A MITEL
PRODUCT
GUIDE

# Unify OpenScape Concierge

Unify OpenScape Concierge V4R2, Plus

Administrator Documentation

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Mitel

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# Contents

# 1 About this manual

This manual provides a description of the OpenScape Concierge administration tools. It is mainly concentrating on OpenScape Data Center application which is used to configure and administrate the OpenScape Concierge application with its options and integration possiblities.
The book's structure tries to reflect Data Center's application structure with its different sections. Where required the settings in OpenScape Concierge **System Management** and / or the connected PABX or OSCC system are outlined.
For the integrated applications like **Contact Data Provider (CDP)** for contact data import, **Button Config** and **Layout Management** configuration how to set up a just installed system, please also refer to the guide "OpenScape Concierge, Configuration, Administrator Documentation".

**NOTE:**
The manual was written for technical specialists (e.g. trained personnel responsible for integrating, installing and managing the software).

## 1.1 Terms and notation

This section describes the terms and notation used in this manual.

### 1.1.1 Style

**Table:** Style

| Convention | Meaning |
|---|---|
| **Bold** | On-screen buttons and icons, menu items |
| ***Cursive bold*** | Database names, variables, fields, file names |
| UPPERCASE | Buttons (SHIFT, CTRL, ALT) |
| *Italics* | Commands, examples, folder names |
| `Courier` | Output texts and error messages, parameters, source text |

### 1.1.2 Terminology

The following terms describe actions that should be performed using the keyboard or mouse, as well as the command button statuses on the screen.

**Table:** Terminology

| Term | Meaning |
|---|---|
| Press | Press a key on the keyboard. |
| Input | Enter letters, numbers, database names, variables. |
| Enter | Press the confirmation key (ENTER or Return). |
| Double-click | Click the left mouse button twice quickly. |
| Right-click / right mouse button | Click the right mouse button once. |
| Select or highlight | Click an item once with the left mouse button. |
| Drag | Select an object and click and hold the left mouse button while moving the object to a new position. |

| Term | Meaning |
|---|---|
| Drop | Release the left mouse button to drop the dragged object. This can only occur after you have dragged an item. |
| Active / released | Active commands are displayed as black text on the screen. This means that they are available to the user. Active icons are displayed in their usual colors if available. |
| Deactivated / not released | Deactivated command buttons and icons are displayed in gray on the screen, meaning that they are not available to the user. |
| Button / icon | Buttons for performing functions |

### 1.1.3 Notes

The following notes are used in this manual:

**NOTE:**
Identifies useful information which is important for the working process.

**IMPORTANT:**
Indicates a situation that could result in functional disorders or damage to property.

## 1.2 Abbreviations

**Table:** Abbreviations

| Abbreviation | Name | Meaning |
|---|---|---|
| ACD | Automatic Call Distribution | Automatic distribution of calls (call center telephone system) |
| ART | ACD Routing Table | OS4000 ACD routing table |
| BDE | Borland Database Engine | |
| CBC | Concierge Button Config | Concierge Admintool |
| CDC | Concierge Data Center | Concierge Admintool |
| CF | CallForward | Setting in OSV |
| CFU | CallForward unconditional | Setting in OSV |
| COS | Class of Service | A set of Feature which is assigned to your phone |
| CLM | Concierge Layout Manager | Concierge Admintool |
| CTI | Computer Telephony Integration | Integration of telephone system and supporting software |
| DB | Database | |
| DDI | Dialed Digits Inwards | Direct dial number |
| Dll | Dynamic link library | |
| ETB | Electronic phonebook | Part of the OpenScape Concierge application |

| Abbreviation | Name | Meaning |
|---|---|---|
| GDPR | General Data Protection Regulation | Law for the protection of personal data |
| H4K | HiPath 4000 – now OpenScape4000 | PABX / Telephone system |
| MCID | Malicious Call Identification | |
| MLHG | MultiLineHuntGroup | Mulitline hunt group in OSV |
| MoH | MusicOnHold | Music on hold setting in OSV |
| NA | Not available | Agent status **Not available** |
| OS4000 | OpenScape4000 – former HiPath 4000 | PABX / Telephone system |
| OS4K | OpenScape4000 – former HiPath 4000 | PABX / Telephone system |
| OSC | OpenScape Concierge | OpenScape Concierge application |
| OSCC | OpenScape ContactCenter | ACD of OpenScape Voice |
| OSCC-E | OpenScape ContactCenter Extension | Contact center solution package from the CoC environment |
| OSV | OpenScape Voice | Soft switch |
| OCX | OLE Control Extension | Program module |
| PABX | Private Automatic Branch Exchange | HiPath 3000, OS4000, or OpenScape Voice |
| RCF | Remote Call Forwarding | Setting in OSV |
| RCG | Route Control Group | Setting in OS4000 |
| RNA | Ring no Answer | Call was not accepted |
| SDK | Software Developer's Kit | Development software |
| SIP DN | Session Initiation Protocol Directory Number | Subscriber Setting in OSV |

# 2 Introduction

## 2.1 General

OpenScape Concierge is a convenient, user-friendly attendant console for OpenScape Voice and OpenScape 4000. The solution can run standalone or integrated with OpenScape Contact Center (OSCC).

Two variants of OpenScape Concierge are available:

- OpenScape Concierge **Professional**
- OpenScape Concierge **Plus**

OpenScape Concierge **Professional** provides the full range of available functions. OpenScape Concierge **Plus** is a variant which is reduced to essential features.

Concierge without OSCC offers call picking or simple call push functionality based on group membership of the attendants, a functionality that is also used to control the visibility of calls in the Client GUI.

Detailled call and user statistics, enhanced routing and contact center functionalities are realized with OpenScape Contact Center integration where Concierge users are handled as ACD agents.

The central Concierge Provider Service (CPS) offers call and announcement handling.

The integrated telephone book (ETB) with Calendar and UC, Circuit, Skype or Microsoft Teams integration options display all necessary information to the attendants at a glance.

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**IMPORTANT:**
The example configurations in this manual describe a configuration in the environment of the lab. In customer's environment other parameters are required, like e.g. different number ranges, prefix access codes, etc.
**Only trained staff should configure and adopt the configuration to the customer's environment.**

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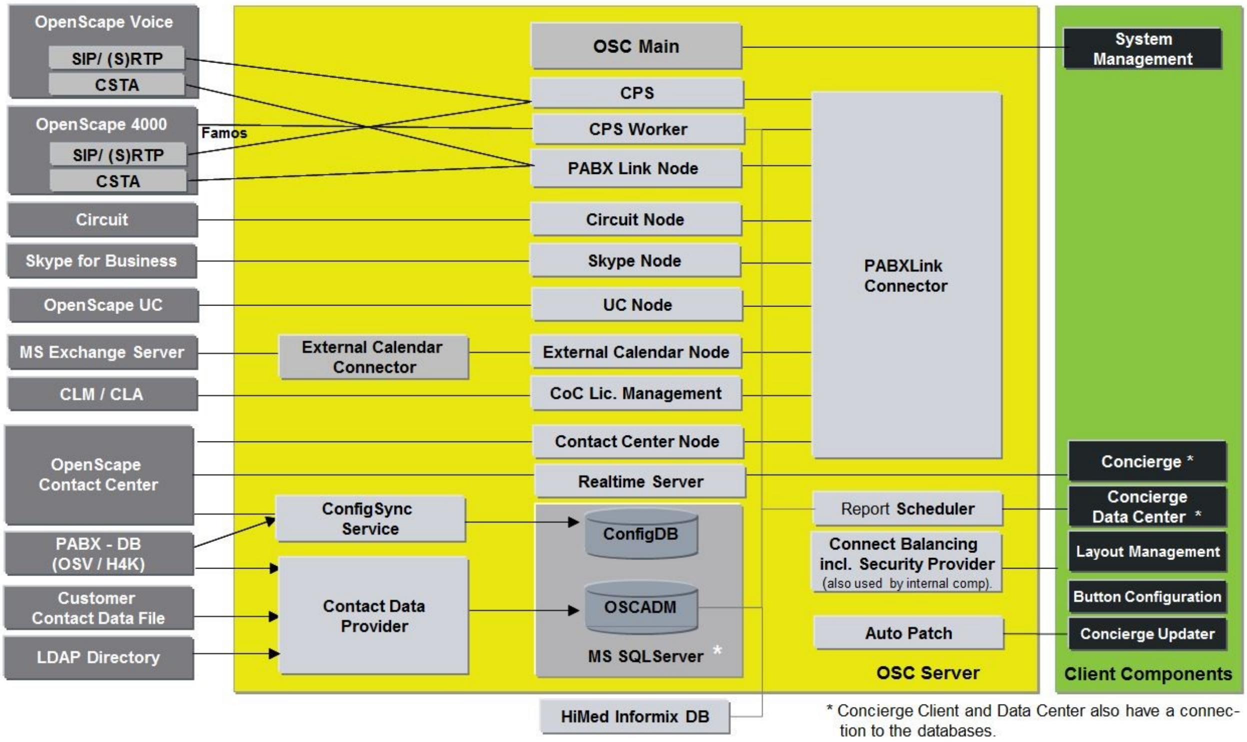
OpenScape Concierge V4 is the successor of OpenScape Contact Center Extensions (OSCC-E) V3R1.

### 2.1.1 Further documentation relating to Concierge

- OpenScape Concierge Configuration, Administration Documentation
- OpenScape Concierge Plus User Guide
- OpenScape Concierge Setup Client Installation Manual
- OpenScape Concierge Setup Server Installation Manual

## 2.2 OpenScape Concierge components of Server and Clients




<u>Description of the most important OSC Server components:</u>
On top of the figure the service **OSC Main** is displayed. It controls all processes on the machine and can be started and stopped using Windows services; it is named "**OpenScape Concierge Service**".

The MS SQL Server Express database on the main machine, with ***OSCADM*** and ***ConfigDB*** for hosting Concierge data.
Processes called *ControlConfigDB* and *ControlOscadmDB* are responsible for creating and maintaining the databases – these are not in the figure.
This database can also be swapped out on a dedicated machine.

The central instance is the **PABXLink Connector** where the function nodes of the different components connect to and integrate with each other.

The **CPS (Concierge Provider Service)** is responsible for controlling the calls that are handled by the Concierge users / attendants. Without OSCC the CPS is responsible for automatic push of calls to agents / attendants (ACD).
The CPS is responsible for holding, transferring and parking calls as well as for the pager functionality. When the call is assigned to an attendant and the attendant speaks with the caller CPS is not involved, it comes back to CPS if the agent parks or pages or transfers or holds the contact.

The **CPS Worker** is a worker process of CPS and is used for additional communication needs in case:
- OSCC is used to monitor OSCC call flow
- OS4K Famos interface is used to read and set Class of Service
- HiMed is used to synchronise patient data into OSConcierge database.

**Contact Data Provider (CDP)** is responsible for (automatically) importing contact data for the **Electronic Telephone Book (ETB)**. Multiple sources of different types can be used for that data import.

The **Realtime Server** consists of the Realtime Server and the Realtime Node which is part of the Contact Center Node.

The **UC node** connects Concierge with **OpenScape UC** for displaying the presence status and the media state of the UC extension to the attendant.
The **Circuit node** connects Concierge with **Circuit** for displaying the presence status of the Circuit extension to the attendant.
The **Skype node** connects Concierge with **Skype for Business** for displaying the presence status of the Skype extension to the attendant.
The **Microsoft Teams node** connects Concierge with **Microsoft Teams** for displaying the presence status of the respective Microsoft Teams user to the attendant (using the respective contact Microsoft Teams e-mail account)."

The **External Calendar** node connects Concierge with external calendar systems to provide external calendar information of contacts in ETB to the attendant. Internal calendar information can additionally be stored in the OSCADM by Concierge.

**Report Scheduler Worker** is responsible to process report schedules.

### 2.2.1 CPS

Besides the CSTA link the **CPS (Concierge Provider Service)** is the second important connection between OSC Server and the communication platform (OS400/OSV/OSCC). CPS is a central service in the system. It is responsible for the complete handling of the calls that are in scope of Concierge as well as for the handling of announcements for callers handled by Concierge.

Calls that are parked or appended are connected to the CPS where the caller can listen to defined music. Calls that are transferred are temporarily connected to the CPS as long as the target device has not accepted the call. This allows Concierge to always keep track and control of the calls until they are connected to the target party.

In case the required person does not answer, the CPS is the instance that decides how to proceed with the call. It is no longer the ***Intercept*** settings of the communication platform that make the decisions in case the target user can not be reached.

This way the CPS is always the master of calls for the attendant console. This includes RTP streams to the CPS. Concierge defines the handling in all possible scenarios and can report on what happened in every moment.

Finally the CPS also provides a simple ACD routing of incoming calls in installations without OpenScape Contact Center.

### 2.2.2 OpenScape Contact Center Integration (for Professional version only)

With the optional OpenScape Contact Center integration the following services are also required:

- **Contact Center Node**
- **CPS Worker** is mainly used with OSCC and is responsible for displaying the waiting OSCC calls in the Concierge GUI. Also COS changes are handled by CPS Worker.

### 2.2.3 Client Applications

These client applications are used with OpenScape Concierge:

- OpenScape **Concierge Client** (Attendant Console application)
- **Concierge Data Center** (Concierge related configuration)
- **Layout Management** (Configuration of the Concierge client layout (look).
- **Button Configuration** (Speed- and Direct dial button configuration)
- **System Management** (Main server configurations)

**Remarks**

The **System Management** is the general administration tool for configuring the OSC Server’s base parameters, like IP addresses, port numbers, database settings and passwords as well as its OSC applications settings.

# 3 OpenScape Concierge Client application

The OpenScape Concierge client application is based on the executable file ***Concierge.exe*** running on the Concierge user's (Attendant's) client PC. The Concierge application has a variety of configuration options for adapting the functionality to the needs of the users, like e.g. the modification of *direct dial buttons* or feature access based on user permissions. All the settings are hosted in the OSC server's OSCADM database.

Furthermore layout settings of the Concierge client GUI can be customized individually based on individual user settings.

Together with the application an initialization file, *Concierge.ini* is installed. This contains a few parameters connecting to the server (IP addresses & port numbers). Furthermore the default language files are stored in the client applications installation folder. These contain the language specific GUI parameters of the Concierge application. All other configuration settings are stored centrally on the server.

Individual layout and language settings as well as logging information are stored in the user's roaming profile area of the clients.

---

**IMPORTANT NOTE for the use of the telephone device:**
It is recommended to use headset for the operator's phone device in order to get the best user experience.

The attendant **must not** operate the Concierge attendant console by using the phone device. **It is not allowed** to transfer calls, consult calls and hold calls etc. using the phone.

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## 3.1 Language files

The standard local language information for Concierge Client and Concierge Management tools is defined in the language file ***Concierge_lang*.xx*.ini*** (where **xx** stands for the language suffix like *de, en, es, fr, it or pt-br*)***.*** These standard language files come with the installation of the client and reside in the same folder as the ***Concierge.exe***. As language files might also be replaced when patching or upgrading the application, it is not allowed to change those files.

During start up of the application the user interface of Concierge Client and Concierge Data Center follow this sequence to display parameter entries:

1. Custom Language File (**OSConcierge_Lang.Custom.xx.ini**)
2. Database entry in Concierge Data Center (Basic data/Language configuration)
3. Standard OSC language file delivered with installation (***Concierge_lang*.xx*.ini)***
4. In case the required language file or a certain parameter within a language file is not available Concierge starts with English as default language.

Adjustments of linguistical terms can be done tenant-wide in Concierge DataCenter under Basic data / Language configuration. For details refer to section 6.2.3 Language configuration

In case you want to customize the language file for a dedicated Concierge Client and/or Concierge Management tools you have to use the files “OSConcierge_Lang.**Custom**.*xx*.ini” (see next section).

### 3.1.1 Customizing the language file

To customize for example label or button names or hotkey functions, you have to use the OSConcierge_Lang.Custom.*xx*.ini, which you will find an empty version under *<drive>:\Users\<user name>\AppData\Roaming\OpenScape Concierge\OSConcierge* after an initial start of any Concierge tool.

**Procedure**

1. Copy the paragraph and the parameter you want to change from the original language file into your OSConcierge_Lang.Custom.*xx*.ini.
   -> *Remember **NOT** to modify the original language file!*
2. In your OSConcierge_Lang.Custom.*xx*.ini modify the parameter value as wanted.
3. Save your changes in your customized language file and make sure the language suffix is correctly entered in the file name (e.g. OSConcierge_Lang.Custom.***de.***ini for German).
   Also check that the language file is in ANSII when saving it.

This file will not be overwritten by an upgrade

### 3.1.2 Implement new languages

It is possible to use other languages than the standard languages (German - de, English - en, Spanish – es, French -fr, Italian -it, Portuguese-brazil - pt-br) for Concierge Client and Concierge Management tools. Follow the procedure to implement another language:

**Procedure**

1. Copy the ***Concierge_lang*.xx*.ini*** of your choice.
2. Rename the file where *xx* is substituted by the language suffix (e.g. Czech – **cz,** Dutch – **nl** and so on).
3. Open your new file and translate the parameter values following the “=“. Please see section 3.1.2.1 Translation Guidelines for OSConcierge_Lang.xx.ini.
4. Save your changes. Make sure that the language file is in ANSII when saving it.
5. Store the new language file in the same folder as the ***Concierge.exe*** on the client PC or under a central path.
6. In order to make the new language file available for the Concierge client and/or Concierge Management tools you have to enter the file name into the ***OSConcierge.ini***:

   *example when storing the language file locally on the client’s PC:*
   [General]
   LanguageFile = OSConcierge_Lang.*xx*.ini

   *example when storing the language file in a central directory:*

[General]
LanguageFile = C:\Temp\OSConcierge_Lang. *xx*.ini

7. It is also possible to have an additional individual language file with the new language. Then follow the procedure under 3.1.1 Customizing the language file and also enter into ***OSConcierge.ini*** under section [General]:
   CustomLanguageFile =
   $PersonalApplicationData$\OSConcierge_Lang.Custom.*xx*.ini
   *or*
   CustomLanguageFile = %TEMP%\OSConcierge_Lang.Custom.*xx*.ini

---

**NOTE:**
When a user starts the Concierge client application for example the login form will only make the new language selectable for the user because of the above mentioned OSConicerge.ini entry.

---

**Test your configuration**

Now test the new language in Concierge applications.

1. Start OSConcierge and OSConcierge Management tools
2. Check especially all labels, buttons, tabs and templates.
3. Also make sure the new language fits on buttons and labels.

You might not see all translated parameters because some menus and error messages are context sensitive and can only be seen in a test environment.

