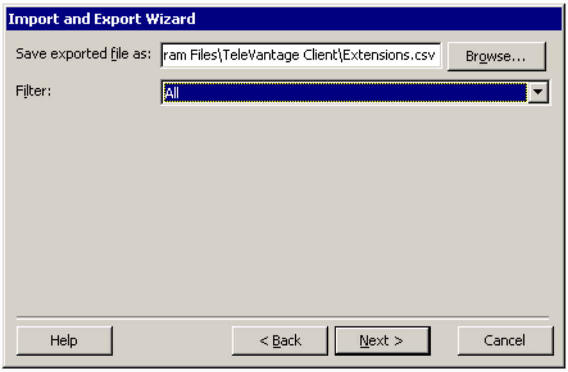
Exporting the Extensions view

You can export the Extensions view to a .CSV file for use in other applications.

1. Click **File > Import and Export**. The Import and Export Wizard opens.



2. Under **Choose an action to perform**, select **Export Extensions** and click **Next**.

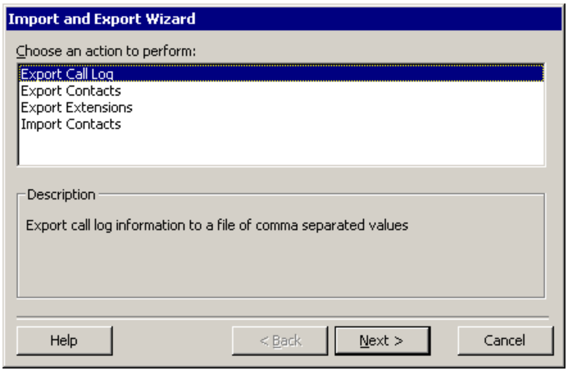


3. Under **Save exported file as**, browse to the folder in which you want to save the .CSV file.
4. Under **Filter**, choose the extensions or workgroups that you want to export, and then click **Next**.
5. Click **Finish** to complete the export or **Cancel** to close the Wizard without performing any action.

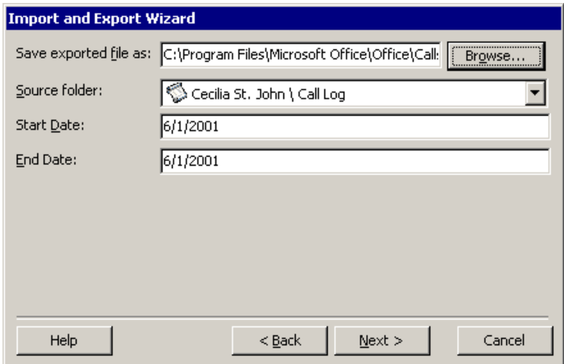
Exporting the Call Log

You can export your Call Log to a .CSV file that can be read and analyzed in a spreadsheet program such as Microsoft Excel.

1. Choose **File > Import and Export**. The Import and Export Wizard opens.



2. Click **Export Call Log**, and then click **Next**.



3. Click **Browse** and then specify a file name and destination for the Call Log file.
4. Enter the **Start Date** and the **End Date** for the portion of the Call Log that you want to export.
5. Click **Next** and then click **Finish**. The portion of the Call Log that you specified is saved to the .CSV file.

Result codes when exporting the Call Log

When the Call Log is exported, the Result field appears as a code. Use the following table to interpret the result codes:

Code	Result
1	Connected, user hung up
2	Connected, user was hung up upon
3	Abandoned
4	Left message
5	Blind transfer
6	Supervised transfer
8	Login to user account
9	Call was sent directly to voice mail
10	No answer
12	Login failed the maximum number of times

CHAPTER 9

USING PERSONAL STATUSES

CHAPTER CONTENTS

About personal statuses

Your personal status lets your colleagues know where you are and what you are doing. It also specifies how your calls are handled under specific circumstances.

A personal status consists of the following:

- A personal status icon and a name, such as Available. These appear next to your name in the Extensions view, so that other TeleVantage users can see at a glance whether you are in the office and available. Likewise, by looking at the Extensions view you can see the personal status of other users. For example, if the Extension view shows Helen Shire in the personal status On Vacation, you would know not to call her.
- A collection of preferences that determines how your incoming calls are handled. For example, the Do Not Disturb status sends your incoming calls directly to voice mail without ringing your phone.

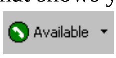
Each personal status consists of the following call handling preferences:

- **Where I Am** specifies the phone at which your incoming calls ring. Changing this setting is equivalent to forwarding your calls. See “Forwarding calls” on page 15-3.
- **Taking calls** determines whether your phone rings when calls arrive.
- **Queue calls** is a setting for call center agents that determines whether or not the queue sends them calls. See Appendix B.
- **Routing List** specifies the routing list that TeleVantage uses to process calls. For more information about routing lists, see “Using routing lists” on page 15-7.
- **Greeting** specifies the recording that TeleVantage plays to callers when they reach your voice mail (or any other final action of your routing list). For more information about greetings, see “Managing greetings” on page 13-18.

Example: When you leave the office for an off-site event, you can select the personal status Out of the Office. This TeleVantage personal status can change your **Where I Am** setting to forward your calls to the number that you specify. It can also change your **Greeting**, so that callers who reach your voice mail hear a special greeting that you recorded (“I am out of the office this morning. Please leave a message, or you can try me again later, as my calls are forwarded to where I can be reached”).

Note: To change your personal status, you must have permission to do so. If you cannot change your personal status, see your system administrator.

The Personal Status button in the status bar

The status bar contains a button that shows your current personal status. Click that button to select a different personal status. 

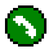
Using predefined personal statuses

Five predefined personal statuses are available to all users. Three additional predefined personal statuses are available only to call center agents.

You can also create custom personal statuses for your own use, for example, Working From Home, At Client XYZ, and so forth. See “Creating a custom personal status” on page 9-6.

Predefined personal statuses (for all users)

The following table lists the predefined personal statuses that are available to all users.

Icon	Status	Description
	Available	Lets people know that you are available to take calls. All calls ring your phone. You can turn call forwarding on if you want to take calls at a different location, for example, if you are working from home. Call center agents can use this status to make themselves available. For more call center agent personal statuses, see the next table.
	Do Not Disturb	Lets people know that you are not taking calls. No calls ring your phone. You can record a greeting that tells callers you will get back to them later, and you can send your calls directly to voice mail. **Note:** You can create a call rule that overrides the Do Not Disturb personal status by allowing calls from specific people to ring your phone. For more information, see Chapter 17.
	In a Meeting	These personal statuses let people know where you are when you are away from your desk. Like Do Not Disturb, by default these personal statuses send your calls directly to voice mail without ringing your phone, though you can change that behavior with these statuses. You can customize each of these statuses individually by recording a greeting that tells callers where you are, if you are forwarding your calls, and so on.
	Out of the Office	
	On Vacation	

Predefined personal statuses (for call center queue agents)

In addition to the predefined personal statuses shown in the previous table, the predefined personal statuses shown in the following table are available to agents in a call center queue. For information about working as an agent in a call center queue, see Appendix B. For information about working as an agent in an ACD workgroup call center, see Appendix D.

Icon	Status	Description
	Available (Queue Only)	This status or the Available status makes you available. When you select this status, the queue begins sending calls to you. With this status, only queue calls ring your phone. Non-queue calls are sent directly to your voice mail. To have all your calls ring your phone, make yourself available by selecting the Available status (see the previous table). You can also select this status by picking up the phone and pressing ***51**.
	Available (Non-Queue)	This status makes you unavailable at the end of your shift. When you select this status, the queue stops sending calls to you. With this status, non-queue calls still ring your phone. To prevent all calls from ringing your phone, make yourself unavailable by selecting Do Not Disturb. You can also select this status by picking up the phone and pressing ***52**.
	On Break	This status puts you on a break during your shift. While this status is selected, the queue does not send calls to you. When you take a break, be sure to use the On Break status rather than Available (Non-Queue), which ends your shift. Using On Break when you take a break will ensure the integrity of call center statistics. You can also select this status by picking up the phone and pressing ***53**.

Notes for call center agents:

- You can make yourself available by selecting either Available or Available (Queue Only).
- You can make yourself unavailable by selecting any status other than Available, Available (Queue Only), or On Break.

Selecting a personal status

This section explains how to select a personal status using the Client or the phone.

Selecting a personal status in the Client

Use any of the following methods to select a personal status in the Client:

- Click the Personal Status button on the status bar, and then choose a personal status.
- Choose **Tools > Personal Status** and then choose a personal status.
- In the Personal Statuses view, select a personal status and then choose **Actions > Set as Active**.

You can configure a personal status so that it prompts you to change its settings whenever you select it. Doing this makes it easier for you to change your call forwarding or greeting each time that you select that personal status. For example, you may want to specify a different forwarding number every time you select the “Out of the Office” personal status. For more information, see “Personal status and your active settings” on page 9-9.

Selecting a personal status on the phone

You can select a personal status on the phone in the following ways:

- Log in and press **6 1**. See “Selecting a personal status on the phone” on page 5-8. You can select the Available personal status quickly by picking up the phone and pressing ***50**.
- For call center agent statuses, pick up your phone and press ***51** through ***53**. Use these quick commands to begin and end your shift and to go on break. See “Starting and ending your shift, and taking breaks” on page B-2.

Modifying a personal status

You can modify predefined and custom personal statuses to reflect your changing availability and location. For example, if you are often away from your desk attending meetings, you can modify the In a Meeting personal status to send your callers directly to voice mail and play a special “in a meeting” greeting that you record.

The following predefined personal statuses have preferences that you cannot modify.

- **Do Not Disturb.** The **Taking calls** preference is fixed at **No**—the status always sends you calls directly to the final action of your routing list (usually your voice mail) without ringing your phone.
- **Available**. The **Taking calls** preference is fixed at **Yes**—this status always implies that you are ready to take calls.
- **Available and Available (Queue Only) for call center agents.** The **Queue calls** preference is always set to **Yes**. For more information, see Appendix B.

You cannot delete or rename predefined personal statuses.

To modify a personal status

1. In the Personal Statuses view, double-click the personal status. The Personal Status dialog box opens.
2. Follow the steps described in the next section, “Creating a custom personal status.”

Creating a custom personal status

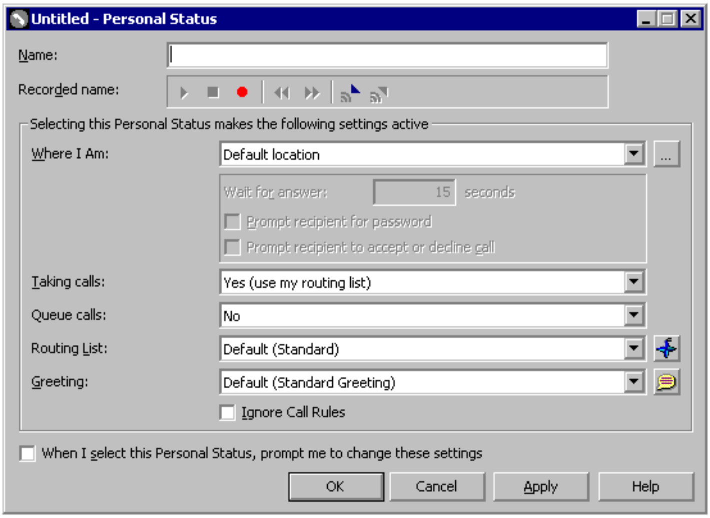
You can create custom personal statuses for your own use for any of the following reasons:

- To provide more information to your colleagues about where you are and what you are doing, for example, Working From Home, At Client XYZ, and so forth.
- To facilitate frequent changes to several call-handling settings at once. For example, whenever you work at the East Side office you might want to forward your calls and change your voice-mail greeting. By creating a custom personal status called East Side Office, you can automatically make both those changes just by selecting the status.

Custom personal statuses are identified in the Extensions Pane or folder by  .

To create a custom personal status

1. Choose **File > New > Personal Status**. The Personal Status dialog box opens.



2. Enter a name for the personal status.
3. Use the audio controls under **Recorded name** to record the name, so that you can select the status by using the telephone commands (see “Selecting a personal status on the phone” on page 5-8).
4. Specify how you want your calls handled while this personal status is selected. For most call handling preferences, you can select either a specific item or **Default**. Selecting Default uses the item that is your current personal status default. Your current personal status default is shown in parentheses when you select Default. See “Personal status defaults” on page 9-12 for more information.

   Note: If you change your personal status default, preferences set to **Default** are updated.

   - Under **Where I Am**, you can forward your calls to another location by clicking ... and specifying the location. The Call Me at Another Location dialog box opens, which functions in the same manner as the Place Call To dialog box. For information about how to use this dialog box, see “Placing a call” on page 12-2.

     If you select an external number, you can use the external number call forwarding options. For an explanation of these options, see “Forwarding calls in the Client” on page 15-3.

   - For **Taking calls**, specify whether you want your telephone to ring or not when a call arrives.

     If set to Yes, incoming calls follow your active routing list, which usually includes ringing your phone. If set to No, incoming calls are sent directly to the final action on your active routing list, which by default is your voice mail.

- The **Queue calls** field appears only if you are an agent in a call center queue. Specify whether you want to receive queue calls when this personal status is selected. If you specify Yes, this personal status marks you as available, and while it is in effect you receive calls from all queues for which you are signed in. See Appendix B for complete instructions on working as an agent in a call center queue.

  You can modify this field only for custom personal statuses or the predefined statuses In a Meeting and Out of the Office.

- Select the **Routing List** that your calls use when you select this personal status.
  - To create a new routing list, click .
  - To edit a routing list in the list, select it, and then press ALT while clicking .

  For more information about routing lists, see “Using routing lists” on page 15-7.

- Select the **Greeting** played to callers when they reach your voice mailbox.
  - To record a new greeting, click .
  - To rerecord a greeting in the list, select it and then press ALT while clicking .

  For more information about greetings, see “Managing greetings” on page 13-18.

- Check **Ignore Call Rules** if you want to disable your call rules when this personal status is in effect. With your call rules disabled, all your incoming calls follow your Standard routing list. See Chapter 17 for more about call rules.

  Note: Checking this box is equivalent to choosing **Tools > Ignore Call Rules** whenever this personal status is in effect.

  With the box unchecked, your call rules might cause some callers to hear greetings or follow routing lists other than the ones specified by this personal status.

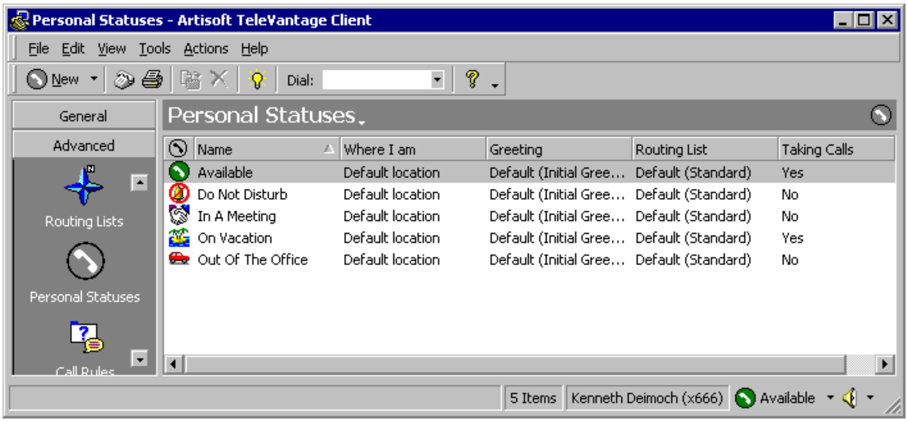
5. Check the box at the bottom of the dialog box if you want a dialog box to open automatically whenever you select this personal status. Doing this lets you quickly change preferences that you frequently modify.

   Checking this box is helpful to you for those personal statuses whose greetings or forwarding locations you customize on a regular basis. For example, whenever you select the Out of the Office personal status, the dialog box opens and you can specify a different call forwarding location.

6. Click **OK** to save the new personal status.

The Personal Statuses view

Click **Advanced** in the view bar and click the button for the Personal Statuses view. The Personal Statuses view displays all your personal statuses. Double-click a personal status in the view to edit or view its properties.You can see the personal statuses of other users in the Extensions view.



Personal status and your active settings

When you select a personal status, its preferences are copied to your active settings. Your *active settings* are all the settings that, taken together, determine how TeleVantage handles your incoming calls. They are:

- The currently active personal status
- **Where I Am** (the phone that rings for your incoming calls)
- **Active greeting** (the greeting played to callers who reach your voice mail)
- **Active routing list** (the routing list that incoming calls follow)
- **Taking calls** setting (whether your phone does or does not ring)
- **Ignore call rules** (whether your calls rules are enabled or disabled)

In addition, call center agents have the **queue calls** setting, which determines whether they are currently available to receive queue calls. See Appendix B.

Changing your active settings

You can change your active settings in the following ways:

- Change each active setting individually by going to the appropriate view or dialog box. For example, you can set your active greeting in the Greetings view, your active routing list in the Routing Lists view, your **Where I Am** setting by forwarding your calls, and so forth.
- Change several active settings at once by selecting a personal status. For example, if your On Vacation personal status uses the “I’m on vacation” greeting and specifies that your phone does not ring, whenever you select the On Vacation status, “I’m on vacation” becomes the active greeting and your Taking calls setting is set to No.
- Change active settings directly by using the Active Settings dialog box (see the next section).

Each change you make to an active setting overrides the previous one.

Example: You select the personal status On Vacation, which makes the “I’m on vacation” greeting active. Then you open the Greetings view and make the “Standard” greeting active. The “Standard” greeting is now the active one, even though the On Vacation personal status is still in effect.

Changing your active settings directly

The Active Settings dialog box gives you quick access to all your active settings in one place. Changes you make in this dialog box become your new active settings, and remain active until something else changes them, for example, until you select a new personal status or change the active greeting in the Greetings view.

You can use the Active Settings dialog box in the following ways:

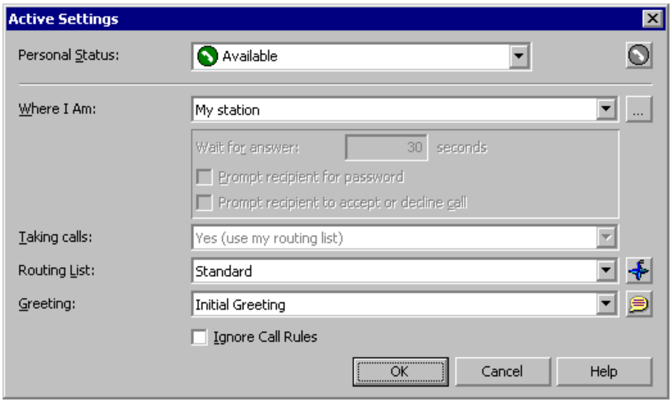
- See at a glance all your current active settings, so that you know how your incoming calls are being handled.
- Set an aspect of a personal status differently whenever you select that status. For example, whenever you select the status Out of the Office, you might want to specify a different call forwarding location. You would select the status, and then specify your call forwarding location in the Active Settings dialog box.

  You can set a personal status to open the Active Settings dialog box whenever you select that personal status so that you can make this kind of change. To do so, edit the personal status as shown in “Modifying a personal status” on page 9-6, and check **When I select this Personal Status, prompt me to change these settings**.

  Note: If you find that you override a personal status preference frequently in the same way, consider changing the preference in the personal status permanently. For example, if you want the Out of the Office personal status to always use your custom routing list that includes your cell phone, specify that routing list in the personal status itself.

To change your active settings in the Active Settings dialog box

1. Choose **Tools > Active Settings**. The Active Settings dialog box opens.



2. Change any of the following:

   ■ To change your current personal status, select a personal status in the drop-down list.

      ■ To create a new custom personal status, click .

      ■ To edit the selected personal status in the list, press ALT while clicking .

   ■ To change the active **Where I Am** phone, **Taking calls**, **Routing List**, or **Greeting** settings, use the instructions in step 4, (“To create a custom personal status” on page 9-7).

3. To make sure that all incoming callers hear the greeting specified here when they reach your voice mail, check **Ignore Call Rules**. Doing this disables your call rules and causes all incoming calls to follow your Standard routing list. The **Routing List** setting in this dialog box changes to reflect this choice.

   Note: Checking this box is equivalent to choosing **Tools > Ignore Call Rules** whenever this personal status is selected.

   With the box unchecked, your call rules might cause some callers to hear greetings other than the one specified here.

4. When you are done, click **OK**. If the active settings are different than the current personal status, you are prompted to apply these settings as edits to the personal status. Choose one of the following:

   ■ **Yes.** The active settings go into effect and also are copied to the personal status’ preferences. Choose this option if you want to apply these active settings every time you select this personal status.

   ■ **No.** The active settings go into effect as overrides to the personal status. The personal status remains unchanged. Choose this option to make a one-time change that will not be repeated the next time you select personal status.

Active settings hierarchy

Several different TeleVantage features allow you to specify an active setting. For example, you can specify a routing list in the Routing Lists view, in a call rule, and in a personal status. This section describes which setting is used in cases of conflict.

The hierarchy for active settings is as follows:

1. **Call rule.** When a call is handled by a call rule, its settings are used if specified.
2. **Active Settings dialog box/Personal status.** Settings that are not specified by a call rule use the current setting in your Active Settings dialog box. These are set by your current personal status, but you can also set them manually by choosing **Tools > Active Settings**.

Important: The exception to this rule concerns greetings, which take their highest priority from the routing list followed. If a routing list specifies a greeting that is not the active greeting, that greeting is always the one played for calls using that routing list.

Personal status defaults

When you select a personal status with a greeting or routing list preference, it makes that greeting or routing list active. When you are done using that personal status, you might want your active greeting and routing list to revert to what they were before. *Personal status defaults* are a way of accomplishing this. Personal status defaults specify the greeting and the routing list that become active when you select a personal status that has no greeting or routing list preference.

Only one greeting and one routing list can be your personal status defaults at a time. When you select a personal status with no greeting preference, the personal status default greeting becomes active. When you select a personal status with no routing list preference, the personal status default preference becomes active.

Example: You set your “Everyday” greeting to be your personal status default, because this is the greeting you normally use. Several times during the day you change your active greeting by selecting the personal status In a Meeting, which applies your custom “Be Back Soon” greeting. When you return from the meeting and select the personal status Available (or any other personal status) your personal status defaults are restored, so your “Everyday” greeting becomes active again.

You can change the greeting and the routing list that are your personal status defaults at any time. See “Setting personal status defaults” on page 9-13.

Using the Where I Am default

Where I Am specifies the phone that rings when you receive a call. The *Where I Am default* is your station, unless you are forwarding your calls. In that case, it is your call forwarding number. This setting enables you to temporarily override your call forwarding with a personal status, and then restore it.

Example: You forward your calls to your home phone. You then select the custom personal status Lunch Hour, which changes **Where I Am** to your cell phone. When you come back from lunch you select the personal status Available (or any other personal status), which restores your **Where I Am** default. **Where I Am** returns to being your home phone, retaining your call forwarding.

Setting personal status defaults

There can be only one personal status default of each type (greeting and routing list) at any one time. Use the following procedures to:

- Set a personal status default greeting and routing list
- Set a personal status to use your default greeting and routing list

To designate a greeting or routing list as the personal status default

1. Open the Greetings view or the Routing Lists view and double-click the item that you want to be the personal status default.
2. In the dialog box for that item, check **Default Personal Status Greeting/Routing List**.
3. Click **OK**.

When you make a greeting active using the telephone commands, that greeting also becomes your personal status default greeting.

To set a personal status to use your defaults

1. Edit the personal status. See “Modifying a personal status” on page 9-6.
2. Under **Greeting**, **Routing List**, or **Where I Am**, select **Default**. The drop-down list displays the item that is currently the personal status default in parentheses.

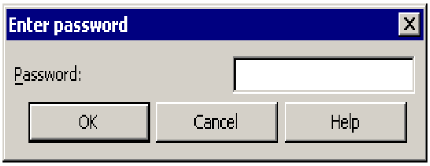
   When you create a new custom personal status, these preferences are already set to Default. The only reason you would need to change them to Default is if you had previously changed them to use specific items.
3. Click **OK**.

Changing the personal status of another user

You can change the personal status of another TeleVantage user if you know that user's password. This feature is useful when users want to change their personal status but do not want to log on to TeleVantage themselves. For example, a secretary can change the personal status for the boss, or the user who is acting as the Operator user can change the Operator's personal status without logging on as the Operator user.

To change another user's personal status

1. In the Extensions view, right-click the user.
2. Choose **Apply Personal Status** and click a personal status. The Enter Password dialog box opens.



Enter the password of the user and click **OK**.

CHAPTER 10

USING THE EXTENSIONS VIEW

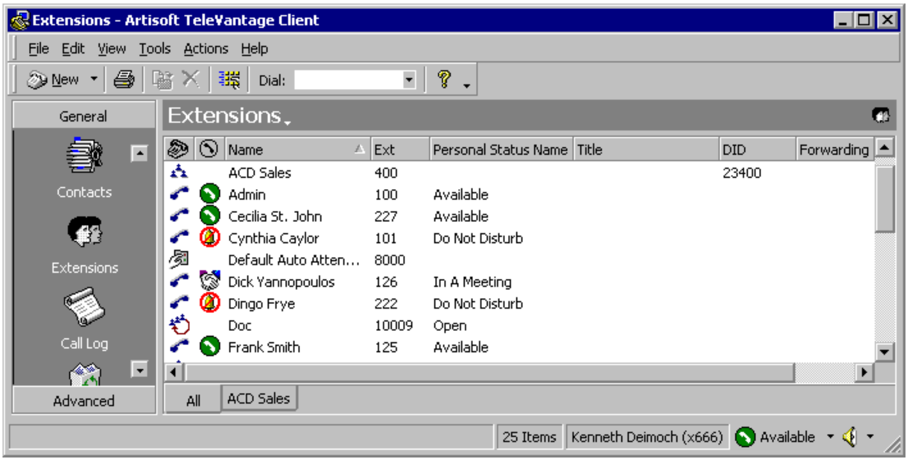
CHAPTER CONTENTS

The Extensions view

The Extensions view lists each TeleVantage user and all other TeleVantage extensions, along with information about the current status of the extensions. You can use the Extensions view to quickly place calls to other TeleVantage extensions or to change another user's personal status if you have permission to do so.

A glance at the Extensions view can tell you:

- A user's extension number
- Whether a user is currently on a call
- A user's current personal status
- Whether a user has call forwarding turned on, and the location to which the calls are forwarded
- The extensions of your office's auto attendants and queues



The Extensions view updates automatically in real time.

Extensions view tabs

The Extensions view contains tabs that display related groups of extensions. Click each tab to view its contents.

- **All tab.** This tab displays all TeleVantage extensions. Your system may be configured to not show this tab.
- **Workgroup tabs.** The Extensions view contains a tab for each public workgroup of which you are a member, and a tab for each personal workgroup that you created and

decided to show as a tab. Click a workgroup tab to see the extensions within that workgroup. See “Using workgroups” on page 16-14.

- **Queue tabs.** If you are an agent in call center queues, the Extensions view contains a tab for each queue. Click the tab to see the agents who are members of that queue.

Extensions view columns

The following table shows the columns that are available in the Extensions view. To show or hide columns, see “Showing and hiding columns” on page 18-15.

Column	Description
	Type of extension or user phone state. The extension types are: User whose phone is on hook User whose phone is off hook Call center agent in wrap-up state Auto attendant Call center queue Workgroup IVR Plug-in
	Icon for the user’s current personal status.
Name	Extension’s name.
Ext	Extension.
Personal Status Name	Name of the user’s current personal status. For call center queues, this column displays the queue’s current status. Queue statuses are: **Open.** The queue is distributing to its calls to available agents as normal. **Closed.** You have set the queue to send its calls directly to voice mail. **No agents.** All agents in the queue are currently signed out or unavailable, so the queue is automatically sending its calls directly to voice mail.
Title	User’s title, if available.

Column	Description
DID	User's Direct Inward Dial (DID) number, if one exists. This is the number used to dial the user directly from an outside line.
Forwarding	If the user has turned on call forwarding, this is the extension to which calls are forwarded. If the user's calls are being forwarded to an outside phone number, "External number" is displayed.
Queue Calls	Specifies whether the user is currently available to receive calls from call center queues.
ACD Calls	If checked, the user is available to receive ACD workgroup calls.
Comments	Any notes associated with the extension.
Station	The default station for the extension.
Mailbox	If checked, the extension has a voice mailbox.

Placing calls to an extension

To place a call to an extension, double-click the extension. If your phone is on hook, it rings to connect you to the call being placed.

Automatically switching to the Call Monitor view

You can have TeleVantage automatically switch to the Call Monitor view when you place a call from the Extensions view.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Display Call Monitor in the following situations**, check **Placing new calls from Contacts or Extensions**.
4. Click **OK**.

Changing another user's personal status

From the Extensions view you can change another user's personal status if you know that user's password. For instructions, see "Changing the personal status of another user" on page 9-14.

CHAPTER 11

RECEIVING AND HANDLING CALLS IN THE CLIENT

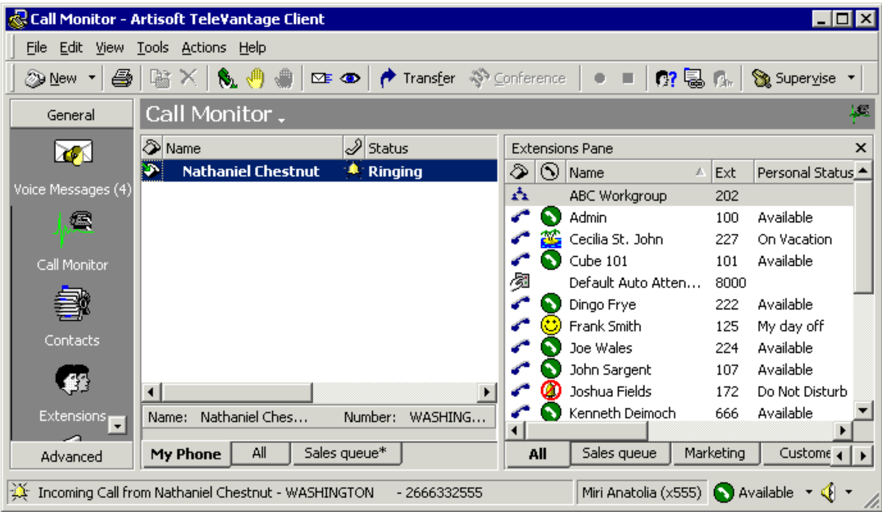
About receiving and handling calls in the Client

In the TeleVantage Client, the Call Monitor view is the visual counterpart to your telephone. The Call Monitor lets you see all your incoming calls and any outgoing calls at once, often with the callers identified by name.

In the Call Monitor view you can:

- See who is calling you and take the call or send it to voice mail
- Click calls to transfer them, put them on hold, send them to voice mail, or perform other actions
- Move among multiple calls on hold with a click of the mouse
- Record calls
- Conference calls (including creating or starting a conference)

The Call Monitor view

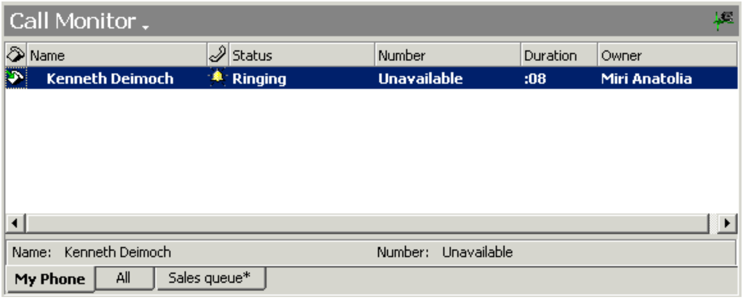


For an explanation of Call Monitor view columns, press **F1** for online Help. For information about changing the Call Monitor view columns that are displayed, see “Customizing columns” on page 18-15.

Each row in the Call Monitor view is an item that contains information about one call, or one party in a call. Conference calls appear as a grouped item with each party to the conference call as a separate indented row.

Call Monitor view tabs

For most people, the Call Monitor view contains one tab, called My Phone. However, the Call Monitor can display other tabs that group related calls. Click each tab to view the related call activity at your phone.



- **My Phone tab.** This tab always appears in your Call Monitor view and displays all calls to or from your telephone. This includes calls that are forwarded to your extension (in this case, the called party who forwarded the call is identified in the Owner column), and calls to your DID number if you have one.
- **All tab.** The All tab appears if any other tabs in addition to the My Phone tab appear in your Call Monitor. The All tab allows you to see all calls for all tabs in one place. Calls in the All tab are grouped by the call owner's name.
- **Queue tab.** If you are an agent in a call center queue, all the current calls for the queue appear on a separate tab labeled with the queue name. An asterisk (*) on the queue tab indicates that you are signed out for that queue. For details about participating in a queue, see Appendix B.
- **<call owner> tab.** Calls for users who have shared their Call Monitor views with you appear on separate tabs labeled with the call owner's name. For more information, see "Sharing your Call Monitor view" on page 11-16.
- **Workgroup tab.** If you belong to a workgroup, all current calls for the workgroup appear on a separate tab labeled with the workgroup's name. For more information about workgroups, see "Using workgroups" on page 16-14.