---

**NOTE:**
After an client upgrade it is possible that the upgraded standard language files contain new parameters. The Concierge application will work with available parameters from the *OSConcierg_Lang.Custom.*xx*.ini*; if a parameter does not exist in this languagage file, Concierge works with the default language *Concierge_lang.*en*.ini* file to get the new parameters.

---

#### 3.1.2.1 Translation Guidelines for OSConcierge_Lang.*xx*.ini

**IMPORTANT:**
The first valid line has to contain the language to be displayed on the Login window of the Concierge applications. For example: [Italian]

```
;;OpenScape Concierge

[Italian]
;;2014-07-23
DatePopupNow = Ora
DatePopupClear = Cancellare
DatePopupOK = Ok
```

Basis for translating is the originally delivered "OSConcierge_Lang.en.ini".

1. Therefore copy this language file and name it "OSConcierge_Lang.<your language>.ini".
2. Open the file with an ASCII text editor (Notepad or another editor but not Wordpad nor Word or a similar tool creating binary content) and change [English] to your language in the first valid row – see example above.
3. Translate the English words / phrases on the right site of the "=" (equal sign) into your language.
4. Save the file in ANSII and follow the procedure under section 3.1.2 Implement new languages.

**Important rules for Concierge language files:**

- Do not delete lines in the Concierge language file.
- Make sure you do **NOT** change the parameters left of the “=” (equal sign).
- Do not use any additional carriage return / linefeeds.
- Do not use any additional semicolon.
- If you face wrong search matches especially when you search for names containing language specific characters (e.g. ą , č , Ş, …) this may only be changed in the software.
- Many Hotkeys (for fully keyboard controlled Concierge) are controlled via character / letter sensitive short cuts (press keyboard key for a special activity or press combinations like Ctrl-a, Alt-a or Ctrl-Alt-a etc.) and are therefore sometimes language dependant. They will not work for example if the word in the new language does not contain the same letter. It is strongly recommended to ask for support in case you need to change hotkeys.
  You can detect Hotkeys by searching for “&” infront or within a word (e.g. ETBShowExtrasBtn = (Alt+E)&Extras) or “Ctrl+”, “Alt+” or “Ctrl+Alt+” (e.g. Ctrl+A).
  - Do NOT use Ctrl+Shift+<letter or digit> because this is reserved for the Button Configuration (Direct Dial Buttons).

The situation for the report builder slightly differs. This tool uses special language mechanisms outside of the Concierge language file. Thus its recommended accepting the English (or other officially supported language) expressions since reporting is normally not used by the attendants. The software would automatically use the English expressions if the corresponding expression is not defined in the local language.

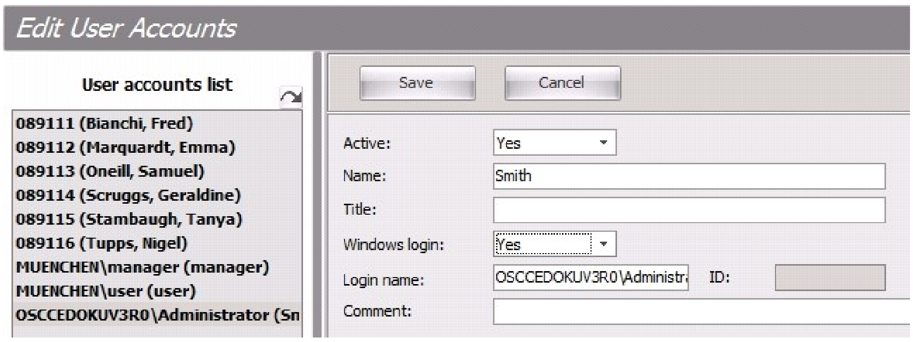
If local language support is needed for the short cuts too, or needed in the report builder as well or if you need changes in the contact search algorithm please get in contact with Unify support for a language / project specific support.

## 3.2 Starting Concierge Client with Windows authentication logon

In case the Concierge clients are supposed to start with Windows authentication logon you perform following steps in Concierge DataCenter.

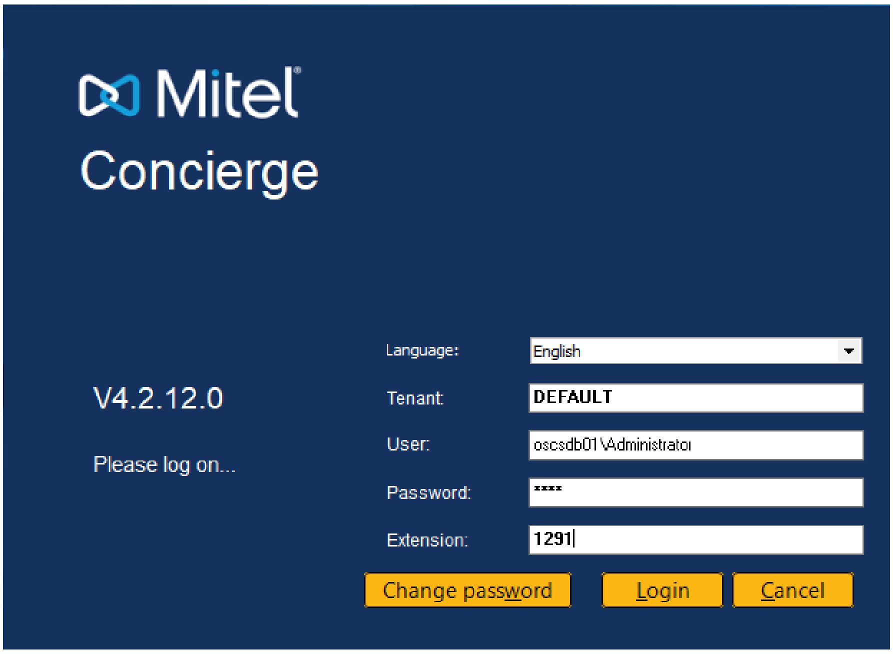
**Procedure**

Start Concierge DataCenter. When entering the user account under User administration / Accounts choose following settings:
**Windows login** = **Yes**
**Login name** = enter the Windows Login information (*domain\user name*).



**NOTE**:
You do not need to fill in the **Password** field. It is deactivated anyway.

When you start the Concierge client application now, you only have to verify the extension and click the **Login** button to log on.




**NOTE:**
It is not possible to use Windows authentication logon in combination with Client auto logon (logon without logon mask).

# 4 OpenScape Concierge DataCenter

The **OpenScape Concierge DataCenter** is used for administration and configuration of the OpenScape Concierge solution. This application connects directly to the database and offers a GUI to allow the administrator to make changes quick and simply.

## 4.1 Starting OpenScape Concierge DataCenter


Click **OSCDataCenter** on the desktop, to start the OpenScape Concierge DataCenter application.

---

**NOTE:**
You also find a shortcut to Data Center under the **Start Menu** or double click the ***DataCenter.exe*** in the installation path under "\bin\Concierge\Concierge Management" like e.g. "`C:\Program Files (x86)\OpenScape Concierge\bin\Concierge \Concierge Management\DataCenter`".

---

There are **two default types of user accounts to log on to the Concierge Data Center,** that come with the installation:

1. The "***systemmanager***" account, that is used for central, system wide administration tasks which generally affect the whole system with tenants / users.
2. The ***tenant's "manager"*** account. This is used for the tenant's administrator to specify tenant's ressources, like phone book entries (contact data) or the tenant's users, simply spoken all items that are not in scope of the system administrator.

Normally these both accounts are sufficient for Concierge configuration, but in case user accounts with certain rights are required, the Data Center offers the possibility to create those user accounts in accordance with customer requirements. See section 5.3 User administration and 6.6 User administration for further details.

---

**NOTE:**
Data Center allows multiple instances to run on one PC at the same time. So settings can be done in parallel!

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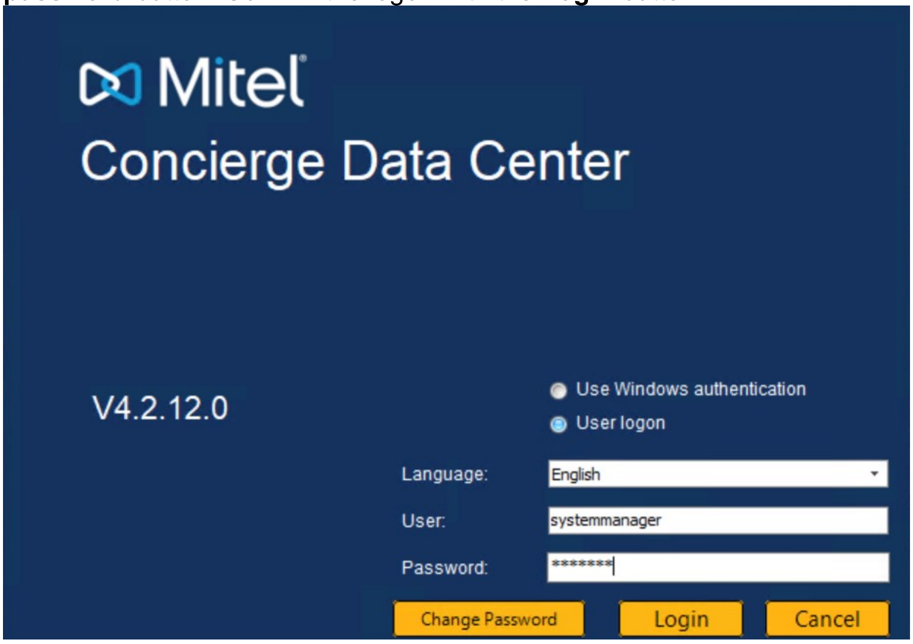
### 4.1.1 Initial Logon

For initial configuration right after installation you start Concierge DataCenter with the login of the default systemmanager account – see section 5 Login with "systemmanager" rights.
Thereafter you can either login with the default manager account or with a self-created manager account – see section 6.6 User administration.

For logging on to <u>Data Center</u> with Windows authentication see section 3.2 Starting Concierge <u>Client</u> with Windows authentication logon.

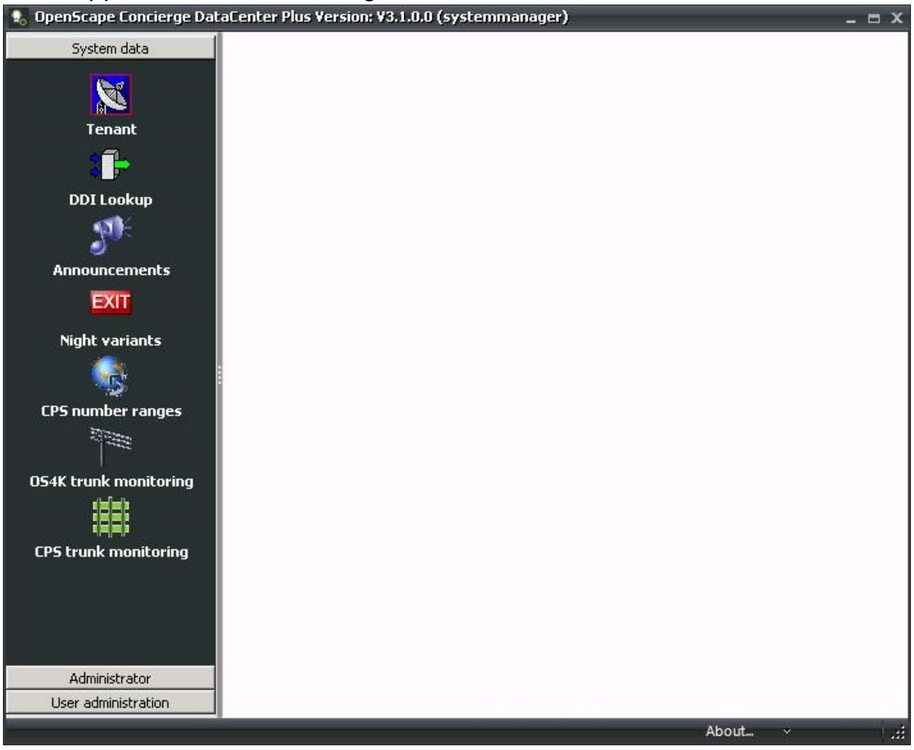
# 5 Login with “systemmanager” rights

The **systemmanager** account is required for the first time an administrator logs on to the OpenScape Concierge DataCenter after installation.
The default password "manager" can be changed by using the **Change password** button. Confirm the logon with the **Login** button.



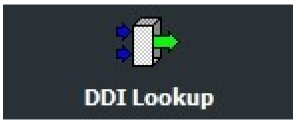

## 5.1 System data

The "OpenScape Concierge DataCenter" window with the "System data" menu appears after the user logs on.



On the upper edge of the window you can see in the brackets the user that is logged on; in the given picture the *systemmanager* user.
The first time a screen appears reminding the logged on person to complete a basic configuration for the Tenant (including Site and Outbound access settings). The start screen that appears shows the tenant settings in *System data*. Further configurations are done in the *System data* menu. It shows of the following elements for configuration:

**Table:** Elements of the *System data* menu

| Symbol | Name |
|---|---|
|  | **Tenants** |
|  | **DDI Lookup** |
|  | **Announcements** |
|  | **Night Variants** |
|  | **CPS number ranges** |
|  | **OS4K Trunk Monitoring** |
|  | **CPS Trunk Monitoring** |

## 5.1.1 Tenant

**Access**


The **Tenants** icon to open the "Edit tenant" window can be found in the *System data* menu.

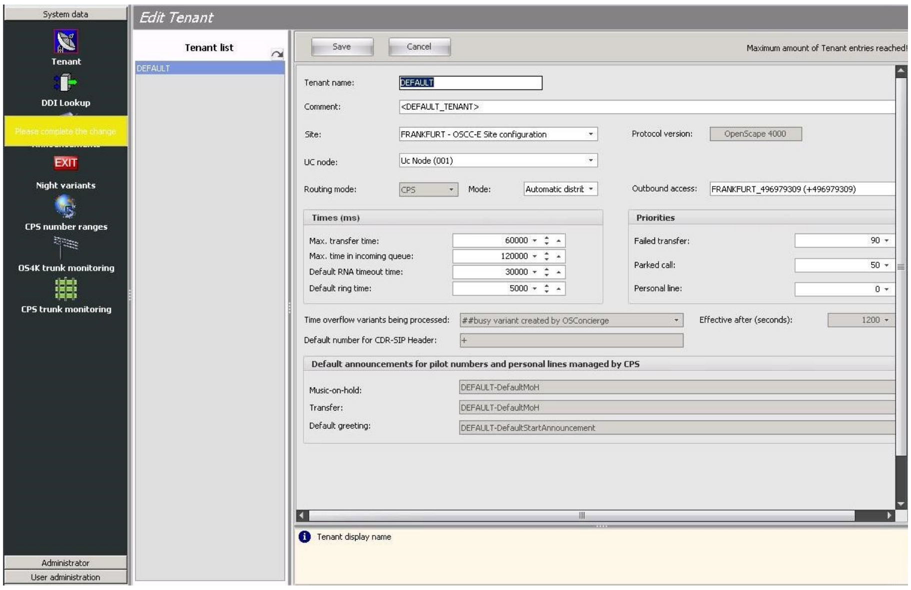
Only a *Systemmanager* is authorized to modify the tenants settings.

For creating *Systemmanager* users, please see section 5.3.1 Accounts.

**Description**

A default tenant is created automatically during the installation procedure. It is recommended to use that tenant named DEFAULT.

The settings can be modified by pressing the **Change** button. The fields that can be edited become white. If a field becomes light green the required value is mandatory. Fields that are configured with another user account or in another GUI stay grey.




**Tenant's general settings on system management level:**

Tenant's general settings are the **Tenant name** and a **Comment** that is mandatory. The **Site** can be selected from the dropdown menu out of the sites that are specified by *System Management*. Similarly the entries for the the **UC, Circuit, Skype node or Microsoft Teams** (depending on the integrated Presence information system) and the **Number range** are predefined for a given system by *System Management*. The **protocol version** (type of communication platform) is also predefined.
The **Routing Mode** is automatically set to CPS. The ***Mode*** itself can be selected between the option ***Automatic distribution*** as well as ***manual pickup*** of calls from the Caller queue window.
The **time overflow variants** with its **timer** is configured on the tenant management level.

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**NOTE**:
Additional Overflow variants need to be created in the Administration area of Data Center before they can be used here.

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**Times (ms)**

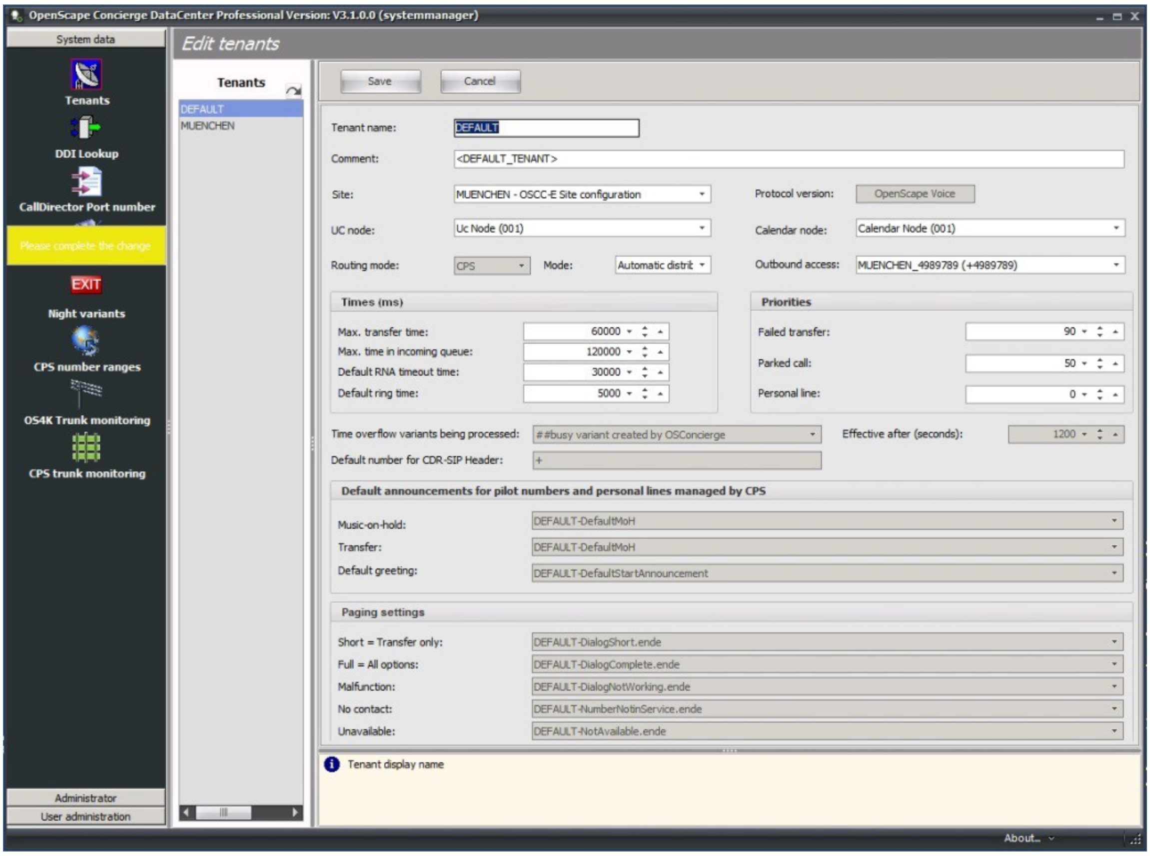
In this area the time parameter for Concierge handling the calls are specified. These values can be overwritten by the tenant's manager on a DDI based level and are explained in detail in section 6.4.1.2 Times.

**Priorities:**

Right besides the *Times* pane *priorities* can be configured for different types of calls. A priority of a call describes its importance in terms of the order of distribution / visibility. The priority values can be overwritten by the *tenant's manager* based *on* a DDI level and are explained in detail in section 6.4.1.4 Priorities.

**Announcements for Pilot and Personal Lines**

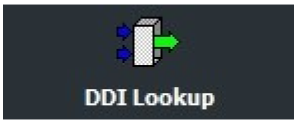
The *announcement* settings for pilot numbers and personal lines are defined on a *tenant manager* level; they are explained in section 10 Best practice - Announcements Handling.




## 5.1.2 DDI Lookup

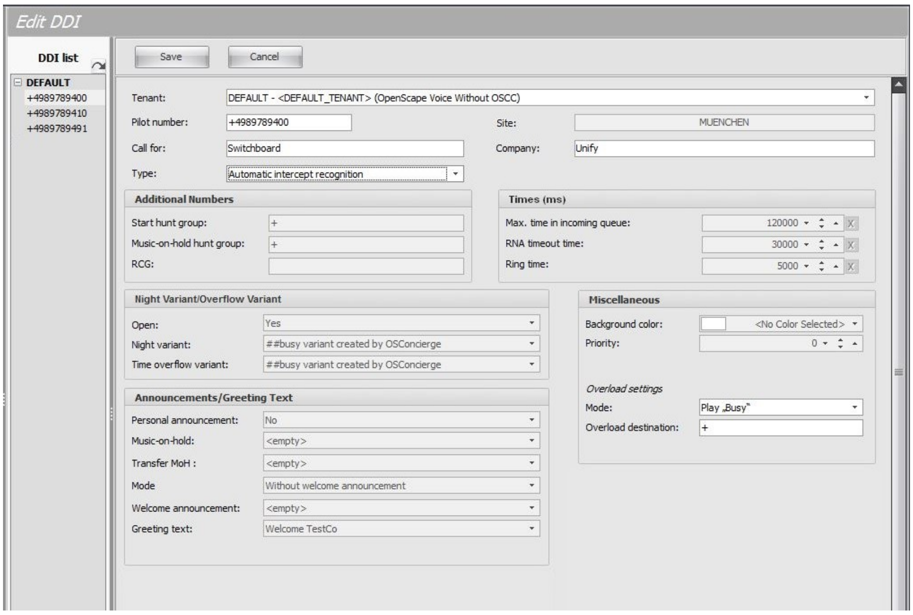
In this section the general properties of the *DDI lookup table* (or *DDI List*) are described from a *systemmanager* perspective. The chapter outlines the settings in the DDI lookup table depending on the required service and how these reflect the settings in the PABX.
Furthermore OpenScape Contact Center specific settings are required, which are described below.

### Access




The **DDI Lookup** icon to open the "Edit DDILookup" window can be found in the "System data" menu.

Only the *systemmanager* is authorized to create or delete entries in the system's DDI lookup table. The *tenant's manager* can modify for their own tenant's entries.




The ***DDI Lookup*** is the central instance for Concierge to evaluate an incoming call via its pilot number that is also called service number. Different pilot numbers reflect the different callers' requirements, so with that table one defines how the system handles an incoming call.
In the upper area of the window the routing entries of the communication platform are defined, these have to be monitored for properly gathering all call parameters.
Tenant specific *time settings can be overwritten for the different pilot numbers* in the DDI List settings with the *tenant's manager* account. Similarly the settings for the night variants, announcements and greeting texts.

---

**NOTE:**
If the fields stay on <empty>, the system will use the tenant's times and announcements settings.

---

These settings have to be specified for both types of deployment – with and without OSCC integration and can be overwritten by the *tenant's manager.*

**General information specified on *systemmanager* level:**

General settings for a DDI List entry are **Tenant**, that can be choosen from dropdown menu out of the tenants as specified above. The **Pilot number** is the subscriber number of the corresponding service. The field **Call for** describes the name of the service. The entry in field **Type** can be choosen from dropdown menu – see help text in System Management. The entry in the **Site** field comes with the specified tenant. **Company** is an optional field for further customer information.

**Additional numbers (with OSCC integration only):**

Under additional numbers you specify the Communication platform entities assigned with the Pilot number of this DDI List entry.

1. Start Huntgroup **requires the pilot number that is assigned to the *Start*** *Huntgroup* (also called *Initial Huntgroup* in OpenScape Contact Center.)

2. **Music-on-hold hunt group** requires the Extension that is assigned to the MoH Huntgroup when integrating with OpenScape Contact Center.
3. **RCG** is used to describe the RCG assigned to the Pilot number when integrating with OS4000.

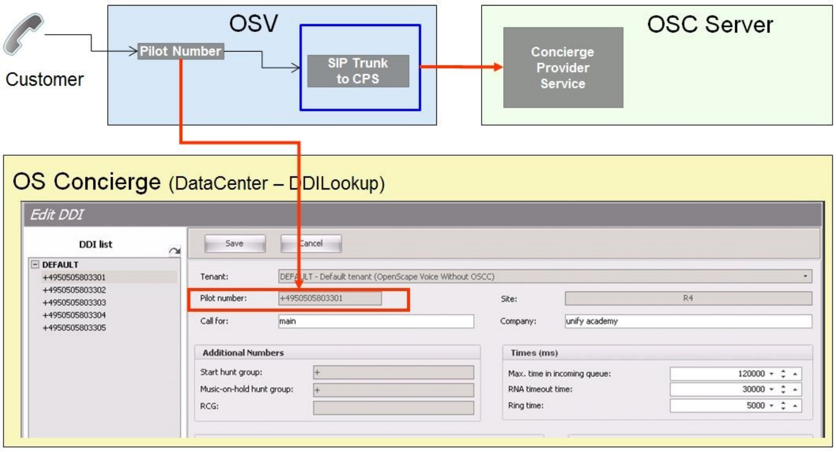
#### 5.1.2.1 DDI Lookup entry for OSV

The configuration of service numbers (pilot numbers) in OSV without OpenScape Contact Center is outlined:
Pilot numbers route the incoming calls to the SIP trunk of CPS. The CPS is then fully responsible for handling / distributing the call.

---

**NOTE:**
It is very important in the scenario without OpenScape Contact Center to configure **overflow handling** and **night variant routing**, see also section 5.1.4 Night Variants

---




The picture displays the pilot number routings for Concierge in OSV. The pilot number is one number out of the range of numbers that route to the CPS running on the OSC Server / Concierge Server and fall back to the fall back hunt group if CPS is down.
In case of a Concierge Server failure the **fallback hunting group** in OSV is responsible for call handling. This fall back configuration is used for service number calls and also for agent's Personal Line calls
This configuration is used for all kinds of service calls handled by Concierge; e.g. Main and Internal lines. Additional service numbers can be created.

---

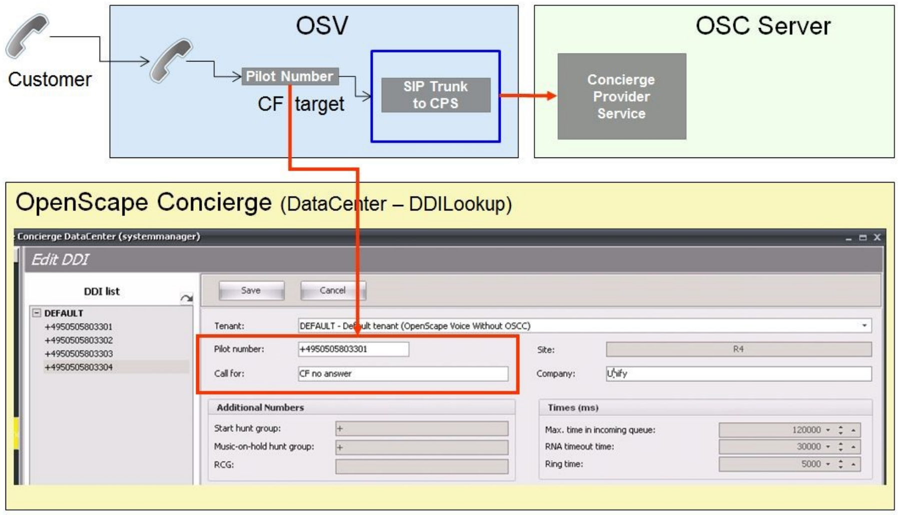
**NOTE:**
For the agents' **Personal Line** numbers, a configuration similar to the service numbers in OSV is used; the configuration for the personal line numbers are as described above!

---

For detailed information on configuration of DDI Lookup settings refer to section 6.4.2 DDI Lookup.

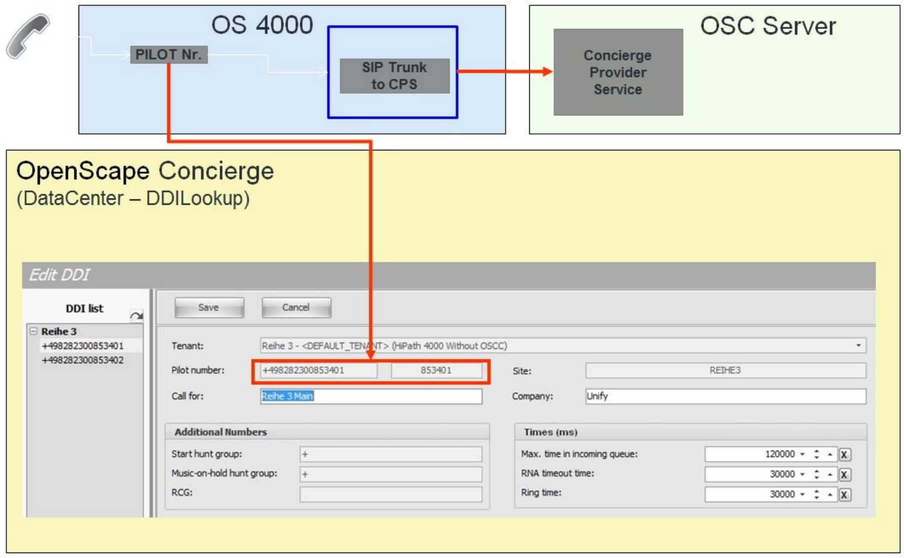
**Example for Call forwarding busy / no answer:**

This example shows the numbers that have to be configured for CF busy and CF no answer:



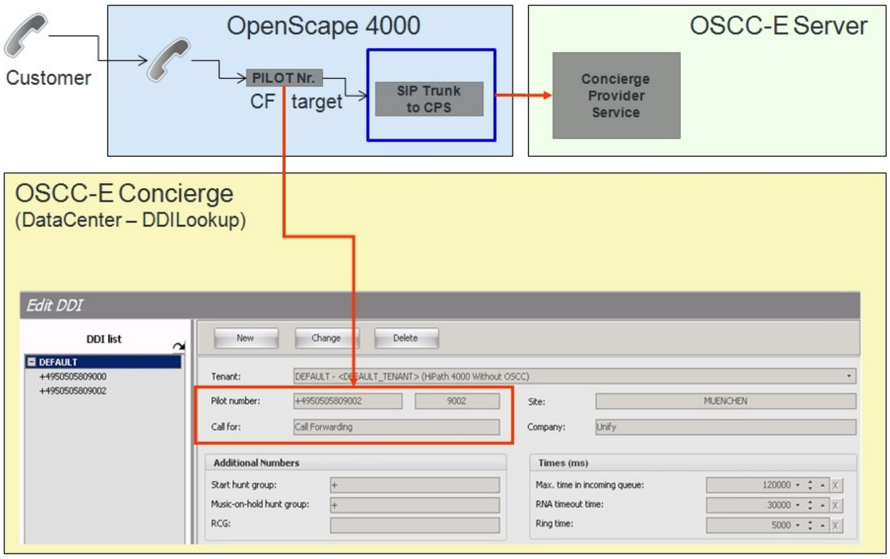

## 5.1.2.2 DDI Lookup entry for OpenScape 4000

The following displays the relations between the pilot number in OpenScape 4000 that routes the call to the CPS and the required entries in the DDI Lookup in Concierge Data Center.




We see the configuration of a pilot number in Data Center using Concierge. The pilot number must be a number that routes to CPS as described above. At least one service number has to be configured. Optionally additional service numbers can be used, depending on the customer's needs, like e.g. one for main, internal, Intercept or CF that allow Concierge creating meaningful statistics.

These queues with their corresponding pilot number need to be configured in Concierge Data Center for Concierge being able to monitor the incoming calls.




We see the Data Center configuration of Call Forwarding (CF) targets for Concierge.

---

**NOTE:**
In the scenario remember to configure the overflow handling and night variant routing, see section 5.1.4 Night Variants.

---

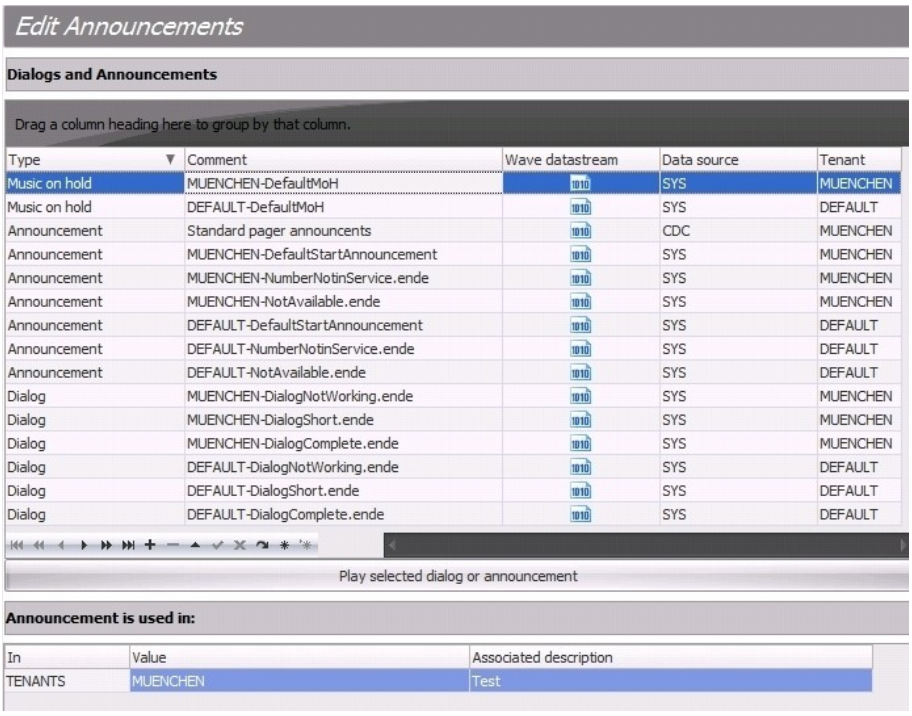
### 5.1.3 Announcements

Before using an announcement can be used by CPS the corresponding wave file has to be registered in Data Center. This can be done under System data, section Announcements. The **Edit Announcements** window shows all wave files that are registered in Concierge Data Center.

**Access**


The **Announcements** icon to open the "Edit” window can be found in the *System data* menu.

For detailed description please refer to section 10 Best practice - Announcements Handling



Edit Announcements

Dialogs and Announcements

Drag a column heading here to group by that column.

| Type | Comment | Wave datastream | Data source | Tenant |
|---|---|---|---|---|
| Music on hold | MUENCHEN-DefaultMoH | | SYS | MUENCHEN |
| Music on hold | DEFAULT-DefaultMoH | | SYS | DEFAULT |
| Announcement | Standard pager announcents | | CDC | MUENCHEN |
| Announcement | MUENCHEN-DefaultStartAnnouncement | | SYS | MUENCHEN |
| Announcement | MUENCHEN-NumberNotinService.ende | | SYS | MUENCHEN |
| Announcement | MUENCHEN-NotAvailable.ende | | SYS | MUENCHEN |
| Announcement | DEFAULT-DefaultStartAnnouncement | | SYS | DEFAULT |
| Announcement | DEFAULT-NumberNotinService.ende | | SYS | DEFAULT |
| Announcement | DEFAULT-NotAvailable.ende | | SYS | DEFAULT |
| Dialog | MUENCHEN-DialogNotWorking.ende | | SYS | MUENCHEN |
| Dialog | MUENCHEN-DialogShort.ende | | SYS | MUENCHEN |
| Dialog | MUENCHEN-DialogComplete.ende | | SYS | MUENCHEN |
| Dialog | DEFAULT-DialogNotWorking.ende | | SYS | DEFAULT |
| Dialog | DEFAULT-DialogShort.ende | | SYS | DEFAULT |
| Dialog | DEFAULT-DialogComplete.ende | | SYS | DEFAULT |

Play selected dialog or announcement

Announcement is used in:

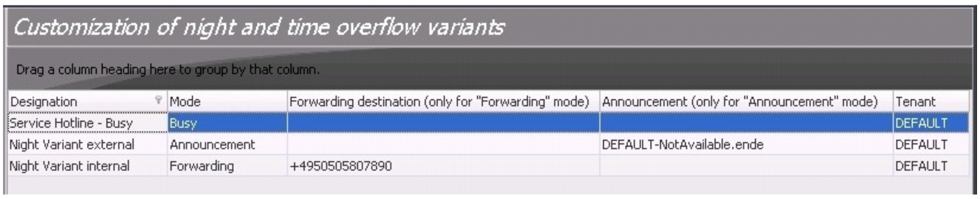
| In | Value | Associated description |
|---|---|---|
| TENANTS | MUENCHEN | Test |

## 5.1.4 Night Variants

### Access


### Description

**Night variants** and **overflow variants** define the options available for handling an incoming call in case no attendant or not enough attendants are available for handling an incoming call or if the service number is closed. Configure night variants and time overflow variants under **System data** / **Night Variants**.