Using the My Phone tab to handle calls

After you answer a call, the Call Monitor automatically switches to the My Phone tab. The My Phone tab is the only tab from which you can perform call-handling commands on a call. If you select an active call in another tab, the call-handling commands are unavailable.

Call Monitor view panes

The Call Monitor view contains the following two panes that you can hide or show:

- The Extensions Pane, which shows users' availability (personal status) and enables drag-and-drop call handling. See "Adding the Extensions Pane to the Call Monitor view" on page 8-11 and "Dragging and dropping items" on page 8-14.
- The Notes Pane, which enables you to type and save call notes. See "Creating notes about a call" on page 11-14.

Call Monitor view columns

The Call Monitor view contains several columns that show detailed information about a call, such as Trunk Name and Target Station. Some of the columns are hidden by default. For an explanation of the columns, press **F1** in the Call Monitor view for its online Help. For instructions on hiding and showing columns, see "Customizing columns" on page 18-15.

Viewing a custom data column in the Call Monitor

If your TeleVantage system is configured to display custom data in the Call Monitor, the custom data appears in one or more columns. You can view the available columns in the Show Columns dialog box. You can hide and show custom data columns the same way you can hide and show normal columns (see "Customizing columns" on page 18-15). Contact your TeleVantage system administrator to see if any custom data columns are available in your Call Monitor view.

Displaying the Call Monitor view automatically

TeleVantage can open the Call Monitor view automatically in the following situations:

- When you receive an incoming call
- When you place or return calls from other Client views

When the Call Monitor view opens automatically, it appears in front of all other open windows on your computer.

To display the Call Monitor view automatically

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Display Call Monitor in the following situations**, check one or both of the following options:
   - **Placing new calls from Contacts or Extensions**
   - **Returning calls from Voice Messages or Call Log**
4. To display the Call Monitor view automatically on incoming calls, click the Incoming Calls tab and check **Display the Call Monitor**.
5. Click **OK**.

Selecting and acting on a call in the Call Monitor view

Click a call in the Call Monitor view to select it. After it is selected, you can choose commands to apply to that call.

To use a command on a call in the Call Monitor view, do one of the following actions:

- Right-click the call and choose a command on the shortcut menu. This option is often the fastest way of choosing a command, but it may be difficult to do so during times when phone traffic is heavy. This is due to the fact that calls change position in the Call Monitor view as new calls arrive and transferred calls leave the Call Monitor view.
- Click a button on the toolbar.
- Choose a command from the **Actions** menu.
- Press Enter. This puts the selected call on hold, or retrieves it if it is already on hold.

Call ownership

In the Call Monitor you can perform call-handling commands only on calls that you own. You own a call if you are the one who answered it. If you select a call that you do not own, the call-handling commands are unavailable.

Examples of calls that you can see, but that you do not own, include calls in a Queue tab that are being handled by another agent, or calls in a shared Call Monitor tab that are being handled by the sharing user.

To determine who owns a call, look at the name in the Owner column.

Double-clicking calls

Double-clicking in the Call Monitor view has the following effects:

- Double-clicking an active call puts it on hold.
- Double-clicking any other type of call takes the call (connects you to the caller). This includes incoming calls, calls on hold, parked calls, and calls for which you are screening a message.

Commands while a call is ringing

While calls are ringing at your phone, the Call Monitor view displays “Incoming Call.” If TeleVantage can identify the caller, the item in the Call Monitor view also displays the caller’s phone number and name, which enables you to screen your calls. (See “Teaching TeleVantage to recognize your contacts” on page 16-7.) While calls are ringing, you can perform the following actions:

- Take the call
- Send the call to voice mail
- Put the call on hold without talking to the caller first
- Transfer the call without talking to the caller first

Taking the call

If you are already on another call, select the incoming call and choose **Actions > Take Call**. Your current call is put on hold. You can easily move among multiple calls by choosing **Take Call** again.

When you use **Take Call** in the Call Monitor view, call announcing is not used. However, you can play the caller’s name over your speakers by choosing **Actions > Announce Caller**. To have incoming callers’ names played over your speakers automatically, see “Other options for incoming calls” on page 11-15.

Sending the call to voice mail

Select the call, and then choose **Actions > Take Message**. The call is sent to your voice mail.

Note: Call center agents cannot perform this command on an incoming queue call.

You can listen to a voice message as the caller is leaving it and pick up the call if needed.

To listen to a voice message as it is being left

1. Select the call while it is ringing or while the caller is leaving a message.
2. Choose **Actions > Screen Message**.
3. Pick up your phone and listen to the message as it is being left. This is a one-way connection. The caller cannot hear you.
4. To interrupt the message and take the call, choose **Actions > Take Call**. You are connected to the caller.

Putting an incoming call on hold

Choose **Actions > Hold** when you are momentarily unable to take an incoming call but intend to speak to the caller soon. This command puts callers on hold without your talking to them first and plays a special grab-and-hold greeting that you have recorded. (See “To record a grab-and-hold greeting” in this section.) Callers can wait on hold or leave a voice message. The Status column in the Call Monitor view shows their choices.

TeleVantage supplies you with an initial grab-and-hold greeting that says, “The person you are trying to reach is on another call. To hold for your party, remain on the line. Otherwise, to leave a message, press 1. To end this call, press 2". The caller can also press 0 to transfer to the Operator, though this option is not mentioned in the prompt.

You can rerecord this greeting to say, for example, “This is Angela. I am on another call right now, but if you hold for a moment I will be right with you.” The options that callers hear with this greeting are contained in a separate prompt that only your TeleVantage system administrator can change.

To put an incoming call on hold

Select the incoming call and choose **Actions > Hold**.

To record a grab-and-hold greeting

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Incoming Calls tab.
3. Use the audio controls under **Play this greeting when an incoming call is placed on hold** to record a grab-and-hold greeting. See “Using the audio controls” on page 8-23.
4. When you have recorded your grab-and-hold greeting, click **OK**.

Transferring a call without talking to the caller first

You can transfer the call to another extension while it is still ringing. The procedure is the same as transferring a call normally. See “Transferring a call” on page 11-9.

Commands after you answer a call

After you answer a call, you can perform actions on that call, including the following:

- Putting a call on hold
- Transferring a call
- Recording a call
- Associating a call with a contact
- Parking a call
- Unparking a call
- Muting a call
- Playing a caller's name
- Disconnecting a call while staying on the phone
- Entering an account code for a call
- Creating notes about a call

Instructions for each of these commands appear in the following sections.

You can also include the call as part of a conference call. See "Creating conference calls" on page 12-9.

Important: To perform a Call Monitor command on a call, you must select the call in the My Phone tab. The commands are unavailable from other tabs. See "Call Monitor view tabs" on page 11-3.

Putting a call on hold

To put a call on hold, select the call, and then choose **Actions > Hold**. Alternately, select the call and press Enter.

To retrieve the call from hold, select the call and either choose **Actions > Take Call** or press Enter.

You can put as many calls on hold at one time as you want. The **Duration** column in the Call Monitor view shows how long each call has been waiting on hold.

Notes

- Use **Actions > Hold** instead of the Hold button on your phone. When on hold, callers hear music (if your system has music on hold), but they hear only silence if you use your phone's Hold button.
- You cannot put a call to a queue, auto attendant, or IVR Plug-in on hold. If you attempt to do so, the call is disconnected.

Ringback for calls on hold

By default, if you hang up with one or more calls on hold, TeleVantage's ringback feature rings your phone to remind you. If you do not pick up your phone, any calls on hold are sent to voice mail.

You can choose how long TeleVantage waits when you have calls on hold before ringing your phone. You can also turn ringback entirely off. See "Turning ringback for calls on hold on and off" on page 18-7.

Ringback is not available when working at a remote phone.

Transferring a call

The Call Monitor view allows you to easily transfer a call to any party, either another TeleVantage user or someone at an external phone number. You can look up users and contacts by name, and you can see in advance if an extension is busy. You can even transfer a call to an auto attendant or to a user's voice mail.

Drag-and-drop transferring

With the Extensions Pane showing in the Call Monitor view, you can drag a call from the Call Monitor to an extension in the Extensions Pane to transfer the call to that extension. For more information about drag-and-drop commands, see "Dragging and dropping items" on page 8-14.

Blind vs. supervised transfers

You can transfer a call in one of the following ways:

- **Blind transfer,** sometimes called an unattended transfer. You transfer the call without first speaking to the recipient. When the recipient answers the phone, the call is connected.

  Note: If you transfer a ringing call, you are performing a blind transfer.

- **Supervised transfer,** sometimes called an attended transfer. You ask the recipient to accept the call, and then you transfer the call if the recipient agrees, or you send the call to the recipient's voice mail if the intended recipient does not agree to take the call.

To transfer a call

1. Select the call that you want to transfer.
2. Choose **Actions > Transfer**. The Transfer To dialog box opens.
3. Select the person or enter the number to which to you want to transfer the call. See "Placing a call" on page 12-2 for instructions.

   Note: You may be prohibited from transferring an external caller to an external number. See your TeleVantage system administrator for more information.

4. If you are transferring the call to an external number, select the dialing service to use from the **Call Using** drop-down list. See "Using dialing services" on page 12-6.

5. If you are transferring the call to a user or a contact, choose a blind or supervised transfer. (See “Blind vs. supervised transfers” on page 11-9 and in the next step).

6. If you selected **Blind transfer**, click **OK**. The transfer is completed and the call disappears from your Call Monitor.

   If you selected **Supervised transfer**, go to the next step in this procedure.

7. Click **OK**. You are connected to the recipient’s extension, and the caller is put on hold. The incomplete transfer displays as a linked three-party call in the Call Monitor.

8. Speak to the recipient and announce the caller. A dialog box opens and asks you if you want to complete the transfer or cancel it.

9. Choose one of the following options:

   - **Complete.** The transfer is completed and the call disappears from your Call Monitor. You can also complete the transfer by hanging up the phone.
   - **Conference.** You, the caller, and the recipient are all connected in a conference call.
   - **Cancel.** The transfer process ends and you are reconnected to the caller.

Transfer tips for Operator users

By using workgroups and showing the Extensions Pane in the Call Monitor view, you can easily find and choose the recipient of a call that you want to transfer. Define workgroups to represent the departments of your office. When transferring a call you can then view only the members of a workgroup, for example, the Marketing workgroup. You can see at a glance the names of members of the Marketing department and who is available to take a call. See “Using workgroups” on page 16-14 and “Adding the Extensions Pane to the Call Monitor view” on page 8-11.

You can also transfer calls more easily by resizing the Transfer To dialog box, by showing and hiding columns, and by sorting calls by column. See “Customizing the Client for Operators” on page 18-13.

Recording a call

If your TeleVantage system administrator has given you the required permission, you can record your TeleVantage conversations, including conference calls. By default, recordings appear in the Inbox folder of your Voice Messages view, although your TeleVantage system administrator may have set them to appear in another person's Voice Messages view. Recorded conversations are stored in the limited space that you have been allocated for all of your voice files.

The maximum length of a single recording is equal to the total number of minutes available in your voice mailbox. By default this is 20 minutes, but your TeleVantage administrator may have set a different limit.

Important: It is possible for a recorded conversation to "over fill" your voice mailbox. The recording will not be cut off. However, you cannot receive more voice messages when your voice mailbox is full. For this reason, you should check your available mailbox space after recording any conversation to be sure that you have space for new voice messages. See "Viewing your voice mailbox size" on page 13-9 for more information.

To record a call

1. During an active call, choose **Actions > Start Recording**. TeleVantage starts to record the call.
2. To stop recording, choose **Actions > Stop Recording**.

To play a call you just recorded

1. In the Voice Messages view, click the Inbox folder, or open another mailbox if your system is set up differently.
2. Select the recording.
3. Choose **Actions > Play**.

If the recordings are in your own Inbox folder, you can listen to them by using the telephone commands. See "Listening to your voice messages" on page 5-3 for more information.

Note: You can also play call recordings from the Call Log. See "Listening to a recorded call from the Call Log" on page 14-9.

Associating a call with a contact

Unidentified calls appear in the Call Monitor view as being from "Unknown." You can associate a particular unidentified call with one of your contacts, so that the Call Monitor and Call Log views display a name with the call. You can also permanently associate the call's Caller ID phone number or text with the contact, so that TeleVantage automatically identifies the contact on all subsequent calls from that phone.

To associate a call with a contact, choose **Actions > Associate**. See "Associating a call or Caller ID number with a contact" on page 16-9.

Parking a call

Parking a call puts a call on hold and lets any TeleVantage user retrieve it from any TeleVantage telephone or Client program in your office.

To park a call

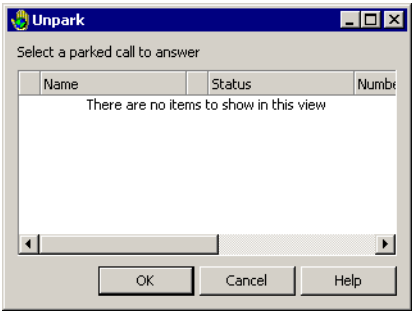
1. In the Call Monitor, select the call you want to park.
2. Choose **Actions > Park**. The **Status** column in the Call Monitor view displays "Parked on <orbit number>.

Unparking a call

You can retrieve a parked call from any TeleVantage telephone or Client program in your office.

To answer a parked call from any Client program

1. Click **Tools > Unpark**. The Unpark dialog box opens.



2. Select the call that you want to unpark and answer and click **OK**.

You can also answer the call by picking up a TeleVantage phone, pressing ***92**, and then entering the orbit number.

If no one answers the parked call

By default, if no one answers a call that you parked, TeleVantage rings your phone to connect you to the caller. If you do not answer, the ringback is repeated periodically until either you answer or someone else answers the call.

Note: TeleVantage never sends a parked call to voice mail. If you do not answer the ringback, it tries to reach you indefinitely.

You can choose how long TeleVantage waits before ringing your phone for callback of parked calls. You can also turn ringback off. See "Turning ringback for calls on hold on and off" on page 18-7.

Ringback is not available when working at a remote phone.

Muting a call

With TeleVantage you can mute a call even if your phone does not have a mute button. When muted, you can hear the caller, but the caller cannot hear you.

To mute a call, choose **Actions > Mute**. Choose **Actions > Mute** again to turn muting off.

Playing a caller's name

You can play a recording of a caller's name over your speakers at any time during a call by choosing **Actions > Announce Caller**.

The recording that plays is either the caller's voice title, if one has been recorded, or the caller's answer to the call announcing prompt, "Please say your name." If you choose **Actions > Announce Caller** and a name does not play, one or more of the following conditions are present: the caller has no voice title recorded, you have the call announcing prompt turned off, or the caller did not answer the prompt.

See "Customizing or turning off call announcing" on page 18-4 for more about call announcing. See "Recording your voice title" on page 2-2 for more about voice titles.

You can also have the caller's name play automatically when an incoming call arrives. See "Other options for incoming calls" on page 11-15.

Disconnecting a call while staying on the phone

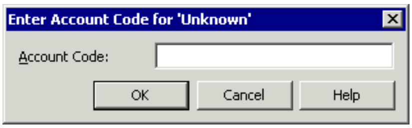
You can disconnect a call without hanging up the phone. Select the call, and then choose **Actions > Disconnect**. This command disconnects the caller and provides you with a dial tone. This command is useful if:

- You want to disconnect a single party in a conference call. Hanging up your phone would disconnect you from the whole conference.
- You are going to immediately dial another call. If you hang up and pick up your phone too quickly, TeleVantage can read that as a Flash command, which would put the call on hold instead of disconnecting it.

Entering an account code for a call

While on a call, you can enter an account code for the call or change the one already entered.

1. Select the call, and then choose **Actions > Enter Account Code**.



2. Enter an account code.
3. Click **OK**.

You can also enter an account code using the telephone commands. See "Entering an account code for a call" on page 4-11.

Creating notes about a call

While a call is visible in your Call Monitor view, you can type notes about the call in the Notes Pane. If the Notes Pane is not showing, choose **View > Notes Pane**.

If the call is transferred to someone else, notes that you created about the call are sent with the call (for example, you can add a note such as "Customer wants to track invoice #123987" before transferring the call to your shipping department). When the call is complete, you can view or edit the notes for the call in the Call Log view (see Chapter 14, "Using the Call Log View").

Preventing certain calls from ringing your phone

You can prevent certain types of calls from ringing your phone, as follows:

- **All calls.** Select the Do Not Disturb personal status, which sends all your incoming calls directly to voice mail without ringing your phone. See "Sending your calls straight to voice mail with Do Not Disturb" on page 4-11 and Chapter 9. Note that agents in ACD workgroups continue to receive ACD workgroup calls even with Do Not Disturb selected.
- **Calls from call center queues.** For agents in call center queues only. Select any personal status whose **Queue calls** preference is set to No, such as Available (Non-Queue) or Do Not Disturb. These statuses mark you as unavailable and you do not receive queue calls. See Appendix B.
- **Calls from ACD workgroups.** For agents in ACD workgroups only. Choose **Tools > Options**, click the Incoming Calls tab of the Options dialog box, uncheck **Accept ACD workgroup calls**, and then click **OK**. Doing this marks you as unavailable and you do not receive calls from ACD workgroups.

Incoming call indicators

When you receive a call, the “ringing bell” button appears in the system tray on your Windows taskbar (see the next figure). Hold the mouse pointer over the button to see who is calling by phone number and name, if available.

Right-click the button for a shortcut menu of call-handling commands such as **Take Call** and **Take Message**. Double-click the button to bring the Client to the front of your desktop.

TeleVantage can also give you information about an incoming call on the phone, in the following ways:

- **Call announcing.** TeleVantage announces the caller’s name and gives you the choice of accepting the call or sending it to voice mail. See “Call announcing” on page 4-2 and “Customizing or turning off call announcing” on page 18-4 for more information.
- **Call waiting.** When you are on a call, TeleVantage alerts you of an incoming call by playing the call waiting tone (two beeps). See “Call waiting” on page 4-3 for more information.
- **Caller ID display.** If you have a telephone with a Caller ID display, you can use it to see the Caller ID of the incoming call. See “Displaying Caller ID on a phone” on page 18-6 for more information.
- **Customized ring patterns.** See the next section.

Customized ring patterns

You can set ring patterns for incoming calls of a particular category or type. The type of ring then allows you to quickly identify the type of incoming call. For example, you can use one ring for internal callers and two rings for external callers. For instructions, see “Changing ring patterns” on page 18-9.

Other options for incoming calls

The Incoming Calls tab of the Options dialog box offers you other ways TeleVantage can signal an incoming call. See “Customizing incoming call behavior” on page 18-10 for more information.

Sharing your Call Monitor view

You can share your Call Monitor view with other TeleVantage users. Those users see your calls when they click on a tab with your name on it in their Call Monitors. If you give them the View and Edit permission level, they can answer your calls using that tab and perform all call-handling commands on them. If you give them the View Only permission level, they can see your calls but cannot answer them or perform any commands on them.

When you share calls with another user, your calls also appear in your own Call Monitor, but if the other user accepts one of your shared calls, you cannot manage it or take it.

Note: Calls that you share with another user do not ring at the other user's telephone. If you want your calls to ring there, forward your calls to the user instead of sharing them. For more information about call forwarding, see Chapter 15.

You can use call sharing in the following ways:

- A coworker can cover your calls when you step away from your desk.
- Your assistant can screen all your calls and pick up routine calls while letting important calls go through to you directly.

Example: A manager shares calls with an assistant so that the assistant can monitor all calls. Based on the caller's identity, the assistant lets some calls go through, answers other calls, and sends some calls directly to the manager's voice mail. If another call arrives while the manager is already on a call, the assistant can see with whom the manager is talking, determine if the current call is too sensitive to be interrupted, and handle the call appropriately.

Note: Calls that you receive from a call center queue are not shared, even if you are sharing your Call Monitor view.

For instructions on sharing your Call Monitor view, see "Sharing views and folders" on page 8-20.

Viewing shared calls

When users share their Call Monitor views with you, the following tabs appear in your Call Monitor view:

- A <call owner name> tab for each user who has shared calls with you. This tab displays only the calls for that user.
- The All tab, which displays all calls including shared calls. The calls are organized by call owner name.

See "Call Monitor view tabs" on page 11-3 for information about how tabs are used in the Call Monitor to display calls.

CHAPTER 12

PLACING CALLS IN THE CLIENT

CHAPTER CONTENTS

About placing calls in the Client

You can place calls in any Client view. You can place calls with the phone either on-hook or off-hook. If the phone is on-hook when you place a call, your phone rings immediately after you finish dialing the number. If the phone is off-hook when you place a call, you hear TeleVantage dialing the number.

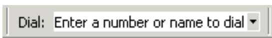
Placing a call

TeleVantage provides the following ways for you to place calls from the Client:

- Placing calls by using the toolbar's Dial field
- Placing a call by using the Place Call To dialog box
- Speed-dialing from other views in the Client
- Placing calls by using other contact managers

Placing calls by using the toolbar's Dial field

The Client toolbar includes a **Dial** field that you can use to place calls.



Click the arrow next to the **Dial** field for a list of recently dialed numbers.

To place a call using the toolbar's Dial field

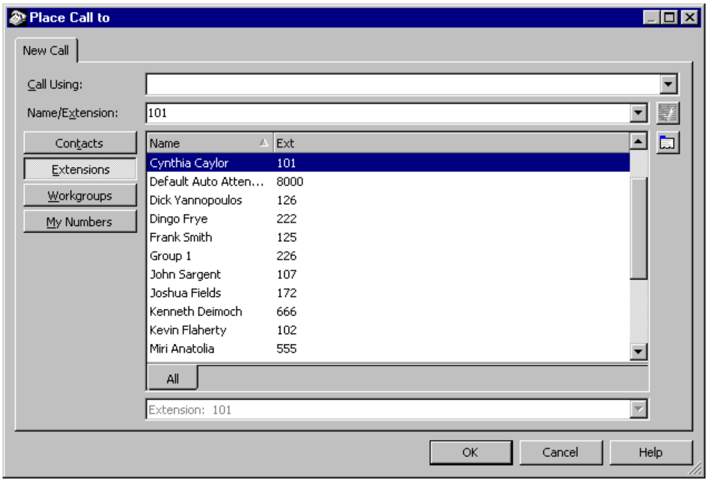
1. Type either of the following in the **Dial** field:
   - The number to dial. If it is an external number, type the full number that you would dial on the phone, including the access code. You can type hyphens as part of the number.
   - The name of a user, contact, or contact company name. Partial matches are acceptable.
2. To enter an account code for the call in the toolbar's Dial field, type a vertical bar character (|) after the number, followed by the account code.
3. Press ENTER to place the call.

TeleVantage searches all of the Contacts, Extensions, and Workgroups for a match. If only one match is found, the system places the call immediately. If there is more than one match, a dialog box opens and you can select a name on the list and click **Dial** to place the call.

If your phone is on-hook, it rings to connect you to the call being placed.

Placing a call by using the Place Call To dialog box

1. Choose **File > New > Call**. The Place Call To dialog box opens.



2. Enter or select the number to dial in one of the following ways:

   - Enter the number to dial in the **Name/Number** or **Name/Extension** field. You can also type the name of a contact or user.
   - Click **Contacts** and select a contact on the list.

     The contact's default phone number appears in the drop-down list below the main list. If the contact has more than one phone number associated with it, you can select a different number to call on the drop-down list.

     To create a new contact, click to open a new Contact dialog box. To edit the currently selected contact, press ALT and click . See "Entering a new contact" on page 16-4 for more information.
   - Click **Extensions** and select an extension on the list. You can select a user, queue, auto attendant, or IVR Plug-in.
   - Click **Workgroups** and select a workgroup in the list.

     When you call a workgroup, all TeleVantage phones within that workgroup ring simultaneously. The first member of the workgroup to pick up the phone connects to the call. Contacts in the workgroup are ignored.
   - Click **My Numbers**. To place a call to one of your own phone numbers, such as your home or mobile phone, select it on the list. To place a call to another number, enter the number in the **Number** field.

     For instructions on entering numbers in your My Numbers list, see "Entering My Numbers" on page 12-4.

Note: To verify that the phone number is entered in a correct format, click .

3. To enter an account code for the call, type a vertical bar character (|) after the number, followed by the account code.
4. If you are placing a call to an external number, make sure that the appropriate dialing service is selected on the **Call Using** drop-down list (see the section “Using dialing services” on page 12-6).
5. Click **OK** to place the call.

Another way to place a call to a user is to double-click the user in the Extensions view (or in the Extensions Pane).

Entering My Numbers

You can store your own phone number in your TeleVantage account, such as your home number or your mobile phone number. When placing, forwarding, or transferring a call, you can click **My Numbers** and select one of your numbers.

To enter a phone number in the My Numbers list

1. Open either the Place Call or Call Forwarding dialog box.
   - To open the Place Call dialog box, choose **File > New > Call**.
   - To open the Call Forwarding dialog box, choose **Tools > Call Forwarding**.
2. Click **My Numbers**.
3. Click the type of number you want to enter or modify, for example, **Home** or **Mobile**.
4. In the **Name/Number** field, enter the number. Click anywhere in the dialog box to save the entry.
5. Click **OK**.

Speed-dialing from other views in the Client

By choosing **Actions > Speed Dial**, you can place calls from the following Client views:

- **Voice Messages view.** Places a call to the Caller ID or callback number of the selected voice message.
- **Extensions view.** Places a call to the selected extension. Double-clicking an extension performs the same action. If a workgroup is selected, all users in the workgroup are called simultaneously, and the first user to answer receives the call.
- **Contacts view.** Places a call to the default phone number of the selected contact. You can also choose **Actions > Place Call** and select another of the contact's numbers from the submenu. Double-clicking a contact may perform the speed dial command, depending on how you have configured your Contacts view (see "Defining double-click behavior in the Contacts view" on page 18-15).
- **Call Log view.** Places a call to the Caller ID or callback number of the selected call.
- **Workgroups.** Places a call to the selected workgroup. All users in the workgroup are called simultaneously, and the first user to answer receives the call. If there are no users in the workgroup, your call is placed to the TeleVantage Operator extension.

Placing calls by using other contact managers

You can place calls by using other contact managers such as Microsoft Outlook, GoldMine or FrontOffice 2000, or Interact Commerce Corporation's Act!. For more information, see "Using the TAPI Service Provider and the CMA" on page 1-3.

Using dialing services

When you place an external call, you must use the correct dialing service. Your TeleVantage system administrator typically sets up dialing services with names like “Phone number” or “Chicago Centrex” with access codes of 9 or 8 so that it is easy for you to remember the appropriate dialing service to use when you place a call.

For example, to call an external phone number, you could do one of the following:

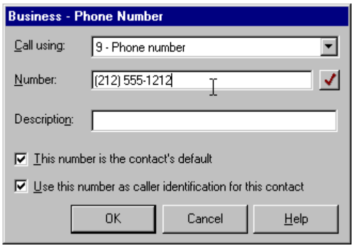
- Make sure that the dialing service “Phone number” is selected on the **Call using** drop-down list in the Place Call To dialog box in the Client. Choose the phone number that you want to dial on the list, and click **OK**.
- Dial the access code “9” on your telephone and then dial the phone number.

The dialing services available to you depend on how your system is set up. Your TeleVantage system administrator can tell you how to choose the appropriate dialing service for the following types of calls:

- Local or long-distance calls over a T1 line
- Calls to a PBX or Centrex extension
- Calls to a user on another TeleVantage system through an Internet connection
- Calls to the Internet address of an H.323 terminal such as Microsoft NetMeeting

Entering a phone number by using a dialing service

Whenever the Client opens the Phone Number dialog box and prompts you to enter a phone number, you must first select the dialing service to use.



To enter a phone number by using a dialing service

1. In the **Call Using** field of the Phone Number dialog box, select the dialing service to use. Ask your TeleVantage system administrator about the different dialing services available in your system.
2. In the **Number** field, enter a phone number, Internet address, or Centrex or PBX extension (see the next three procedures for detailed instructions).
3. Click **OK** to place the call.

Entering a phone number

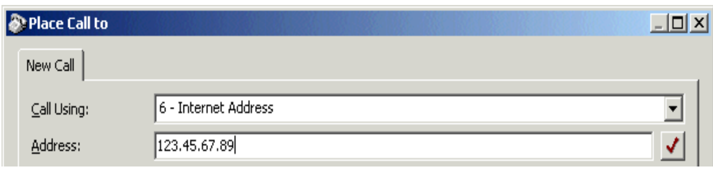
If you selected a phone number dialing service in the **Call Using** field, enter a phone number in the **Number** field. Use the following guidelines:

- For local calls, you might not need to enter the city or area code. TeleVantage will automatically dial the number correctly. You do not need to enter the long-distance prefix as part of a long-distance number.
- To enter a phone number for international dialing, enter the country code followed by the phone number, for example, 44-987-654-3210. You do not need to enter the international dialing prefix as part of an international number.

Entering an IP address

If you selected an Internet dialing service in the **Call Using** field, use the **Address** field to enter the IP address of the remote H.323 device or TeleVantage Server to which you want to connect. For example, 123.45.67.89 or abccorp.com. Use the following guidelines:

- If the IP address connects you to a remote TeleVantage Server, you can dial a user on that system by appending the appropriate Direct Inward Dial (DID) digits, if they exist. Separate the address from the DID digits by a slash, for example, 123.45.67.89/2717.
- You can append only DID digits to an IP address, not a user's extension.

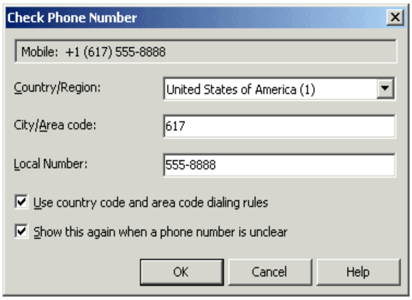


Entering a Centrex or a PBX extension

If you selected a Centrex or PBX dialing service in the **Call Using** field, enter a Centrex of PBX extension in the **Extension** field.

Checking a phone number

To confirm that TeleVantage has correctly interpreted a complex phone number or address that you have entered—for example, that it has recognized the correct country on an international call—click next to the **Number** or **Address** field. The Check Phone Number dialog box opens. You can correct any dialing errors here before you place the call.



To check a phone number

1. Select **Use country code and area code dialing rules** if you want TeleVantage to apply dialing rules that determine if a number is a local or long-distance call. Clear it to have TeleVantage dial the number exactly as entered, as if you had dialed it on the phone.
2. Click **OK** to close the Check Phone Number dialog box.

Redialing numbers and returning calls

You can quickly perform the following dialing actions in the Client:

- **Redial the last number you dialed.** Press **F12** on your keyboard.
- **Return the last call you received.** Press **F11** on your computer keyboard. The name of the last caller and the phone number appear in the status bar at the bottom of the Client window.

You can also redial and return calls by using the phone. See “Placing calls with * options” on page 3-5.

Displaying the Call Monitor when you place a call

TeleVantage can display the Call Monitor automatically when you place a call from the Contacts view or the Extensions view. It can also automatically switch to the Call Monitor when you return a call from the Call Log view or the Inbox folder of the Voice Messages view. See “Displaying the Call Monitor view automatically” on page 11-4 for details.

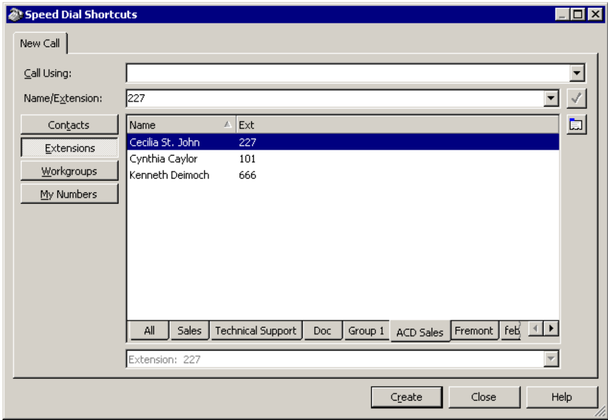
Creating speed dial shortcuts

Speed dial shortcuts are Windows Explorer shortcuts for phone numbers that you dial frequently. Speed dial shortcuts appear as icons on your Windows desktop. You can drag them to your Microsoft shortcut toolbar or to any directory. Double-clicking them will call the phone number and launch the Client if it is not already running.