Customization of night and time overflow variants

Drag a column heading here to group by that column.

| Designation | Mode | Forwarding destination (only for "Forwarding" mode) | Announcement (only for "Announcement" mode) | Tenant |
|---|---|---|---|---|
| Service Hotline - Busy | Busy | | | DEFAULT |
| Night Variant external | Announcement | | DEFAULT-NotAvailable.ende | DEFAULT |
| Night Variant internal | Forwarding | +4950505807890 | | DEFAULT |

Three modes of night variants or time overflow variants can be configured:

- **Mode Busy:** A busy signal is played to the caller
- **Mode Announcement:** An announcement is played to the caller
- **Mode Forwarding:** The call will be forwarded to an extension number which can handle the call.

### Procedure

1. Use the “**+**” button on the bottom line to create a new entry. Specify a designation. Choose a mode as described above.
2. In case the mode *Forwarding* is used, configure the forwarding destination.
3. In case the mode *Announcement* is used, choose an Announcement from the dropdown list.

4. Assign the tenant’s name.

---

**NOTE:**
For details and usage of Night Variants please refer to the tenant’s night variant settings in section 6.4.4 Night Variants.

---

### 5.1.5 CPS number ranges

**Access**


**Description**

The Concierge Provider Service (CPS) is the central application of Concierge for handling and controlling calls.
Without OSCC integration all incoming calls are handled by CPS.
If calls are put on hold or parked, they are connected back to CPS that keeps them locally until further handling is required.

CPS is connected to the PABX as a SIP endpoint using a SIP trunk connection.

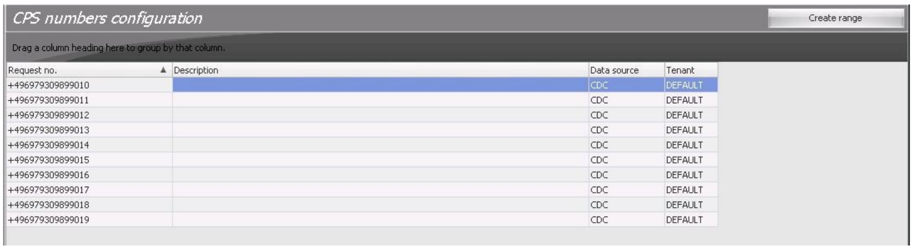
In this area the extension numbers that are used by CPS for call handling (park, hold, and transfer) – so called *internal resources* have to be registered.

The ranges for *personal lines* and *service numbers* are independent of these resources!

---

**NOTE:**
In CPS configuration settings in OSV and OpenScape 4000 these number ranges are referred to as “internal resources”

---




| Request no. | Description | Data source | Tenant |
|---|---|---|---|
| +496979309899010 | | CDC | DEFAULT |
| +496979309899011 | | CDC | DEFAULT |
| +496979309899012 | | CDC | DEFAULT |
| +496979309899013 | | CDC | DEFAULT |
| +496979309899014 | | CDC | DEFAULT |
| +496979309899015 | | CDC | DEFAULT |
| +496979309899016 | | CDC | DEFAULT |
| +496979309899017 | | CDC | DEFAULT |
| +496979309899018 | | CDC | DEFAULT |
| +496979309899019 | | CDC | DEFAULT |

Configure the extension numbers or ranges of extension numbers that are used by CPS.

---

**NOTE:**
Please also refer to ***OpenScape Concierge Configuration, Administrator documentatio***n, section “Formula for estimating the number range of internal CPS resouces“ for details on the size of the corresponding ranges for the appropriate environment (OSV or OS4K with or without OSCC) for further details.

---

**Request numbers** are used for transferring calls from the attendant to the CPS. Whenever a call shall be handled by CPS, which is the case while being on hold, in the transfer process or in the parking queue etc. a request number is used for that transfer process to the CPS.

---

---

Add single request numbers or callback numbers to the database tables or use the **Create range** button in the upper right area to define ranges of numbers according to the settings in the PABX.

**Table:** Data fields CPS number Configuration

| Column | Description |
|---|---|
| Request number | Port number / extension number of the port for usage with CPS.<br>(By dialing this number the communication platform routes the call to the SIP trunk that connects CPS) |
| Description | Use this field for information regarding that port number, esp. if there are important remarks. |
| Data source | CDC is the data source name for OpenScape **C**oncierge **D**ata**C**enter. |
| Tenant | Name of Tenant that belongs to that ressource |

At the lower border of the table, a new entry can be added by clicking the plus button. Once the entry has been created and completed, it can be transferred and saved to the database by clicking the green checkmark.

### 5.1.5.1 Example: Definition of numbers and number ranges

**CPS connection uses following types of number ranges:**

One for the **personal line numbers** of the attendants, one for **internal CPS resources** like *Request pool* and a pool of **Service Numbers**.
Furthermore if CPS fails, a **fallback Hunt Group** has to be defined in the OSV, where all attendant users are members. The fallback solution is used for the personal lines and Service Numbers in case of CPS failure.
Calls coming in via the personal line numbers and Service Numbers are re-routed to that fallback hunt group.
The **internal resources** are not in use if CPS fails. Therefore no fallback for these is required.

**Example number ranges:**

| Parameter | Description | Value |
|---|---|---|
| CPS Resources for the example in the following sections | | |
| Personal Lines Start | Numbers that route to CPS used for Personal Line Numbers of attendants | 4950505803200 |
| Personal Lines End | | 4950505803299 |
| Loop Number | Unique number that is not used for elsewhere | 4950505803300 |
| Request Numbers Start | Numbers that route to CPS used for internal tasks, like e.g. Park, Append, Transfer | 4950505803301 |
| Request Numbers End | | 4950505803349 |
| Service Numbers Start | Numbers that route to CPS used for handling customer calls | 4950505803350 |
| Service Numbers End | | 4950505803399 |

| Parameter | Description | Value |
|---|---|---|
| CPS Resources for the example in the following sections | | |
| Fallback Hunt Group | Hunt Group for Calls to Pilot and Personal Line Numbers, if CPS fails | 4950505805520 |

## 5.1.6 OS4K Trunk Monitoring (with OpenScape 4000 only)

**Access**


Only the *systemmanager* is authorized to create or delete entries in this dialog.

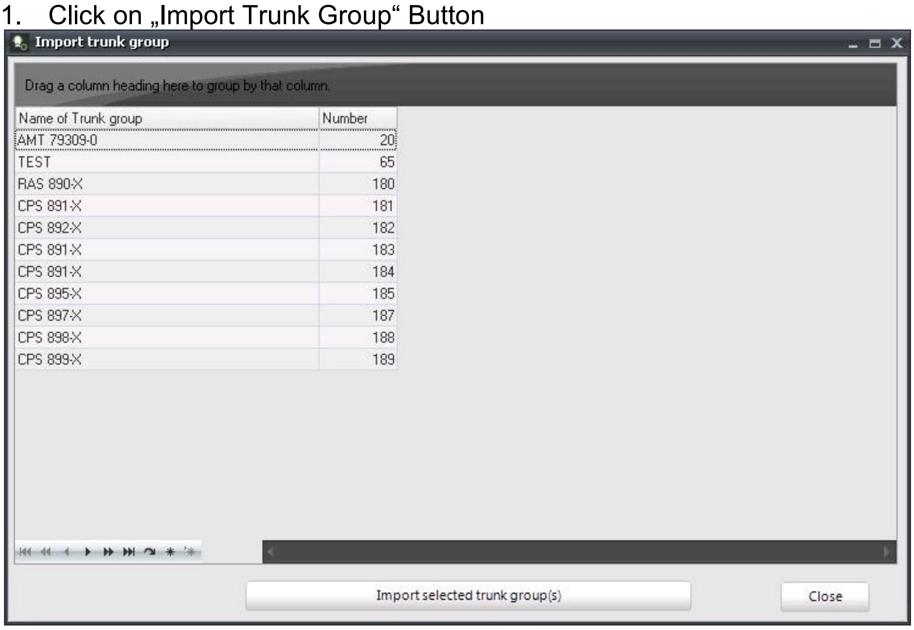
**Description**

In case of integration with OS4000 the trunks of the OS4000 have to be monitored in order to correctly receive all information about a call even in complex call scenarios like recall or automated transfer etc.

Adding Trunk group information is performed by an import dialog. The ConfigSync process automatically provides this information for selection.


**Procedure**

1. Click on „Import Trunk Group“ Button




2. Select the trunk group(s) over which calls were received

3. Click on “Import selected Trunk Group(s)

**Table:** Data fields

| Column | Description |
|---|---|
| Site | Configured Site name in System Management |
| Number | Configured Trunk Group Number in OS4K |
| Name of Trunk Group | Configured Name of Trunk Group in OS4K |
| Comment | Input field for comments |
| Datasource | CDC is the data source name for OpenScape **C**oncierge **D**ata**C**enter. |

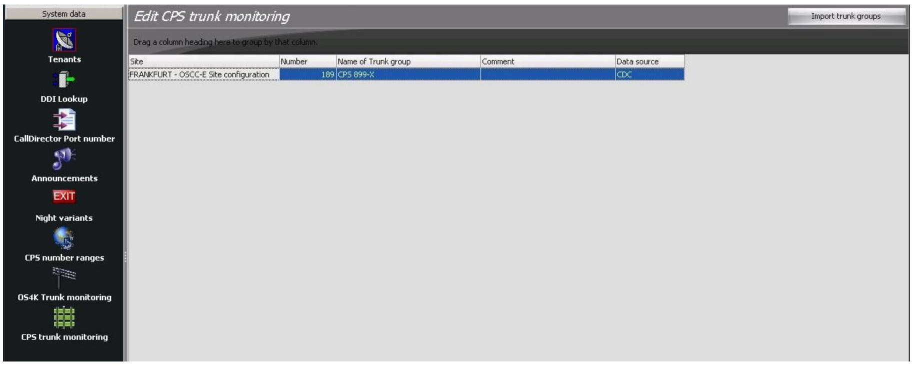
### 5.1.7 CPS Trunk Monitoring

**Access**


Only the *systemmanager* is authorized to create or delete entries in this dialog.

**Description**

Connected SIP trunks to OS4000 have to be monitored similar to the OS4K trunks described above.




Adding Trunk group information is performed by an import dialog. The ConfigSync process provides this information automatically for selection.

**Procedure**

1. Click on „Import Trunk Group“ Button
2. Select the trunk group which corresponds to the CPS
3. Click on “Import selected Trunk Group(s)

**Table:** Data fields

| Column | Description |
|---|---|
| Site | Configured Site name in System Management |
| Number | Configured Trunk Group Number in OS4K |
| Name of Trunk Group | Configured Name of Trunk Group in OS4K |
| Comment | Input field for comments |

| Column | Description |
| --- | --- |
| Datasource | CDC is the data source name for OpenScape **C**oncierge **D**ata**C**enter. |

## 5.2 Administrator

| Symbol | Name |
|---|---|
|   | **Contact Data Provider** |
|   | **Db Info** |
|   | **Update Database** |
|   | **Database version** |
|   | **GDPR** |

Use the folder Administrator for the administration of Contact Data and Database Maintenance

### 5.2.1 Contact Data Provider

**Access**


The **Contact Data Provider** icon to open the "Contact Data Provider" window can be found in the "Administrator" menu.

Only the *systemmanager* account has authorization for this menu option.

**Description**

External data can be prepared for importing contact data into the Concierge Database (OSCADM) using the Contact Data Provider (CDP) module to populate the data within the Electronic Telephone Book (ETB).

For details please refer to section 9

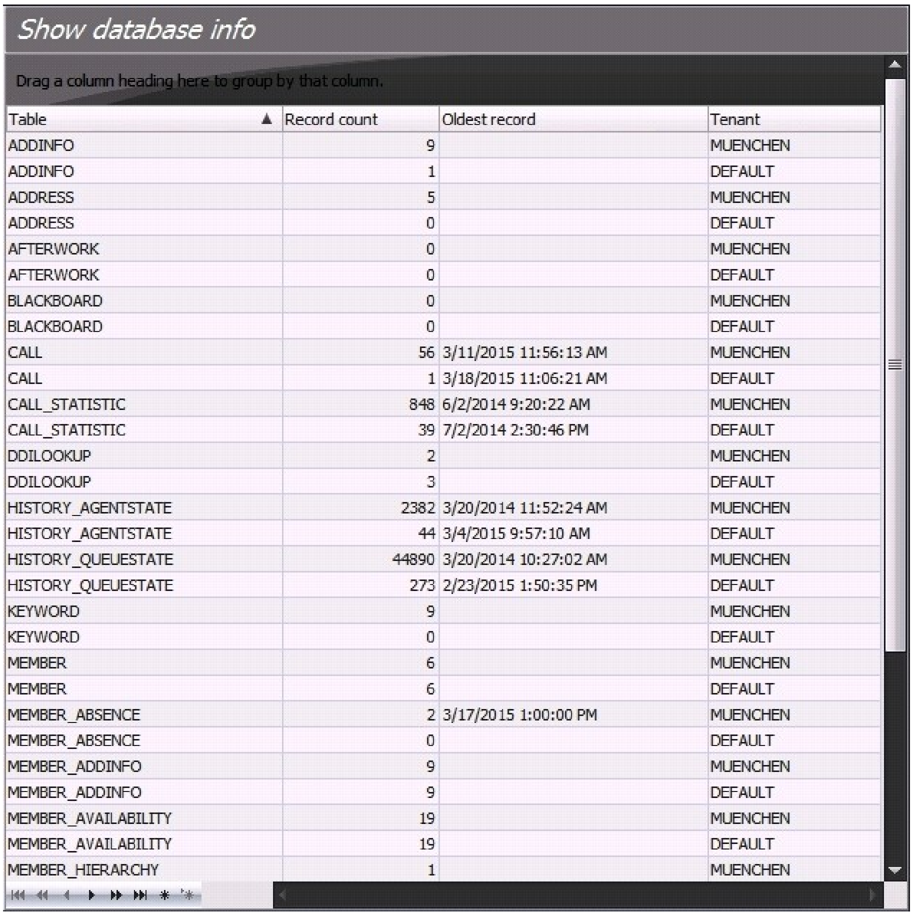
### 5.2.2 Db Info

**Access**


The **DB Info** icon to open the "database information window" can be found in the "Administrator" menu.

Only the *systemmanager* account has authorization for this menu option.

The number of data records in the database can be depicted clearly with “Db Info”.


Show database info

Drag a column heading here to group by that column.

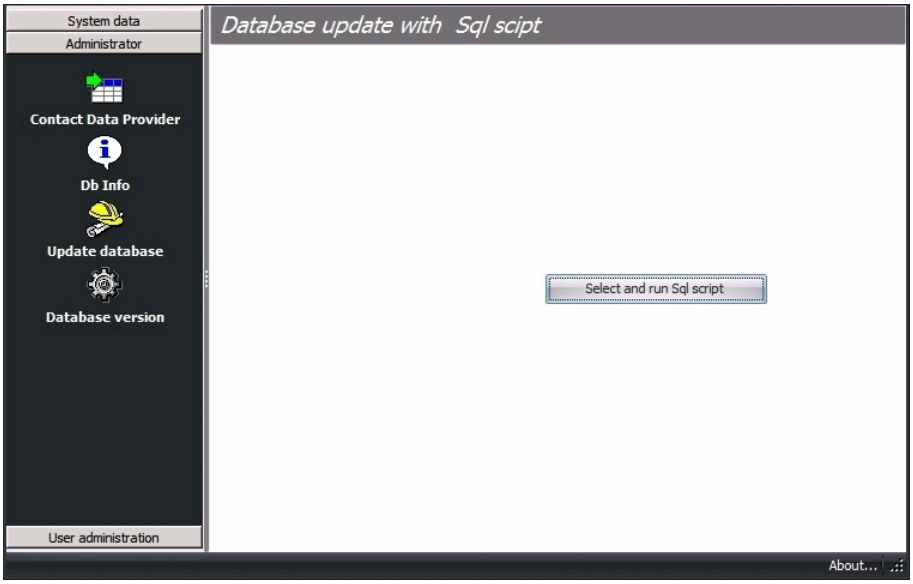
| Table | Record count | Oldest record | Tenant |
|---|---|---|---|
| ADDINFO | 9 | | MUENCHEN |
| ADDINFO | 1 | | DEFAULT |
| ADDRESS | 5 | | MUENCHEN |
| ADDRESS | 0 | | DEFAULT |
| AFTERWORK | 0 | | MUENCHEN |
| AFTERWORK | 0 | | DEFAULT |
| BLACKBOARD | 0 | | MUENCHEN |
| BLACKBOARD | 0 | | DEFAULT |
| CALL | 56 | 3/11/2015 11:56:13 AM | MUENCHEN |
| CALL | 1 | 3/18/2015 11:06:21 AM | DEFAULT |
| CALL_STATISTIC | 848 | 6/2/2014 9:20:22 AM | MUENCHEN |
| CALL_STATISTIC | 39 | 7/2/2014 2:30:46 PM | DEFAULT |
| DDILOOKUP | 2 | | MUENCHEN |
| DDILOOKUP | 3 | | DEFAULT |
| HISTORY_AGENTSTATE | 2382 | 3/20/2014 11:52:24 AM | MUENCHEN |
| HISTORY_AGENTSTATE | 44 | 3/4/2015 9:57:10 AM | DEFAULT |
| HISTORY_QUEUESTATE | 44890 | 3/20/2014 10:27:02 AM | MUENCHEN |
| HISTORY_QUEUESTATE | 273 | 2/23/2015 1:50:35 PM | DEFAULT |
| KEYWORD | 9 | | MUENCHEN |
| KEYWORD | 0 | | DEFAULT |
| MEMBER | 6 | | MUENCHEN |
| MEMBER | 6 | | DEFAULT |
| MEMBER_ABSENCE | 2 | 3/17/2015 1:00:00 PM | MUENCHEN |
| MEMBER_ABSENCE | 0 | | DEFAULT |
| MEMBER_ADDINFO | 9 | | MUENCHEN |
| MEMBER_ADDINFO | 9 | | DEFAULT |
| MEMBER_AVAILABILITY | 19 | | MUENCHEN |
| MEMBER_AVAILABILITY | 19 | | DEFAULT |
| MEMBER_HIERARCHY | 1 | | MUENCHEN |

## 5.2.3 Database update

### Access


The **Update database** icon to open the "Database update window” can be found in the "Administrator" menu.

Database update scripts can be loaded and executed. This can happen, for example, as a result of errors. The script will be made available by development.




## 5.2.4 Database version

**Access**


The **Database version** icon to open the "Database version" window can be found in the "Administrator" menu.