Right-click a call, an extension, or a contact and choose **Create Speed Dial Shortcut** to create a speed dial shortcut on your desktop. You can also use the next procedure to create a speed dial shortcut.

To create a speed dial shortcut

1. Choose **Tools > Speed Dial Shortcuts**. The Speed Dial Shortcuts dialog box opens.



2. Enter a phone number for the shortcut to dial or click **Contacts**, **Extensions**, **Workgroups**, or **My Numbers** and choose the appropriate number from the list.

   Note: You cannot make a shortcut for a workgroup unless your TeleVantage system administrator has given it an extension.

3. Click **Create**. A dialog box opens and confirms that the shortcut has been added to your desktop.
4. Repeat steps 2 through 3 to create other speed dial shortcuts or click **Close**.

Creating conference calls

TeleVantage lets you conference up to seven calls together. This total number includes the user who creates the conference call. The Call Monitor view treats a conference call as a single call. You can put a conference on hold or park it exactly as you would a single call.

Conference calls appear in a tree structure in the Call Monitor view. Participants appear on indented rows under the conference call. Click the top row to perform an action on the conference.

You can create a conference call by:

- Adding parties to a call
- Conferencing two separate calls together

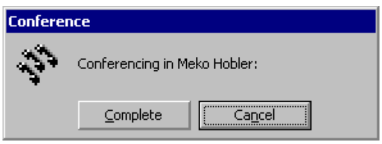
Adding parties to a call

Use this procedure to start and build a conference call. The call is placed on hold while you are adding new parties, but the parties already conferenced can continue to talk to each other.

1. Dial the first party and wait for an answer.
2. Click the call in the Call Monitor view.
3. Choose **Actions > Conference**. The Conference dialog box opens.
4. Select the second party for the conference call or enter a phone number to dial, and then click **OK**. See “Placing a call” on page 12-2 for more information.

   Note: If you have more than one active call when you choose the Conference command, click the New Call tab in the Conference dialog box to place the call.

   When the call is answered, you are connected to the new party in a separate call. The Conferencing dialog box opens giving you the option of adding the party to the conference or not.

5. Determine whether you want to add the new party to the conference. Then click one of the following:
   - **Complete.** The new party joins the conference call.
   - **Cancel.** The new party’s call is disconnected, and you return to the conference call.
6. Repeat steps 2-5 to add more parties to the conference.

Important:

- No more than 7 parties can participate in a conference call.
- You cannot conference two conference calls together.

To add parties to a conference by dragging and dropping

To drag and drop parties into a conference, you must have the Calls Pane open in the Extensions or Contacts view, or the Extensions Pane open in the Call Monitor view. For more information, see “Adding the Calls Pane to any open view” on page 8-11 and “Adding the Extensions Pane to the Call Monitor view” on page 8-11 for instructions.

Drag and drop parties to the conference as follows:

- Using the Calls Pane in the Extensions or Contacts view, you can drag users or contacts onto the active call in the Calls Pane to automatically add them as parties to the conference. If you press SHIFT while you drag a user from the Extensions view, the Conference dialog box opens and provides further options.
- Using the Extensions Pane in the Call Monitor view, you can create a conference call by pressing SHIFT and dragging and dropping a call or an extension onto another call.

For other drag-and-drop operations you can perform in the Client, see “Dragging and dropping items” on page 8-14.

Conferencing separate calls together

Use the following procedure when you have two or more separate existing calls that you want to conference together with yourself. You cannot conference two conference calls together.

To conference separate existing calls together

1. Select all the calls that you want to conference together. Press CTRL on your computer keyboard as you select multiple calls.
2. Choose **Actions > Conference**. The selected calls are now conferenced with you.

Using Hold and Disconnect on external callers

You can put individuals in a conference call on hold, or disconnect them, but only if they are external callers. You cannot place users on hold or disconnect them.

To place an external call on hold or disconnect

1. Select the external caller in the Call Monitor or the Calls Pane.
2. Choose **Actions > Hold** or **Actions > Disconnect**.

Ending a conference call

A conference call normally ends when all parties hang up at roughly the same time. If you leave the conference call early, however, the conference call continues without you. The other participants can continue to talk, even if you started the conference and your company is paying for the outgoing calls used to create it. To terminate the call, each participant must hang up, or you must disconnect all parties.

CHAPTER 13

MANAGING VOICE MESSAGES IN THE CLIENT

CHAPTER CONTENTS

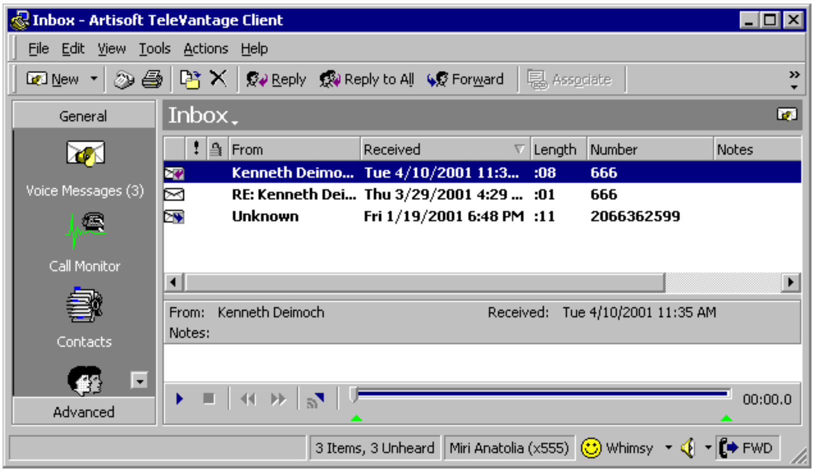
About managing voice messages in the Client

You can manage your voice messages in the TeleVantage Client in the same way that you manage e-mail messages in your e-mail program. Your new voice messages appear in a list in the Inbox folder of the Voice Messages view according to the time and the caller. You can listen to them in any order you want, and you can easily forward them, reply to them, or archive them in other folders that you create.

For instructions on how to listen to voice messages by using the telephone commands, see Chapter 5.

The Voice Messages view

The Voice Messages view contains your voice messages, as well as any call recordings sent to your voice mailbox. New messages in the Voice Messages view appear in the Inbox (see the next figure). Audio controls for playing your voice messages appear in the audio bar above the status bar. When you play a message, the audio bar shows elapsed message playback time in minutes and seconds.



Note the following display attributes of items in the Voice Messages view:

- **Bold text** indicates a new (unheard) message.
- **FW:** in the From column indicates a message that was forwarded to you.

  Note: You can view the date on which a forwarded message was created by showing the Created column in the Voice Messages view. See “Customizing columns” on page 18-15.

- **RE:** in the From column indicates a message that was sent to you in reply to another message.

Voice Message view folders

You can store your voice messages in folders within the Voice Messages view. Click a folder in the Folder List to view and act on the voice messages in that folder. See "Using the Folder List" on page 8-17.

The Voice Messages view contains two predefined folders:

- **The Inbox folder.** New voice messages appear here. After you listen to them, they remain here unless you move or delete them.
- **The Saved folder.** Saved messages appear here. When you save a message by using the telephone commands, it moves to the Saved folder.

Note: These two folders are the only voice message folders accessible through the telephone commands. Voice messages that you put in other folders are not accessible using the phone.

You can create as many custom voice message folders as you want. See "Managing folders" on page 8-18 for instructions on creating folders and moving voice messages from one folder to another.

Viewing shared voice message folders

When other users share their voice messages with you, those messages appear in folders identified by the users' names. You can find those folders under **Public Folders** in the Folder List. If you have permission to access the voice mailbox of a call center queue, that mailbox also appears as a folder under Public Folders. See "Using the Folder List" on page 8-17.

Viewing custom data

The Voice Messages view contains a Custom Data column that is hidden by default. By showing it you can view all custom data that your office might have associated with the call, for example, customer ID or caller priority. To show columns, choose **View > Current View > Show Columns**.

Listening to your voice messages and call recordings

To listen to a voice message or call recording, double-click its line in the Voice Messages view. For instructions on using the audio controls, see "Using the audio controls" on page 8-23.

You can play the message or recording either over your computer's speakers or over your telephone. Choose **Tools > Audio Output** to switch audio output from one to the other. You can also use the button in the status bar.

If you have call announcing turned on, messages less than five (5) seconds in length are prefaced by a recording of the caller's name.

Note: You can open some Client views while a message is playing and the message will continue to play. The message stops playing, however, if you open a view with another audio control visible, for example, the Greetings view.

Listening to a voice message as it is being left

To listen to a voice message as the caller is leaving it, without being heard by the caller, do the following:

1. Open the Call Monitor view by clicking its button in the view bar.
2. Choose **Actions > Screen Message**.
3. Pick up your phone and listen to the voice message as it is being left. This is a one-way connection. The caller cannot hear you.
4. To take the call while the caller is leaving a message, choose **Actions > Take Call**. You are connected to the caller. The caller's message up to that point is left as a new voice message.

You can also listen to a voice message as it is being left via the phone. See "Call announcing" on page 4-2.

Handling your voice messages

You can perform the following tasks on a voice message:

- Forward it to other users
- Reply to one or more users directly with a voice message of your own
- Return the call, if the Caller ID or contact information is available
- Send the voice message as a .WAV file attachment to an e-mail message
- Opening the contact record of a contact's voice message
- Send a new voice message to other users
- Delete a voice message
- Associate a message with a contact
- Mark an existing message Private, unheard, or Urgent
- Add notes to an existing message

Forwarding a voice message

You can forward a voice message, except if it is marked Private, to one or more users. A copy of the message is sent directly to the voice mail of all recipients.

You can also attach a recording of your own at the beginning of the forwarded message. For example, "Bob, this is Jim. I received this message and thought you would want to hear it." Your recording precedes the forwarded message.

The envelope icon next to a message you have forwarded changes to  .

To forward a voice message

1. In the Voice Messages view, right-click a voice message that you want to forward and select **Forward** on the shortcut menu. The Forward Message dialog box opens.
2. In the **Available Users** list, select the users to whom you want to forward the message. To select multiple users, press CTRL while you select users.
3. Click **Add** to move the selected users to the **Recipients** list.
4. Optionally, record a short message that introduces the message you are forwarding. Use the audio controls (for detailed instructions, see “Using the audio controls” on page 8-23).
5. Click **Send**. A copy of the selected voice message, preceded by your short introductory message, is forwarded to the users in the Recipients list. When recipients select the message, they can view (in the **To** field) a list of other users who received the same message. Users can reply to the sender or to all recipients.

Replying to a voice message

Replying to a voice message lets you send a recorded reply directly to the voice mail of the user who sent you the message. You can send the reply to other users as well. Select the message and choose **Actions > Reply.** Then perform steps 3-5 of “To forward a voice message” in the previous section.

The envelope icon next to a message to which you have replied changes to  .

You can reply in this way only to a message left by another TeleVantage user. You cannot send a message in reply to a message left by an external caller.

Note: Replying to a message sends a new message to another user’s voice mail. To call back the person who left you the voice message, choose **Actions > Place Call** instead (see the next section).

To reply to all recipients of a message

1. Select the message.
2. Click **Actions > Reply to all**.

The recipients are listed in the Recipients pane of the Reply to Message dialog box.

Calling back the person who left a voice message

You can call back the person who left you a voice message by using the TeleVantage **Place Call** or the **Speed Dial** command. **Place Call** lets you choose the number to call if several numbers are available. **Speed Dial** returns the call to the default number.

To call a person back

1. Select the voice message left by the person you want to call back.
2. On the **Actions** menu, choose **Place Call** or **Speed Dial**.

Note: On messages from unidentified callers, TeleVantage places a call to the phone number from which the message originated. If the message was left by someone calling from an office (PBX) extension, you might not be able to connect to the correct party.

E-mailing a voice message

You can e-mail a voice message as a .WAV file attachment to someone who is outside the TeleVantage system.

To e-mail a voice message, you must have an e-mail reader that supports MAPI installed on your computer, such as Microsoft Outlook or Eudora Pro.

To e-mail a voice message

1. Select the message you want to send by e-mail.
2. Choose **File > Send To Mail Recipient**. Your MAPI mail client Send dialog box opens with the message attached.
3. Address and send the e-mail as you normally would.

Opening the contact record from a voice message

If a voice message was left by an identified contact (see Chapter 16), you can open the contact record to view or change information about the contact. To do so, choose **Actions > Open Contact**.

Deleting voice messages

By default, messages in the Deleted folder that are older than three days are permanently removed from TeleVantage. For information about how to change the default, see “To empty the Deleted folder automatically” on page 8-19.

To move a voice message to the Deleted folder

1. Select the message.
2. Choose **Edit > Delete**. The message is moved to the Deleted folder. You can still play it or retrieve it if necessary.

Deleting a message permanently

To delete a message permanently, select the message and press SHIFT+DELETE. A message is also deleted permanently when you delete it from the Deleted folder or empty the Deleted folder. See “Managing the Deleted folder” on page 8-19.

Microsoft Exchange Server synchronization

If your office uses Microsoft Exchange Server for e-mail, TeleVantage can synchronize the Voice Messages view’s Inbox and Deleted folders with those in your e-mail program. When synchronized, messages that you delete in one application are deleted in the other application.

For example, if you delete a voice message notification e-mail in your e-mail program, TeleVantage moves that voice message to its own Deleted folder. Similarly, if you delete the matching voice message in TeleVantage, your e-mail notification moves to your e-mail program’s Deleted folder.

For more information, see your TeleVantage system administrator.

Associating a voice message from “Unknown” with a contact

A voice message that appears from “Unknown,” means that TeleVantage could not identify the caller. You can associate the message with a contact, so that the correct name appears in the Call Monitor and so that TeleVantage identifies the contact on subsequent calls from that phone.

See “Associating a call or Caller ID number with a contact” on page 16-9 for complete instructions.

Marking a voice message Heard or Unheard

The envelope icons   indicate whether or not you have listened to a message.

To mark an old (heard) voice message as new (unheard), select the message and then choose **Actions > Mark As Unheard**.

Marking a voice message Urgent or Private

You can mark a voice message Urgent, Private, or both. Private messages cannot be forwarded, and users who share your mailbox cannot play them, reply to them, or call back the sender.

The icons in the columns to the right of the envelope icon show whether a message is Urgent or Private .

- To mark a voice message Urgent, select the message and choose **Actions > Urgent**. Select the command again to remove its Urgent status.
- To mark a voice message Private, select the message and choose **Actions > Mark As Private**. After a message is marked Private, it cannot be made not Private again.

Adding notes to a voice message

To add written notes to a voice message, click the message and type your notes in the Notes Pane at the bottom of the Voice Messages view.

Any notes that you create for a message accompany that message if it is forwarded to other users.

Hiding and showing notes

To hide or display the Notes Pane, choose **View > Notes Pane**. To hide the Notes column, see “Showing and hiding columns” on page 18-15.

Managing call recordings

The following types of call recordings can appear in your Inbox:

- Recordings that you made yourself using the Call Monitor (see “Recording a call” on page 11-11).
- Recordings made automatically by the system. Usually such recordings are sent to the voice mailbox of a system administrator or call center queue supervisor. If you are receiving such recordings in error, speak to your system administrator.

You can listen to a call recording by double-clicking it, just as you listen to a voice message. You can also handle call recordings just as you handle voice messages.

For automatic call recordings made by the system only, you can choose **Actions > Open Call Log Details** to open the Call Log Details dialog box and view details about the recorded call. See “Viewing call details” on page 14-5. This command is not available for call recordings you made yourself, or call recordings made automatically by a call center queue.

Organizing voice messages in folders

TeleVantage allows you to archive your voice messages in folders that you create. You can create as many folders and subfolders as you want. See “Organizing the contents of a view in folders” on page 8-17.

Sharing your voice messages

You can share your voice message folders with other TeleVantage users, including your Inbox folder, your Deleted folder, and your Saved folder. You can also share any custom folders that you create. See “Sharing views and folders” on page 8-20

Viewing your voice mailbox size

Your voice mailbox has a limited amount of disk space (in minutes) to store your voice messages. Ask your TeleVantage system administrator for the total number of minutes that have been allocated to you. The TeleVantage default is 20 minutes.

All voice files in all your folders count against your total mailbox space, including messages in the Deleted folder and recorded conversations. When your mailbox is full, callers cannot leave you voice mail. They hear a message telling them that your mailbox is full.

If you log in to TeleVantage by using the telephone commands and your mailbox is nearly full, TeleVantage prompts you to empty your Deleted folder.

To view the amount of space remaining in your mailbox

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab. The **Usage** progress bar indicates how close your voice mailbox is to being full.

Note: When your mailbox is nearly full, you hear a warning message when you start the Client or when you log in on the telephone.

Setting a maximum length for your voice messages

You can set a maximum length for voice messages. If a message exceeds the time limit, TeleVantage ends the message. The default maximum is 180 seconds (three minutes). The highest maximum you can set is 300 seconds (5 minutes).

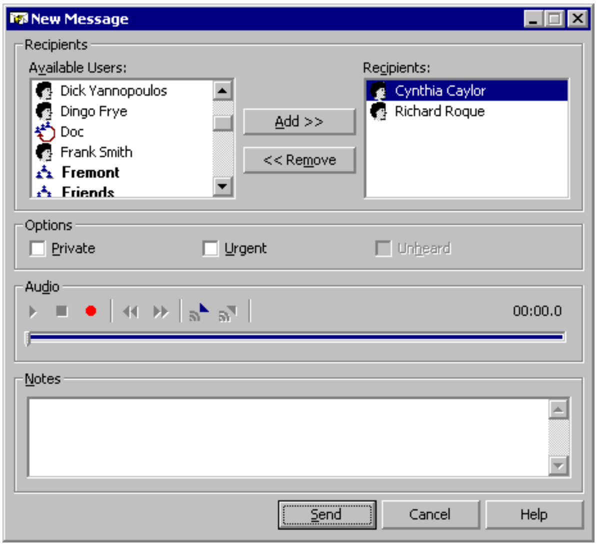
To set the maximum length for voice messages

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. In the **Maximum message length** field, enter a number of seconds.
4. Click **OK**.

Sending a message directly to a user's voice mail

You can record a message and send it directly to the voice mail of one or more TeleVantage users.

1. Choose **File > New > Voice Message**. The New Message window opens.



2. Click the recipients who you want receive the message in the **Available Users** list. Hold down the CTRL key as you click to select multiple users. If you select a workgroup or a queue, the message is sent to every user within the workgroup or queue.
3. Click **Add** to move the selected users to the **Recipients** list.
4. Use the audio controls to record the message. For instructions, see "Using the audio controls" on page 8-23.
5. Select any of the following options:
   - **Private.** The voice message is marked Private and cannot be shared by the recipients.
   - **Urgent.** The voice message is marked Urgent.
6. In **Notes**, type any notes that you want to accompany the message. The notes appear in the Notes column of the recipients' Voice Messages views.
7. Click **Send** to send the message.

Knowing when you have new messages

New voice messages appear in the Inbox folder of the Voice Messages view soon after they are left. TeleVantage indicates new voice messages in the following ways:

- System tray button
- Stutter dial tone
- Message-waiting light (if supported by your phone)
- New message tone
- E-mail, pager, and call notifications

System tray button

If the Client is running, the following button appears in the system tray at the lower right corner of your Windows taskbar when a new message arrives:

Hold the mouse pointer over the button to see the number of new (unheard) voice messages.

Double-click the button to bring the Client program to the front of your Windows desktop.

Stutter dial tone

A dial tone that begins with a stutter indicates that you have unheard voice messages.

To enable or disable stutter dial tone

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select or clear **Stutter tone**.
4. Click **OK**.

Message waiting light

If your phone has a CLASS message waiting light that TeleVantage supports, you can have it flash to indicate new voice messages.

To enable or disable the message waiting light

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select or clear **Message waiting indicator**.
4. Click **OK**.

Note: If more than one user is assigned to a phone, the message waiting light and stutter dial done occur if there are new messages for any of them.

New message tone

The Client can play a tone whenever a new voice message is received. See "Playing a sound when a new message arrives" on page 18-12.

E-mail, pager, and call notifications

TeleVantage can alert you by e-mail, page, or telephone call whenever you receive a new voice message. This feature is handy if you are working at a remote location at which the Client program is not available. You can then call your office or log on to the Web Client and hear your messages.

You can receive notification for all voice messages, or for urgent messages only. You can also receive notifications only on specific days or at specific times. See "Scheduling notifications" on page 13-15.

Important: For e-mail notification to work properly, the TeleVantage Server must be configured correctly. See your TeleVantage system administrator if you encounter any problems.

Notification is sent only for new voice messages, not new call recordings.

Setting up e-mail notification

E-mail notification messages include the caller's name (if available), the phone number at which the call originated, the extension at which the message was left, the message length, and any notes associated with the message. You can even have TeleVantage attach the voice message itself to the e-mail as an audio file so that you can play it wherever you are.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Notifications tab.
3. From the **Settings for** drop-down list, choose **E-mail notifications**.
4. Select one of the following notification options on the drop-down list:
   - **Do not send e-mail notifications.** You do not receive e-mail notification of new voice messages.
   - **Send e-mail for all messages.** You receive an e-mail notification whenever you receive a new voice message.
   - **Send e-mail for Urgent messages only.** You receive an e-mail notification whenever you receive a voice message marked Urgent.
5. In the **E-mail address(es)** field, type one or more e-mail addresses to which you want TeleVantage to send notifications. Separate addresses by semicolons.
6. To instruct TeleVantage whether to attach the voice message to the e-mail as a .WAV file, select one of the following options on the drop-down list:
   - **Do not attach voice message.** Messages are not attached to the e-mail.
   - **Attach voice message.** Messages are attached to the e-mail and also appear in the Inbox folder of the Voice Messages view marked as new (unheard).

- **Attach voice message and mark as heard.** Messages are attached to the e-mail and appear in the Inbox folder of the Voice Messages view marked as old (heard).
- **Attach voice message and delete from Inbox.** Messages are attached to the e-mail and are moved to the Deleted folder of the Voice Messages view.

Note: Your TeleVantage system can be synchronized with Microsoft Exchange so that changes you make to messages in one Inbox folder are reflected in the other. See "Microsoft Exchange Server synchronization" on page 13-7 for more information.

7. Click **OK**.

Setting up pager notification

You can set pager notifications to include the Caller ID of the voice message, the TeleVantage extension that the caller dialed, and the length of the voice message.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Notifications tab.
3. From the **Settings for** drop-down list, choose **Pager notifications**.
4. Select one of the following notification options on the drop-down list:
   - **Do not send pager notifications.** You do not receive pager notification of new voice messages.
   - **Send a page for all messages.** You receive a page whenever you receive a new voice message.
   - **Send a page for Urgent messages only.** You receive a page whenever you receive a voice message marked Urgent.
5. In the **Page using** field, select the dialing service that you want TeleVantage to use to dial your pager. For more information about dialing services, see "Using dialing services" on page 12-6.
6. In the **Dial Sequence** field, enter the dial string for your pager, including the phone number of the paging service and your pager's PIN, if required. The dial string can contain any touch tone digit (0-9, *, #). You can enter commas to indicate 2-second pauses in the dial sequence.

   You can also use the following special characters to add information to the page:
   - I or i sends the Caller ID number (for an external call) or TeleVantage extension (for an internal call).
   - E or e sends the TeleVantage extension that the caller dialed.
   - L or l sends the length of the voice message in seconds.

Example: The dial sequence `18007771000,,,1245983#E` causes TeleVantage to dial your paging service, pause for 6 seconds, enter your pager's PIN (1245983) followed by # to indicate end-of-PIN, enter your extension (the extension at which the voice message was left), and then hang up. Your pager would display only the extension, 103 for example.

7. Click **OK**.

Notes

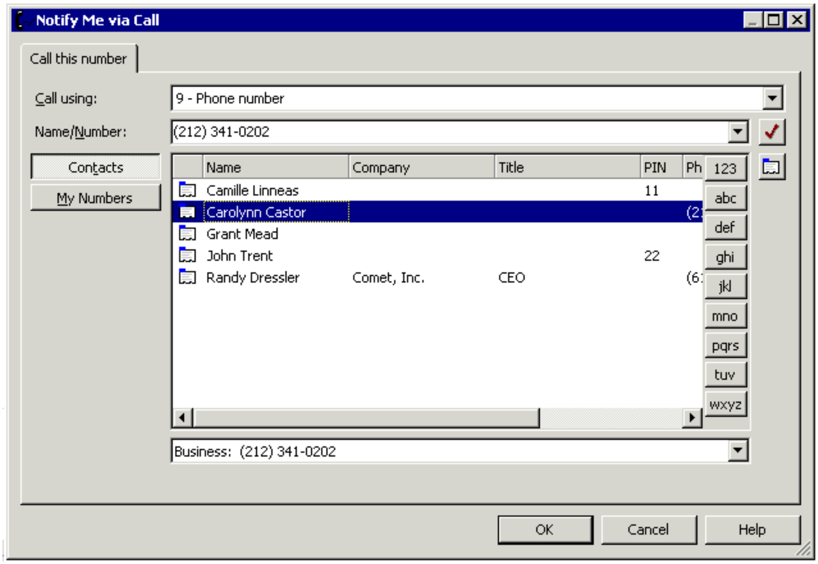
- If you receive only the last portion of the pager data that you specify, you may not have placed enough pauses between the pager number to be dialed and the information to send. If this problem occurs, add more commas to the **Dial Sequence** field.
- Do not enter multiple stars (*) in a row in the pager string. Use only one star to send a dash. Multiple consecutive stars can terminate the page message.

Setting up call notifications

TeleVantage places notification calls to the number of your choice. The call says, "<the queue's voice title> has a new voice message from <caller's voice title if available>. Press # to hear your message." By pressing #, you can log into the queue's account and hear the new message.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Notifications tab.
3. From the **Settings for** drop-down list, choose **Call notifications**.
4. Select one of the following notification options from the drop-down list:
   - **Do not place call notifications.** Calls are not placed when the queue receives new voice messages.
   - **Place call for all messages.** A call is placed whenever the queue receives a new voice message.
   - **Place call for urgent messages only.** A call is placed whenever the queue receives a voice message marked urgent.

5. Click ... in the **Number** field to open the Notify Me via Call dialog box.



6. From the **Call Using** drop-down list, select the access code and dialing service to use when placing notification calls.
7. Click **Contacts** or **My Numbers**, then select the number to call.
8. Click **OK**.

Note: You can enter or change the phone number to which notification calls are sent using the telephone commands. Log in and press **6 4**. By logging in from a remote phone, you can have call notifications sent to wherever you are.

Scheduling notifications

If you do not want to receive notifications 24 hours a day, 7 days a week, you can schedule notifications to occur at specific times only. For example, you can have TeleVantage send notifications only during business hours or after business hours on work days. You can also set up custom hours. You can create different schedules for e-mail, pager, and call notification.

Schedule entries

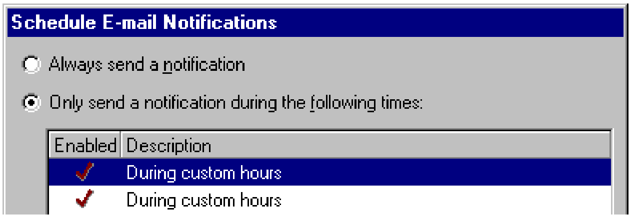
Your schedule is composed of individual schedule entries that TeleVantage uses in combination. For example, if you want to be notified of new voice messages during business hours and all day on holidays, you can add one schedule entry for “during business hours” and another schedule entry for “on holidays.” You can define your own custom schedule entries for even greater precision.

Each schedule entry can be enabled or disabled, which gives your notification schedule adaptability and flexibility. For example, if you do not want to be paged during the current holiday, you can disable the schedule entry for “on holidays.” When you return after the holiday you can enable it again.

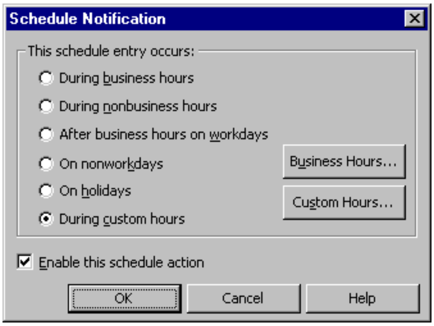
The following procedure illustrates how you would create a schedule that sends e-mail notifications for new voice messages during business hours (one schedule entry) and on holidays (a second schedule entry). Both schedule entries are enabled.

To define a schedule for notifications

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Notifications tab.
3. From the **Settings for** drop-down list, select the type of notification for which you want to create a schedule.
4. Click **Schedule**.
5. The Schedule (E-mail, Pager, or Call) Notifications dialog box opens and displays any schedule entries that have been defined so far.



6. Select one of the following:
   - **Always send a notification.** The schedule (if any has been set up) is ignored, and you receive notification of new voice messages at all times.
   - **Only send a notification during the following times.** You receive notification only during the times specified in your schedule.
7. To add a schedule entry, click **Add**. The Schedule Notification dialog box opens.



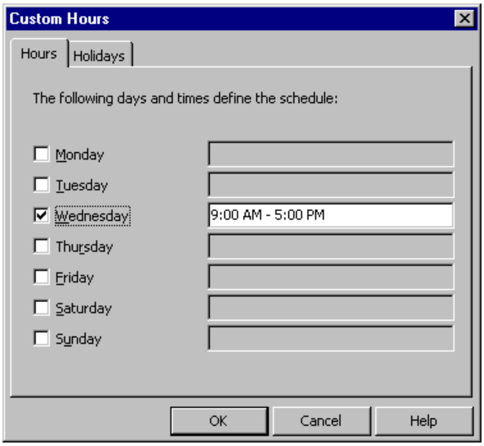
8. To specify which set of business hours to use for scheduling, click **Business Hours**. Your office may have set up multiple sets of business hours, for example, one set for the sales department and another for support. In the Business Hours dialog box under **Name**, select the business hours during which you want to schedule notifications, and then click **OK**.

   Note: If your office has no business hours set that matches your notification needs, you can ask your TeleVantage system administrator to create a new set for you or you can define custom hours for your schedule (see the next step).

9. Under **This scheduled entry occurs**, choose a time during which you want to be notified of new voice messages. For purposes of illustration, the business hours are assumed to be Monday through Friday, 9:00 a.m. to 5:00 p.m.:

   - **During business hours.** Notifications are sent Monday through Friday, 9:00 a.m. to 5:00 p.m.
   - **During nonbusiness hours.** Notifications are sent at all times other than business hours, including early mornings, evenings, weekends, and holidays. In this example, notifications are sent Monday through Friday, 5:01 p.m. to 8:59 a.m., and all day on Saturdays, Sundays, and holidays.
   - **After business hours on work days.** Notifications are sent Monday through Friday, 5:01 p.m. to 8:59 a.m.
   - **On nonwork days**. Notifications are sent all day on Saturdays and Sundays.
   - **On holidays**. Notifications are sent all day on holidays.
   - **During custom hours**. Notifications are sent only during the days and hours you define, independent of your office's business hours and holiday hours. Click the **Custom Hours** button to specify days and times. The Custom Hours dialog box opens.

     On the Hours tab, enter the days and times.



On the Holidays tab of the Custom Hours dialog box, click **Add** to specify individual calendar dates. When your custom hours are finished, click **OK**.

10. To receive notifications during the times you have chosen, make sure **Enable this schedule action** is checked in the Schedule Notification dialog box, and then click **OK**. You return to the Schedule E-mail (or Pager) Notification dialog box.
11. To add more schedule entries, repeat this procedure. When your schedule is finished, click **OK**.

Managing greetings

Greetings are recorded messages that callers hear when they reach your voice mail. For example, “This is Steve. I’m not at my desk at the moment, but leave me a message and I’ll get back to you soon.”

With TeleVantage you can record and store multiple greetings and specify when you want TeleVantage to use each one. For example, you can have a normal greeting for everyday use, another greeting for extended absences, and a third greeting for vacations. You can also create and use custom greetings for individual callers (see Chapter 17).

Greetings for situations other than voice mail

You may need to record greetings for other circumstances than voice mail. TeleVantage often plays a greeting before the final action of a routing list. If your account has no voice mailbox, or if you create a routing list with a final action of “Transfer to extension,” “Hang up,” or “Pause and Repeat,” you might need to record a greeting that tells the caller about those actions. See “Using greetings with routing list final actions” on page 15-14.

Space for greetings

You have a limited amount of disk space for greeting and voice title recordings. See your TeleVantage system administrator to find out how much space has been allocated to you and how much you have used.

Using a grab-and-hold greeting

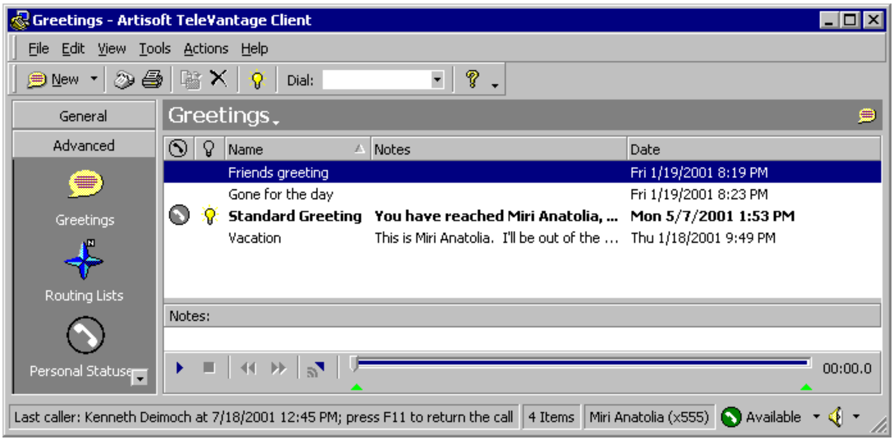
Your TeleVantage account includes a special greeting called a grab-and-hold greeting that TeleVantage plays to callers when you put incoming calls on hold without talking to the callers first. For more information about recording and using a grab-and-hold greeting, see “Putting an incoming call on hold” on page 11-7.

Greetings and personal status

Your greeting settings may be overridden if you apply a personal status with different greeting preferences, or if you change your active settings directly. However, neither of these actions changes the settings in the Greetings view. For more information about personal status and the active settings, see Chapter 9.

The Greetings view

Click **Advanced** on the view bar to locate the button for the Greetings view. Click the button to open the view.



The Greetings view contains three sections:

- **The Greetings list.** Your existing greetings appear here.
- **The Notes Pane.** This pane displays the contents of the greeting. To hide or show the Notes Pane, choose **View > Notes Pane**.
- **The audio controls.** Use these controls to record a new greeting or rerecord a selected greeting. See “Using the audio controls” on page 8-23.

The active greeting

The active greeting is the greeting that TeleVantage plays by default when callers reach your voice mail. Only one greeting at a time can be the active greeting.

Note: Callers can hear a greeting other than your active greeting if you specify another greeting in a personal status, call rule, or routing list. See “Greeting hierarchy” on page 13-20.

The active greeting appears in bold text and is marked by  . To designate a greeting as the active greeting, select it and choose **Actions > Set as Default and Active**. This command also makes the greeting the personal status default greeting (see the next section).

To make the greeting your active greeting without making it the personal status default greeting, double-click the greeting to edit it and check **Active greeting for this extension**.

The personal status default greeting

The personal status default greeting is the greeting that is used whenever you select a personal status whose Greeting property is set to **Default**. For more information, see “Personal status defaults” on page 9-12.

The personal status default greeting is marked by . To make a greeting the greeting that you want to be your personal status default, select the greeting and choose **Actions > Set as Default and Active**. This command also makes the greeting the active greeting.

To make the greeting your personal status default greeting without making it the active greeting, double-click the greeting to edit it and check **Default personal status greeting**.

Note: When you make a greeting active using the telephone commands, it also becomes the personal status default greeting.

Greeting hierarchy

A routing list, a call rule, your current personal status, and your active greeting can all specify a different greeting to play when the caller reaches the final action of your routing list (usually the final action is your voice mail). In cases of conflict, TeleVantage uses the following rules:

- If the routing list being followed specifies a greeting, that greeting plays, overriding all other settings.
- If the routing list does not specify a greeting, then TeleVantage uses the standard hierarchy for active settings. See “Active settings hierarchy” on page 9-12.

Recording a new greeting

1. Choose **File > New > Greeting**. The Greeting dialog box opens.
2. Enter a **Name** for the greeting.
3. In the **Contents** field, enter a description of the greeting. This description can be the text of the statements used in the greeting.
4. Record the greeting by using the audio controls. See “Using the audio controls” on page 8-23.
5. Click **OK**.

To rerecord or edit an existing greeting, double-click the greeting in the Greetings view and edit the greeting by using the audio controls.

E-mailing a greeting

You can e-mail a greeting as a .WAV file attachment.

1. Select the greeting that you want to e-mail.
2. Choose **File > Send To Mail Recipient**. Your e-mail application’s Send dialog box opens with the greeting attached.
3. Address and send the e-mail as you normally would.

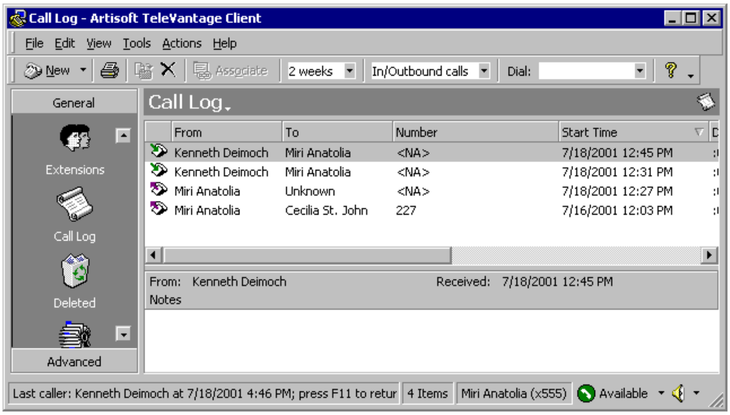
CHAPTER 14

USING THE CALL LOG VIEW

CHAPTER CONTENTS

The Call Log view

The Call Log view contains a record of all incoming and outgoing phone calls associated with your extension. Internal calls (calls between TeleVantage users) may or may not be logged, depending on how your TeleVantage system administrator set up the system.



Call Log view filters

The Call Log view toolbar contains two drop-down lists that enable you to view only the calls you want.

Use either or both of the following:

- **Time filter.** View only the most recent calls according to the time frame you select.
- **Inbound/outbound filter.** View only inbound calls, only outbound calls, or both.

Call Log view columns

The following table shows the columns that are available in the Call Log view. Many of these columns are hidden by default. You can view more information for a call in either of the following ways:

- Double-click a call to view it in the Call Details dialog box, in which more columns are displayed. See “Viewing call details” on page 14-5.
- Add more columns to the Call Log view itself. See “Customizing columns” on page 18-15.

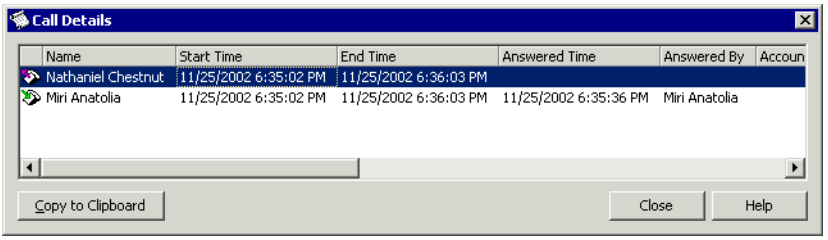
Column	Description
	Indicates incoming or outgoing calls, respectively. Called **Direction** in the Show Columns dialog box.
Account Code	Account code associated with the call, if any.
Answered By	Name of the user who answered an incoming call. Useful for analyzing data for ACD workgroups.
Callback number	The callback phone number entered by the caller, if one is available.
Called Number	On incoming calls, your Direct Inward Dial (DID) number if the caller used it to call you. The field is blank for incoming calls without DID. On outgoing calls, the number you dialed.
Custom Data	Custom data, if any, associated with the call. Custom data can be collected by IVR Plug-ins, auto attendants, or call center queues.
Dial String	Digits that TeleVantage actually dialed over the trunk, which may be different than the digits TeleVantage displays in a contact’s phone number. For example, a dial string may contain an international or long-distance access code, a dialing prefix, or a dialing suffix.
Duration	Length of the call, beginning at the time when the two parties are connected.
From	Name of the person who originated the call. On incoming calls, "Unknown" appears unless the user identified the caller as a contact. On outgoing calls, this is the user’s name.
From Device	The station ID or TeleVantage trunk number from which the call originated.
From Number	On incoming calls, the caller's extension or external phone number. On outgoing calls, the user's extension.
Left Message	If checked, the caller left a voice message.
Notes	Any notes associated with the call.

Column	Description
Number	On incoming calls, Caller ID name and number if available. On outgoing calls, the number the user dialed. On a call to or from another TeleVantage user, this field contains <NA>.
Organization	Organization associated with the call, if any. Organizations are associated with outbound calls only, and represent the Organization to which the calling party belongs.
Placed By	Name of the person who placed the call. On incoming calls, “Unknown” appears unless TeleVantage identified the caller as a contact or user. On outgoing calls, the user’s name appears.
Recorded by Queue	If checked, the call was automatically recorded by a call center queue.
Recorded by User	If checked, you recorded the call manually using the Client commands (see “Recording a call” on page 11-11).
Result	How the caller’s wait ended. The possible outcomes are: **Abandoned.** The caller hung up before the call was answered. **Connected.** The call was answered. **To voice mail.** The call was sent to voice mail. **Blind Transfer.** A blind transfer sent the caller to another party. **Supervised Transfer.** A supervised transfer sent the caller to another extension. **Unknown.** TeleVantage was unable to identify the outcome of the call. **Login.** You logged in to TeleVantage at a remote phone.
Start Time	Date and time that the call first arrived in the TeleVantage system.
Stop Time	Date and time that the call ended.

Column	Description
To	Name of the party who received the call. On incoming calls, this is the user's name. On outgoing calls, "Unknown" appears unless the user identified the person as a contact. "& others" in this column indicates a call with more than two parties, for example, a conference call or a call that was transferred. Double-click the call to see all the parties in the Call Details dialog box.
To Device	On incoming calls, the user's station ID. On outbound calls, the trunk used for the call. If an incoming call was transferred, this column shows the last station that took the call.
To Number	On inbound calls, the extension or DID number that the caller dialed. On outbound calls, the number you dialed.
Wait Time	On incoming calls, the length of time from when the caller selected the user's extension to when the user picked up. On outgoing calls, **Wait Time** is always 00:00. This column is used primarily in call centers to keep track of the time callers spent waiting for an agent.

Viewing call details

You can view more information about your calls by double-clicking a call in the Call Log view. The Call Details dialog box opens.



The Call Details dialog box displays a separate line for each party in the call.

Note: The Call Details dialog box shows current information about the parties in the call, while the Call Log view shows the information as it was at the time of the call. Therefore the two can sometimes be different, for example, if the call was from a contact and you changed the contact's name since the time of the call.

Call Details columns

The Call Details dialog box contains the columns shown in the following table.

Column	Description
 	Indicates the incoming and outgoing components of the call, respectively.
Name	Name of the parties in the call. On incoming calls, “Unknown” appears unless the user identified the caller as a contact. On outgoing calls, the user’s name appears.
Start Time	Date and time that each party began participating in the call.
End Time	Date and time that each party left the call.
Answered Time	Date and time that the call was answered.
Answered By	Name of the users for whom this was an incoming call. Useful for analyzing data for ACD workgroups.
Account Code	Account code associated with the call, if any. See “Entering an account code for a call” on page 4-11.
Number	On incoming lines, Caller ID name and number, if available. On outgoing lines, the number dialed. On a call to or from another TeleVantage user, this field contains <NA>.
Number Type	The type of number displayed in the Number column. Types are: **Phone** External phone number **Internet** Internet or IP network address **Extension** Internal extension **Custom** Centrex extension
Access Code	On outgoing calls and incoming calls over an IP gateway, the access code of the dialing service used to place the call.
DID	On incoming lines, your Direct Inward Dial number if the caller used it to call you. DID is not applicable for outgoing lines.

Column	Description
Device	On incoming lines, the trunk or station number at which the call was placed. On outgoing lines, your station number.
Dial String	Digits that TeleVantage actually dialed over the trunk, which can be different than the digits TeleVantage displays in a contact's phone number. For example, a dial string can contain an international or long-distance access code, least-cost routing information, or dialing prefix or suffix.
Left Message	A check in this field indicates that the caller left a voice message.
Result	How the call ended. For a list of possible results, see **Result** in the previous table, on page 14-4.
Custom Data	Custom data, if any, associated with the call. Custom data can be collected by IVR Plug-ins or call center queues that prompt the caller for information.

Taking notes on a Call Log entry

You can take notes on a Call Log entry. Notes can help identify a call in the list or summarize important information about a call.

To take notes on a Call Log entry, select the entry, click in the Notes Pane, and then type your notes. When you are done, you can press ENTER or click your mouse anywhere. The notes you just created appear in the Notes column for that Call Log entry.

Hiding and showing the Notes Pane

To hide or show the Notes Pane, choose **View > Notes Pane**.

Associating a call from "Unknown" with a contact

When a Call Log entry appears from "Unknown," it means that TeleVantage was unable to identify the caller. You can associate the call with a contact, so that the correct name displays and TeleVantage identifies the contact on subsequent calls from that phone.

See "Associating a call or Caller ID number with a contact" on page 16-9 for complete instructions.

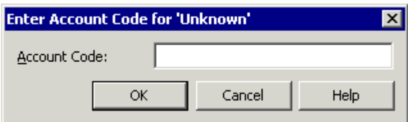
Returning a call in the Call Log view

1. Select the call in the Call Log view that you want to return.
2. On the **Actions** menu, choose one of the following:
   - **Place Call.** This command lets you choose the number to dial from a submenu. If the caller is a contact, you can choose the phone number to call from the list of the contact's phone numbers. You can also choose to call by using the Caller ID number of the call.
   - **Speed Dial.** This command places a call immediately to a user's extension, a contact's default number, or an unknown caller's Caller ID number. You can also choose Speed Dial by double-clicking the call.
3. Click **OK**. TeleVantage dials the number.

Entering an account code for a call

You can enter an account code or change the one already entered for a call in the Call Log. You must have permission to view and edit the Call Log to enter or change account codes.

1. Select the call, and then choose **Actions > Enter Account Code**.



2. Enter an account code.
3. Click **OK**.

You can also enter an account code using the telephone commands. See "Entering an account code for a call" on page 4-11.

Opening the contact record from a contact's call

If a call was identified as being from a contact, you can open the contact's record to view or change information about that contact. To do so, select the call and choose **Actions > Open Contact**.

Listening to a recorded call from the Call Log

If a call was recorded, you can play the recording from the Call Log. To play a call recording, you must have permission to view the voice mailbox in which the call recording resides.

To see which calls have call recordings attached to them, show the following two Call Log columns:

- **User Recording.** Displays a check for any call with an attached recording that you made.
- **Queue Recording.** Displays a check for any call that was recorded automatically by a TeleVantage call center queue. If your calls are not subject to such recording, you do not need to show this column.

To show columns, choose **View > Current View > Show Columns**.

Note: The Notes pane contains a call recording note if the call was recorded automatically by a call center queue.

To play a call recording

Select the call, then choose one of the following commands:

- **Actions > Open User Recording.** Plays call recording that you made manually.
- **Actions > Open Queue Recording.** Plays a call recording that was made automatically by a call center queue.

Note: If a command has multiple recordings to choose from, it plays the last recording made by the first user or queue to make recordings. For example, if you recorded two sections of a call, the last recording would play. If a call was handled by two queues, each of which automatically recorded it, the first recording would play.

Sharing the Call Log

You can share your Call Log view with other users, so that they can view it in their own Client. See “Sharing views and folders” on page 8-20.

Reporting on the Call Log

If you want to create reports based on the Call Log, you can do either of the following:

- Export the Call Log and analyze the data in Microsoft Excel. See “Importing and exporting TeleVantage items” on page 8-24.
- Run the TeleVantage Call Center Reporter by choosing **Tools > Reports**. You must have the required licenses to use the Call Center Reporter and you also must have permission to use it. See your TeleVantage system administrator about installing and running the Call Center Reporter.

Exporting the Call Log

For instructions on exporting your Call Log to a .CSV files, see “Exporting the Call Log” on page 8-29.

Advanced TeleVantage Features

CHAPTER 15

CALL FORWARDING AND ROUTING LISTS

CHAPTER CONTENTS

About call forwarding and routing lists

TeleVantage provides two ways of receiving your calls at a phone other than your own, ensuring that you do not miss important calls when you are away from your desk:

- **Call forwarding.** Your incoming calls ring at another phone. You can use another extension or an external number (for example, your home phone number). Click **Tools > Call Forwarding** in any view to forward your calls to another number (see “Forwarding calls” on page 15-3).
- **Routing lists.** Your incoming calls try a series of phone numbers until you answer at one of them. Open the Routing Lists view to create routing lists (see “Using routing lists” on page 15-7).

Call forwarding and Where I Am

When you forward your calls, you change a TeleVantage active setting called **Where I Am**. This setting specifies the phone (extension or external number) that rings when you receive incoming calls. By default, **Where I Am** is your TeleVantage station. You can change **Where I Am** in the following ways:

- **Forward your calls. Where I Am** becomes the number to which your calls are forwarded. See the next section, “Forwarding calls.”
- **Select a personal status with a unique Where I Am number. Where I Am** becomes the number specified in the personal status preference. See Chapter 9.
- **Change your active settings directly. Where I Am** becomes the number you specify. See “Personal status and your active settings” on page 9-9.

To view your current **Where I Am** location, choose **Tools > Active Settings**.

Forwarding calls

Call forwarding causes your calls to ring at another phone, either another extension or an external number. Call forwarding is useful when you are working away from your desk or your office for a period of time.

Notes

- Call forwarding automatically updates the default **Where I Am** location in all your routing lists and personal statuses. Whenever a routing list or personal status would normally try you at your desk, it tries you at your forwarding phone number instead. See "Using routing lists" on page 15-7 for more information.
- Your call forwarding settings may be overridden if you apply a personal status with a specific **Where I Am** preference or if you change your active settings directly. For more information about personal status and the active settings, see Chapter 9.

Forwarding calls by using the telephone commands

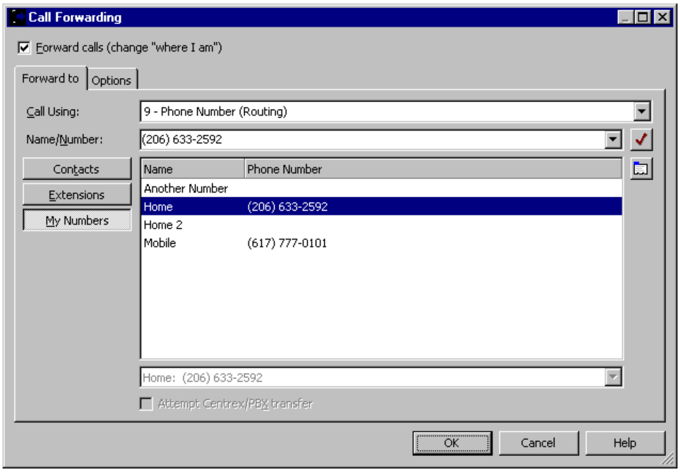
You can also forward your calls using the telephone commands. See "Forwarding your calls" on page 4-12.

Forwarding calls in the Client

The following two procedures describe how to use call forwarding in the TeleVantage Client.

To turn call forwarding on

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog box opens.



2. Check **Forward Calls (change "Where I Am")**.

3. Enter or select the number to dial in one of the following ways:

- Enter the number to which calls are forwarded in the **Name/Number** or **Name/Extension** field. You can also type the name of a contact or user.
- Click **Extensions** and select an extension on the list. You can also select a queue, auto attendant, IVR Plug-in, or workgroup.
- Click **Contacts** and select a contact on the list. The contact's default phone number appears in the drop-down list below the main list. If the contact has more than one phone number associated with it, you can select a different number on the drop-down list.

  To create a new contact, click  to open a new Contact dialog box. To edit the currently selected contact, press ALT and click . See "Entering a new contact" on page 16-4 for more information.
- Click **My Numbers**. To forward your calls to one of your own phone numbers, such as your home or mobile phone, select it on the list. To forward your calls to another number, type the number in the **Number** field. For instructions on entering numbers in your My Numbers list, see "Entering My Numbers" on page 12-4.

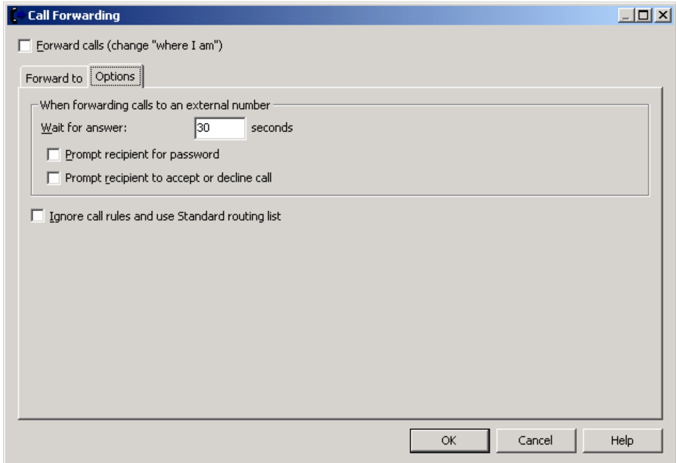
Note: When you forward calls to a mobile phone, make sure that you check **Prompt recipient to accept or decline call** on the Options tab. See "Mobile phone issues with routing lists" on page 15-8.

4. To enter an account code that will automatically be associated with all calls forwarded to this number, type a vertical bar character (|) after the number, followed by the account code.

At this point most users can click **OK** to complete call forwarding. The following steps are for advanced TeleVantage users.

5. If you want to route calls by using the Centrex or PBX dialing service, check **Attempt Centrex/PBX Transfer**. See "Forwarding calls over Centrex or PBX trunks" on page 15-7 for an explanation.

6. To set other call forwarding options, click the Options tab.



You can set any of the following options:

- **Wait for answer.** Enter the length of time in seconds that you want a call to ring the forwarding number before proceeding to the next step on your routing list (usually your voice mail). If you are using the option **Prompt recipient for password** or **Prompt recipient to accept or decline call** (described later in this step), you should enter at least 30 seconds. If you enter less time, the call might be sent to your voice mail before you finish listening and responding to the prompts.
- **Prompt recipient for password.** If checked, the person who picks up the phone hears, “Call for <your voice title>. Please connect me.” To be connected to the caller, you must enter your TeleVantage password. Entering a password ensures that only you can receive your forwarded calls.

  This option works only when calls are forwarded to an external number and when you have a voice title for yourself recorded. If you have not recorded a voice title, TeleVantage ignores your selection of this option. See “Recording your voice title” on page 2-2.
- **Prompt recipient to accept or decline call.** If checked, when you pick up the phone at an external number, TeleVantage announces the caller (“Call from”) and intended recipient (“Call for”) and asks you to accept or decline the call. Declined calls proceed to the next step in your routing list, usually your voice mail.

  The call announcing prompt loops, so you might not hear it from the beginning when you pick up the phone. Press any key on your phone other than 1 or 2 to start the prompt at the beginning.

  This option is used only when forwarding calls to an external number. When forwarding to an internal extension, your normal call announcing settings are used. See “Customizing or turning off call announcing” on page 18-4.

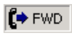
- **Ignore call rules and use Standard routing list.** Check to send all your incoming calls to the specified number, regardless of any call rules or routing lists that you have created that might otherwise send a call to a different number. If you have not created custom call rules or routing lists, you do not need to check this box.

  This setting disables your call rules and uses the Standard routing list for all calls. See “Using routing lists” on page 15-7 for an explanation of routing lists and Chapter 17 for an explanation of call rules.

7. Click **OK**.

To turn call forwarding off in the Client

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog box opens.
2. Uncheck **Forward Calls**.
3. Click **OK**.

Note: When your calls are forwarded, 

appears in the status bar. You can double-click this button to open the Call Forwarding dialog box.

Receiving forwarded ACD workgroup calls

If you receive calls as part of an ACD workgroup, and you have forwarded those calls to another number, the ACD workgroup user’s settings override your call forwarding settings. For example, you might have unchecked **Prompt recipient to accept or decline call**, but you might nevertheless get prompted to accept or decline the call when you receive an ACD workgroup call.

Placing calls at another user’s extension

Forwarding your calls to another user’s extension does not mean that you are logged in to that user’s station. When you place outgoing calls at another user’s phone, you are subject to the dialing restrictions and permissions that are in effect at that user’s station. Calls that you place at another user’s station appear in the Call Log view of that user.

To place calls as yourself from another user’s extension, log in either through the Client or the telephone commands. If you are using the telephone commands, log in, press **#** for a dial tone, and then place your outgoing call.

When you hang up, the station reverts to its regular user.

Call forwarding and voice mail

If no one answers at your call forwarding location, the call transfers to your voice mail.

To completely transfer your calls to another user's phone, so that the other user receives your voice mail as well as the calls themselves, do not use call forwarding. Instead, create a routing list whose only step is a final action of **Transfer to Extension**, and make this routing list your active routing list. (See “Using routing lists” on page 15-7.)

Forwarding calls over Centrex or PBX trunks

If your company has trunk lines that are connected by Centrex lines, an external PBX, or a TeleVantage IP Gateway, you can use the Centrex/PBX transfer feature to economize TeleVantage's trunk use.

You can check **Attempt Centrex/PBX transfer** when you set up call forwarding or when you set up a routing list step to a Centrex or PBX extension. If this option is checked, TeleVantage does the following:

- If the incoming call is on an analog Centrex/PBX line, TeleVantage attempts to route the user's incoming calls out to the forwarding number on the same trunk line using a Centrex or external PBX transfer, thus saving two TeleVantage trunks. Incoming calls on other analog trunk types are routed to the forwarding number in the usual way, using a second trunk.
- In cases where a call is forwarded between three TeleVantage Servers using IP Gateways, TeleVantage performs call path replacement to conserve trunks.

Note: Forwarding calls with this method avoids tying up extra trunks. However, when a call is routed out using a Centrex or PBX transfer, TeleVantage loses control of it and cannot send it to subsequent steps on the user's routing list. For example, after transfer using Centrex or PBX, a call cannot go to voice mail.

Using routing lists

A *routing list* is a series of phone numbers that TeleVantage dials when calls for you arrive. If you do not answer at one location, TeleVantage proceeds to the next. For example, you can set up a routing list that tries you at your desk, then at your home, and finally at your mobile phone.

A routing list also contains a final action that determines what happens if no one answers by the end of the list. Usually the caller is sent to your voice mail, but you can specify other final actions. For example, you can transfer calls to another extension, put callers on hold and try the series of numbers again, or hang up.

You can create as many routing lists as you want and make any one of them the active routing list at any time.

How routing lists move from step to step

A routing list moves to the next phone number in the series if it:

- Detects a busy signal
- Encounters the three-tone operator intercept, for example, when a number is not in service
- Rings for a number of seconds that you specify

You can have TeleVantage prompt the recipient to accept or decline the call. In that case, the routing list moves on unless someone presses **1** to accept the call. You can choose to prompt the recipient at external phone numbers only. See “Creating a new routing list” on page 15-10 for more information.

Important: If you are using hands-free answering, your routing list will not be used unless you have enabled call announcing. When you are in hands-free mode, your phone is automatically picked-up—whether you are there to hear it or not. Therefore, the pickup stops the routing list from being processed. If you want your routing list to be processed while you are using hands-free answering, be sure to enable call announcing (click **Tools > Options** and then click the Incoming Calls tab).

Caller options while following a routing list

When a routing list moves to the next step, TeleVantage can alert the caller and offer the following choices:

- Press 1 or stay on the line to try the next number.
- Press 2 to leave a voice message.
- Press 3 to return to the auto attendant.
- Press 0 to transfer to the Operator. If you have defined a personal Operator, the call is transferred to that extension. If you have not defined a personal Operator, the call is transferred to your office’s Operator extension.

You can specify whether TeleVantage offers these choices for each step in the routing list. See “Creating a new routing list” on page 15-10.

Mobile phone issues with routing lists

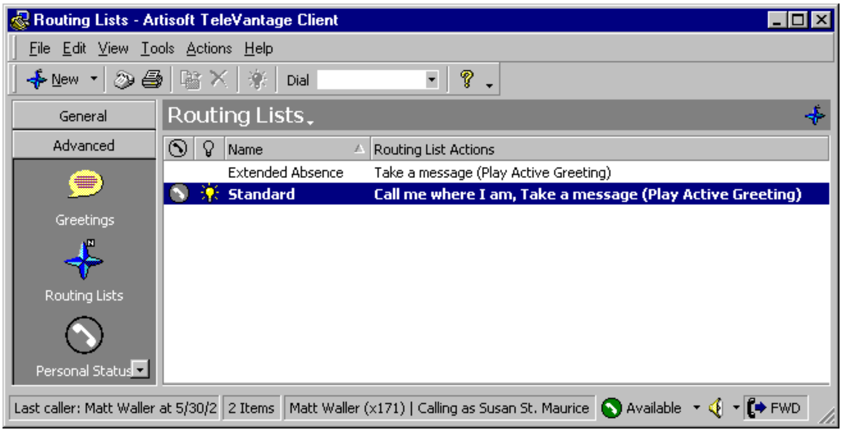
Calls to a mobile phone are picked up by the mobile phone company first and then passed to the individual phone. When TeleVantage detects this first pickup, it stops proceeding down the routing list, whether or not you actually answer the mobile phone. For this reason, when you put a mobile phone in your routing list, always check **Prompt recipient to accept or decline call**. TeleVantage then relies on user input to signal a connection and will proceed down the routing list unless you explicitly accept the call.

Routing lists for individual callers

By using call rules, you can have TeleVantage use a specific routing list for a specific caller or group of callers. For example, you can have a routing list for important customers that includes trying your mobile phone and another routing list for everyone else that only rings your extension. See Chapter 17 for more information.

The Routing Lists view

Click **Advanced** on the view bar to locate the button for the Routing Lists view. Click the button to open the view.



The Standard routing list

The Standard routing list is the default routing list that is built into TeleVantage. It consists of one step: trying you at your **Where I Am** location. (See “Call forwarding and Where I Am” on page 15-2.) If you are busy or do not answer, the routing list sends the caller to voice mail.

You cannot edit the Standard routing list. To have calls follow a different route, you must create a new routing list and make it the active routing list.

The active routing list

The active routing list is the routing list that all incoming calls follow. Calls can follow another routing list if you have created call rules for them (see Chapter 17). Only one routing list at a time can be the active routing list. The active routing list is marked by bold text and  .

You cannot delete the active routing list.

To make a routing list the active routing list

1. Right-click the routing list that you want to make the active routing list.
2. Choose **Actions > Set as Default and Active**.

This command also makes the routing list the personal status default routing list (see the next section). To make a routing list active without making it the personal status default routing list, edit the routing list and check **Active routing list for this extension**.

Note: Your active routing list may be changed if you apply a personal status with a different routing list preference or change your active settings directly. For more information about personal status and active settings, see Chapter 9.

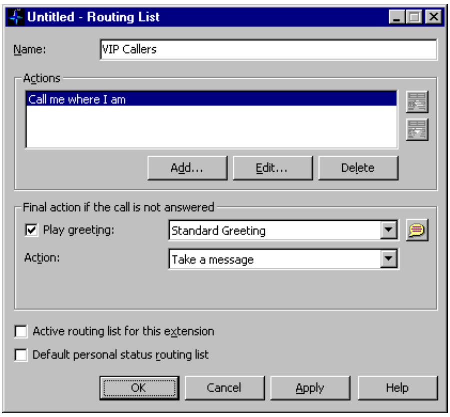
The personal status default routing list

The personal status default routing list is the one that is used whenever you select a personal status whose Routing List preference is set to **Default**. For more information, see “Personal status defaults” on page 9-12.

The personal status default routing list is marked by . To make a routing list the personal status default, select the routing list and choose **Actions > Set as Default and Active**. This command also makes the routing list the active routing list. To make a routing list the personal status default routing list without making it active, edit the routing list and check **Default personal status routing list**.

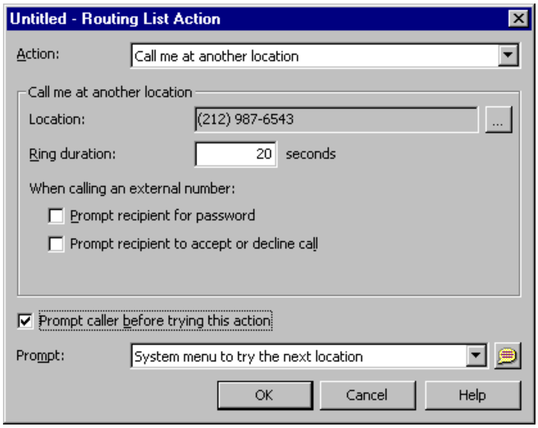
Creating a new routing list

1. Choose **File > New > Routing List**. The Routing List dialog box opens. Under **Actions**, the steps of your routing list appear in the order that they will be completed. Each step is a phone number at which TeleVantage will try to reach you.



2. Enter a name for the routing list in the **Name** field.

3. Click **Add** to add a routing list step. The Routing List Action dialog box opens.



4. In the **Action** field, choose one of the following actions. The other elements in the dialog box change depending on your selection.