The current database version is shown in this table:

*Show database version*

Drag a column heading here to group by that column.

| Version date | Last update | Comment |
|---|---|---|
| 5/1/2015 | 10/22/2015 12:33:49 PM | V3 R1.0.0 |
| 5/1/2015 | 10/16/2015 9:44:05 AM | V3 R1.0.0 |
| 6/17/2015 | 10/16/2015 9:43:12 AM | V3 R0.5.0 |
| 6/1/2015 | 10/16/2015 9:43:11 AM | V3 R0.4.0 |
| 3/12/2015 | 10/16/2015 9:43:11 AM | V3 R0.3.0 |
| 12/31/2014 | 10/16/2015 9:43:11 AM | V3 R0.3.0 |
| 12/12/2014 | 10/16/2015 9:43:10 AM | V3 R0.2.1 |
| 10/10/2014 | 10/16/2015 9:43:10 AM | V3 R0.2.0 |
| 7/15/2014 | 10/16/2015 9:43:10 AM | V3 R0.1.0 |
| 5/1/2014 | 10/16/2015 9:43:10 AM | V3R0 |
| 6/1/2013 | 10/16/2015 9:43:08 AM | V3R0 |
| 6/1/2013 | 10/16/2015 9:42:50 AM | V2R1 last version |
| 5/31/2012 | 10/16/2015 9:42:50 AM | DDI and DDI_MoH as varchar; new DDILookup single row entry format |
| 12/14/2010 | 10/16/2015 9:42:50 AM | Drop PK_DDILOOKUP |
| 4/20/2012 | 10/16/2015 9:42:49 AM | Search addinfo, search by destination extended, v_Member_Availability uses co... |
| 1/31/2012 | 10/16/2015 9:42:49 AM | Call table extended |
| 1/30/2012 | 10/16/2015 9:42:49 AM | Reporting extended |
| 9/1/2011 | 10/16/2015 9:42:48 AM | MemberAvailabilitySearch extended |
| 12/15/2010 | 10/16/2015 9:42:48 AM | Division and supergroup support |
| 12/1/2010 | 10/16/2015 9:42:47 AM | Greetings, one search field support |
| 11/18/2010 | 10/16/2015 9:42:47 AM | Afterwork table extended |
| 9/24/2010 | 10/16/2015 9:42:35 AM | Basis Version V1R3. Afterwork report integrated, availability trigger enhanced |

## 5.2.5 GDPR

**Access**


GDPR = *General Data Protection Regulation*
Queries for personal data stored in the DB can be made here.

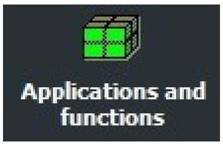
**Permissions**

By default the GDPR work area is visible for system managers and managers. The authorization for the GDPR functions can be configured via the group assignment / access rights / function.
The area is displayed if at least **read access** for the group of the logged-in user is granted.
The **search** and **print** functions require **read access** in addition.
For **printing** the personal data additionally the **editing right** is necessary.
**Deleting** subject entries requires **execute permission**.

**Processing**

For information on processing GDPR requests, such as search, deletion of subscribers or conversation anonymization, see section 6.5.5.1 Processing.

## 5.3 User administration

| Symbol | Name |
|---|---|
|   | **Accounts** |
|   | **Applications and functions** |

With the **user account "*systemmanager*"** you can *create additional users on the system management level* that are allowed to log on to Data Center for administration of central items as described in this paragraph.
These users are allowed to log on to Data Center with a *systemmanager* account.
Those accounts and their permissions in the Data Center are created and administrated in this menu.

---

**NOTE:**
By logging on with a *systemmanager* account the user does not see the items that are configured with in the tenant's section.
The user can see / administrate the items on the system management level, not on the tenant's level.

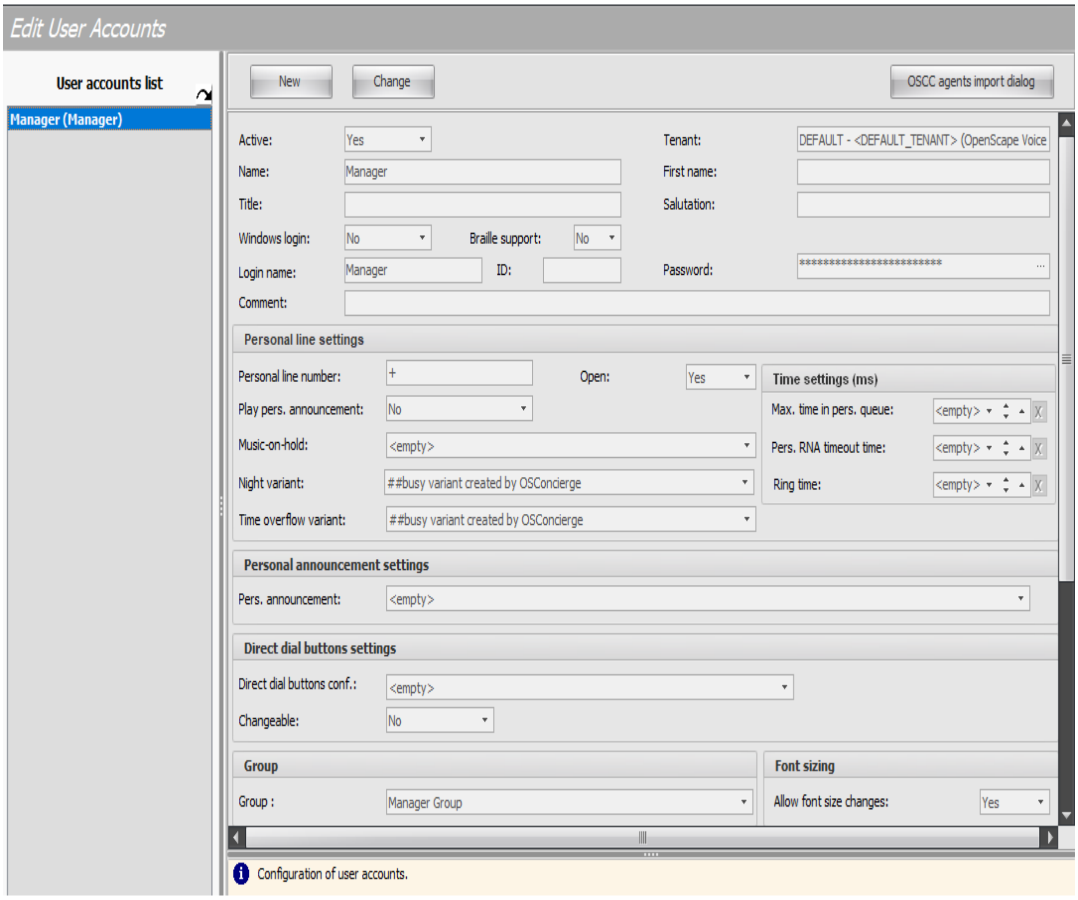
---

### 5.3.1 Accounts

User accounts on the system management level can be created and admistrated with this menu.

**Access**


The **Accounts** icon to open the "user accounts" window can be found in the "Administrator" menu.




We see the user accounts on the system management level. By default the user *systemmanager* is created. Additional users can be created to allow logging on to the system management level.

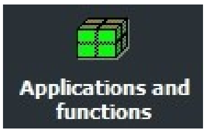
---

**NOTE:**
All other users (manager, attendants) are created with a tenant's manager account see section 6.6 User administration.

---

### 5.3.2 Applications and functions

**Access**




The **Application and functions** icon to open the "Edit applications and functions" window can be found in the "Administrator" menu.

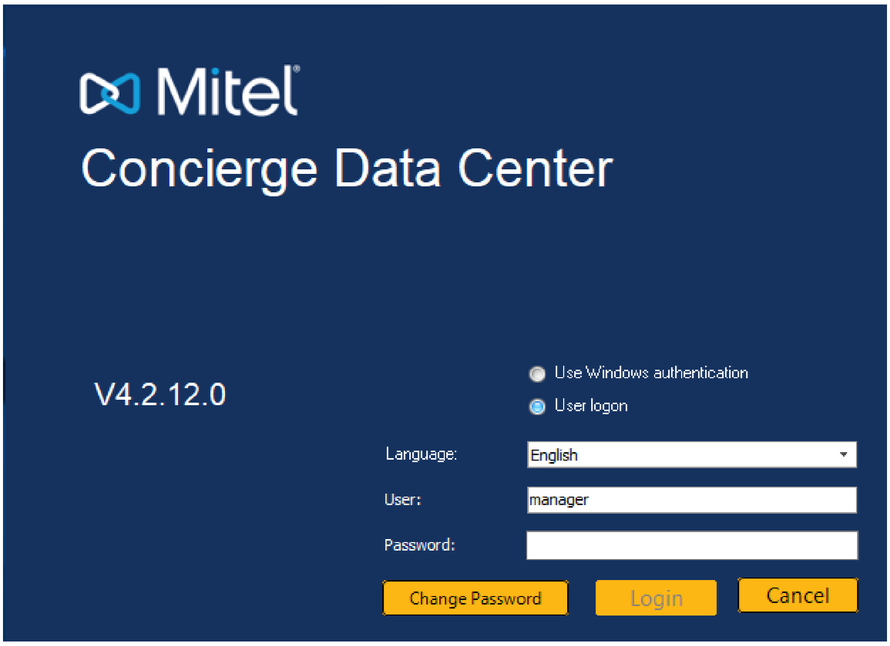
Under "Applications and functions" the user rights and functionallities are displayed for a user function group. With a *systemmanager* account the logged on user sees the settings but can only change the comments.

Use the Group configuration to adjust rights for specific groups.

# 6 Logging on to OSC DataCenter with Tenant's manager account

The configuration options available for the tenant's manager accounts are described in the next sections.
Two user accounts for logging on to the tenant's items are automatically created for every tenant created with a *systemmanager* account.
The accounts are <*Tenant name*>\Manager with the password "manager" and <*Tenant name*>\User with the password "user".
If an administrator therefore logs on as a manager, the account name is typically composed of the tenant and the user name manager or user

**NOTE:**
For simplicity it is possible to logon to the tenant "DEFAULT" using just "manager" instead of "DEFAULT\manager". Similarly the "DEFAULT\user" can be shortened to "user" only when logging on to the DataCenter!




The default password can be changed with the **Change password** button.
Confirm the logon with the **Login** button.
A comprehensive rights concept exists for users and managers. The relevant selection options are displayed depending on which account is used to log on to the DataCenter.
Following installation, the DEFAULT tenant as well as the associated "manager" and "user" users are created automatically.
Use of the Windows logon information requires configuration of the Windows logon account comprising <DomainName>\UserId. A password is not required because a Windows logon account only makes sense in conjunction with personal logins and with password protected screensavers.

**NOTE:**
The user name data is **not** case sensitive. The password input data **is** case sensitive.

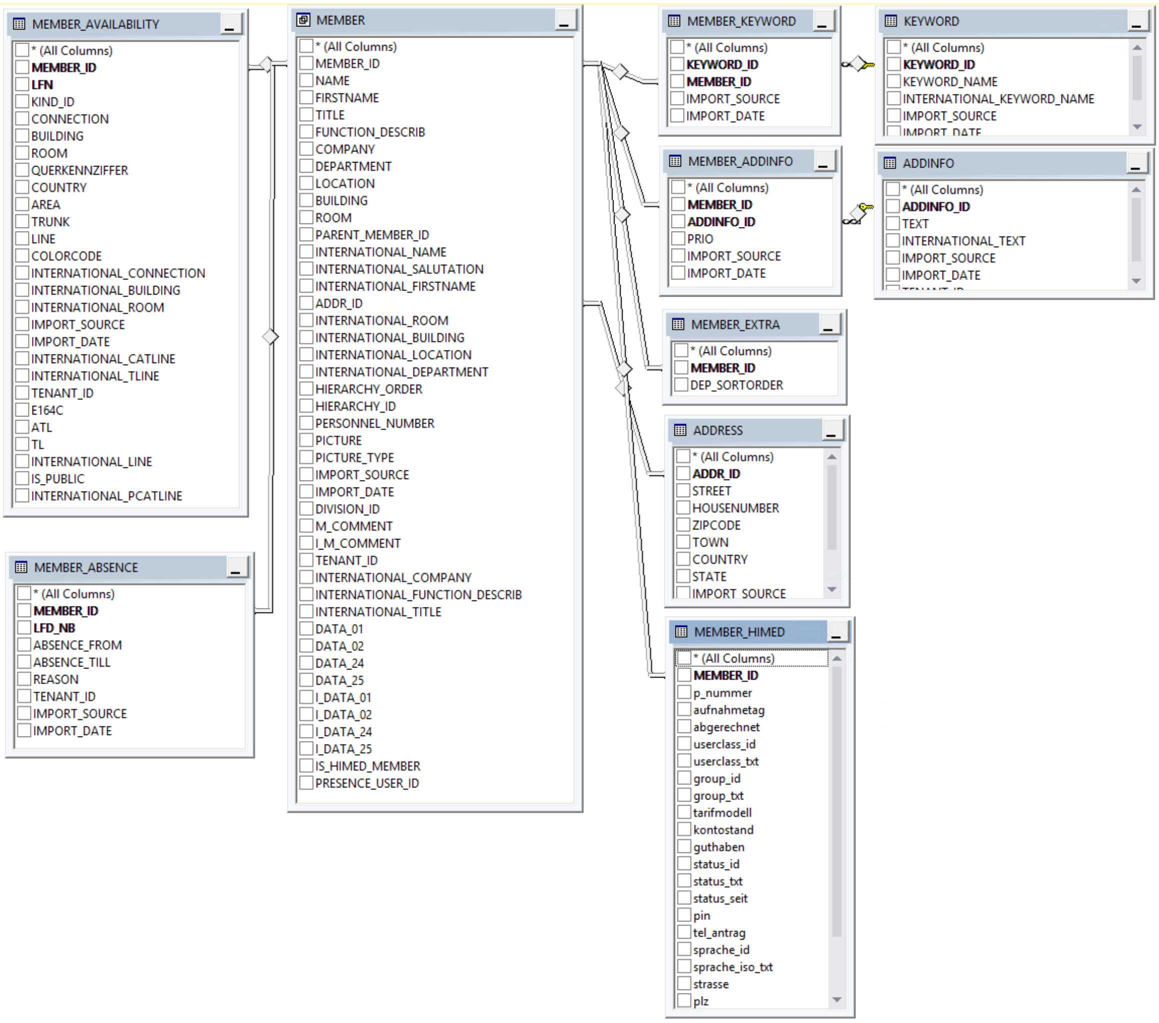
## 6.1 Contact data

Under Contact Data the contact data records in OSCADM for Electronic Telephone Book can be administrated.

| Symbol | Name |
|---|---|
|   | **Contact** |
|   | **Adresses** |
|   | **Additional Info** |
|   | **Keywords** |

### 6.1.1 Database structure

For a common understanding of the matter it is helpful to have an idea about the database structure for the contact data. This is also helpful for understanding the automatic Contact data import via CDP as described in section 9 Contact Data Provider – Importing Contact Data.
This section gives an overview on the database structure for OpenScape Concierge’s contact data fields




The picture gives an impression on how the contact data is structured. The table **MEMBER** stores organizational data of a contact like name, salutation, location and also Presence User ID (logon e-mail address) of Circuit, Skype for Business or Microsoft Teams users etc.

Each possibility on how a contact can be reached like phone numbers, email address or facsimile is stored as availability in the **Member_Availability** table which is linked to the Member table.

**KEYWORD**s can be assigned to a member for keyword search in the ETB as well as **additional information** (**ADDINFO**) that belongs to a user/ member, which might be of interest for the attendant (like e.g. deputy information etc).

The **ADDRESS**es are stored in separate tables; this saves space as many of the contacts use similar postal address information.

The **ABSENCE**s can be defined for a contact in environments without external calendar integration.

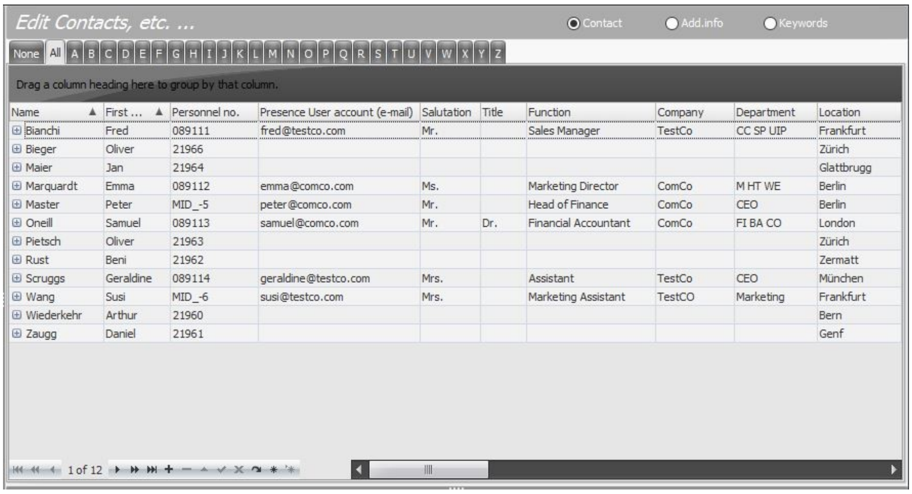
The **Member_HIMED** table stores information synched from the HiMed system.

### 6.1.2 Editing Contact data for Electronic Telephone Book (ETB)

The OpenScape Concierge phonebook entries can be edited directly in the database with the "Contact" menu (if they are not imported). Contact data, address entries, additional information, keywords and absences can be added, modified and deleted.

## Access


The **Contact** icon to open the "Edit contacts, etc…" window can be found in the "Contact data" menu.




| Name | First ... | Personnel no. | Presence User account (e-mail) | Salutation | Title | Function | Company | Department | Location |
|---|---|---|---|---|---|---|---|---|---|
| Bianchi | Fred | 089111 | fred@testco.com | Mr. | | Sales Manager | TestCo | CC SP UIP | Frankfurt |
| Bieger | Oliver | 21966 | | | | | | | Zürich |
| Maier | Jan | 21964 | | | | | | | Glattbrugg |
| Marquardt | Emma | 089112 | emma@comco.com | Ms. | | Marketing Director | ComCo | M HT WE | Berlin |
| Master | Peter | MID_-5 | peter@comco.com | Mr. | | Head of Finance | ComCo | CEO | Berlin |
| Oneill | Samuel | 089113 | samuel@comco.com | Mr. | Dr. | Financial Accountant | ComCo | FI BA CO | London |
| Pietsch | Oliver | 21963 | | | | | | | Zürich |
| Rust | Beni | 21962 | | | | | | | Zermatt |
| Scruggs | Geraldine | 089114 | geraldine@testco.com | Mrs. | | Assistant | TestCo | CEO | München |
| Wang | Susi | MID_-6 | susi@testco.com | Mrs. | | Marketing Assistant | TestCO | Marketing | Frankfurt |
| Wiederkehr | Arthur | 21960 | | | | | | | Bern |
| Zaugg | Daniel | 21961 | | | | | | | Genf |

**Remarks:**
Press the tab “All” to see available Contact Data for your tenant in the Concierge Database.

### 6.1.2.1 Adding contacts/contact data

At the lower border of the table, a new entry can be added by clicking the plus  button. Once the entry has been created and completed, it can be transferred and saved to the database by clicking the  green checkmark.