   - **Call me where I am.** This action sends calls to your **Where I Am** phone, which is your station unless you have changed it (see "Call forwarding and Where I Am" on page 15-2). Specify the length of time the phone should ring in the **Ring duration** field.

   - **Call me at another location.** This action directs calls to an extension or an external number that you specify. Click ... to open the Call Me at Another Location dialog box, which functions in the same manner as the Place Call To dialog box. For information about using this dialog box, see "Placing a call" on page 12-2.

     Specify the length of time the phone should ring in the **Ring duration** field.

     If you choose an external number, see step 5 for further options.

     Calls routed to another extension do not follow call forwarding or routing lists in effect at that extension. To send calls to another extension so that they follow that extension's forwarding or routing list, use a final action of **Transfer To extension**.

     You cannot route calls to an auto attendant or call center queue as a routing list step, but you can do so by using a final action of **Transfer To extension**.

   - **Call a Workgroup.** This action directs calls to one or all members of a workgroup. Usually this action is used only by TeleVantage system administrators setting up an ACD workgroup. For instructions, see "Routing calls to workgroups" on page 15-13.

     Specify the length of time the phone or phones should ring in the **Ring duration** field.

   - **Play Greeting.** This action does not ring a phone, but instead plays the caller the greeting that you select on the **Greeting** drop-down list. You can also play a greeting as part of each step and before the final action. To record a new greeting from this dialog box, click . See “Managing greetings” on page 13-18.

While any greeting is playing, the caller can press 0 to transfer to the Operator or 1 to leave a voice message. You might want your greeting to mention these options.

5. If you are routing the call to an external number, you can use the following options under **When calling an external number**:

   - **Prompt recipient for password.** The person who answers the phone hears, “Call for <your voice title>. Please connect me.” To be connected to the caller, you must enter your TeleVantage password. Using this option ensures that only you can receive your calls at the external phone number.

     This option is available only if you have recorded a voice title. See “Recording your voice title” on page 2-2 for more information.

   - **Prompt recipient to accept or decline call.** TeleVantage announces the caller (“Call from”) and the intended recipient (“Call for”), and offers the option to accept or decline the call. Declined calls proceed to the next routing list action.

     With this option checked, the call will not be connected unless someone presses **1** to accept it. For this reason, leave the field unchecked when routing to a pager.

6. To play the caller a message before the routing list tries this step, check **Prompt caller before trying this action**, and then select the message on the drop-down list. You can select one of your greetings or **System menu to try the next location**, which offers the caller options (see “Caller options while following a routing list” on page 15-8). You can also click to create a new greeting.

   For example, a message might say, “The system will now try my home number to try to find me. If you would rather transfer to the Operator, press 0.”

7. Click **OK** to add this step to your routing list. The Routing List Action dialog box closes, and the new step appears under **Actions** in the Routing List dialog box.

   Repeat steps 3-7 to create additional steps for the routing list.

8. When you have finished creating the steps that you want to the routing list to take, in the Routing List dialog box, specify the **Final action if the call is not answered**. That is, specify what you want TeleVantage to do if it gets to the end of the routing list and no one has answered.

   To play a greeting before the final action, check **Play greeting** and choose the greeting on the drop-down list. For information about the System hold greeting, see the **Pause and repeat** final action in the following list.

   Important: Under most circumstances you should select this check box and select **Active** as the greeting. For information, see “Using greetings with routing list final actions” on page 15-14.

   Select one of the following final actions on the **Action** drop-down list:

   - **Take a message.** The call is sent to your voice mail.

   - **Hang up.** Calls from TeleVantage users and from external callers are disconnected.

- **Prompt to hang up.** External callers are prompted to choose to end the call or to stay on the line for more options. Callers who want more options are transferred back to your company's auto attendant.
- **Transfer to an extension.** The call is transferred to an extension that you select on the **Extension** drop-down list, for example, an operator, a coworker who handles your calls, or an auto attendant. The transferred call is treated as a new call to that extension. If no one answers at that extension, the call follows that extension's routing list.
- **Transfer to other voice mail.** The call is sent directly to another user's voice mail.
- **Pause and repeat.** The caller holds for the number of seconds you define in the **Pause duration** field, and then begins the routing list again. During the pause, callers can press **0** for the operator or **1** to leave a voice message. The greeting you choose can mention these options.

  In the list of greetings is a special prerecorded greeting called the System Hold Greeting. It says, "The person you are calling is unavailable. To hold, please stay on the line. To leave a message, press 1." It does not mention the option to press 0 for the operator.

Note: You can also play a greeting before each individual action of the routing list. See step 6 of this procedure.

9. Check **Active routing list for this extension** if you want to make this routing list your active routing list.
10. Check **Default personal status routing list** to make this routing list the default routing list for your personal statuses. See "Personal status defaults" on page 9-12.
11. Click **OK** to save the routing list and close the Routing List dialog box.

Routing calls to workgroups

A routing list step can send a call to a group of people rather than a single phone by using the action **Call a Workgroup**. Anyone in the workgroup can answer the call. TeleVantage system administrators must use this option to set up ACD workgroups.

Workgroups can contain users and contacts, and can be as large or as small as you want. See "Using workgroups" on page 16-14 for instructions on creating a workgroup.

To route calls to a workgroup as a step in an existing routing list

1. Double-click the routing list in the Routing Lists view. The Routing List dialog box for that routing list opens.
2. Click **Add**. The Routing List Action dialog box opens.
3. In the **Action** field, select **Call a Workgroup**.
4. Select a **Workgroup** or click  to create a new workgroup.

5. Under **Method**, choose one of the following ways to ring the workgroup's phones:
   - **Sequentially from the top down.** The call tries each member of the workgroup in order until it is answered, starting with the first user.
   - **Individually in a round robin.** The call tries each member of the workgroup in order until it is answered, starting with the next user in line after the one who answered the preceding call.
   - **Simultaneously.** The phones of all workgroup members ring simultaneously, and the call goes to the first user who accepts it. Any contacts in the workgroup are ignored.
6. In the **Ring duration** field, specify the length of time each workgroup phone should ring before the call tries the next phone in the workgroup.
7. For any external numbers in the workgroup, you can choose to **Prompt recipient to accept or decline call.** When calling a workgroup, **Prompt recipient for password** is automatically selected, so that ACD calls are guaranteed to be answered by agents.
8. To play callers a message before they are routed to the workgroup, check **Prompt caller before trying this action**, and select the message on the **Prompt** drop-down list.
9. Click **OK**. You return to the Routing List dialog box, in which the new routing list step appears in the **Actions** list.
10. Use the arrows next to the **Actions** list to reorder any steps in the routing list and then click **OK**.

When routing calls to a workgroup, you also can use the **Pause and repeat** final action. This action keeps callers on hold until a member of the workgroup answers the call. Calls are answered in the order of longest hold time, or "first in, first out" (FIFO).

Using greetings with routing list final actions

For most routing lists, you should check **Play greeting** before the final action and select **Active**. This ensures that callers who reach the routing list's final action (for example, your voice mail) hear a greeting. It also allows the greeting to change based on your other settings. For example, you can use a call rule to play a different greeting when your friend Jim calls (see Chapter 17), or have a different greeting play when you select the personal status On Vacation (see Chapter 9).

If you select a specific greeting under **Play greeting**, that greeting overrides the active greeting and plays to all callers who reach the final action of the routing list, even if a different greeting is specified in a call rule or personal status.

If you clear the **Play greeting** checkbox, no greeting plays to callers who reach the final action of this routing list, even if a greeting is specified in a call rule or personal status. If the final action is Take a Message, callers who reach your voice mail hear only the beep that signals that recording has begun.

When to use a specific greeting with a routing list

It is highly recommended that you select a specific greeting to play before the final action of a routing list whose final action is not Take a Message. In such a case, you want to be sure that the greeting that callers hear matches the action that is about to happen. Examples of greetings for other final actions are the following:

- **Hang Up.** "I'm sorry you couldn't find me. I'm not taking messages at the moment. Good-bye."
- **Transfer to extension.** "I'm sorry you couldn't find me. I'm transferring you now to my administrative assistant."
- **Pause and repeat.** "The person you are calling is unavailable. To hold, please stay on the line. To leave a message, press 1." This is the text of the System Hold Greeting, a greeting provided with TeleVantage for just this circumstance. You can also record your own version. See "Managing greetings" on page 13-18 for instructions on recording greetings.

CHAPTER 16

MANAGING CONTACTS AND WORKGROUPS

CHAPTER CONTENTS

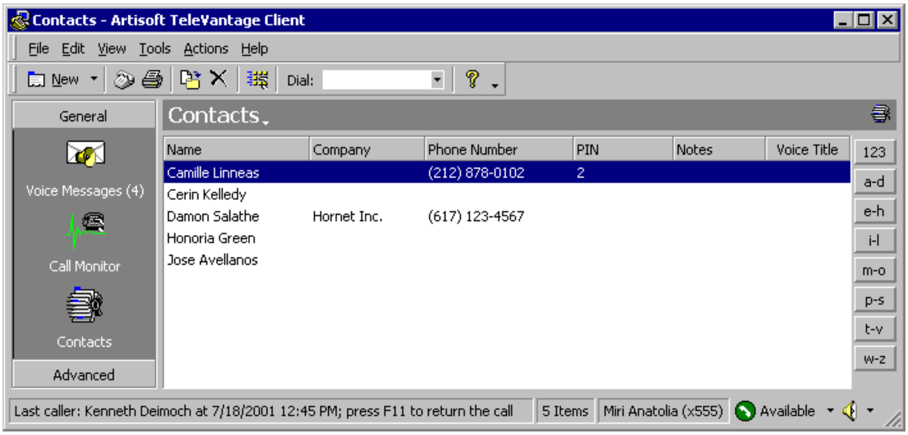
About contact management and TeleVantage

The Client's Contacts view provides you with an online phone book of your telephone contacts in which you can enter the names, phone numbers, and other information about people you talk with frequently on the phone. After you enter contacts, you can place calls to them with a few clicks of the mouse.

This chapter describes the Contacts view and then explains the following aspects of working with contacts:

- Managing contacts
- Teaching TeleVantage to recognize your contacts
- Using workgroups

The Contacts view



Using contacts folders

You can create folders to organize your contacts. For example, you could have a Friends folder for personal contacts that keeps your friends separate from your other contacts. Separating contacts into folders makes it easier to find your contacts quickly. See "Organizing the contents of a view in folders" on page 8-17.

Private and public contacts

In TeleVantage, contacts can be private or public, as follows:

- **Private contacts** are your own personal contacts. These contacts appear only in the Contacts view of your Client on your computer. Other users cannot see your contacts unless you explicitly share your Contacts folder with them.
- **Public contacts** are contacts that are available to all users in your office in their Client applications. Public contacts appear only in the folder named Contacts under Public Folders in the Folder List. Anyone in your office can see these contacts as a view by clicking the folder. TeleVantage uses this folder to identify these callers throughout your office.

To view public contacts, select **Public Folders** in the Folder List, and then select the Contacts view within that folder. See “Using the Folder List” on page 8-17. You can also view public contacts by choosing **Actions > Place Call**.

To enter or edit a public contact, you must have public contact editing permissions. If you do not have those permissions, you can view and place a call to public contacts, but you cannot edit them.

Viewing shared contacts

To view contacts that another user has shared with you, click that user’s name under **Public Folders** in the Folder List and click the Contacts folder.

Changing double-click behavior

You can choose whether double-clicking a contact opens the contact for editing or places a call to the contact. See “Defining double-click behavior in the Contacts view” on page 18-15 for more information.

Using the A-Z buttons for quick access

Use the A-Z buttons on the right side of the Contacts view to quickly move to a letter of the alphabet. The buttons alphabetize your contacts according to the column by which the view is currently sorted.

Managing contacts

You can manage your contacts using the TeleVantage Client, or you can use another contact manager application or customer relationship management program with TeleVantage if you prefer. You can also import contacts from other contact managers into TeleVantage.

Using TeleVantage Client contacts

You can enter or import your contacts in the Contacts view of the Client (see “Entering a new contact” on page 16-4 and “Importing and exporting contacts” on page 8-24). Working with your contacts in the Contacts view lets you take full advantage of TeleVantage’s automated call-handling features.

Entering a new contact

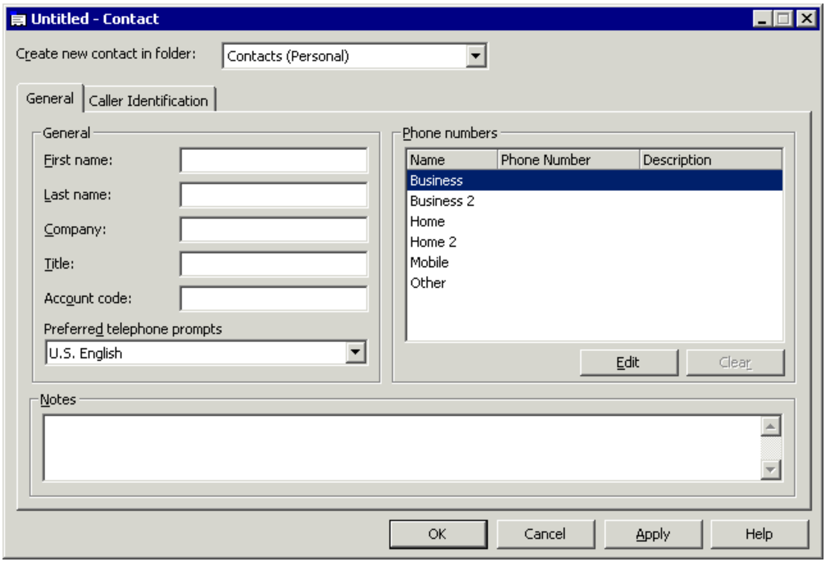
Entering a new contact involves the following tasks, which are explained in detail in the three procedures that follow:

- **Entering a contact’s name and basic information.** Other basic information includes the contact’s company, any account code, and the language used for prompts for this contact. You can also enter up to 5,000 characters in the Notes Pane of the Contact dialog box.
- **Entering a contact’s phone numbers.** When you enter a contact’s phone numbers, you can specify the number used for Caller ID and the number that is the default number to dial when you call the contact.
- **Recording a contact’s voice title.** Like your own voice title, a contact’s voice title is a short recording that you create of the contact's name. If you are using call announcing, TeleVantage announces calls from the contact by saying “Call from,” followed by the contact’s voice title. Contacts who do not have voice titles recorded are prompted to say their names each time they call you, unless you have turned off that prompt (see“Customizing or turning off call announcing” on page 18-4).

  Note: You have a limited amount of space for all voice files, including voice titles. Therefore, if you have many contacts, you can save space by recording voice titles for the most important ones only. Ask your TeleVantage system administrator how much space you have been allocated and how much you have used.

To enter a contact's name and basic information

1. Choose **File > New > Contact**. The Contact dialog box opens to the General tab.



2. Select which folder to create the contact in, using the **Create new contact in folder** drop-down list.

   If you have permission to create public contacts, you can make this contact a public contact by choosing **Contacts (Public)**. Public contacts can be seen and used by all TeleVantage users. All other selections create a private contact, which only you can see and use.

3. Enter the appropriate information about the contact in the **First Name**, **Last Name**, **Company**, and **Title** fields. The first and last names are displayed in the Call Monitor view when this contact calls you.

   Either a first name or a last name is required. To create a contact that has the name of a company only, enter the company name into one of these fields.

4. If your office uses account codes, you can enter an **Account code** for the contact. TeleVantage automatically uses the account code for the call when it identifies the contact on an incoming call or when you dial one of the contact's numbers on an outgoing call.

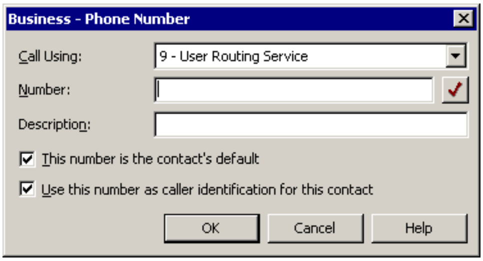
   If you are prompted to enter account codes when you place calls, you will hear a double beep instead of a single beep to indicate you are dialing a contact who has an account code already entered. When you hear the double beep, you can press **#** on your phone to accept the contact's existing account code, or you can enter another account code.

For more information, see “Entering account codes when placing calls” on page 3-3.

5. In the **Preferred telephone prompts** drop-down list, select the language that you want TeleVantage to use when it plays voice mail and other prompts to this contact. The available languages are the languages that were installed on your system.

To enter a contact’s phone numbers

1. On the General tab in the Contact dialog box, double-click the appropriate line in the **Phone Numbers** list. The related Phone Number dialog box opens.



2. Enter the phone number, Internet address, or other destination by selecting the dialing service on the **Call using** drop-down list and then entering the number in the field below the list. See “Entering a phone number by using a dialing service” on page 12-6 for more information.
3. You can enter a short description of this phone number in the **Description** field. This is a good place to enter extensions.
4. Check **This number is the contact’s default** if this is the phone number you dial most frequently to reach the contact. The number you choose as the default is slightly faster to select when you place calls.
5. Check **Use this number as caller identification for this contact** if you want TeleVantage to identify calls from this number as calls from the contact. If this option is unchecked, calls from this number appear in the Call Monitor and Call Log views as being from “Unknown.”

   Note: Checking this box adds the phone number to the contact’s Incoming Caller ID list. See “Teaching TeleVantage to recognize your contacts” on page 16-7 for an explanation of the list.

6. Click **OK** to close the Phone Number dialog box.
7. To enter more phone numbers for this contact, repeat steps 1-6 for the other categories of phone numbers in the phone number list.
8. Click **OK** to close the Contact dialog box. The new contact now appears in the Contacts view.

To record a voice title for a contact

1. In the Contacts view, select the contact for whom you want to record a voice title and choose **File > Open**.
2. In the Contact dialog box, click the Caller Identification tab.
3. Record the voice title by using the audio controls. See "Using the audio controls" on page 8-23 for instructions.
4. Click **OK**.

Notes

- TeleVantage can play the voice titles of contacts over your computer speakers automatically when those contacts call. See "Customizing incoming call behavior" on page 18-10 for more information.
- TeleVantage can also capture the names of contacts in the voices of the contacts when they respond to the call announcing prompt. TeleVantage can then use those recordings as voice titles. See "To associate a call with a contact" on page 16-10 for more information.

Placing calls to your contacts

You can place a call to a contact with a phone number using the Client. See "Placing a call" on page 12-2 for instructions.

Sharing your contacts

You can share any of your contacts folders with other TeleVantage users. Those users can access your contacts folders from their Folder Lists according to access levels that you specify. You can grant individual users specific levels of access to your contacts.

For instructions, see "Sharing views and folders" on page 8-20.

Teaching TeleVantage to recognize your contacts

TeleVantage's more advanced features depend on TeleVantage recognizing your contacts. You can teach TeleVantage to recognize your contacts in the following ways:

- By recognizing the Caller ID number or name of the contact's phone.
- By recognizing a special number you give to the contact to dial after your extension, called a Contact PIN. By using Contact PINs, TeleVantage can recognize contacts regardless of the phone they use to call.

Note: TeleVantage automatically identifies other TeleVantage users when they call.

The benefits of having TeleVantage recognize contacts include:

- Their names appear in the Call Monitor view while the phone is ringing to let you know who is calling.
- Their names appear in the Call Log and Voice Messages views, so that you can easily see contacts in your phone record and quickly call them back.
- Their names are displayed on your Caller ID phone, if you have one.
- You can use call rules to set up individualized call handling for them, such as playing a unique voice-mail greeting or routing their calls according to a specific routing list (see Chapter 17).
- You can exempt them from the Do Not Disturb personal status, so that their calls ring your phone when others are sent directly to voice mail.

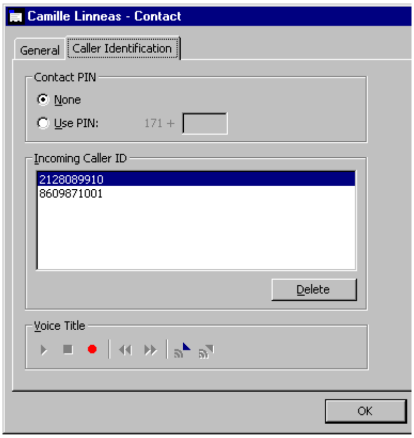
One form of identification, Caller ID from the phone company, is available automatically for every call. The phone number and Caller ID name of the caller appear in the Number column of the Call Monitor, the Call Log, and the Voice Messages views.

Identifying contacts by name

Each contact has a list of associated phone numbers called the Incoming Caller ID list. When a call arrives from one of those phone numbers, TeleVantage identifies that contact.

The Incoming Caller ID list can include Caller ID names as well as phone numbers. See "Understanding name and number on Caller ID" on page 16-11 for pointers on which item is more useful for identifying a given contact.

To view a contact's Incoming Caller ID list, select the contact in the Contact's view, choose **File > Open**, and then click the Caller Identification tab.



To guarantee that TeleVantage recognizes contacts, regardless of the phone number from which they are calling, use a contact PIN. See "Using contact PINs for guaranteed recognition" on page 16-11 for more information.

Adding phone numbers for contact recognition

You can add a phone number to a contact's Incoming Caller ID list by doing one of the following:

- Add a new phone number for the contact in the General tab and check **Use phone number as caller identification for this contact**. See "Entering a new contact" on page 16-4 for more information.
- Associate the phone number from a call or voice message with the contact. See "Associating a call or Caller ID number with a contact" on page 16-9 for more information.

Deleting a number from the Incoming Caller ID list

If TeleVantage wrongly identifies a contact as the caller, it is likely that the Incoming Caller ID list for that contact includes an incorrect phone number. You can prevent further misidentification by deleting the phone number from the list.

1. Double-click the contact from whom you want to delete a phone number. The Contact dialog box opens.
2. Click the Caller Identification tab.
3. In the **Incoming Caller ID** list, select the incorrect phone number.
4. Click **Delete** and then click **OK**.

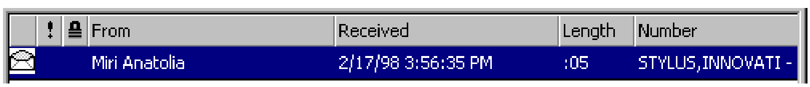
Associating a call or Caller ID number with a contact

If TeleVantage shows a caller's name as "Unknown," but you know who the caller is, you can associate the call with one of your contacts. Doing this replaces "Unknown" with the contact's name.

You can also associate the Caller ID number or the name from the call with a contact. Doing this adds the number to the contact's Incoming Caller ID list. Future calls from that phone show that contact as the caller. In this way you can "teach" TeleVantage to recognize the people who call you.

For example, the following illustration shows a voice message before association, showing "Unknown" as the caller.

The next illustration shows the same message after you associate it with your contact Miri Anatolia.

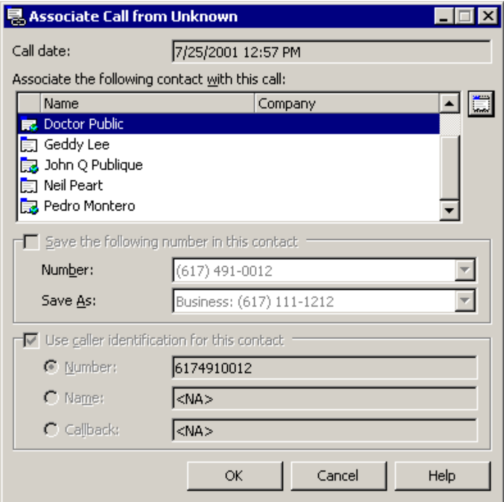


You can teach TeleVantage to recognize a caller by Caller ID name instead of the phone number. This can be useful, for example, if the contact calls from a company with a PBX that randomly assigns phone numbers to trunks but uses a Caller ID name that remains the same.

To associate a call with a contact

1. Click one of the following:
   - An active call in the Call Monitor view
   - An entry for a call in the Call Log view
   - A voice message in the Inbox folder of the Voice Message view

2. Click on the toolbar. The Associate dialog box opens.



3. Select the contact in the list with whom you want the phone number shown to be associated. If you want to cancel an association and revert the call to its original identification, click “<Unknown>.”

   Note: If a call was originally identified as being from a contact, clicking “<Unknown>” reverts it to being identified as from that contact.

   To create a new contact directly from this dialog box, click . (See “Entering a new contact” on page 16-4 for instructions.) When you finish creating the contact, you return to this dialog box with the new contact added to the list.

4. If the call came from a phone number that is new for this contact, you can add the new number to the contact’s phone number list now. You can then dial it later from the Client. Check **Save <phone number> as the following phone number**, and then select the phone number category on the drop-down list.

5. If you are associating an active call in the Call Monitor view, you can create a voice title for the contact based on the recording of the caller’s name that was made by the caller. To create a voice title in this way, check **Use this voice title**. You can test the recorded name by clicking the button to the right of the field.

   Note: This field is available only if there is a recorded name available to capture.

6. If you want only to label the individual call or voice message with the contact's name, uncheck **Use caller identification for this contact**.

   If you want TeleVantage to associate all subsequent calls from that phone with the contact, check **Use caller identification for this contact** and select one of the following:

   - **Number.** TeleVantage uses the phone number to recognize subsequent calls.
   - **Name.** TeleVantage uses the Caller ID text to recognize subsequent calls.
   - **Callback.** TeleVantage uses the callback number entered by the caller. This option is only available if the caller entered a callback number.

   See the next section for more information.

7. Click **OK**.

You cannot associate a phone number or Caller ID text with a public contact unless you have permissions to edit public contacts. You can, however, label an individual call as being from a public contact.

Understanding name and number on Caller ID

When you receive a call, TeleVantage receives two pieces of information about where the call originated: the phone number and the Caller ID name. You can associate either of these items with a contact.

Depending on where the call originated, one item may work better than the other, as the following examples illustrate:

- **If the call is from a home phone** (for example, `ANTANDER,LOU - 6178380405`). In this case, where both the number and name are unique, either could be used for association.
- **If the call is from a company with many phone lines** (for example, `Artisoft - 6175641121`). In this case the phone number may change with every call, because the office's PBX system uses a random trunk for all outgoing calls. The Caller ID name, however, remains constant, so you should use that for association.
- **If the call is from a standardized Caller ID name** (for example, `california - 7605550807`). In cases where the Caller ID name is standardized for many different phones, you should use the phone number for association.

Using contact PINs for guaranteed recognition

Contact PINs provide a guaranteed way for callers to be recognized by TeleVantage whenever they call. A contact with a PIN can call from any phone number and be identified by TeleVantage.

Contact PINs are unique numbers that you give out to contacts. Contacts add their PINs to your extension when they call you.

Examples:

- Your extension is 177, and you give Mr. Jones a contact PIN of 55. Mr. Jones calls your office, and when prompted to enter your extension, he types in 17755. TeleVantage is thus assured of identifying this call as coming from Mr. Jones.
- If you have a car for sale, you could advertise it in the paper with your extension plus a contact PIN (for example, "Call me at ext. 17756"). Set up the contact as "Car buyer" with a PIN of 56. Now when anyone calls about the ad, it appears as from "Car buyer" in your Call Monitor.

To enter a contact PIN

1. In the Contacts view, double-click the contact for whom you want to create a contact PIN. The Contact dialog box opens.
2. Click the Caller Identification tab.
3. Under **Contact PIN**, enter the number that you intend to give to this contact. If the contact PIN you entered conflicts with one already created, TeleVantage prompts you to enter a different number.
4. Click **OK**.

Note: You cannot enter a contact PIN for a public contact.

Opening contacts from within other views

After an incoming call has been identified as coming from a contact, you can easily open the contact record from the Voice Messages view (if the contact left a voice message) or the Call Log view. Select the call or voice message, and then choose **Actions > Open Contact**.

Using contacts in another contact manager

If you make extensive use of another TAPI-compatible contact manager or customer relationship management application such as Microsoft Outlook, GoldMine or FrontOffice 2000, or Interact Commerce Corporation's Act!, you can place TeleVantage calls to your contacts from those applications by using the TeleVantage TAPI Service Provider. See your TeleVantage system administrator about installing the TAPI Service Provider, and then follow your contact manager's instructions for placing calls. Calls placed by other applications still appear in your TeleVantage Call Log and Call Monitor views.

You can also install the TeleVantage Contact Manager Assistant (CMA) and receive screen-pops showing the name, the Caller ID, and the time of day of the call. Act! users can receive screen-pops without installing the CMA.

You do not need to have the TeleVantage Client installed to use the TAPI Service Provider or the CMA.

Using the TeleVantage Contact Manager Assistant

The Contact Manager Assistant enables Outlook, GoldMine, or FrontOffice 2000 contact managers to pop up contact information automatically when contacts in one of your contact managers call. TeleVantage recognizes the incoming Caller ID number, Caller ID, or name.

To run the Contact Manager Assistant (CMA)

1. Choose **Start > Programs > Artisoft TeleVantage > Contact Manager Assistant**. The program starts and runs in the background.
2. Right-click  in the system tray for a shortcut menu of commands that you can use to configure and personalize the program. For further instructions, see the CMA's online Help.

Importing contacts from other contact managers into TeleVantage

You can export contacts from other contact managers and import them into TeleVantage.

Exporting contacts from Microsoft Outlook

The following instructions show how to export contacts from Microsoft Outlook:

1. In Outlook, Select **File > Import and Export**.
2. Select **Export to a file** from the list and click **Next**.
3. Select **Comma Separated Values (Windows)** and click **Next**.
4. Select a folder in which to store the contacts file and click **Next**.
5. Enter a filename and click **Next**.
6. Click **Finish**.

Importing contacts into TeleVantage

See "Importing and exporting TeleVantage items" on page 8-24.

Using workgroups

A *workgroup* is a group of related extensions or contacts. Extensions in TeleVantage include users, IVR Plug-ins, auto attendants, or queues. With a workgroup you can:

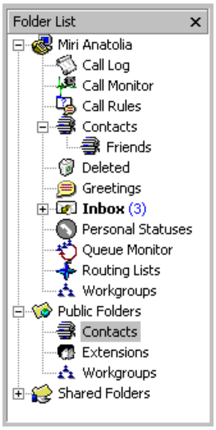
- Send, reply, or forward a voice message to the workgroup. All users in the workgroup receive the message at once. See “Sending a message directly to a user’s voice mail” on page 13-10.
- Create a call rule for the workgroup. Incoming calls from any member of the workgroup are handled according to the call rule. For example, you can have a custom voice-mail greeting that plays for all the members in your “VIP group.” See Chapter 17 for more information.
- Share your voice mailbox or contacts with the workgroup. See “Sharing views and folders” on page 8-20.
- Call the workgroup. The phones of all users in the workgroup ring simultaneously, and the first user to answer is connected. See “Placing a call” on page 12-2. Members of a workgroup other than users are ignored, for example, contacts, queues, auto attendants, and IVR Plug-ins.
- View the users in your workgroup when transferring calls, which makes it easier to pick the right recipient. You can set any workgroup to appear as a tab in the Extensions section of the Transfer To dialog box. For example, you can define the members of your Sales department as a workgroup. When you have a call for the Sales department, you can click the Sales tab and see all the department members at a glance, along with their current personal statuses. See “Transferring a call” on page 11-9, and “Having a workgroup appear as an Extensions tab” on page 16-17.
- Quickly answer any ringing phone in your workgroup by picking up your phone and pressing ***99**. See “Answering a call at another ringing phone” on page 4-4.
- Place a page to all users in the workgroup (if the workgroup has an extension). Available users with supported phones receive the page and you can speak over their speakerphones without their needing to pick up the phone. See “Placing a page or intercom call” on page 3-6.
- Create a routing list that distributes calls to the users in a workgroup according to the distribution algorithm you choose. TeleVantage system administrators use this feature to set up ACD workgroups. See “Routing calls to workgroups” on page 15-13. For information about setting up ACD workgroups, see *TeleVantage Call Center Administrator’s Guide*.

Personal and public workgroups

Generally, the workgroups you will create in TeleVantage are *personal* workgroups. Only you can see the personal workgroups that you create. Other users cannot see workgroups that you create.

Public workgroups, which are accessible to all TeleVantage users who have permission to see them, can be created only by Administrator users or other users who have been given special permission to do so.

To view the public workgroups in your office, click **Public Folders** in the Folder List and then click **Workgroups**. See “Using the Folder List” on page 8-17.