When using Circuit, Skype or Microsoft Teams Node a **Presence User account** (e-mail) has to be defined.

**Important hints:**
The Import Source column of a given contact in the Edit contacts window displays the data source of that contact. This value is either CDC for a contact created via Data Center or if the contact was created by the import procedure via CDP, it has the name of that data source!
A contact which has CDC as data source will not be updated (changed or deleted) by any import. Changes there can only be made manually in Data Center.
If an entry was originally imported via CDP and manually modified in Data Center the data source value will change to CDC for this contact and will not be updated in case its values in the import source change.

---

**NOTE:**
For manually editing imported contacts in Data Center the Parameter ***WithImportedDataEditable*** must be set under **Client Configuration** in section **Advanced settings**.

---

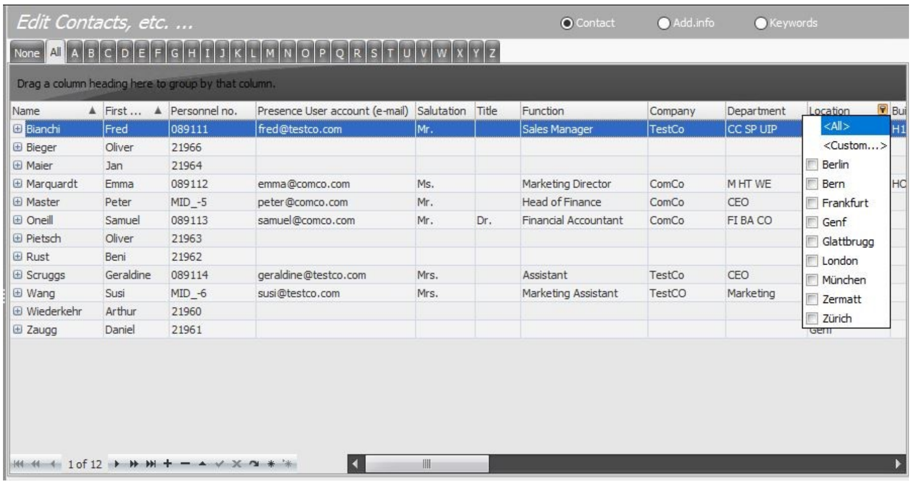
**Remark**: These entries are contacts within the ETB – they are not user accounts to log on to the Concierge application.

### 6.1.2.2 Selecting contact data

The **Edit Contacts** window can be selected here. The first letter of the last name is defined as a filter.

### 6.1.2.3 Filtering contact data

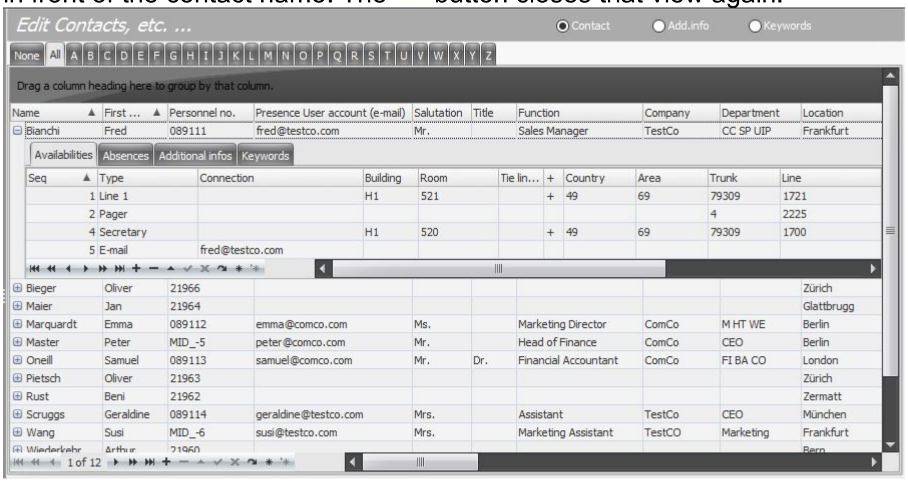
Filters are available for viewing contact data. The filter option is offered in every column header. Filters can also be combined, for example if all employees in a department at a location are to be filtered out.
The arrow (drop down list) on the right-hand side of the column header can be used to enter the filter:




Available filters can be selected by clicking them or user-defined filters can be defined, for example if all departments that start with SEN are to be searched for.
For more details on filtering options please refer to section 12.1.2 Table filter functions.

### 6.1.2.4 Detailed view of a contact's data

Additional information on the contact can be displayed using the button in front of the contact name. The button closes that view again.



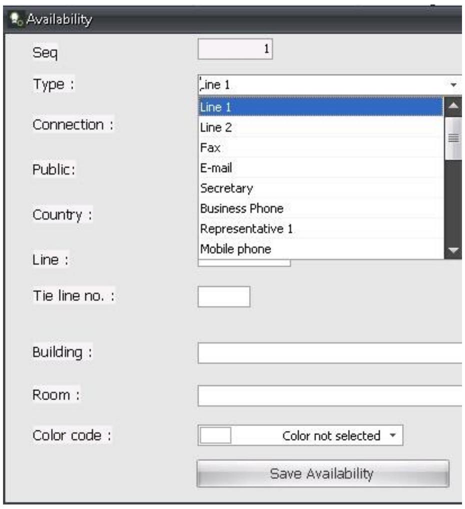

**Availabilities**, **Additional information**, **Absences** and **Keywords** are defined and displayed here..

### 6.1.2.5 Defining availabilities

**Availablity** describes a way (or possibility or channel) to contact the required person/ target person. Typically a phone number is an availability, but also email addresses, a fax, a pager number or the secretary of the target person can describe an availability in the ETB. Multiple *availabilities* can be created for each contact.

Availabilities can be searched for, modified, added and deleted with the function buttons  (See description in Section 12.1.1 Database functions).

**Table:** Availabilities fields

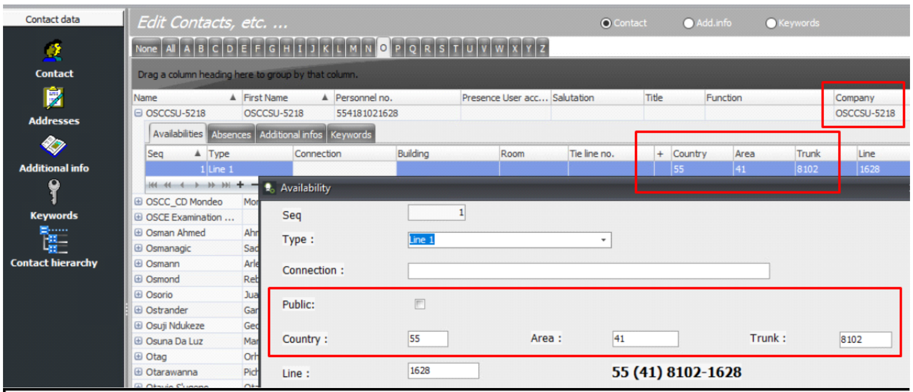
| Field | Description |
|---|---|
| Seq | Serial number; indicates the position for the display |
| Type | <br>Type of contact number e.g. Line 1,Fax,Private number of the contact person. |
| Connection | When Type = Email: enter the email address into this field.  For other Type entries you can use it as description field, which is displayed together with the phone number. |
| Public | Checkbox to identify whether a public number uses + (Plus) format and then the internal number format is without + (Plus).<br>In the **Availabilities** tab you can clearly see the difference between private and public setting in the column **+.**<br>+ (Plus) indicates public, <empty> indicates private. |
| Building | Building |
| Room | Room |
| Tie line access code | Tie line access code |
| Country | Country code |
| Area | Area code |
| Trunk | Trunk linenumber |
| Line | Extension number |
| Color code | Color highlighting of entries in the view |
| Data source | The data source defines how the data record was created, CDC stands for the **C**oncierge **D**ata **C**enter manual input; data records imported via CDP will have the data source as configured there. |

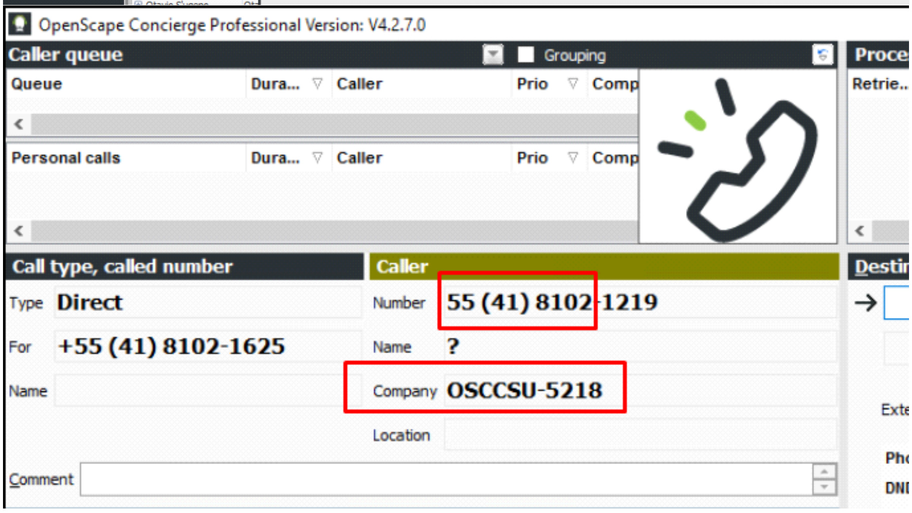
**NOTE:**
For Private Number Plan configuration, please see section 12.2 Private Numbering Plan

### 6.1.2.5.1 Configuration of “Show Suspect Company Name” feature:

The "Show Suspect Company Name" feature works by displaying a potential public company name to the user. It checks the "Country, Area, and TRUNK" fields.

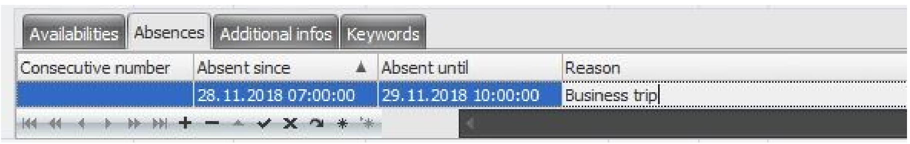
If there is any number registered in ETB with the same "Country, Area, and Trunk" numbers, it will display the same "Company" name as the registered number.

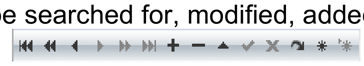


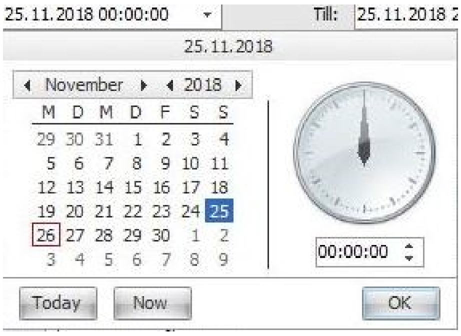




## 6.1.2.6 Defining absences

A number of absences can be configured here for every contact. These absences will be displayed parallel to external calendar absences (if external calendar is configured).




Absences can be searched for, modified, added and deleted with the function buttons  (See description in Section 12.1.1 Database functions).
The start and end time is entered via a simple interface:




### 6.1.2.7 Defining address information for a contact

Because address information is often similar for multiple contacts, a central address list can be used for defining address data.
By clicking the Address field of a contact under the **Edit Contacts** window, a dropdown list appears from which the required entry can be selected.

The full address information in the database is available and defined under **Contact data\ Addresses**:

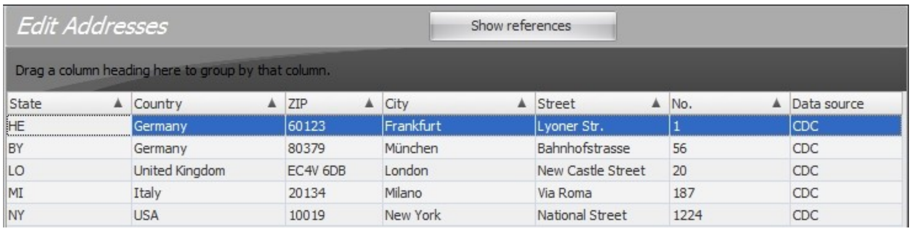
The required address can be selected and the entry saved in the database with the checkmark ✓.

## 6.1.3 Defining central address information

**Access**

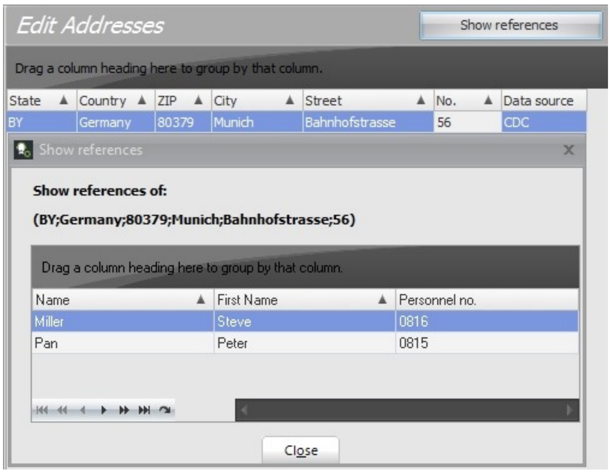

Central addresses are defined under **Contact data\ Addresses**.

Addresses can be modified, added and deleted with the function buttons.  (See description in Section 12.1.1 Database functions).




| State | Country | ZIP | City | Street | No. | Data source |
|---|---|---|---|---|---|---|
| HE | Germany | 60123 | Frankfurt | Lyoner Str. | 1 | CDC |
| BY | Germany | 80379 | München | Bahnhofstrasse | 56 | CDC |
| LO | United Kingdom | EC4V 6DB | London | New Castle Street | 20 | CDC |
| MI | Italy | 20134 | Milano | Via Roma | 187 | CDC |
| NY | USA | 10019 | New York | National Street | 1224 | CDC |

The **Show references** button can be used to show all the contacts for which the selected address is configured:
Therefore choose the address and press the **Show references** button.

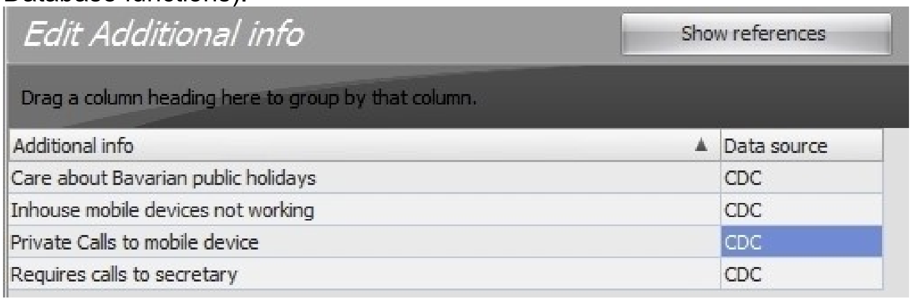



## 6.1.4 Defining additional information

**Access**


Additional information is defined under **Contact data/Additional info**

Additional information can be modified, added and deleted with the function buttons  (See description in Section 12.1.1 Database functions).




The contacts that are assigned with a particular additional information can be seen by clicking the **Show references** button when the additional info of interest is highlighted.

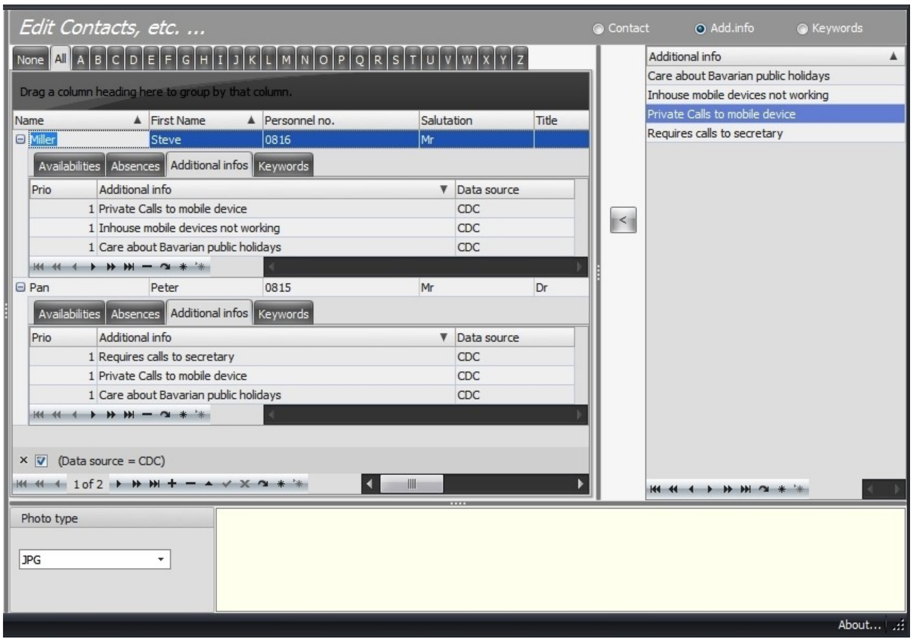
### 6.1.4.1 Assigning additional information to contact data

**Access**


Additional Information for contacts is openend under **Contact data \ Additional info**.

**Description**

Additional Information entries are used to specify details related to a person or an extension that is usefull for the attendant, like e.g. “the secretary shall be called in order to reach the manager”.
This allows the attendant to have non standard information available!
Any additional information is included in the contact view by selecting "**Add.info**".

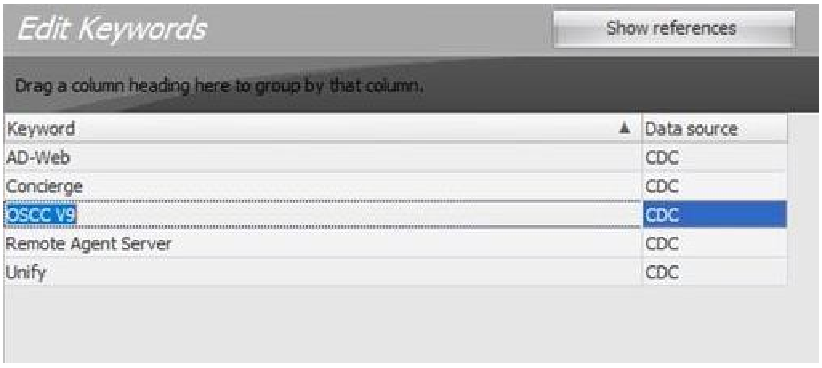



Additional information from the selection list can be assigned to the contacts with the  button. Several entries of additional information can be assigned at the same time to one or more selected contacts.

## 6.1.5 Defining keywords

**Access**


Keywords are defined under **Contact data\Keywords**.



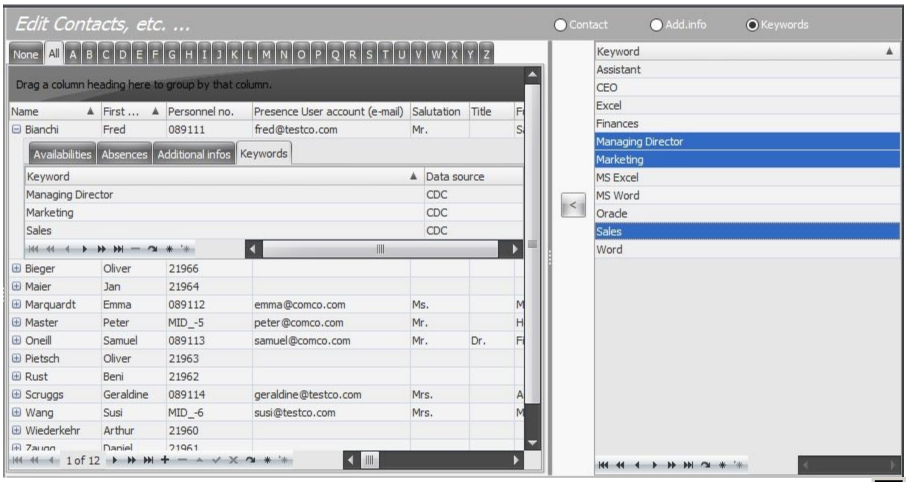

The contacts that have been assigned to the particular key word can be seen by clicking the **Show references** button when the keyword of interest is highlighted.

### 6.1.5.1 Assigning keywords to contact data

Key words can be used as a search criteria in the ETB search. This allows the attendant to search for a person that has a specific keyword assigned, independent of other parameters. All keywords are included in the contact view by selecting "Keywords".

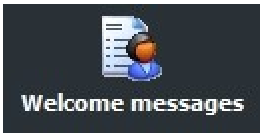

All keywords can be seen and assigned to a contact by selecting "**Keywords**" in the Edit

Contacts window.




Keywords from the selection list can be assigned to the contacts with the  button. Several keywords can be assigned at the same time to one or also more selected contacts. Highlight the corresponding entries and press the button .

## 6.2 Basic data

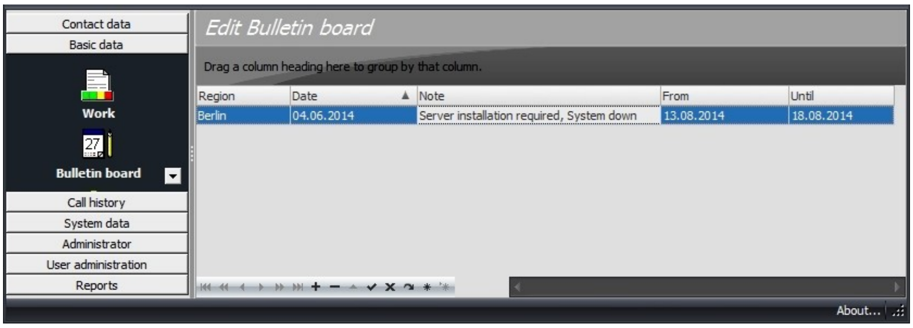
| Symbol | Name |
|---|---|
|  | **Bulletin Board** |
|  | **Button Configuration** |
|  | **Language configuration** |
|  | **Welcome Messages** |

### 6.2.1 Bulletin board

**Access**


The **Bulletin board** icon to open the "Edit Bulletin board" window can be found in the "Basic data" menu.

Entries for the bulletin board can be made here.




Messages for the bulletin board can be searched for, modified, added and deleted with the function buttons
 (See description in Section 12.1.1 Database functions).

---

**NOTE:**
Entries for the bulletin board are normally deleted after 31 days (standard). This value can be changed – see chapter 6.5.3 Purge data .
The values “from / until” in the Bulletin board editing form have no influence on the deletion time – they are only used as the time period the individual information is send via the bulletin board.

---

## 6.2.2 Button Configuration

**Access**


The **Button Configuration** tool can be accessed via this button in the "Basic data" menu.

Please find a detailed description in section 7 OpenScape Concierge Button Configuration.

## 6.2.3 Language configuration

If elements on the Concierge GUI have to be renamed specifically for all attendants within a tenant the recommended way doing this is via the Language configuration in DataCenter.

During the startup of the Concierge Client following order will be performed

1. Checking the Database if entries are available (configured like described in this section)
2. Checking if the OSConcierge_Lang.Custom.***xx***.ini file of an user contains specific entries
3. If in 1. and 2. no entries were found the default language file OSConcierge_Lang.***xx***.ini will be loaded

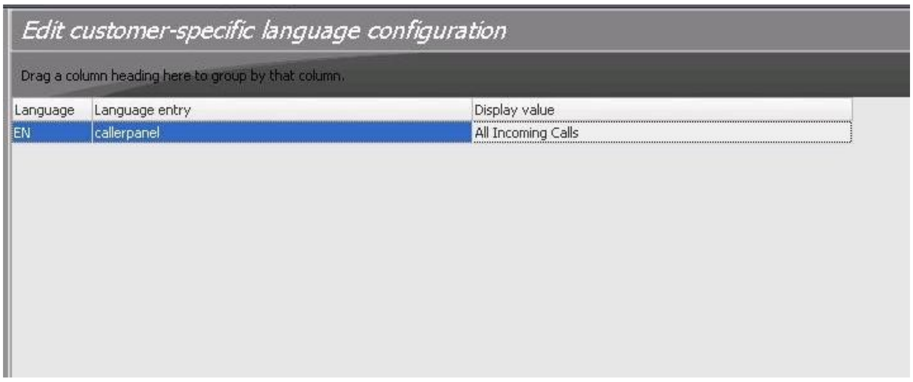
**NOTE:**
***xx*** is representing the language which is used for Concierge Client and Concierge Management tools.
(German - de, English - en, Spanish – es, French -fr, Italian -it, Portuguese-brazil - pt-br)

Configured entries in the database are valid for all Concierge Users within the tenant. If only a single attendant needs specifically renaming please configure the settings in the custom_lanuage file of this user.

See section 3.1 Language files for more information about language modification.

**Access**


The **Language configuration** icon to open the "Edit customer-specific language configuration" window can be found in the "Basic data" menu.




**Procedure**

1. Select the correct element in the corresponding langauge file
2. Enter the language for this change
3. Enter the selected element name identified in 1.)
4. Enter the desired renamed term
5. After the next startup of the Concierge client the element name is changed

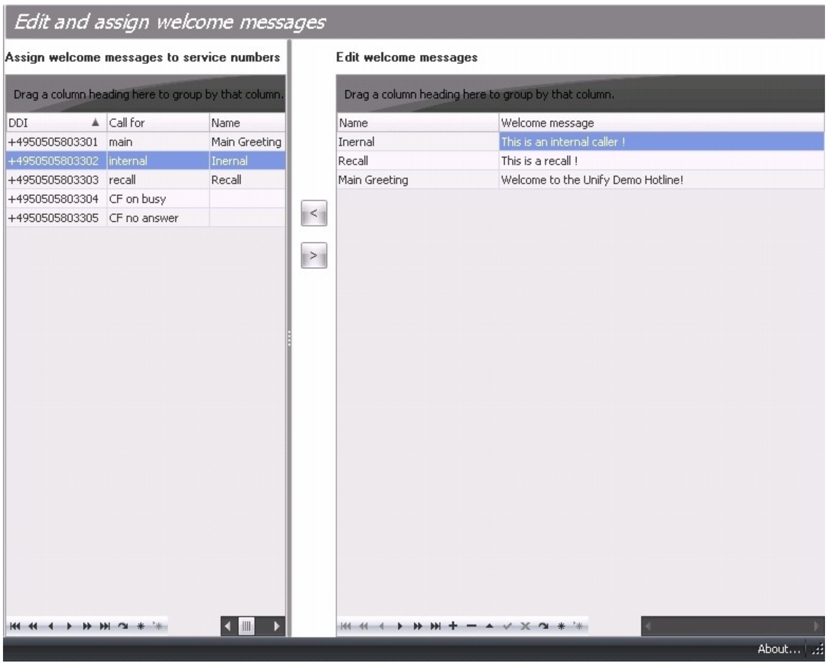
## 6.2.4 Welcome messages

Welcome messages are displayed to the Concierge User on incoming calls. They can offer additional information on the type of call, but also help for the attendant to greet the caller.

**Access**


The **Welcome messages** icon to open the "Edit and assign welcome messages" window can be found in the "Basic data" menu.

Welcome messages can be configured per service numbers / DDI List entry. They should display the wording that the Concierge User should use for greeting customer on an incoming call. The text can be defined without restriction. The Welcome messages window is displayed in 6 lines.




The greeting texts can be added, edited or deleted by the function buttons on the right hand side.

**Procedure**

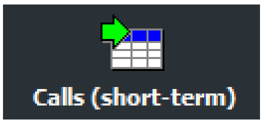
- Add a greeting text via the “**+”** button in the right panel.
- The text appears on the right side under „Edit welcome messages“.
- In order to assign the text to a service number, mark it on the right hand side and on the left hand side mark the service number in question.
- Finalize the assignment by using the upper arrow button in the middle.

---

**NOTE:**
Under **System Data\ Client Configuration\ Greeting Settings** the display parameter of the greeting window can be set, like e.g. **font size**, **position** and the duration how long the message is displayed - see section 6.4.6 Client Configuration!

---

## 6.3 Call history

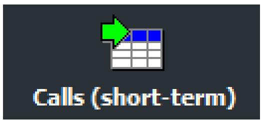
| Symbol | Name |
|---|---|
|  | **Calls (short-term)** |
|  | **Calls (long-term)** |

Historical data about calls and information on keywords that have been searched for can be found under "Call history".
Information on all calls that came in for the attendants are saved in the "Call" and "Call_Statistic" database tables.

The values *short term* = short-term memory in database table "Call" saves the call data for a few days only so that incoming calls can be recognized again.
The values *long term* = long-term memory in database table "Call_Statistic" saves the calls for statistical evaluations over a long period.
All calls that have been handled are stored as a data record in the call tables.

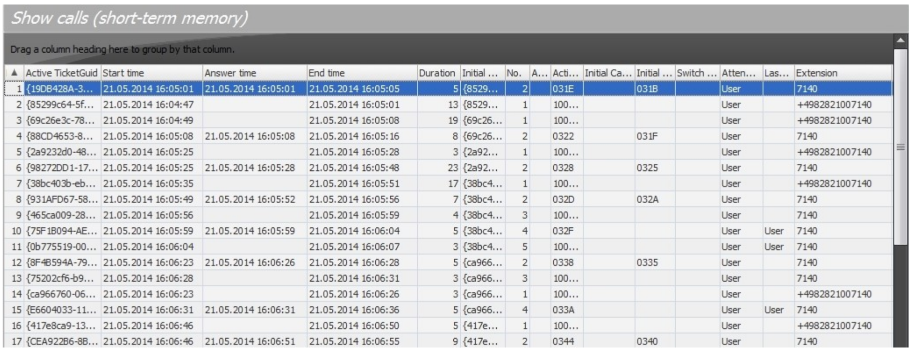
## 6.3.1 Calls (short-term)

**Access**




The **Calls (short-term)** icon to open the "Show calls (short term memory)" window can be found in the "Call history" menu.

The call history for all calls in the short-term memory can be found under Calls (short-term). The Calls table (short term = short-term memory, database table "Call") saves the calls for a few days only so that calls can be recognized again.



Show calls (short-term memory)

Drag a column heading here to group by that column.

| ▲ | Active TicketGuid | Start time | Answer time | End time | Duration | Initial ... | No. | A... | Acti... | Initial Ca... | Initial ... | Switch ... | Atten... | Las... | Extension |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | {19DB428A-3... | 21.05.2014 16:05:01 | 21.05.2014 16:05:01 | 21.05.2014 16:05:05 | 5 | {8529... | 2 | | 031E | | 031B | | User | | 7140 |
| 2 | {85299c64-5f... | 21.05.2014 16:04:47 | | 21.05.2014 16:05:01 | 13 | {8529... | 1 | | 100... | | | | User | | +4982821007140 |
| 3 | {69c26e3c-78... | 21.05.2014 16:04:49 | | 21.05.2014 16:05:08 | 19 | {69c26... | 1 | | 100... | | | | User | | +4982821007140 |
| 4 | {88CD4653-8... | 21.05.2014 16:05:08 | 21.05.2014 16:05:08 | 21.05.2014 16:05:16 | 8 | {69c26... | 2 | | 0322 | | 031F | | User | | 7140 |
| 5 | {2a9232d0-48... | 21.05.2014 16:05:25 | | 21.05.2014 16:05:28 | 3 | {2a92... | 1 | | 100... | | | | User | | +4982821007140 |
| 6 | {98272DD1-17... | 21.05.2014 16:05:25 | 21.05.2014 16:05:28 | 21.05.2014 16:05:48 | 23 | {2a92... | 2 | | 0328 | | 0325 | | User | | 7140 |
| 7 | {38bc403b-eb... | 21.05.2014 16:05:35 | | 21.05.2014 16:05:51 | 17 | {38bc4... | 1 | | 100... | | | | User | | +4982821007140 |
| 8 | {931AFD67-58... | 21.05.2014 16:05:49 | 21.05.2014 16:05:52 | 21.05.2014 16:05:56 | 7 | {38bc4... | 2 | | 032D | | 032A | | User | | 7140 |
| 9 | {465ca009-28... | 21.05.2014 16:05:56 | | 21.05.2014 16:05:59 | 4 | {38bc4... | 3 | | 100... | | | | User | | 7140 |
| 10 | {75F1B094-AE... | 21.05.2014 16:05:59 | 21.05.2014 16:05:59 | 21.05.2014 16:06:04 | 5 | {38bc4... | 4 | | 032F | | | | User | User | 7140 |
| 11 | {0b775519-00... | 21.05.2014 16:06:04 | | 21.05.2014 16:06:07 | 3 | {38bc4... | 5 | | 100... | | | | User | User | 7140 |
| 12 | {8F4B594A-79... | 21.05.2014 16:06:23 | 21.05.2014 16:06:26 | 21.05.2014 16:06:28 | 5 | {ca966... | 2 | | 0338 | | 0335 | | User | | 7140 |
| 13 | {75202cf6-b9... | 21.05.2014 16:06:28 | | 21.05.2014 16:06:31 | 3 | {ca966... | 3 | | 100... | | | | User | | 7140 |
| 14 | {ca966760-06... | 21.05.2014 16:06:23 | | 21.05.2014 16:06:26 | 3 | {ca966... | 1 | | 100... | | | | User | | +4982821007140 |
| 15 | {E6604033-11... | 21.05.2014 16:06:31 | 21.05.2014 16:06:31 | 21.05.2014 16:06:36 | 5 | {ca966... | 4 | | 033A | | | | User | User | 7140 |
| 16 | {417e8ca9-13... | 21.05.2014 16:06:46 | | 21.05.2014 16:06:50 | 5 | {417e... | 1 | | 100... | | | | User | | +4982821007140 |
| 17 | {CEA922B6-8B... | 21.05.2014 16:06:46 | 21.05.2014 16:06:51 | 21.05.2014 16:06:55 | 9 | {417e... | 2 | | 0344 | | 0340 | | User | | 7140 |

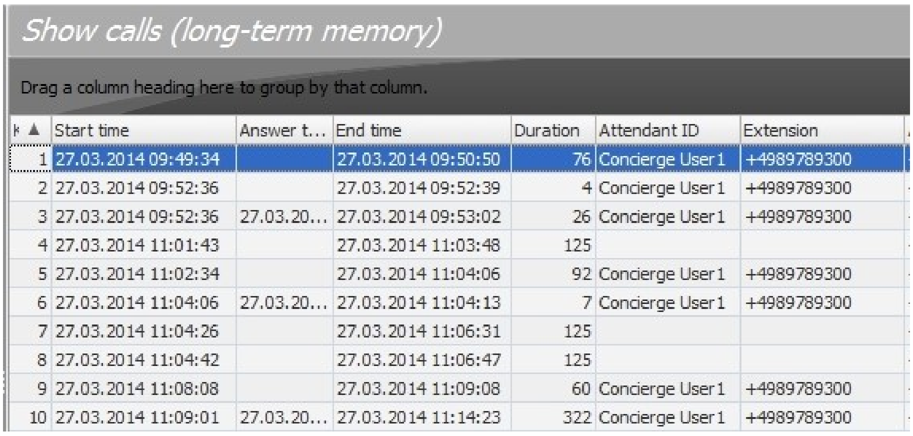
Entries for calls in the short-term memory can be searched for and displayed with the function buttons.  (See description in Section 12.1.1 Database functions).

## 6.3.2 Calls (long-term)

**Access**


The **Calls (long-term)** icon to open the "Show calls (long term memory)" window can be found in the "Call history" menu.

The call history for all calls in the long-term memory can be found under Calls (long-term). The Calls table (long term = long-term memory, database table "Call_Statistic") saves the calls for a long period of time so that calls can be recognized again.




Entries for calls in the long-term memory can be searched for and displayed with the function buttons (See description in Section 12.1.1 Database functions).
For a description of the tables, please see the previous section.

### 6.3.3 Call history tables

The table displays a call that arrived in the system with all its parameters, like Starttime, time when it was answered, ended - system call IDs as well as the contact IDs in OSCC and the PABX, the users involved and the calling number as well as the target number. More parameters are available, see the following tables.

---

**NOTE:**
When a call arrives and has to wait in the caller queue (CPS) and is connected to an attendant in a second step, the statistics show two records, the seconds record’s start time is the first record’s end time. The field ***InitialTicketGuid*** indicates that it is the same call.