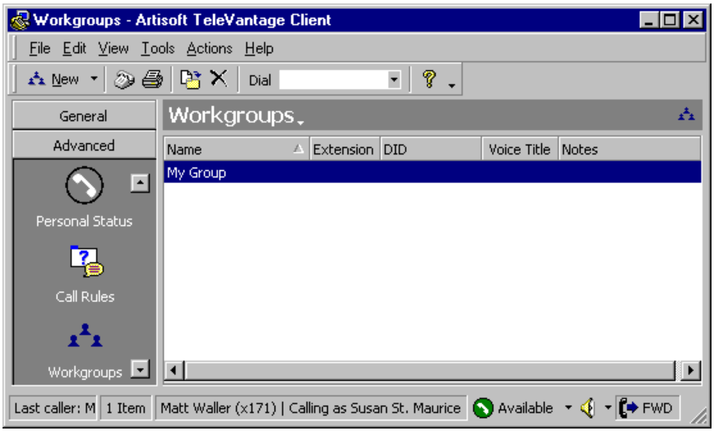


You can also view and select public workgroups when you place a call using the Place Call To dialog box. See “Placing a call by using the Place Call To dialog box” on page 12-3.

Note: You can create or edit public workgroups only if your TeleVantage system administrator has given you permission to do so.

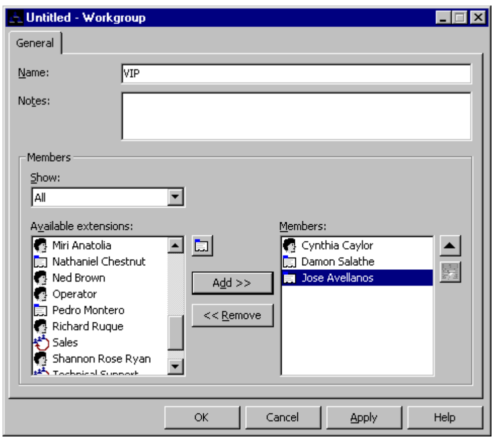
The Workgroups view

The Workgroups view displays your personal workgroups. Click **Advanced** in the view bar to locate the button for the Workgroups view. Click the button to open the view.



Creating a workgroup

1. Do one of the following:
   - To create a personal workgroup, open the Workgroups view.
   - If you have the permission to create a public workgroup, open **Public Folders** in the Folder List and click **Workgroups**. You can only create a public workgroup if your TeleVantage system administrator has given you permission to do so.
2. Choose **File > New > Workgroup**. The Workgroup dialog box opens.



3. Enter a **Name** for the workgroup and any **Notes** to describe the workgroup.

4. Add one or more members to the workgroup by selecting names on the list of **Available Extensions** and then clicking **Add**. Press CTRL to select multiple names on the list. The members you selected appear in the **Members** list. Use the arrows next to the list to arrange the order of the members. Click **Remove** to delete members from the list.

   Note: The order of the workgroup is important only if you have set up a routing list to route calls to it according to the Top Down or Round Robin algorithms. See "Routing calls to workgroups" on page 15-13.

5. Click **OK**.

Personal workgroups appear as a tab in your Extensions view only, not the Extensions views of other users. See the next section.

Having a workgroup appear as an Extensions tab

You can specify whether or not a particular workgroup appears as a tab in your Extensions view. If you create a tab for the workgroup, it lists all extensions within the workgroup, and you can see the current status of those extensions at a glance (contacts in the workgroup do not appear). The tab also appears in the Extensions section of the Place Call To and Transfer Call To dialog boxes.

By default, TeleVantage displays an Extensions view tab for the following workgroups:

- Any of your personal workgroups of which you are a member
- Any public workgroup of which you are a member

Note: You do not see an Extensions view tab for the personal workgroups of other users, even if you are a member of such workgroups.

You can also choose to show a tab for any other personal workgroups or any other public workgroup.

To specify whether a workgroup has a tab in the Extensions view

1. Select the workgroup in your personal Workgroups view or the public Workgroups folder (see "Personal and public workgroups" on page 16-15).
2. Choose **Actions > Show as Tab in Extensions view**. If the menu choice is checked, the workgroup appears as a tab.

For more about the Extensions view, see Chapter 10.

CHAPTER 17

USING CALL RULES

CHAPTER CONTENTS

About call rules

TeleVantage call rules enable you to handle specific incoming calls differently than other calls. For example, you can create a call rule for your friend Jim so that he is routed to your cell phone and hears a special voice-mail greeting whenever he calls.

Call Rules overview

To create a call rule, you determine two things:

- Which incoming calls activate the call rule
- How the call rule handles those calls

Distinguishing which incoming calls activate the call rule

You can distinguish which incoming calls are handled by a call rule by using one or both of the following conditions:

- **Caller condition.** The rule activates depending on who is calling. In addition to having call rules for individual callers, you can have call rules that apply to all internal callers, all external callers, all unidentified callers, or any member of a workgroup.
- **Schedule condition.** The rule activates depending on when the call arrives. You can handle calls differently during business hours, after business hours, and at specific dates or times.

You can use caller and schedule conditions separately or in combination to achieve various effects. See “Combining caller and schedule conditions” on page 17-5.

Determining how the call rule handles calls

A call rule can handle incoming calls according to any combination of the following settings:

- **Greeting.** You can choose which greeting plays if the caller reaches your voice mail.
- **Routing List.** You can choose which routing list a call follows.
- **Taking calls.** You can specify whether your phone does or does not ring. Note that a setting of “Yes” overrides the Do Not Disturb personal status.
- **Personal Status.** You can select a personal status and have the call handled as if that personal status were in effect.

  If you select a personal status, note that its settings are overridden by the call rule’s other settings. For example, a call rule uses the “Standard” greeting. It also uses the Out of the Office personal status, which uses the “Be back tomorrow” greeting. When the call rule handles a call, the “Standard” greeting is the one used.

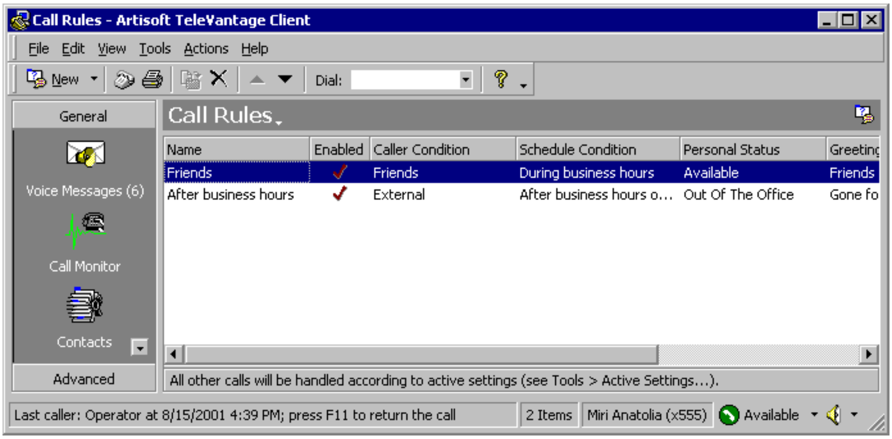
Call rule settings override all other settings for routing list, taking calls, and personal status. See “Active settings hierarchy” on page 9-12.

Examples of how you can use call rules

- Calls from your "Friends" workgroup can follow a routing list that tries you at several locations in the office during business hours.
- During your lunch hour, you can have a special "At lunch" greeting that plays to callers before sending them to voice mail.
- You can have the Do Not Disturb personal status turn on automatically every day at 6:00 pm, but only for internal callers.
- You can create a contact called "Nuisance Callers" and associate the phone numbers of salespeople with that contact. Those callers can follow a routing list that plays a greeting and then hangs up without ringing your phone. The greeting can say, "I'm sorry. I don't accept calls from salespeople during business hours."

The Call Rules view

Click **Advanced** in the view bar to locate the button for the Call Rules view. Click the button to open the view.

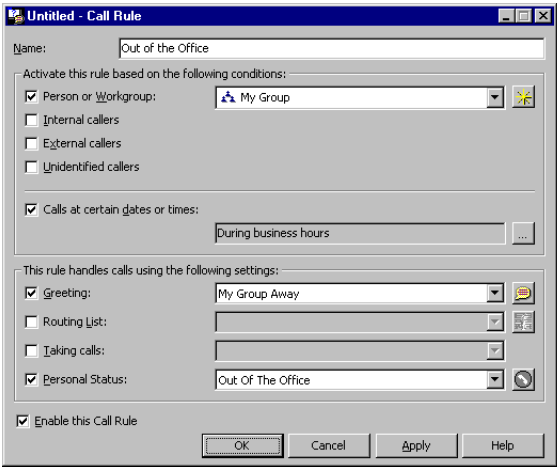


Creating a new call rule

The following procedure explains how to create a call rule. Be sure to go to any sections referenced in the procedure.

To create a new call rule

1. Choose **File > New > Call Rule**. The Call Rule dialog box opens.



2. Enter a name for the call rule in the **Name** field.
3. Select one or more caller conditions. See “Setting caller conditions” on page 17-5.
4. Select a schedule condition. See “Setting schedule conditions” on page 17-6 for more information.
5. Select one or more settings to specify how the rule handles calls. See “Selecting how a call rule handles a call” on page 17-8 for more information.
6. If you do not want this call rule to be active, uncheck **Enable this Call Rule**. The call rule remains in storage, but does not handle any calls until you enable it again. See “Enabling or disabling a call rule” on page 17-8.

   If you want the call rule to be active, leave this field checked.
7. Click **OK**.

Combining caller and schedule conditions

When you create a call rule, you can specify only caller conditions, only schedule conditions, or both conditions together, with the following results:

- **Only caller conditions.** The call rule is always active and handles calls that meet its caller conditions at all times. For example, a call rule for your friend Jim activates whenever Jim calls.
- **Only schedule conditions.** The call rule handles all incoming calls during the specified dates and times, regardless of who's calling. For example, a call rule for after business hours (with no caller conditions set) handles all calls after business hours.
- **Both caller conditions and schedule conditions.** The call rule handles calls only when both conditions are met. For example, a call rule for your friend Jim after business hours handles only calls from Jim that occur after business hours. If Jim calls during business hours, the call rule does not activate. Likewise, if anyone other than Jim calls after business hours, the call rule does not activate.

Setting caller conditions

Under **Activate this rule based on the following conditions**, check the types of callers to whom you want the call rule to apply. If you select more than one caller condition, the call rule will apply if any caller condition is met. For example, selecting internal callers and your Friends workgroup will activate this call rule if any internal user or any member of the Friends workgroup calls.

You can select one or more of the following caller conditions:

- **Person or Workgroup.** A specific user, contact, or workgroup. Select the item from the drop-down list.

  To create a new contact or workgroup, click . To edit the current contact or workgroup, ALT-click . See "Entering a new contact" on page 16-4 and "Creating a workgroup" on page 16-16.
- **Internal callers.** TeleVantage users.
- **External callers.** Callers from outside of your TeleVantage system.
- **Unidentified callers.** Callers from outside of your TeleVantage system who are also not identified as contacts.

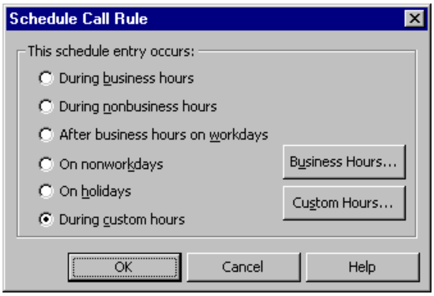
Setting schedule conditions

To make the call rule active during certain dates or times only, check **Calls at certain dates or times**.

If **Calls at certain dates or times** is unchecked, the call rule is always active and will handle incoming calls that meet its caller conditions at all times.

To set a schedule condition

1. Check **Calls at certain dates or times**.
2. Click  or double-click in the schedule text box. The Schedule Call Rule dialog box opens.



3. Under **This schedule entry occurs**, choose an option for when the call rule activates. Choose one of the following two options:
   - Dates and times based on your office's business hours. All options other than **During custom hours** are based on your office's business hours.

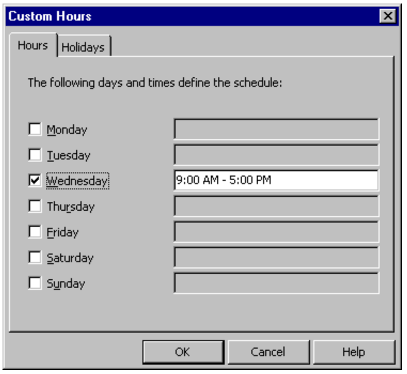
     To view your office's business hours, click **Business Hours**. If your company has more than one set of business hours available, choose the set that you want to use. Note that if you change your business schedule, it affects all other items scheduled through the Client, such as your schedule for e-mail and pager notification of new voice messages (see "E-mail, pager, and call notifications" on page 13-12).
   - Dates and times that you define. Click **During custom hours**. See the next section for instructions.
4. Click **OK**.

Specifying custom hours

If you selected **During custom hours** as your schedule condition, use the following procedures to specify when the call rule activates.

To have the call rule activate on a daily or weekly basis

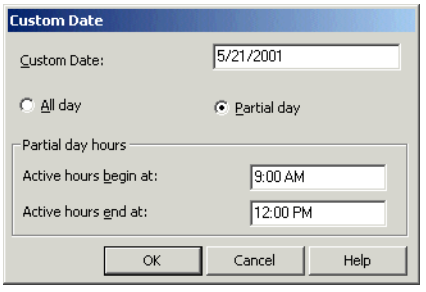
1. Click **Custom Hours**. The Custom Hours dialog box opens.



2. Check the days for which you want to set custom hours.
3. Replace the default times with the hours during which you want the call rule to be active. The call rule will be active during these hours on the selected days.
4. Click **OK**.

To have the call rule activate on an individual date

1. Click **Custom Hours**, and then click the Holidays tab.
2. Click **Add**. The Custom Date dialog box opens.



3. Enter a **Custom Date** on which the call rule will be active.
4. To schedule this rule for the whole day, accept the default of **All day**. Select **Partial day** if you want to set specific hours.
5. If you select **Partial day**, enter the **Active hours** for the day.
6. Click **OK** when you are finished setting the schedule.

Selecting how a call rule handles a call

Calls are normally handled with your active settings, such as your standard greeting and routing list. Call rules override one or more of these settings to handle calls in different ways.

Under **Handle calls using the following settings**, check any combination of the following options. Note that you must check at least one option, or your call rule will do nothing.

- **Greeting.** Select a greeting. Callers handled by the call rule will hear that greeting if they reach your voice mail.
- **Routing List.** Select a routing list. Calls handled by the call rule will follow that routing list.
- **Taking calls.** Select whether or not calls handled by the call rule ring your phone.

  If set to Yes, incoming calls follow your active routing list, which usually includes ringing your phone. If set to No, incoming calls are sent directly to the final action on your active routing list, which by default is your voice mail. Note that a setting of Yes overrides the personal status Do Not Disturb.
- **Personal Status.** Select a personal status. Calls handled by the call rule will be handled as if that personal status were in effect. Note that the call rule's own settings for greeting, routing list, and whether you are taking calls override the preferences in the personal status.

You can click the buttons next to **Personal Status**, **Greeting**, and **Routing List** to create a new item of each type. Press ALT and click a button to edit the currently selected item.

Enabling or disabling a call rule

You can enable or disable existing call rules. Disabled call rules remain in storage but do not handle any calls until you enable them again.

To enable or disable a call rule

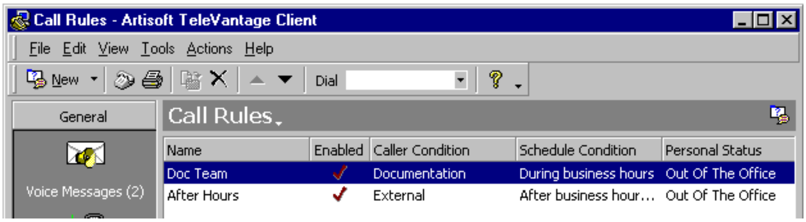
1. In the Call Rules view, select the call rule that you want to enable or disable.
2. Choose **Actions > Enabled** from the menu bar.

Enabled call rules are marked with  .

Choosing the priority of a call rule

TeleVantage handles incoming calls according to the priority of your call rules. The call rules in the Call Rules view are ordered from the top down. If two call rules apply to the same call, the call rule highest in the list is the one used.

You can create multiple call rules that contain similar caller and schedule conditions, and then prioritize them to ensure that the correct greeting and routing list are used for calls. For example, if you create a call rule for a workgroup, but want calls from a certain individual within that workgroup to be handled differently, you can create a call rule for that individual and give it a higher priority than the workgroup's call rule.



To set the priority of a call rule

1. Select a call rule in the Call Rules view.
2. Click  or  on the toolbar to move the call rule to a higher or lower priority position.

How TeleVantage resolves call rule setting conflicts

When a call is subject to multiple call rules, individual settings (personal status, greeting, routing list, or phone) are determined by the highest priority rule in which the setting is not blank. If the highest priority rule has a setting with an instruction, that setting is used. But if it has another setting that is blank, while a lower priority rule has an instruction for that setting, the setting from the lower priority rule is used. This can result in settings from different call rules being used on a single call. See the example that follows.

Example: You create a call rule for your friend Paul that will be in effect during business hours. In that call rule, you choose a custom greeting for him to hear and a routing list that rings your cell phone. You choose to leave the personal status and phone settings blank. If Paul also belongs to the Sales workgroup for which you have a lower-priority call rule, and that call rule specifies a personal status and phone state, calls from Paul are handled in the following way:

- **Greeting.** The custom greeting you created for Paul is used.
- **Routing List.** Calls from Paul ring your cell phone, as specified in Paul's call rule.
- **Taking calls.** The behavior specified in the call rule for the Sales workgroup is used, because no **Taking calls** setting is specified in Paul's call rule.
- **Personal Status.** The Sales workgroup's personal status setting from the Sales workgroup's call rule is used, because no personal status is specified in Paul's call rule.

Ignoring all call rules

If you create routing lists and call rules, TeleVantage handles your incoming calls according to those settings and rules. There can be times, however, when you want TeleVantage to ignore those rules.

You can set TeleVantage to use the Standard routing list and ignore your call rules by choosing **Tools > Ignore Call Rules**. The check mark on the menu indicates that **Ignore Call Rules** is turned on. All call rules are then ignored and all incoming calls ring at your **Where I Am** phone number (your extension, unless you have changed it with call forwarding or a personal status). If there is no answer, the caller is sent to voice mail. Any settings specified by your call forwarding, personal status, or active settings are still in effect.

Example: You have set up a routing list that tries you at various phones around the office. Now you are taking a trip out of town and you want all calls forwarded to your hotel. Use call forwarding to forward your calls to the hotel, and then turn **Ignore Call Rules** on to make sure your calls do not get sent around the office while you are away.

When return to your office and you turn off **Ignore Calls Rules**, TeleVantage again enforces all of your routing lists and call rules.

You can have a personal status cause TeleVantage to ignore call rules whenever that personal status is in effect. See Chapter 9.

CHAPTER 18

CUSTOMIZING YOUR CLIENT

CHAPTER CONTENTS

About customizing your Client

You can customize the Client and your TeleVantage account to suit the way you work.

Most customization options presented in this chapter are set in the Options dialog box. Your TeleVantage system administrator may have made some or all tabs of the Options dialog box unavailable to you. See your TeleVantage system administrator if you cannot access a particular option that is described in this chapter.

Customizing telephone behavior

The options described in this section allow you to customize your interaction with TeleVantage on the phone. These options include:

- Recording a voice title
- Changing the language of telephone command prompts
- Customizing call announcing
- Customizing call waiting
- Displaying Caller ID
- Turning ringback for calls on hold on and off
- Changing your personal Operator
- Customizing your listing in the dial-by-name directory
- Customizing how long and in what pattern your phone rings
- Customizing your hold music

Recording a voice title

A voice title is a short recording of just your name that TeleVantage fits into its own recorded prompts. For more information, and for instructions on recording a voice title on the phone, see “Recording your voice title” on page 2-2.

To record a voice title in the Client

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, use the audio controls under **Voice Title** to record your voice title. See “Using the audio controls” on page 8-23 for more information.
3. Click **OK**.

You have a limited amount of space for your voice title, your contacts’ voice titles, your greetings, and recorded conversations. Ask your TeleVantage system administrator how much space you have been allocated and how much you have used.

Changing the language of telephone command prompts

TeleVantage can play the telephone command prompts in any language that was installed with TeleVantage. Whenever you log in or press **Flash**, the prompts are played in the language you choose.

To change the telephone commands language

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, select the language that you want on the **Telephone prompts** drop-down list. All languages that were installed with TeleVantage appear on the list.
3. Click **OK**.

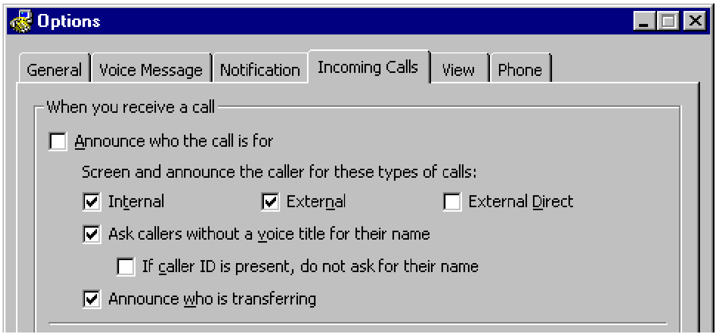
Customizing or turning off call announcing

Call announcing allows you to screen callers by using only your telephone. When you answer your ringing phone, you hear, “Call from,” followed by the name of the caller. You can then accept or decline the call. For detailed information about your options, see “Call announcing” on page 4-2.

The following procedure shows you several ways to customize call announcing. You can also turn it off entirely.

To customize call announcing or turn it off

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Incoming Calls tab.



3. Under **Screen and announce the caller for these types of calls**, choose any of the following:
   - **Internal.** Calls from other TeleVantage users.
   - **External.** Calls from external callers who choose your extension from an auto attendant or are transferred to you by another user.
   - **External Direct.** Calls from external callers who dial you directly. If you have a Direct Inward Dial (DID) number, or if a trunk line is routed directly to your extension, you may receive these types of calls. Ask your TeleVantage system administrator about whether your phone is set up in either of these ways.

   To turn call announcing off for a type of call, uncheck it for that type. With call announcing turned off, you are connected directly to the caller when you answer your phone.

   Note: If your call announcing settings are different for internal and external calls, it can be helpful to set different ring patterns for internal and external callers (see “Changing ring patterns” on page 18-9). You can then tell by the ring pattern whether you will hear the caller or the call announcing prompt when you pick up the phone.

4. Use the following options in conjunction with call announcing for external calls":
   - **Ask callers without a voice title for their names**. By default, if call announcing is turned on, contacts and users without voice titles are prompted to say their names. When you pick up the phone, you hear, “Call from,” followed by what they say. If you uncheck this field, callers are not prompted to say their names.

     With this field unchecked, when you receive a call from a caller without a voice title you will hear either “Call from internal user,” “Call from external caller,” or “Call from contact,” depending on the caller.
   - **If Caller ID is present, do not ask for their name.** If checked, incoming callers with Caller ID are not prompted to say their names. This is a useful setting if you have a phone with a Caller ID display. You can skip asking the caller for a name if you can see on your Caller ID display who is calling.

     If unchecked, all callers without voice titles are prompted to say their names.
   - **Announce who is transferring**. Check this option if you want to hear the name of the person transferring a call to you. For example, if checked, you would hear “Helen Shire is transferring a call from Shane West.” To announce who is transferring, you must have call announcing turned on for internal calls. If it is not turned on, you are connected directly to transferred calls.
   - **Announce who the call is for**. If checked, when you answer your phone you will hear the recorded message, “Call for,” followed by your voice title. This option is useful if two users share the same phone.

     You can use this feature alone or in conjunction with call announcing. When you use both features you will hear, “Call from <the caller’s name> for <your voice title>,” followed by the call announcing menu commands. Without call announcing, you are connected to the caller as soon as the “Call for” announcement plays.

     For more information about distinguishing calls when two users share a phone, see “Distinguishing incoming calls to a shared station” on page 7-3.
5. Click **OK**.

Customizing or turning off call waiting

With call waiting turned off, incoming calls that arrive while you are on the phone go directly to the next step in your routing list (by default, the next step is your voice mail).

However, if call waiting is turned off, you can easily intercept an incoming call visually in your Call Monitor view. See Chapter 11 for more information.

To customize call waiting or turn it off

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, under **Options**, check **Enable call waiting** if you want to use call waiting. Uncheck it if you want to turn call waiting off.
3. If you use the Client's Call Monitor view to alert you to incoming calls, and thus do not want the audible beep over the phone, check **Do not play call waiting beep when using Client.** The beep will play only when you are not running the Client.
4. Click **OK**.

Displaying Caller ID on a phone

If your phone can display Caller ID, you can choose whether or not it shows the Caller ID of incoming calls. If your phone supports Caller ID display on call waiting, you can also choose whether to use that feature.

1. Choose **Tools > Options**.
2. Click the Phone tab.
3. Choose one of the following options:
   - **Caller ID.** When checked, your phone displays the Caller ID of incoming calls.
   - **Caller ID on call waiting**. When checked, your phone displays the Caller ID of incoming calls when you are on the phone. When unchecked, your current caller's ID remains in the phone display despite the incoming call.
4. Click **OK**.

Notes:

- Caller ID is transmitted between the first and second ring. If your phone supports Caller ID, you may want to increase this setting so that there is enough time for Caller ID to be displayed and read.
- Because Caller ID data is sent between the first and second rings, sending Caller ID to a phone can interfere with the beginning of customized ring patterns. See "Changing ring patterns" on page 18-9.

Turning ringback for calls on hold on and off

If you hang up with one or more calls on hold or parked, TeleVantage can ring your phone to remind you of the calls. You can turn ringback on and off, and you can specify how long TeleVantage waits before ringing your phone.

To turn ringback on and off

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the General tab.
3. Do one of the following:
   - To turn ringback on, check **Ring back if I leave a call on hold or parked**.
   - To turn ringback off, uncheck the option.
4. In the **Ring back interval** field, enter the number of seconds that TeleVantage should wait before ringing you back after you put a call on hold or park a call.
5. Click **OK**.

Changing your personal Operator

Callers who reach your voice mail or who are waiting on a routing list can always press **0**. By default, 0 transfers them to your system's Operator, but you can transfer them to any other extension, for example, your company's auto attendant.

To change the extension to which callers transfer when they press 0

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, choose an extension on the **Personal Operator** drop-down list. You can choose a user, auto attendant, queue, or IVR Plug-in.
3. Click **OK**.

Customizing your listing in the dial-by-name directory

The dial-by-name directory lets callers dial a user by entering the first few letters of the user's name. Callers who know your name but not your extension can find you quickly in the dial-by-name directory.

You can remove your name from the dial-by-name directory if you want only callers who know your extension to call you. You can also specify whether or not the dial-by-name directory reads your extension to callers.

To customize your dial-by-name listing

1. Choose **Tools > Options**. The Options dialog box opens.
2. On the General tab, uncheck **List in dial-by-name directory** to remove yourself from the directory. If checked, callers can dial you by name.

3. If you choose to be listed in the dial-by-name directory, you can check **Play extension to the caller** to have TeleVantage read your extension to callers who find you by using the dial-by-name directory. Callers hear “Transferring to <your voice title> at extension <your extension>.”

   If unchecked, callers who find you by using the dial-by-name directory hear only “Transferring to <your voice title>.”

4. Click **OK**.

Customizing how long your phone rings

You can specify how long a call rings your phone before it proceeds to the next step on your routing list (by default your voice mail).

1. Choose **Tools > Options**.The Options dialog box opens.
2. Click the General tab.
3. In the **Default ring duration** field, enter the number of seconds your phone should ring before a call proceeds to the next step on your routing list.

   The ring duration you enter here can be overridden by the ring duration specified in a personal status or routing list.

   Note: By default the minimum ring duration is 5 seconds and the maximum is 120 seconds. Your system administrator can extend the possible range from 1 to 999 seconds.

4. Click **OK**.

Note: Caller ID is transmitted between the first and second ring. If your phone supports Caller ID, you may want to increase this setting so that there is enough time for Caller ID to be displayed and read before the call is sent to the next step on the routing list.

Changing ring patterns

You can change how your phone rings when you receive an incoming call. You can set different ring patterns for internal and external calls.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Under **Ring patterns**, select the type of ring that you want for **Internal calls** and **External calls**. The "Splash ring" settings create a group of short rings followed by a pause.

   Note: On some systems, Splash ring 3 will play as Splash ring 2. This occurs if your TeleVantage Server uses DI/SI32 or HDSI Dialogic boards, and the incoming call has Caller ID information.

   To test a ring pattern, click the button to the right of the drop-down list. Your phone rings three times in a demonstration of that ring. Because the ring pattern derives from a continuous loop, the first one might be truncated. Listen for the subsequent rings to hear the pattern accurately.
4. Click **OK**.

Note: If your ring patterns do not begin correctly, it may be because you are sending Caller ID data to a display phone. See "Displaying Caller ID on a phone" on page 18-6.

Enabling and disabling hands-free answering

For an overview of hands-free answering, see "Using hands-free answering" on page 4-4. Use the following procedure to enable or disable hands-free answering from the Client:

1. On the main menu, click **Tools > Options**. The Options dialog box opens.
2. Click the Phone tab.
3. Select the **Enable hands-free answering** check box to enable hands-free answering. Clear the check box to turn hands-free answering off.
4. Enter the desired time in the **Dial tone time-out seconds**. This setting identifies how long a dial tone plays after the end of a call before the station reverts to silence while it waits for the next call. A setting of 0 indicates no dial tone, which means that the station reverts to silence as soon as a call ends.
5. Click **OK**.

Note: You can also pick up the phone and press ***10** to enable and disable hands-free answering.

Customizing your hold music

If your office has multiple sources of music-on-hold, you can use any source as your personal hold music, that callers hear when you put them on hold.

Your system administrator makes this setting for you. Talk to your system administrator about the music-on-hold options that are available and which one you would like to use as your personal hold music.

Customizing incoming call behavior

You can customize how TeleVantage handles incoming calls, as follows:

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Incoming Calls tab.
3. If you have Call Monitor tabs other than "My Phone," you can select the category of incoming call that triggers the options you select in step 4. Select the category from the **For the following calls** drop-down list. The categories correspond to your Call Monitor tabs (see "Call Monitor view tabs" on page 11-3). For example, if you select your workgroup "Friends," then the options will trigger on incoming calls from any member of "Friends." To have the options trigger on any incoming call, select **All**.
4. Select any of the following options:
   - **Display the Call Monitor.** Brings the Client to the front of your desktop with the Call Monitor showing when a call arrives. If you are actively working in another view, the Client opens the Call Monitor view. If the Client is not running, it will start.
   - **Play the caller's name over the speakers**. Announces the caller's name over your computer speakers if the recording is available. TeleVantage users and identified contacts are announced if they have voice titles already recorded. Unidentified callers are announced only if you have call announcing turned on with the prompt to say their names.
   - **Flash the title bar**. Flashes the Client's title bar.
   - **Flash the Call Monitor tab.** Flashes the Call Monitor tab that contains the incoming call. This can be useful if you work with multiple Call Monitor tabs, for example, if you are an agent in a call center.
5. Click **OK**.

You can also customize the pattern in which your phone rings for internal and external incoming calls. See "Changing ring patterns" on page 18-9 for more information.

Customizing ISDN outbound Caller ID

You can determine the type of Caller ID that accompanies your outbound calls on ISDN trunks.

Note: On trunk types other than ISDN, your outbound Caller ID is always set by the telephone company.

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Other tab.
3. From the **Calling party presentation** drop-down list, select one of the following options:
   - **System default.** Your outbound Caller ID will be whatever your system administrator has set for the TeleVantage system as a whole. The current setting is displayed in parentheses.
   - **Custom.** Your outbound Caller ID number will be whatever your system administrator has specified as your custom number. The current number is displayed in parentheses. Talk to your system administrator to request a different custom number.

     When you select Custom, your outbound Caller ID name is your TeleVantage username.
   - **Set by telephone company.** No specific Caller ID is attached to your outbound calls. Outbound Caller ID is assigned by your telephone company network.
   - **Blocked.** Caller ID appears blank on your outbound calls.
4. Click **OK**.

You can block outbound Caller ID on your calls using the telephone commands, as follows:

- ***67.** Blocks outbound Caller ID. Caller ID will not be shown on your subsequent outbound calls.
- ***82.** Unblocks outbound Caller ID. Caller ID reverts to your custom setting. If no custom setting is available, the system Caller ID setting is used.

Customizing voice message behavior

You can customize use of stutter dial tone, the message waiting light, and the order in which you hear your voice messages. For example, you can hear your unheard (new) messages in the order newest to oldest, and then you can hear your heard (old) messages in the order oldest to newest.

Turning off stutter dial tone

Stutter dial tone is an audible signal that alerts you to new voice messages when you pick up your phone. Stutter dial tone is the default. To turn it off:

1. Choose **Tools > Options**.
2. In the Options dialog box, click the Phone tab.
3. Uncheck **Stutter tone**.
4. Click **OK**.

Enabling a message waiting light

If your phone has a CLASS-compatible message waiting light or other display feature that indicates new voice messages, you can enable that feature in the Client and use it.

1. Choose **Tools > Options**. The Options dialog box opens.
2. In the Options dialog box, click the Phone tab.
3. Check **Message waiting indicator**.
4. Click **OK**.

Setting voice message playback order

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. Under **Voice message playback order**, choose the order you prefer.
4. Click **OK**.

Playing a sound when a new message arrives

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the Voice Messages tab.
3. Check **Play a sound when a new message arrives**.
4. Click **OK**.

The sound file played is Chord.wav, located in the TeleVantage Client directory (by default C:\Program Files\TeleVantage\Client). To play a custom sound file, name it Chord.wav and place it in that directory.

Customizing the Client for Operators

If you are an Operator user, you can use the following options to make your tasks easier and faster:

- **Place incoming call on hold automatically.** When you have several incoming calls at once, you can have TeleVantage put each one on hold automatically until you are ready to answer it, so that none of them go to voice mail. Edit your routing list to use the **Pause and Repeat** final action, and the System Hold Greeting. See “Using routing lists” on page 15-7.
- **Transfer calls by dragging-and-dropping to the Extensions Pane.** If you display the Extensions Pane in the Call Monitor view, you can transfer a call by dragging it from the Call Monitor to an extension in the Extensions Pane. This action performs a blind transfer. See “Adding the Extensions Pane to the Call Monitor view” on page 8-11 and “Dragging and dropping items” on page 8-14.
- **Resize the Transfer To dialog box.** You can make the Transfer To dialog box larger so that you can see more users and more columns at a glance. TeleVantage remembers the new size of the Transfer To dialog box whenever you open it.
- **Viewing users by workgroup.** In the Extensions view, Extensions Pane, and Transfer To dialog box, each workgroup can be represented by a tab that lists its members. You can create workgroups that represent the departments of your office, so that when transferring calls, you can see at a glance all the users in a given department. For example, if you have to transfer a call to Sales, you can click the Sales tab (for the Sales workgroup) and see all the members of the Sales department and their current personal statuses. See “Having a workgroup appear as an Extensions tab” on page 16-17.
- **Increasing ring duration.** If you have a phone with multiple DKTs and you let multiple calls ring until you can answer them, speak to your system administrator about increasing your maximum ring duration using TVSettings.

Customizing the Client display

You can customize the Client display in any of the ways discussed in the following sections.

Showing or hiding Client window elements

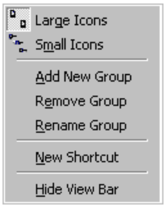
You can show or hide the Client's view bar, Folder List, status bar, and toolbars by checking or unchecking their entries on the **View** menu.

Customizing the view bar

You can change the look and organization of the Client's view bar in the following ways:

- Display large or small shortcut buttons
- Add, delete, and rename shortcut groups
- Add, delete, and rename shortcuts buttons within a shortcut group

Right-click in the view bar away from a shortcut button to see a menu of all view bar customization commands.



Displaying large or small shortcut buttons

To change the size of the shortcut buttons in the view bar, right-click in the view bar and choose **Large icons** or **Small icons**.

Adding, deleting, and renaming shortcut groups

A *shortcut group* is a grouping of shortcut buttons for display purposes, marked by a group header. By default, the Client comes with two shortcut groups, **General** and **Advanced**. You can rename these groups, delete them, or add new groups of your own.

1. To perform a command on a shortcut group, click the group header to select that group.
2. Right-click in the group away from a shortcut button, and choose **Add new group**, **Remove group**, or **Rename group** from the menu.
3. If you are adding or renaming a group, a dialog box opens. Type the group's name and click **OK**.

Adding shortcuts within a group

To add a new shortcut to a shortcut group, right-click in that group away from a shortcut button and choose **New Shortcut**. In the dialog box that opens, select a folder and click **OK**. A shortcut to that folder is added to the shortcut group and you can now open the folder by clicking that shortcut.

Deleting or renaming shortcuts

To delete or rename a shortcut on the view bar, right-click the shortcut button and choose **Remove from view bar** or **Rename**.

Defining double-click behavior in the Contacts view

Double-clicking a contact lets you either edit the information for the contact or place a call to the contact.

To define the result of double-clicking a contact

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Double clicking contacts behavior**, select the desired behavior.
4. Click **OK**.

Customizing columns

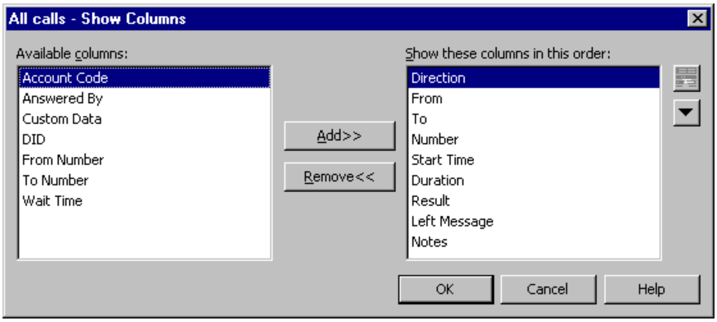
You can choose to show or hide columns in a view. You can also customize columns in a view by moving, resizing, and sorting them. The changes you make to columns in a view are saved when you exit the Client.

Showing and hiding columns

For each view in the Client, you can choose the columns that you want to see in the view. Some views do not show all the available columns by default.

To show or hide columns in a Client view:

1. Choose **View > Current View > Show Columns**. You can also right-click in the view and select **Show Columns**. The Show Columns dialog box opens. For an explanation of the columns, click **Help**.



2. Do any of the following:

   - In the **Available columns** list, select a column and click **Add** to show it.
   - In the **Show these columns in this order** list, select a column and click **Remove** to hide it.
   - Use the arrows to arrange the columns in the left-to-right order you want. The highest columns appear furthest to the left.

3. Click **OK**.

Moving columns

To move a column, click its header and then drag and drop it to a new location. You can also move columns by using the Show Columns dialog box (see the previous section).

Resizing columns

You can change column widths by dragging the sides of the column headers.

Sorting by column

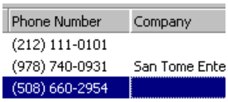
Click a column header to sort the items in a view by the information in that column. Click the column header again to sort in the reverse order.

The column in the view that contains an arrow is the column by which the display is currently sorted. The direction of the arrow indicates the order.

Keeping columns in view when you scroll horizontally

In any view you can drag a vertical lock line to a column division, so that all columns to the left of the lock line remain on-screen when you scroll horizontally. For example, in the Contacts view, you could keep the Name column on-screen when you scroll to the right, so that you can always see the names of your contacts as you view other columns with information about them.

The lock line is originally just inside the first column of the view. The mouse pointer changes to a lock icon when you hover over it. After you drag it to a column division, the lock line appears as a bold white line between the column headers and in the selected row.



Changing the font of a Client view

You can choose the font and size of data in each Client view. To do so, go to the view, then choose **View > Current View > Font**.

Changing how names are displayed

Several views in the Client display names and allow you to sort by the columns in which they appear. For example, in the Contacts view and the Extensions view, one column contains names.

To specify how names are displayed in a view

1. Choose **Tools > Options**. The Options dialog box opens.
2. Click the View tab.
3. Under **Name Format,** select the format that you want:
   - **First name Last name** - Joe Smith
   - **Last name, First name** - Smith, Joe
4. Click **OK**.

Hiding and showing toolbar buttons in a view

In any view, you can hide or show buttons on the toolbar. Click the triangle at the far right of the toolbar and choose **Add or Remove Buttons**. In the menu that opens, check or uncheck a toolbar button to hide or show it.

Other customization options

The following table refers you to customization options described elsewhere in this manual.

Feature	Description	See
Recording greetings	Create recordings that callers hear when they reach your voice mail.	page 2-3, page 13-18
Recording a grab-and-hold greeting	Create a recording heard by incoming callers when you put them on hold without talking to them first.	page 11-7
Automatically logging on	Log on to the Client without needing to enter your password.	page 8-4
Changing your password	Change the password you use to log in to TeleVantage	page 8-6
Displaying the Call Monitor view automatically	Bring the Client to the front with the Call Monitor showing when you place calls from the Client.	page 11-4
Setting e-mail and pager notification	Receive an e-mail message or a page whenever you have new voice messages.	page 13-12
Setting deletion options	Choose how voice messages are permanently deleted from the Deleted folder.	page 8-19

Appendices

APPENDIX A

TELEPHONE COMMANDS QUICK REFERENCE

This appendix provides a quick reference to the TeleVantage telephone commands. For more instructions on using TeleVantage over the phone, see Chapter 3 through Chapter 6.

Note: Press ***** at any time to return to a higher-level menu.

Call announcing commands

If you have call announcing turned on, you can use the following commands when you answer an incoming call. These commands are offered whether you pick up your phone to answer it or answer it after hearing a call waiting beep.

Call announcing commands	
1	Connect to the caller.
2	Send the caller to your voice mail.
3	Send the caller to voice mail and listen to the message as it is being left. Press **Flash 1** to pick up the call while the caller is leaving a message.
4	In call waiting situations, create a conference call with your current call and the new one.
Hang up	Send the caller to the next step on your routing list. Unless you have created a custom routing list, the next step is your voice mail, so hanging up is the same as pressing 2.

Call handling commands

As soon as you press **Flash** to put a call on hold, you will hear a context-sensitive menu of call handling options. The caller does not hear these menu prompts. At any time while listening to the prompts, you can press **Flash** again to reconnect to the caller.

Call Handling Commands With a call on the line, press Flash, and then...	
1	Transfer the call.
2	Send the call to voice mail.

Call Handling Commands With a call on the line, press Flash, and then...	
3	Disconnect from the call.
4	Reconnect to the call.
5	Create a conference call.
6	Park the call.
7	Silent hold (stops menu until next keypress).
8	Send a Flash to Centrex/PBX service beyond TeleVantage.
#	Get a dial tone (start another call).
***11**	Enter an account code for the call or change the account code already entered.
Flash	Reconnect to the call.

Quick call commands

Pressing * at a dial tone gives you quick access to the commands listed in the following table.

Quick call commands	
***0**	Hear your phone's station ID, extension and other information. Pressing ***00** logs you out from a station you have been using as a visitor, and returns the station to its default user.
***10**	Enable and disable hands-free answering. See "Using hands-free answering" on page 4-4.
***11**	Enter an account code for the current call or the call you are about to dial.
***12**	Enable and disable voice-first answering. See "Receiving internal intercom calls with voice-first answering" on page 4-6.
***15**	Place a page. Dial a workgroup's extension to page all member users' phones with 1-way audio. See "Considerations when placing a page" on page 3-7.
***16**	Place an intercom connection. Dial a user's extension to create a 2-way audio connection through the user's speakerphone. See "Placing a page or intercom call" on page 3-6.
***5x**	See the next table for a list of quick call commands for call center agents and supervisors.
***66**	Redial the last call you placed.
***67**	Block outbound Caller ID for the next call. Dial *67 followed by the phone number. (See also *82.)
***69**	Dial the phone number of your last incoming call.
***70**	Disable call waiting for the next call.
***82**	Unblock (restore) outbound Caller ID for the next call. Dial *82 followed by the phone number. (See also *67.)
***91**	Answer another ringing phone. If multiple other phones are ringing, enter the extension of the phone to answer. Press # to connect. (See also *99.)
***92**	Retrieve a parked call.
***93**	Dial a TeleVantage user by name.

Quick call commands	
***95**	Manage your calls on hold.
***96**	Log off from a remote session. Only available at a dial tone when logged in at a remote phone.
***99**	Answer another ringing phone within your workgroup. (See also *91.)

Quick call commands for call center agents

The following commands are available only for agents in a call center queue.

Quick call commands	
***14**	Call as a queue. This logs your subsequent outbound calls as being placed by the queue, to keep track of which outbound calls are queue-related. To call as a queue, press ***14<queue's extension>#**. To cancel calling as the queue, and revert to calling as yourself, press ***14#**.
***50**	Select the personal status Available. This personal status makes you available, and you start receiving calls from all queues to which you are signed in. In the Available personal status, you receive both queue calls and non-queue (personal calls). To receive only queue calls, choose the personal status Available (Queue Only).
***51**	Select the personal status Available (Queue Only). This personal status makes you available, and you start receiving calls from all queues to which you are signed in. In the Available (Queue Only) status, only queue calls ring your phone. Non-queue calls are sent directly to your voice mail. To have all your calls ring your phone, make yourself available by choosing the personal status Available.

Quick call commands	
***52**	Select the personal status Available (Non Queue). This personal status makes you unavailable and the call center queues stop sending you calls. **Important:** Use this command only at the end of your workday, to preserve the accuracy of queue statistics. To leave your phone temporarily during your workday, use ***53**. You can also end your workday by choosing any personal status other than Available, Available (Queue Only), or On Break.
***53**	Go on break. You become unavailable and the call center queues stop sending you calls, but your workday is still ongoing for statistical purposes. This command changes your personal status to On Break. While you are on break, non-queue calls continue to ring your phone.
***54**	End wrap-up. This command terminates the wrap-up time that follows a queue call. During wrap-up time the queue does not send you calls. Ending wrap-up makes you available to receive queue calls again.
***55**	Hear real-time call center statistics for a queue. To use *55, you must have been given permission to do so by your TeleVantage system administrator.
***56**	Sign in or out of a queue. When signed out of a queue, you do not receive calls from that queue even when you are available. To use *56, you must have been given permission to do so by your TeleVantage system administrator.
***57**	Monitor another agent's call. Neither the agent nor the caller can hear you. This command is available only to call center queue agents who have permission to use it.
***58**	Coach another agent's call. The agent can hear you, but the caller cannot. This command is available only to call center queue agents who have permission to use it.
***59**	Join another agent's call as a full participant. This command is available only to call center queue agents who have permission to use it.

Voice Mail/Account menu

The Voice Mail/Account menu lets you listen to your voice mail, send messages to other users' voice mail, and change your TeleVantage account settings. You need to log in to access this menu.

Logging in

To log in to the Voice Mail/Account menu, pick up your phone and enter **# <your extension> # <your password> #**

When logging in from your own TeleVantage phone, you can skip the extension. Enter **# # <your password> #**.

If your voice mailbox is almost full when you log in, TeleVantage prompts you to empty your Deleted folder. Messages in the Deleted folder count against your total space for voice files. For more information, see "Viewing your voice mailbox size" on page 13-9.

Logging in from a remote location

Depending on how your system is set up, you can log on from a remote phone by calling in and pressing **#** at the auto attendant or **9** at a voicemail greeting. The auto attendant logon key may be different in your system. Check with your system administrator for instructions on remote logon.

Voice Mail/Account menu commands

Summary of Commands			
1	**Voice messages (Inbox folder)**		
2	**Voice messages (Saved folder)**		
	1 Replay	**2** Next message	**3** Delete message
	41 Reply	**42** Forward	**43** Call back
	44 Call back & delete	**5** Previous message	**6** Save
	7 Rewind	**8** Undelete all	**9** Fast Forward
	# Skip message preamble; skip rest of message		
3	**Send voice message**		
	1 Send	**2** Review	**3** Rerecord
	4 Append	**5** Mark Urgent	**6** Mark Private
	***** Cancel		
4	**Manage greetings**		
	1 Replay	**2** Next greeting	**3** Make active
	4 Rerecord	**5** Revert	**6** Record new greeting
	7 Delete		
5	**Call forwarding**		
	1 To this number	**2** To internal	**3** To external
	4 Cancel forwarding	**5** Query forwarding	**6** Toggle ignore call rules
6	**Account preferences**		
	1 Personal status (see next table)		**2** Record voice title
	3 Change password	**4** Change call notification #	
7	**Disconnect from TeleVantage**		
#	**Dial tone to start another call**		

Notes

- Option 7 is available only when logging in from an outside line.
- Option 5 1 forwards your calls to the phone at which you are located. This phone can be a TeleVantage extension or an external number. Using this command at a TeleVantage extension logs you in to that extension. See “Placing outbound calls from shared stations” on page 7-2.
- Option 4 3 reads the callback number to you. You can press 1 to dial it, or press 2 to dial other numbers such as the user's extension or any of the contact's numbers. You can also press 2 # to dial any other number.

Personal Status commands

The commands shown in the following table are available after choosing **6 1** from the voice mail/account menu:

Personal Status commands log in and choose 6 from the voice mail/account menu	
1	Available
2	Do Not Disturb
3	In a Meeting
4	Out of the Office
5	On Vacation
6	Available (Queue only)
7	Available (non-Queue)
8	On Break
9	Custom (followed by 1 to select your first custom status, 2 to select your second custom status, and so on)

APPENDIX B

WORKING AS AN AGENT IN A CALL CENTER QUEUE

CHAPTER CONTENTS

Whether this chapter applies to you

This chapter provides instructions for working as an agent in a TeleVantage call center. Whether or not this chapter applies to you depends on the TeleVantage call distribution method that your office uses, as follows:

- **Use this chapter** if you are an agent in a TeleVantage call center queue that was set up by using the separately licensed call center add-on.
- **Do not use this chapter** if you are an agent in a TeleVantage ACD workgroup that was set up by using an ACD workgroup user and a routing list that sends calls to agents who are members of a workgroup. If you are an agent in an ACD workgroup, see Appendix D, "Working as an Agent in an ACD Workgroup."

For complete information about setting up and running a TeleVantage call center, see the *TeleVantage Call Center Administrator's Guide*.

Starting and ending your shift, and taking breaks

Important: ***Do not use this section*** if you are disallowed from changing your own personal status. In that case, a supervisor will control your workflow. Talk to your queue manager or administrator about how to work in the queue.

As a call center agent, you control your workday by changing your personal status. At the beginning of your shift, you make yourself ready. At the end of your shift, you make yourself unavailable. While you are ready, you receive calls from all queues for which you are signed in. When you make yourself unavailable, queues stop sending calls to you.

Important: If you have to temporarily leave your phone during your shift, choose TeleVantage's On Break personal status.

The following sections describe which personal statuses to use to make yourself ready and unavailable. For instructions on changing your personal status, see Chapter 9.

Starting your shift

To start your shift and begin receiving queue calls, make yourself ready by doing either of the following:

- Using your telephone keypad, press either of the following at a dial tone:
  - ***50.** This selects the Available personal status.
  - ***51.** This selects the Available (Queue Only) personal status.
- In the Client, select either of the following personal statuses:
  - **Available**. You receive personal calls (calls to your extension) and queue calls.
  - **Available (Queue Only)**. You receive only queue calls. Personal calls are sent directly to your voice mail.

If you will be making outgoing calls from the queue, see "Placing calls from a queue" on page B-8.

Ending your shift

Important: Use this procedure at the end of your shift only. To take a break during your shift, use the **On Break** personal status to ensure the integrity of call center statistics. See the next section, "Taking a break."

To end your shift and stop receiving queue calls, make yourself unavailable by doing either of the following:

- Using your telephone keypad, press ***52** at a dial tone. This selects the personal status Available (Non-Queue).
- In the Client, select any personal status whose **Queue calls** preference is set to No, other than On Break. For example, select the Personal status Available (Non-Queue) to receive personal calls without receiving queue calls.

Important: If you have used the ***14** command to mark your outbound calls as being from the queue, you must pick up the phone and press ***14#** to mark your subsequent outbound calls as being personal calls from yourself. Otherwise your outbound calls will continue to be marked as coming from the queue (and may be monitored), even though you have ended your shift. See "Placing calls from a queue" on page B-8.

Taking a break

To take a break from answering queue calls during your shift, do one of the following:

- Pick up the phone and press ***53**.
- In the Client, select the personal status **On Break**.

Important: Select the On Break personal status whenever you leave your phone during your shift, even for a short time. If you leave your phone without selecting On Break, queue calls might be sent to your phone, and callers will hear an interval of ringing before they are placed back on the queue.

When you finish your break and are ready to receive calls again, make yourself ready again. Press ***51** on your phone or select the personal status **Available** or **Available (Queue Only)**.

What call center agents need to know to get the job done

If you are working as a call center agent, you should be aware of the following:

- **While you are ready, always take queue calls that are sent to you.** If a queue call rings your phone and you do not answer, the caller will hear ringing and then be placed back on the queue. Also, if you do not pick up a ringing queue call, or decline it using the call announcing options, the queue might automatically place you in the On Break personal status.
- **Use the On Break personal status only to leave your phone during your shift.** Making yourself unavailable by using other statuses, such as Available (Non-Queue) or Do Not Disturb, signals TeleVantage that you are ending your shift (these statistics are reset daily).

- **Your personal status can be changed by others.** If you do not answer queue calls that ring your phone, the queue can automatically place you in the On Break personal status. Also, a supervisor can change your personal status at any time.

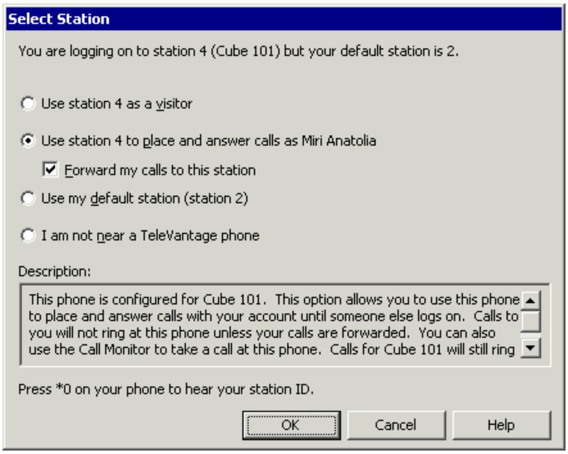
Working at different phones

If you need to work at a phone other than your default station, or if you have no default station and always work at a variety of phones, add the following steps to your routine:

1. When you first sit down at a new phone to receive calls, before marking yourself as Available, log on and forward your calls to your current location. Otherwise, your call center performance might be logged under another agent's name. Use either of the following methods:

   - Pick up the phone and log in by pressing **# <extension> # <password> #**. Once logged on, press **5 1** to forward calls to their current location.

   - Start the TeleVantage Client. The Select Station dialog appears. Select the second logon option, **Use station <x> to place and answer calls as <name>**. Check **Forward my calls to this station**.



2. After you have logged on, make yourself ready as described in "Starting your shift" on page B-2.

3. When you are finished using a phone, log off by either picking up the phone and pressing ***0 0**, or by exiting the Client.

Note: When you are logged in at a station other than your own, voice message indicators apply to you. For example, if you hear stutter dial tone or see a message waiting light on the phone, it means you have new voice messages.

Signing in and out of a queue

You can be either signed in or signed out of each queue to which you belong. Only when you are signed in do you receive calls from the queue. When you are signed out of a queue, you can see and affect its calls in the Call Monitor, but the queue does not send calls to your phone.

As an agent, you might be signed out for the following reasons:

- You are a supervisor who wants to observe a queue and manually take calls if necessary, but you do not want queue calls to ring your phone.
- You are an agent who is a member of multiple queues, and you periodically change which queue you receive calls from. You receive calls only from the queues to which you are signed in.

To sign in or out of a queue

You must have permission to sign yourself in or out of queues. If you do not have permission, talk to your TeleVantage system administrator about signing in and out.

Using the Client

1. Choose **Tools > Queue Sign In/Out**. The Queue Sign In/Out dialog box opens, displaying all queues for which you are a member. A check mark for a queue indicates that you are signed in to that queue.
2. Check the box next to a queue's name to sign in to that queue, or clear the checkbox to sign out.
3. Click **OK**.

Note: In the Queue Monitor or Call Monitor view, you can also right-click a queue tab to sign in or out of that queue.

Using the telephone

Using your telephone keypad, press ***56** at a dial tone. Enter the extension of the queue for which you want to sign in or out followed by #, for example, "*56 102 #".

Seeing whether you are signed in or out of a queue

In the Queue Monitor and Call Monitor views, the tab for a queue displays an asterisk (*) if you are signed out from that queue.

Receiving and handling queue calls

You can receive and handle queue calls by using either the telephone commands or the Client. When the queue sends a call to you, your phone rings and the call appears in the Client's Call Monitor view.

To answer a call, do either of the following:

- Pick up the phone.
- Click the incoming call in the Call Monitor and choose **Actions > Take Call**. If your phone is on-hook, it rings to connect you to the call.

After you are connected to a queue call, you can use any TeleVantage call-handling features such as transfer, park, mute, and so forth. For instructions on handling calls using the phone or TeleVantage Client, see *Using TeleVantage*.

Note: Your queue calls are not shared, even if you are sharing your Call Monitor view.

Viewing your position in the queue

If you have permission to see the Client's Queue Monitor view, you can use it to monitor your position in the queue, and determine when you are likely to receive the next call. See "Monitoring the position of agents in the queue" on page C-12.

Being monitored or coached by a supervisor

Call Center supervisors have the ability to supervise your queue calls on the following levels:

- **Monitoring.** A supervisor may listen in on any of your calls without you or the caller hearing. You will be unaware of the monitoring unless you have the permission **View agents being monitored**. If you do, the monitor appears in the Call Monitor as an indented line under the call.
- **Coaching.** A supervisor may speak to you during a call without the caller hearing. Coaching appears in the Call Monitor as a separate line under the call. If you are being coached, try not to speak to the coach, as the caller will not be aware of the coach's presence on the line.
- **Joining.** A supervisor may join your call, essentially creating a three-way conference call in which all parties can hear each other. For more about conference calls, see *Using TeleVantage*.

Only queue calls are susceptible to being supervised. This includes inbound queue calls and outbound calls that you have associated with a queue after using the ***14** command. Supervisors cannot monitor your personal (non-queue) calls in any way.

Having your calls recorded

The queue may be configured to record some or all of your queue calls. You receive no indication that a call is being recorded. The queue may be configured to place call recordings in your Inbox as new voice messages.

Your non-queue calls will not be recorded unless the TeleVantage system has been configured to record all calls.

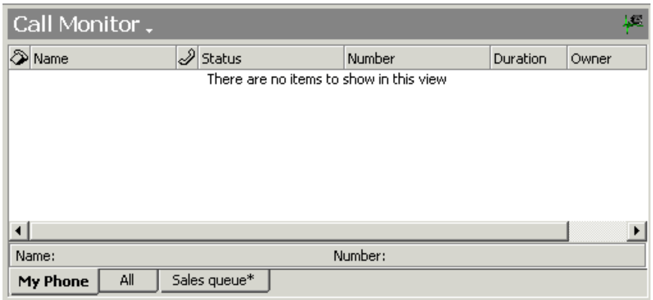
Using the Call Monitor tabs

When you are an agent in a call center queue, your Call Monitor view displays the following tabs:

- A tab that shows the queue's calls, with the name of the queue on it. If the tab name appears with an asterisk, it means that you are signed out from that queue.

  Note: You must have permission to see this tab. If you do not see it, see your TeleVantage system administrator.

- The My Phone tab, which shows all the calls that are being handled by your phone, including any queue calls you have taken.
- The All tab, which shows all your queue and personal calls together.



If you are an agent in multiple queues, the Call Monitor displays a tab for each queue.

Click the My Phone tab or a queue tab to view only the calls for that tab. Click the All tab to view all calls at once.

Note: Your Call Monitor view may display other tabs than the ones described in this section. See Chapter 11 for a full description of the Call Monitor.

Wrap-up time

After you finish a queue call, you are given wrap-up time to complete any work relating to the call. During your wrap-up time you will not receive any queue calls. Your TeleVantage system administrator sets how much wrap-up time you have.

While you are in wrap-up time,  appears in the Client status bar.

Terminating your wrap-up time early

To terminate your wrap-up time early and mark yourself as ready to take queue calls again, do either of the following:

- Click  in the Client status bar.
- Using your telephone keypad, press ***54** at a dial tone.

Viewing queue activity

The Queue Monitor view in the Client displays a list of agents in the queue and up-to-date queue statistics. You can use it to see the status of other agents in the queue and your current position in the queue, among other things.

To see the Queue Monitor view in your Client, you must have the appropriate permission. For a description of the Queue Monitor view, see "Monitoring queue statistics" on page C-3.

Placing calls from a queue

If you are a call center agent and you place a call at your desk using the telephone or the Client, by default TeleVantage treats the call as one made by you. You can choose instead to place calls as a queue, which may be necessary for your work as a call center agent. When you place calls as a queue, TeleVantage treats the call as if the queue placed it. Other agents can see it in their Call Monitors, it can be monitored by supervisors, and statistics and reports can accurately reflect queue activity.

To place calls as a queue, use your telephone keypad to press ***14<queue's extension>#** at a dial tone. TeleVantage treats subsequent calls from your station as being placed by the queue, until you switch back to calling as yourself. Note that when calling as a queue, your calls appear on both the My Phone tab and the queue in your Call Monitor. The calls are logged both in your personal Call Log and the queue's Call Log, with the queue name in the **From** column.

To switch back to calling as yourself, use your telephone keypad to press ***14#** at a dial tone. Subsequent calls from your station are now marked as being placed by you. These calls appear only in your Call Monitor and only in your Call Log.

Important: When you are done placing calls as a queue, be sure to press ***14#** to switch back to calling as yourself. If not, your personal calls will be treated as queue calls, meaning they will be seen by all agents and subject to monitoring by supervisors.

Determining whom you are calling as

The Client’s status bar (at the bottom of the Client window) displays whether the system is treating outbound calls from its station as being from you or from someone else.

You can also learn from whom a station is placing outbound calls by picking up the station and pressing *0. The station information recording includes the line, “The current extension is **<Ext.>** calling as **<Queue>**.”

- **<Ext.>** is the extension of the last user who logged in at the station.
- **<Queue>** is the name of the queue that outbound calls are marked as being from.

For example, the recording might say, “The current extension is **555**, calling as **Sales Queue**.”

Popping up caller information

You can use the TeleVantage Contact Manager Assistant to pop up information about callers that you have in another contact manager application. Callers must be contacts in one of the following contact manager or customer relationship management applications:

- Act! 3.0, 4.0, and 2000
- Goldmine 4.0 and 5.0, and Goldmine Business Contact Manager 5.7
- Goldmine FrontOffice 2000
- Microsoft Outlook 98, 2000, and XP

For instructions on configuring the TeleVantage Contact Manager Assistant, see its online Help.

Act! does not require the Contact Manager Assistant to pop up contact information.

Note: Your office might also use a custom screen pop application created with the Client API. If this is the case, see your TeleVantage system administrator for instructions on using it.

Working remotely

By forwarding your calls, you can work as an agent at a remote phone, for example, your home phone. For instructions on using the Client remotely, see *Using TeleVantage*.

APPENDIX C

SUPERVISING A CALL CENTER QUEUE

CHAPTER CONTENTS

About supervising queues in the Client

This appendix describes the process of supervising a TeleVantage call center queue. For complete instructions on setting up and managing a TeleVantage call center, see the *TeleVantage Call Center Administrator's Guide*.

You can assign agents any number of queue permissions that give them the ability to supervise a queue. Supervisory tasks include the following:

- Configuring the queue in the Administrator, including the agents that belong to it
- Signing agents in or out for the queue
- Viewing real-time queue statistics in the TeleVantage Client
- Changing an agent's personal status
- Managing a queue's voice mailbox
- Supervising agent conversations by monitoring or coaching

You assign permissions separately for each queue. To give an agent supervisor permissions in more than one queue, you must edit the agent separately in each queue.

For instructions on adding agents to a queue and setting their permission levels, see the *TeleVantage Call Center Administrator's Guide*.

Exempting supervisors from receiving queue calls

Because supervisors are agents in the queue, by default they receive queue calls when they are ready, just as other agents do. To exempt a supervisor from receiving calls from a queue, sign the supervisor out for that queue.

When supervisors are signed out from a queue, the queue does not send calls to them. However, supervisors can watch queue calls in the Call Monitor view and answer them if necessary using the **Take call** command. They can also perform all other queue monitoring and managing tasks when they are signed out.

For instructions on signing a supervisor out, see "Signing agents in or out of a queue" on page C-17.

Monitoring current queue calls

Supervisors with the permission **Access Queue call monitor** can view all current queue activity on the queue's tab in the Client's Call Monitor view. Note that only calls associated with the queue appear in the queue's tab. If the agent is on a personal call or a call from another queue, it does not appear in the queue tab.

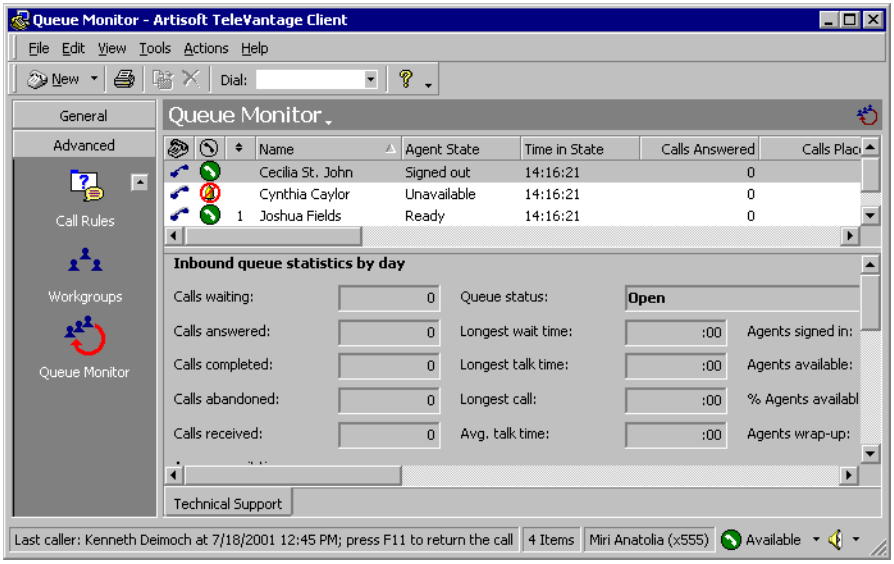
For more information, see "Using the Call Monitor tabs" on page B-7.

Monitoring queue statistics

Agents who have the permission **Monitor queue statistics** set to Allow can monitor a queue's performance by using either the telephone commands or the Queue Monitor view in the Client.

Viewing queue statistics in the Queue Monitor view

To open the Queue Monitor view, click its shortcut in the Advanced section of the view bar.



Each queue for which you have permission to view statistics appears as a tab at the bottom of the view. Click a queue's tab to see statistics for that queue and the agents in that queue.

For a detailed description of when Queue Monitor statistics reset to zero, see "When statistics are reset" on page C-11.

Note: You can continue to use the Call Monitor while you are in the Queue Monitor. Choose **View > Calls Pane** to add the Call Monitor to the Queue Monitor view as a separate pane.

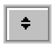
The Agents pane

At the top of the Queue Monitor view, the Agents pane displays the names of all agents in the queue, their current statuses, and their performance, including inbound and outbound calls.

You can have the Agents pane display statistics by day or by shift. Choose **Actions > Show agent statistics by day/shift**. For information about shifts, see the *TeleVantage Call Center Administrator's Guide*.

Note: The Agents pane's statistics are those for the selected queue only. For example, the **Calls answered** field shows the number of calls an agent has answered for this queue. The agent may have answered other calls such as personal calls or calls from other queues.

The Agents pane displays the information shown in the following table. Some columns may be hidden by default. To show them, choose **View > Current View > Show Columns**.

Agents Pane Information	
 **Availability**	Icon showing the agent’s phone as on-hook or off-hook.
 **Personal Status icon**	Icon for the agent’s current personal status.
 **Distribution Order**	The order in which agents are scheduled to receive calls. The order is dependent on the queue’s distribution algorithm. The agent who will receive the next call is the agent with the lowest number among currently Ready agents.
Name	Agent’s name.

Agents Pane Information	
Agent State	Agent’s current level of availability to take calls from this queue. Note than an agent can be in different states for different queues at the same time. The possible states are: **Ready.** The agent is signed in, and in the personal status Available or Available (Queue Only), and the phone is on-hook. The agent is ready to take a call. **Active Inbound.** The agent is on an inbound call from this queue. **Active Outbound.** The agent is on an outbound call associated with this queue. **Wrap-up Inbound.** The agent is in the wrap-up period immediately following the end of an inbound call associated with this queue. **Wrap-up Outbound.** The agent is in the wrap-up period immediately following the end of an outbound call associated with this queue. **Standby.** The agent is On Break, or is in a non-queue call (such as a personal call or a call from another queue.) **Signed out.** The agent is signed out of this queue and so is not taking calls from this queue. **Unavailable.** The agent is in a personal status other than Available or Available (Queue Only), and so is not taking queue calls. **No answer.** The agent did not answer the last queue call. The queue does not send calls to agents in the No Answer status. TeleVantage automatically removes the agent from No Answer status after a certain time based on what caused the No Answer status. **Offering.** The agent's phone is ringing with a call from this queue, but the agent has not accepted the call yet.

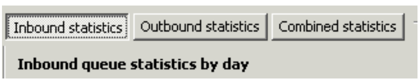
Agents Pane Information	
Time in State	The length of time that the agent has been in the current state for this queue. Times are displayed in the following format: days: hours:minutes:seconds.
Calls answered	Number of calls from this queue that the agent has answered since the beginning of the queue's current display period.
Calls placed	Number of outbound calls associated with this queue that the agent has placed since the beginning of the queue's current display period.
Time on calls	The total time the agent has spent on this queue's calls since the beginning of the shift. You can show this column separately for inbound calls, outbound calls, and all calls.
Longest call	The length of time of the longest queue call (including wrap-up time) that the agent handled since the beginning of the shift. You can show this column separately for inbound calls and outbound calls.
Avg. call	Average length of the agents' queue calls (including wrap-up time) since the beginning of the shift. You can show this column separately for inbound calls, outbound calls, and all calls.
Longest talk	The length of time of the longest single call the agent handled (not including wrap-up time). You can show this column separately for inbound calls, outbound calls, and all calls.
Away	A check mark indicates that the agent has been automatically placed in On Break status by the queue for having let his or her most recent queue calls ring unanswered.
Forced Break	Number of times the queue has automatically placed the agent in On Break status for letting queue calls ring unanswered, since the beginning of the current display period.

Agents Pane Information	
Longest wrap-up	The length of time that the agent spent in the longest wrap-up after a call.
No Answer	Number of queue calls to the agent that rang unanswered, since the beginning of the current display period.
Overflow	The agent's overflow tier. If no number is listed the agent is a primary agent (assuming the overflow skill default is set to 0).
Personal Status Name	Name of the agent's current personal status.
Queue	Name of the agent's queue.
Signed in	A check mark indicates that the agent is signed in to this queue.
Total calls - All	The total number of calls associated with this queue in which the agent has participated since the beginning of the queue's current display period. Includes inbound and outbound calls.

The Queue Statistics pane

At the bottom of the Queue Monitor view, the Queue Statistics pane displays statistics for the queue as a whole. To show or hide the Queue Statistics pane, choose **View > Queue Statistics Pane**.

You can display queue statistics for inbound calls only, outbound calls only, or all calls, by clicking the appropriate button above the **Queue statistics by day section**.



Note: For outbound calls to appear in the Outbound Statistics section, agents must place calls as the queue. See “Placing calls from a queue” on page B-8.

The Queue Statistics pane is divided into the following sections:

- **Current status.** Statistics for the number of agents and calls currently in the queue.
- **Queue statistics by day.** Statistics for calls since the beginning of the current day. These statistics automatically reset to zero at midnight.
- **Queue statistics by period and shift.** Statistics for calls during the current period and shift, compared to the previous period and shift. When the current period or shift ends, the current statistics automatically reset to zero, and the totals that had accumulated are moved into the **Previous** column.

For detailed descriptions of when day, period, and shift statistics reset to zero, see “When statistics are reset” on page C-11.

Note: Queue statistics by shift are not updated during gaps between shifts. For example, if one shift ends at noon and the next shift begins at 12:30, queue activity between 12:00 and 12:30 is not reflected in the shift totals.

The Queue Statistics pane displays the statistics shown in the following table.

Queue Statistics Pane	
Current Status	
Queue status	Whether the queue is currently distributing calls to agents. The possible statuses are: **Open.** The queue is distributing calls to ready agents as normal. **Closed.** The queue is closed. No calls are being distributed to agents. **No agents.** All agents in the queue are currently signed out, so the queue is automatically sending its calls directly to voice mail.
Agents ready	Number of agents waiting to receive queue calls. Ready agents are those who are signed in, have their personal statuses set to Available or Available (Queue Only), and are not currently off hook or in a wrap-up period.
Signed in and available	Number of agents eligible to receive queue calls, including those currently on a call or in wrap-up period. To receive queue calls an agent must be signed in and in a personal status whose **Queue calls** field is set to “Yes,” such as Available or Available (Queue Only.)
% agents ready	The percentage of agents eligible to receive queue calls who are currently waiting for a call. The others are either off hook or in a wrap-up period.
Calls waiting	Number of calls currently waiting on the queue.
Calls being placed	Number outbound calls in the process of being placed. (Connected outbound calls are not counted.)

Queue Statistics Pane	
Agents wrap-up	Number of agents currently in the wrap-up period following a queue call.
Inbound Statistics	
Calls answered	Number of calls answered by an agent.
Calls completed	Number of completed calls in which a caller finished talked with an agent. Completed calls are calls that ended by hanging up or transferring.
Calls received	Total number of calls received, including abandoned calls.
Calls abandoned	Number of callers who decided not to talk to an agent and either hung up or chose a special key option to leave the queue.
Avg. talk time	Length of the average time that callers spent talking with agents.
Total talk time	Total number of minutes that callers have spent talking with agents.
Total call time	Total number of minutes agents have spent on calls (talk time plus wrap-up time).
Longest time	Length of the longest time in each of the following categories (by day only): **Call time.** Length of call, counting talk time plus wrap-up time. **Talk time.** Time spent talking with an agent. **Wait time.** Time spent waiting on the queue.
Average wait time	Average length of time callers waited on the queue for each of the following categories: **All calls.** All inbound calls to the queue. **Answered calls.** All calls to the queue in which the caller spoke with an agent. **Abandoned calls.** All calls to the queue in which the caller hung up or left a voice message.

Queue Statistics Pane	
Redirection	Number of calls that have been automatically redirected by the queue, for each of the following categories: **Maximum wait.** Calls that reached the maximum wait time without being answered. **Queue busy.** Calls that were redirected because the queue was too busy. **Queue closed.** Calls that were redirected because the queue was closed.
Outbound Statistics	
Calls placed	Number of outbound calls placed by this queue.
Calls completed	Number of connected calls that are now over.
Calls connected	Number of currently active connected calls.
Calls not completed	Number of outbound calls that did not find the called party.
Longest time*	Length of the longest time by one call.
Average time*	Length of the average time over all calls.
Total time*	Total number of minutes from all calls.
* See “Time statistics” on page C-11.	
Combined Statistics	
Calls attempted	Total number of inbound calls answered and outbound calls placed.
Calls completed	Total number of inbound and outbound calls completed.
Calls connected	Total number of inbound calls that were connected with an agent and outbound calls that were connected with the called party.
Calls not completed	Total number of inbound calls abandoned and outbound calls not completed.
Longest time*	Longest call and talk time counting both inbound and outbound calls.
Average time*	Average call and talk time counting both inbound and outbound calls.

Queue Statistics Pane	
Total time*	Total call and talk time adding inbound and outbound calls.
* See the next section, “Time statistics.”	

Time statistics

The time statistics in the Queue Statistics pane use the following categories:

- **Call time.** Talk time plus wrap-up time.
- **Talk time.** Time spent talking with an agent.
- **Wrap-up time.** Time spent in wrap-up state after a call.

When statistics are reset

Statistics are reset to zero at the following times:

Statistic type	When reset
Statistics by day	At midnight, or when the Server is restarted.
Statistics by period	On 15, 30, or 60 minute intervals, depending on your configuration for **Statistics period** interval. The intervals are counted from midnight, so a 15-minute interval would reset at 12:15, 12:30, 12:45, etc. All queues that share the same statistics period interval reset at the same clock time. **Note**: Period statistics are always reset counting from midnight, not from the time of a Server restart. This could result in a short period. For example, if the Server was started at 9:50, the period would still end at 10:00, resulting in a 10-minute period.
Statistics by shift	At the end of the shift, as you defined it (see the *TeleVantage Call Center Administrator’s Guide*).

Note: When a call overlaps a reset time, some statistics for it will appear in the first grouping, some in the second, depending on when the statistic is counted. For example, Calls Answered is counted as soon as the call is answered, while Calls Completed is counted when the call ends. Therefore, if a call lasts from 11:58 PM to 12:20 AM, it would be counted as a Call Answered in Day 1, and a Call Completed in Day 2.

When statistics are refreshed

By default the Queue Monitor view refreshes with new statistics as soon as they become available, providing a real-time picture of queue activity. You can enter a slower refresh rate to improve the responsiveness of agents' Client applications. You should change this setting if you find that agents' Client applications are responding too slowly.

To change the Queue Monitor refresh rate

1. In the TeleVantage Administrator, choose **Tools > System Settings**.
2. On the General tab, enter the refresh rate you want (in milliseconds) in **Queue statistics refresh interval**.
3. Click **OK**.

About agents' personal status and state

It is important to distinguish between an agent's personal status and state.

- **Personal status.** Determines whether the agent receives queue calls. An agent's personal status is the same across all queues.
- **State.** Displays the agent's current activity, for example, whether the agent is currently in a queue call. An agent's state can be different in different queues. For example, if an agent is a member of Queue A and Queue B, and the agent is currently in a call for Queue A, his state would be Active in Queue A and Standby in Queue B.

For a description of agent states, see the Agent State column in the Agents pane table on page C-4.

Monitoring the position of agents in the queue

The Queue Monitor's Distribution Order column—displayed as  in the Agents pane—shows the order in which ready agents are scheduled to receive calls. The agent with a 1 in the column is scheduled to receive the next call, followed by the agent with a 2 in the column, and so on. Unavailable agents do not receive a position number. Unavailable agents include agents who are signed out or in a personal status that makes them unavailable such as Do Not Disturb or Available (Non-Queue).

The agent with a 1 in the distribution order will not necessarily receive the next call. The distribution order reflects the scheduled order according to the queue's distribution algorithm, but it does *not* reflect which agents are currently Ready. A Ready agent might have 5 in the Distribution Order column and yet receive the next call because all other agents are busy at the moment. The agent who will receive the next call is the agent with the lowest distribution order number among Ready agents.

Distribution order numbers for overflow agents follow those for primary agents. For example, if a queue has 10 ready primary agents, the first scheduled overflow agent will display 11 in the Distribution Order column. The distribution order of overflow agents is determined first by tier, and then within each tier by the queue's distribution algorithm. For more about overflow agents, see the *TeleVantage Call Center Administrator's Guide*.

The following table shows how agent positions are calculated for each distribution algorithm. The descriptions apply separately to primary agents and to each tier of overflow agents.

Algorithm	Agent positions
Top down	Agents' positions are ordered by their order in the queue and do not change.
Round robin	Agents' positions are reordered according to which agent answered the previous queue call. Whenever an agent answers a queue call, the next agent down in the list becomes 1, the agent after that becomes 2, and so on. When the bottom of the queue is reached, the order continues from the top down until it meets the agent who answered the most recent call.
Longest idle agent	Agent positions are ordered according to the length of time without being in an Active state. The agent who has gone the longest without being Active inbound is in position 1. Note that talking on non-queue calls and being in the On Break personal status place an agent in the Standby state, so that the time since the agent was Active continues to increase. Likewise, Wrap-up is not an Active state, so agents' wrap-up time also increases their "idle" time. Only receiving a queue call makes an agent Active and resets the agent's "idle" time. An agent's position is reduced by 1 whenever an agent with a longer time since being Active receives or places a queue call. The only way for an agent's position to increase is for the agent to receive a queue call.
Fewest calls	Agent positions are ordered according to which agent has received the fewest queue calls during the current display period. The agent who has received the fewest queue calls since the beginning of the shift is at position 1. Note that the length of time spent on a queue call is not significant for adjusting position, only the number of queue calls participated in.

Algorithm	Agent positions
Least talk time	Agent positions are ordered according to which agent has spent the least time on inbound queue calls during the current display period. The agent who has spent the least time on inbound queue calls since the beginning of the shift is at position 1. Note that only calls from a queue count as talk time in that queue. An agent working in two queues will have a different talk time in each.
Simultaneous ring	Agents have no position, as each call rings all agents' phones simultaneously.

Note: The distribution algorithms Longest idle, Fewest calls, Least talk time count inbound queue calls only.

Monitoring queue statistics using the phone

Agents who have permission to monitor queue statistics can hear the current statistics for a queue at any time by picking up a TeleVantage phone and dialing ***55**. The system prompts them to select the queue for which they want to hear statistics.

Dialing ***55** plays the queue statistics shown in the following table. Statistic totals are kept since midnight at the beginning of the current day.

*55 Queue Statistics	
Callers waiting	Number of callers waiting on the queue.
Expected wait time	Rough estimate of how long callers can expect to wait if they called right now. The formula used is <total wait time of all answered calls so far this day> / <number of answered calls so far this day>.
Active agents	Number of agents currently available. This includes all agents who are signed in and in the personal status Available or Available (Queue Only).
Total calls	Total number of calls received today (since the last midnight).
Abandon rate	Abandoned calls as a percentage of total calls.

Supervising other agents’ calls

You can assign agents permission to supervise other agents’ calls in the following ways:

- **Monitoring an agent’s call.** The supervisor can listen to another agent’s call without being heard by the other agent or the caller.
- **Coaching an agent on a call.** The supervisor can coach another agent without being heard by the caller. The agent hears the supervisor but the caller does not. The supervisors can hear all parties.
- **Joining an agent’s call.** The supervisor can be conferenced in to another agent’s call as a full participant and be heard by both parties.

To participate in another agent’s call using any of these methods, agents must have permission to do so.

Note: You can supervise an agent’s outbound queue calls only if the agent has used ***14** to associate outbound calls with the queue. See “Placing calls from a queue” on page B-8.

To monitor, coach, or join an agent’s call using the Client

1. In the Call Monitor, select the call that you want to supervise.
2. Choose **Actions > Supervise**, and choose **Monitor**, **Coach**, or **Join** from the submenu.

To monitor, coach, or join an agent’s call using the telephone commands

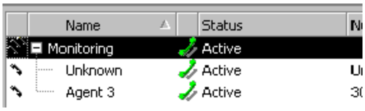
3. Using your telephone keypad, enter one of the following commands at the dial tone:
   - ***57.** Join.
   - ***58.** Coach.
   - ***59.** Monitor.
4. Enter the extension of the agent whose call you want to monitor, coach, or join, followed by **#**.
5. Press **1** to confirm the extension, or press ***** to enter a different extension.

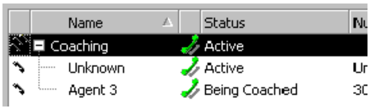
   Note: You can enter the complete digit string rapidly without waiting for the prompts. For example, ***58 3098# 1** to coach extension 3098.
6. Once connected to the call, you can use the following telephone command options:
   - To change the supervising mode—for example, from monitoring to coaching—press **Flash**, then enter the code for the new mode (see step 3).
   - To supervise a different agent, press **Flash #** to return to the dial tone, then begin again at step 3.

If the agent whose call you are supervising transfers the call to another party, or parks it and it is unparked by another party, you are disconnected.

How monitoring and coaching appear in the Call Monitor

When you are monitoring or coaching an agent on a call, the call appears in your Call Monitor showing all three parties to the call. Your row, the top row in the call, is labelled “Monitoring” or Coaching.”



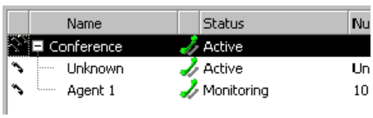


If you are coaching an agent, the agent sees you as a party in the call. If you are monitoring an agent, the agent does not see you as a party, unless that agent has the permission **View agents being monitored** set to Allow. See the next section.

Note: When you join another agent’s call, the call appears as a normal conference call.

Viewing when agents are being monitored

Agents who have the permission **View agents being monitored** set to Allow can see when an agent is being monitored by another agent. The monitoring agent appears in the Call Monitor as another party in the call, identified by the Status “Monitoring.”



Agents who have the permission set to Disallow (the default) cannot see when they or other agents are being monitored.

Note: The Call Log does not keep a record of agents who were monitored.

Managing agents' status

With supervisor permissions, agents can directly control the status of other agents in the queue in the following ways:

- Signing agents in or out of a queue
- Changing an agent's personal status

Signing agents in or out of a queue

An agent who is signed in to a queue receives calls from that queue when ready. When signed out, the agent is still a member of the queue, but does not receive queue calls. An agent who is signed out can still view queue calls in the Call Monitor view and answer them if necessary by using the **Take Call** command.

Supervisors can use the sign in/out feature to move agents among queues without having to delete them from one queue and add them to another. For example, if Kim works as an agent in the Sales queue in the morning and in the Support queue in the afternoon, a supervisor can sign Kim out for the Sales queue at midday and sign her in for the Support queue.

Note: Agents with the **Queue Sign In/Out** permission can sign themselves in and out of the queue. See "Signing in and out of a queue" on page B-5.

You can sign agents in or out using either the Client or the Administrator.

Signing agents in or out using the Client

To use this procedure you must have the queue permission **Monitor Queue statistics** (see the *TeleVantage Call Center Administrator's Guide*) and the general TeleVantage permission **Access Queues folder** (see *Administering TeleVantage*).

1. Open the Queue Monitor view by clicking its icon in the Folder List.
2. If there are tabs for more than one queue, click the tab of the queue for which you want to sign the agent in or out.
3. In the Agents pane, select the agent.
4. Choose **Actions > Sign this agent into queue** or **Sign this agent out of queue**. The command signs the agent in or out.

Signing agents in or out using the Administrator

To use this procedure you must have the general TeleVantage permission **Access Queues Folder** (see *Administering TeleVantage*).

1. Open the Queues view and double-click the queue for which you want the agent to be signed in or out. The Queue dialog box opens.
2. Click the Agents tab and double-click the agent's name in the **Agents in this queue** list. The Agent dialog box opens.
3. Check or uncheck **This agent is signed in**.
4. Click **OK** to close the Agent dialog box.
5. Click **OK** to close the Queue dialog box.

Changing an agent's personal status

A agent who has the permission **Change an agent's personal status** set to Allow can directly change the personal statuses of agents in the queue. A supervisor can use this feature in the following situations:

- When agents are prevented from changing their own personal status. In this case you must manage their workflow for them, changing their personal status to begin and end their workday and to let them take breaks.
- When agents leave their phones and forget to change their personal statuses themselves. In this case, you can set the personal statuses of the agents to On Break.
- When the queue is configured to automatically place agents On Break if they let calls from the queue go unanswered. In this case, you ensure that agents become ready when they return to their desks.
- When agents leave for the day and are still ready. In this case, you can change their personal statuses to make the agents unavailable.

Important: If agents leave at the end of their workday without making themselves unavailable, you must make them unavailable before the start of the next workday, or reports data will be inaccurate.

To change an agent's personal status

1. In the Client, select the agent on the appropriate tab in any of the following locations:
   - The Extensions view
   - The Extensions pane in the Call Monitor view
   - The Agents pane in the Queue Monitor view
2. Choose **Actions > Apply Personal Status**, and then select a personal status.

For more information about how to use personal statuses, see *Using TeleVantage*.

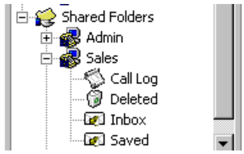
Managing a queue's voice mailbox

Agents who have the permission **Access queue mailbox** set to View and Edit can manage voice messages that callers leave in the queue's voice mailbox. They can listen to messages, reply to them, and delete them. They also can create voice mailbox folders and move messages among those folders.

Agents who have the permission set to View Only can see and listen to voice messages, but not perform any other commands on them.

To access the queue's voice mailbox

1. In the Client, open the queue by going to **Shared Folders** in the Folder List and clicking the plus sign next to the queue's name.



2. Click Inbox, Saved, or another voice mailbox folder to view the contents of that folder.

For complete instructions on managing voice messages using the Client, see *Using TeleVantage*.

Managing queue voice messages on the telephone

You can also manage a queue's voice mail using the telephone by logging in as the queue. When logging in, use the queue's extension and password.

For instructions on logging in and managing voice messages using the telephone commands, see *Using TeleVantage*.

WORKING AS AN AGENT IN AN ACD WORKGROUP

APPENDIX CONTENTS

About participating in an ACD workgroup

This appendix describes how agents participate in an ACD workgroup.

Important: This section covers instructions for working in an ACD workgroup only. For instructions on working in a call center queue, see Appendix B.

For complete instructions on setting up and managing a TeleVantage call center, including an ACD workgroup, see the *TeleVantage Call Center Administrator's Guide*.

Use of the TeleVantage Client

Agents in an ACD workgroup must use the TeleVantage Client. Without the Client, there is no way for agents to control whether or not they receive calls from the ACD workgroup. Agents require the Client to begin and end their workday and to take breaks during it, as described in the next section.

Marking yourself ready and unavailable

To mark yourself as ready to receive ACD workgroup calls:

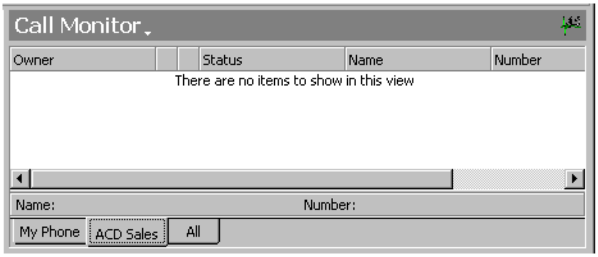
1. Log on to the Client using your own name and password.
2. Click **Tools > Options**.
3. Click the Incoming calls tab.
4. Check **Accept ACD Workgroup calls**.
5. Click **OK**.

To mark yourself as unavailable, which stops ACD workgroup calls from being sent to you, uncheck **Accept ACD Workgroup calls**.

Note: If your ACD workgroup uses the simultaneous ring method, you cannot make yourself available while a call is ringing and answer it. Because you were not available when the call started ringing, your phone will not be rung for that call.

Using the Call Monitor

To use the Call Monitor to handle ACD workgroup calls, agents log on to the Client using their own names and passwords. They can view incoming ACD workgroup calls by using the ACD workgroup tab in their Call Monitor views.



Call Monitor view tabs work as follows:

- **My Phone.** Displays non-ACD calls.
- **<ACD workgroup user name>.** Displays ACD workgroup calls only.
- **All.** Displays all calls together.

Important: For agents to see the ACD workgroup tab in their Call Monitor views, you must have shared the ACD workgroup user’s Call Monitor with them. See “Sharing your Call Monitor view” on page 11-16.

Receiving a call

When a call to the ACD workgroup arrives, the phones in the workgroup ring according to the method specified by the routing list. Calls continue to ring agents until they are answered or until the caller chooses to leave a message or hang up.

Incoming calls appear in all participating agents’ Call Monitor views immediately. Agents do not have to wait for their phones to ring to take a call. As soon as an incoming call appears, they can click it in the Call Monitor view and choose **Actions > Take Call**.

The status of a call in progress appears in agents’ Call Monitor views as “Active.” Agents cannot affect other agents’ active calls. However, they can perform any action on their own calls, such as Hold, Transfer, Mute, and so forth.

Placing ACD workgroup calls

If you are an ACD workgroup agent and you place a call at your desk using the telephone or the Client, by default TeleVantage marks the call as a call made by you. However, you may need to place outgoing calls as part of your work as an ACD workgroup agent. Such calls in TeleVantage can be marked as calls from the ACD workgroup—not as calls from your extension—so that reports on ACD workgroup activity accurately reflect agent performance.

To mark all subsequent outbound calls as ACD workgroup calls, use your telephone keypad to press ***14<ACD workgroup user's extension>#** at a dial tone. All calls that are made from your station are now logged as calls that are made by the ACD workgroup user. The calls appear in the Call Monitors of all agents in the workgroup. The calls do not appear on the My Phone tab in your Call Monitor. The calls are logged both in your personal Call Log and the ACD workgroup user's Call Log, with the queue name in the **From** column.

To switch back, and mark subsequent outbound calls as being from you, press ***14#** at a dial tone again. All subsequent calls from your station are now marked as being placed by you. These calls appear only in your Call Monitor and only in your Call Log.

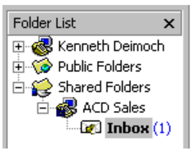
Taking a break

To take a break during your work shift, uncheck **Accept ACD Workgroup calls** as described in "Marking yourself ready and unavailable" on page D-2.

Note: The Do Not Disturb personal status does not stop ACD workgroup calls from ringing your phone.

Listening to the ACD workgroup's voice mail

If you have shared the ACD workgroup user's Inbox with other agents, and given those agents the required permission, they can play and respond to the ACD workgroup's voice messages. To do so, they go to the ACD workgroup's Inbox under **Shared Folders** in the Folder List.



Agents can play and respond to the ACD workgroup's voice messages exactly as they work with their own voice messages.

Viewing the ACD workgroup's contacts and Call Log

If the ACD workgroup's contacts and Call Log have been shared with you, you can view those folders under **Shared Folders** in the Folder List.

LOGGING ON WITH COMMAND-LINE SWITCHES

You can add various switches to the command line that the Client shortcut uses to start the Client. To change the command line, right-click the Client shortcut icon, choose **Properties**, and then click the Shortcut tab. The **Target** field shows the command line.

Add switches to the end of the command line with a space before the switch. You can add multiple switches separated by spaces. For example:

```
C:\Program Files\TeleVantage\Client\TVClient.exe /Server:TeleVantage /station=77
```

The command line switches for the Client are:

- **/allowmultiple**. Enables you to run multiple instances of the Client at the same time on your computer.
- **/Server**. (Syntax: `/Server=<Servername>`, for example, `/Server=TeleVantage`). Runs the Client against a specific TeleVantage Server on your network. This is useful when you want to have one Client session using a Server other than the one your Client runs against by default.
- **/station**. (Syntax: `/station=<station ID>`, for example, `/station=77`.) Makes your Client use a specific TeleVantage phone.
- **/user /password**. (Syntax: `/user=<username> /password=<password>`, for example, `/user:Charles Gould /password:2112`. The two switches can be used separately.) Use to automatically log on to the Client as a specific user.

APPENDIX F

REPORTING PROBLEMS

CHAPTER CONTENTS

Enabling problem logging on Windows 9x systems

If your computer is a Windows 95 or Windows 98 system, by default the collection of TeleVantage log files is turned off, which makes troubleshooting harder.

If you encounter a problem on a Windows 9x system, do the following:

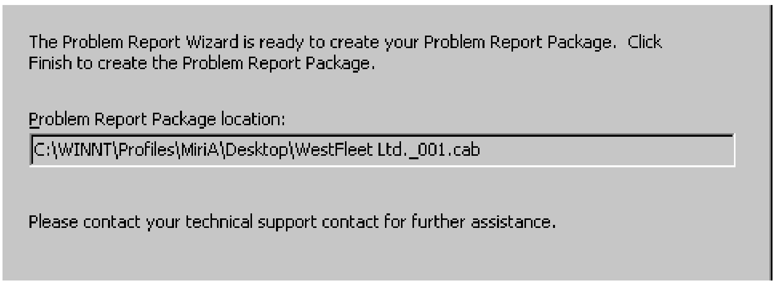
1. In the Client, choose **Help > Problem report logging** and make sure that it is toggled on.
2. With logging on, try to duplicate the problem.
3. Run the Problem Report Wizard as described in the next section.

Using the Problem Report Wizard

If you experience a problem with one of the TeleVantage workstation applications—Client, Administrator, Call Center Reporter, Contact Manager Assistant, or TAPI Service Provider—report the problem to your TeleVantage system administrator by using the Problem Report Wizard. The Problem Report Wizard is a tool that collects appropriate log files and prompts you for information that can help solve the problem.

The Problem Report Wizard creates a problem report package as a .CAB file in the location of your choice. You can then send the .CAB file to your system administrator.

To prevent .CAB files from being overwritten, the Wizard gives each problem report package a unique name based on your company name and a unique sequence number, as shown in the following example.



The Wizard increments the sequence number in the file name each time it creates a new problem report package.

Reporting a problem that involves a specific call

If you encountered a problem that involved a call, the best way to report the problem is as follows:

1. In the TeleVantage Client or Administrator, go to the Call Log view and select the call during which the problem occurred.
2. Choose **Actions > Report a Problem**. The Problem Report Wizard opens with details about the call already entered.
3. Complete the Problem Report Wizard screens.

Reporting other problems

If your problem does not involve a specific call, run the Problem Report Wizard as follows:

1. Do one of the following:
   - From the Client, choose **Help > Report a Problem**.
   - Run the file `C:\Program Files\Common Files\Artisoft\TeleVantage\TVPRWizard.exe.`
2. Answer the questions presented in each Wizard window.
3. Send the problem report package to your TeleVantage system administrator by attaching it to an e-mail message or moving it to another location on the network. Ask your TeleVantage system administrator which method to use.

   It can be helpful to include in your e-mail the time at which the problem occurred, as closely as you can identify it.

Because a problem report package can be large, after you send it to your TeleVantage system administrator, you should delete it from your system to regain disk space.

INDEX

Symbols

Numerics

A

B

C

F

G

H

I

J

L

T

U

V

W