---

#### 6.3.3.1 Table: **Call history**

| Column | Meaning | Reference |
|---|---|---|
| Key | Generated unique ascending key per data record | |
| Active ticket guid | Unique key per data record | |
| Start time | Time call arrives | |
| Answer time | Time call is answered (calls that go into the park queue, for example, have no answer time (Windows time 0 = 30.12.1899)) | |
| End time | Time call is ended | |
| Duration | Difference between end time and start time in seconds | |
| Initial ticket guid | Unique key for calls where the call was possibly transferred or parked a number of times | |
| No. | Serial number incremented for calls where the call was possibly transferred or parked a number of times | |
| Active Call Center Call ID | Current call ID of Contact Center | |
| Active switch call ID | Current call ID of switch | |
| Initial Call Center Call ID | Call ID of Contact Center for first time call is answered | |

| Column | Meaning | Reference |
|---|---|---|
| Initial Switch Call ID | Call ID of switch for first time call is answered | |
| Switch Call ID after transfer | Call ID of switch following transfer | |
| Attendant ID | Agent ID | |
| Last attendant | Agent ID of last agent who had the call | |
| Extension | Phone number of agent's extension | |
| Last extension | Phone number of last agent's extension | |
| Prio | Contact Center priority | |
| Routing | Identifies the routing configuration of the Contact Center | |
| Call Center Routing Key | Identifies the key number of the routing configuration of the Contact Center | |
| Call for | When calling the attendant (direct call to the extension or call via the personal line), this is the personal line number. When calling a service number, it is e.g. the called service number. | |
| Call for name | "Call for" ID from the DDI lookup table for number dialed originally | |
| Caller no. | Caller's number, if transferred | |
| Caller name | Caller's name, if transferred | |
| Caller company | Caller's company, if transferred | |
| Destination no. | Destination phone number where the call was tried to be transferred to. See “End reason” to know, if the call transfer was successful. | |
| Destination name | Station name where the call was transferred, if known | |
| Note | Comment by agent regarding the call | |
| Call reason begin | Identifies the reason for the start of the call | See Reason table |
| Call reason end | Identifies the reason for the end of the call | See Reason table |
| No. of recalls | Number of recalls | |
| Waiting | Number of customers waiting for busy subscribers | |
| Callcenter handling type | Contact Center specific information | See handling type constant table |

#### 6.3.3.2 Table: **Reason**

| No. | Call Data | Explanation |
|---|---|---|
| -1 | CS_UNDEFINED | Undefined |
| 0 | CS_NEWCALL_INC_SERVICENUMBER | New incoming call via service number |
| 1 | CS_NEWCALL_INC_DIRECT | New incoming call direct to extension |
| 2 | CS_NEWCALL_OUT | New outgoing call |
| 3 | CS_NEWCALL_INC_QUEUE | New incoming call to a queue |
| 4 | CS_KNOWNCALL_INC_SERVICENUMBER | Known incoming call via service number |

| No. | Call Data | Explanation |
|---|---|---|
| 7 | CS_CALLFORWARDBUSY | Intercept on busy |
| 8 | CS_CALLFORWARDNOANSWER | Intercept on no answer |
| 9 | CS_CALLFORWARD | General intercept without more detailed specification |
| 10 | CS_CALLFORWARDNUMBERNOTVALID | Intercept due to incomplete number |
| 15 | CS_RECALL_DIRECT | Recall directly via OSCC |
| 16 | CS_RECALL_OWN_SERVICENUMBER | Recall via service number, call was transferred last by agent |
| 17 | CS_RECALL_FOREIGN_SERVICENUMBE R | Recall via service number, call was not transferred last by agent |
| 20 | CS_CALLFROMPARKQUEUE_OWN | Own parked call |
| 21 | CS_CALLFROMPARKQUEUE_FOREIGN | Call not parked by agent |
| 22 | CS_CALLTOPARKQUEUE | Place call in park queue |
| 23 | CS_CALLFROMPARKQUEUE_WAITFORF REEDEST_OWN | Connect call to destination |
| 24 | CS_CALLFROMPARKQUEUE_WAITFORF REEDEST_FOREIGN | Connect call to destination |
| 25 | CS_CALLTOPARKQUEUE_WAITFORFREE DEST | Place call in park queue and connect to destination |
| 26 | CS_CALLINPARKQUEUE | Call arrived in park queue |
| 27 | CS_CALLINPARKQUEUE_WAITFORFREE DEST | Call arrived in park queue and connected to destination |
| 28 | CS_CALLINPARKQUEUE_ABANDONED | Call placed in park queue |
| 30 | CS_CALL_TRANSFER_COMPLETE | Call transferred |
| 31 | CS_CALL_TRANSFER_NEW | New call transferred to agent |
| 32 | CS_CALL_TRANSFER_KNOWN | Known call transferred to agent |
| 33 | CS_CALL_ DISCONNECTED | Call ended without transfer |
| 34 | CS_CALL_TRANSFER_INTERNAL | Call transferred from processing queue to agent |
| 40 | CS_CALL_ DEFLECTED | Call not accepted |
| 41 | CS_CALLINQUEUE_ABANDONED | Call canceled in queue or caller hangs up |
| 42 | CS_CALLDEFLECTEDTONV_NOCLIENT | Call was transferred to assigned night variant because no Concierge agent was logged on |
| 43 | CS_CALLDEFLECTEDTONV_TIMEOVERF LOW | Call was transferred to assigned night variant because the maximum waiting time in the queue was exceeded |
| 44 | CS_CALLINQUEUE_ABANDONED_NOCLI ENT | Call abandoned in queue / caller has hung up. No client logged on. |
| 45 | CS_NV_PLAY_BUSY | Call re-routed to night variant with "Play Busy" mode (ID=0) and clients logged on |
| 46 | CS_NV_PLAY_ANNOUNCEMENT | Call re-routed to night variant with "Play Announcement" mode (ID=2) and clients logged on |
| 47 | CS_TO_DISCONNECT | Call re-routed due to time threshold with "Play Busy " mode (ID=0) and clients logged on |
| 48 | CS_TO_PLAY_ANNOUNCEMENT | Call re-routed due to time threshold with "Play Announcement" mode (ID=2) and clients logged |

| No. | Call Data | Explanation |
|---|---|---|
| | | on |
| 50 | CS_CALL_CALL_PICKUP | Call answered by call pickup |
| 51 | CS_CALLINPARKQUEUE_AUTO_RECALL | Call picked from the Processing queue via AutoRecall - Flag |
| 52 | CS_CALLFROMPARKQUEUE_OWN_AUTO_RECALL | Received own parked call via AutoRecall from the Processing queue |
| 53 | CS_CALLFROMPARKQUEUE_WAITFORFREEDEST_OWN_AUTO_RECALL | Received own appended call via AutoRecall from the Processing queue |
| 60 | CS_CALL_TAKEOVER | CPS: The contact searched by paging has directly taken the caller from the Processing queue |
| 61 | CS_CALL_JOINED | CPS: The attendant has linked the active call from the contact with the parked customer call - EndReason for the parked customer call |
| 62 | CS_CALL_TRANSFER_JOIN | CPS: The paged contact talks to the attendant and is linked to the parked call - EndReason for the active contact call |
| 63 | CS_CONSULT_CALL | ConsultTransferCPS: B-Party (Consult) call started, as A-Party (customer) is on hold. |
| 64 | CS_CONSULT_JOINED | ConsultTransferCPS: The attendant has transferred a active (consult) call to a parked customer call - EndReason for the parked (on hold) customer call |
| 65 | CS_CONSULT_TRANSFER_JOIN | ConsultTransferCPS: The active (consult) connection will transfer the parked customer call - EndReason for the active B-call (Consult) |
| 70 | CS_NEWCALL_INC_PRIVATENUMBER | New incoming call via the personal line |
| 80 | CS_NEWCALL_INC_QUEUE_DELIVERED | DDI queued Call was delivered to an attendant |
| 81 | CS_NEWCALL_INC_PRIVATENUMBER_DELIVERED | Private line/number call was delivered to an attendant |
| 90 | CS_NV_DEFLECT_NOCLIENT | Call deflected to extension as no client logged on |
| 92 | CS_NV_PLAY_BUSY_NOCLIENT | Call deflected to night variant with mode "Play Busy" (ID=0) |
| 93 | CS_NV_PLAY_ANNOUNCEMENT_NOCLIENT | Call deflected to night variant with mode "Play Announcement" (ID=2) |
| 100 | CS_CPS_InParkOrTransfer | Call is enqueued to CPS for transfer or park or attach or page |
| 101 | CS_CPS_UnParkOrTransfer | Call is dequeued (out) of CPS after transfer or park or attach or pager req. |
| 102 | CS_CPS_DISCONNECTED | Call is disconnected by caller or agent while in park or transfer or attach or page |
| 110 | CS_CPS_TRANSFER_REQUEST | Client has transferred Secure Transfer Request to CPS or for a parked call a Secure Transfer Request is required |
| 111 | CS_CPS_TRANSFER_FAILED | Call could not been transferred to destination. |
| 115 | CS_CPS_TRANSFER_ABORT | The transfer was cancelled by the client, but the call is still queued/parked and not retrieved |
| 120 | CS_CPS_USER_DISCONNECT_IN_QUEUE | Call was ended by the client in the Caller queue |

| No. | Call Data | Explanation |
|---|---|---|
| 130 | CS_CPS_DIAL_WITH_LINEACCESS | External line transferred |
| 131 | CS_CPS_DIAL_WITH_LINEACCESS_SUCCESS | External line transferred - successful |
| 132 | CS_CPS_DIAL_WITH_LINEACCESS_NOTCONNECTED | External line transferred - not connected |
| 133 | CS_CPS_DIAL_WITH_LINEACCESS_ABORTED | External line transferred - disconnected without dialing |
| 498 | CS_CPS_RECALL_TO_AGENT_FAILED | Recall to agent failed |
| 499 | CS_LOCAL_PARK | local parked call similar to CS_CALLTOPARKQUEUE (22) but the call was put on hold locally |
| 501 | CS_BARGE_IN_TO_PROCESSING_QUEUE_CALL | Processing queue conversation established |
| 502 | CS_IN_DOCTOR_CALL | Call to searched person established |
| 997 | CS_CPS_ChannelMaxUtilized_Deflect | Call deflected, max count of utilized channels exceeded |
| 998 | CS_CPS_ChannelMaxUtilized_Busy | Call busy, max count of utilized channels exceeded |
| 999 | CS_CPS_SHUTDOWN | CPS shutdown on active calls than this is the EndReason for all open transactions |

#### 6.3.3.3 Handling type/Contact type constant table

The precise meaning of the constants can be found in the respective OpenScape Contact Center manuals.

## 6.4 System data

The menu **System data** for the *tenant's manager* account shows nearly similar information as for the system manager account.

| Symbol | Name |
|---|---|
|  | **Tenants** |
|  | **DDI Lookup** |
|  | **Announcements** |
|  | **Night Variants** |
|  | **CPS number ranges** |

| Symbol | Name |
|---|---|
|  | **Client configuration** |

The elements **Tenants** and **DDI Lookup** display entries that have been pre-configured with the *systemmanager* account and assigned to the tenant.

**Remark:** Tenants and DDI Lookup items can be modified by pressing the change button, new entries cannot be created nor existing entries can be deleted.

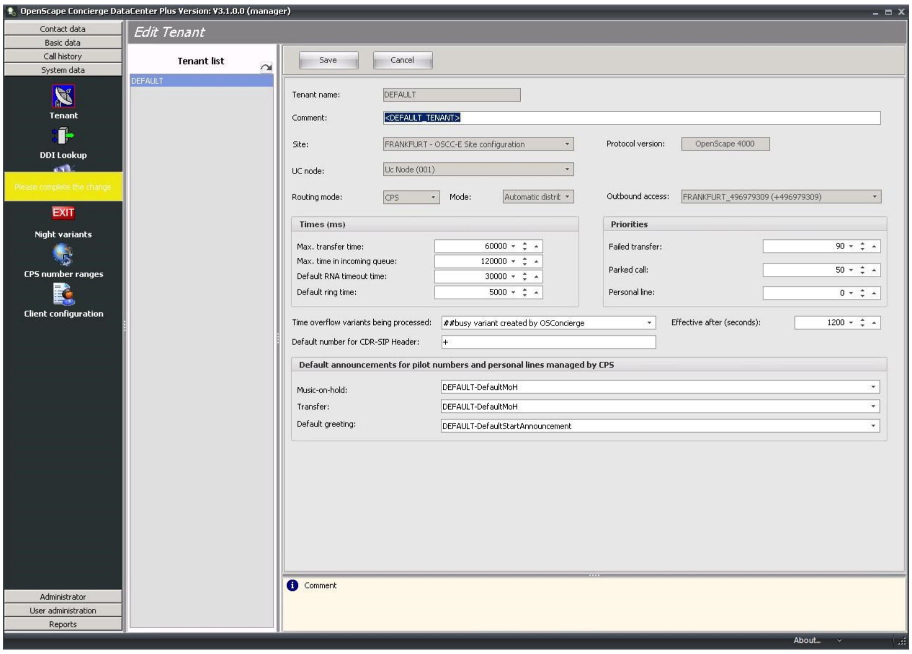
## 6.4.1 Tenant

**Access**


The **Tenant** icon to open the "Edit tenants" window can be found in the "System data" menu.

Open the menu and modify the values that are allowed to modify according to your requirements by pressing the **Change** button.
Tenant’s general settings are pre-defined by the settings specified by the *systemmanager* user; similarly the entries for the **OSCC node**, the **Calendar node**, the **UC, Circuit, Skype or Microsoft Teams node** (depending on the integrated Presence system) and the **Number range.**

Contact a system administrator if further configurations are required in these sections!



#### 6.4.1.1 Tenant’s general settings:

On the Tenant’s management level in Data Center the time overflow handling can be modified as well as the settings in the time parameters; furthermore the priorities, the announcements for the paging functionality as well as the default announcements for pilot numbers and personal lines.

All other settings are determined by the *systemmanager* user.

#### 6.4.1.2 Times

---

**NOTE:**
The tenant’s times values act as default values for a tenant; the values can be overwritten individually for each DDI lookup entry.

---

In the area **Times** you modify the default values for the times for the Concierge user / application handling the customer calls – the unit is milliseconds.
**Max. transfer time** defines how long the system tries to reach the target person the call has been transferred to.
If this threshold is exceeded in a call transfer scenario, the call will stay in the **Processing Queue** window in the Concierge GUI or will automatically be distributed to the attendant.
Please refer to the recall parameters in the **ProcessingQueue** attributes under Client Configuration settings.
**Max. time in incoming queue** describes the time the system will hold the call to wait for agents answering before the call is routed to the specified *Time Overflow variant*.
This tenant’s *Times* values and the time overflow variant can be overwritten on a DDI lookup entry base, please see also section 6.4.2.4 Announcements / Greeting Text

Enter the settings for announcements and greeting texts. Basis for some entries are set under:

**System data / Announcements** see section 6.4.3 Announcements and
**Basic data / Welcome messages** see section 6.2.4 Welcome messages.

#### 6.4.1.3 Miscellaneous

Under “Miscellaneous” a **priority** can be assigned to the incoming call as well as a **background color** used in the Concierge GUI, when the call arrives.

Furthermore **overload settings** can be defined; means what happens if the CPS is overloaded. The mode “busy signal” plays a busy signal; or in the deflect mode the call is routed to an **overload destination** that is a mandatory parameter in this case.

**Default RNA timeout time** is the maximum time a distributed call is ringing on the Concierge user’s phone. If that time is exceeded before the agent accepts the call, CPS takes that call away from the Concierge user and sets the user’s routing state to “unavailable”. The call will be routed to another available attendant.
Please also note the information about the function „Automatic Availabilty for Last Agent“ – see section 11.1 Times
RNA timeout **time**.

**NOTE**:
The **RNA timeout time** is not used in case of integration with OpenScape Contact Center!

**Default ring time** defines the time the caller hears the ring tone until the call is connected by the Concierge / CPS system.
For cost free services adjust the times with this parameter!

#### 6.4.1.4 Priorities

Right from the Times pane Priorities can be configured.
A priority of a call describes its importance in terms of the order of automatic distribution and in the display in the caller queue. The call with the highest priority in the system will be routed first to an attendant that has the required knowledge for handling the call.
The highest priority call evaluation covers all calls of caller queue, personal line calls and **Processing Queue** calls which should be delivered back to the attendant.
Priorities range from 0 to 1000, where 1000 describes the highest importance of a call.
**Failed transfer** defines the priority of a call that was transferred to a target person, but the person was not reached. In this recall scenario, the call stays the **Processing Queue** with the given priority.
**Parked call** defines the priority of calls that are parked by the attendant. The call stays enqueued into the **Processing Queue** with the given priority.

**NOTE:**
The recall timers mentioned are set under **System data \ Client Configuration** in section **ProcessingQueue**.

**Personal line** calls are private calls coming in via dedicated number for that Concierge user. These calls are queuing in CPS as personal calls and are also displayed in the Concierge GUI.

#### 6.4.1.5 Time overflow variants being processed (maximum Processing Queue time for a call)

**Description**

If a call stays in the processing queue due to an unsuccessful transfer, a recall or parking and no further attendant / instance is able to handle that call, it will be handled as of these settings after exceeding the threshold **Effective after (seconds)**, see the **Tenant's default settings**:
Maximum Processing Queue time for a call


#### 6.4.1.6 Default number for CDR-SIP Header

When using more than one office gateway a subscriber number (e.g. an attendant extension number) can be used to perform an associated dial request.

The default number for the CDR-SIP header is only used for time overflow on incoming queues using night variants with redirection that are executed on behalf of the concierge provider service!

The dial request is done with the number assigned dial plan and the corresponding gateway.

#### 6.4.1.7 Default announcements for CPS-managed pilot numbers and personal lines

Specify default announcements for CPS-managed calls that come in via DDI pilot numbers or via the personal lines to the attendant.

**Music on hold:** This wave file is played when the call is put on hold.
**Transfer:** This wave file is played to the caller during the transfer phase if the target person is not yet connected. That means while the CPS contacts the target person the caller waits on CPS and listens to the music specified here.
**Default greeting:** This wave file is played to the caller when the call arrives in the system!

---

**NOTE**: For more details please refer to section 10 Best practice - Announcements.

---

#### 6.4.1.8 Emergency line settings

Specify the emergency line to which all calls from pre-configured queues will be transferred in an emergency situation.

**Line Number**: The number of the line to which calls will be transferred when the Emergency Button is pressed.

**Night Variant Description**: Name of the emergency night variant that will appear in pre-configured queues that will be closed in an emergency situation.

---

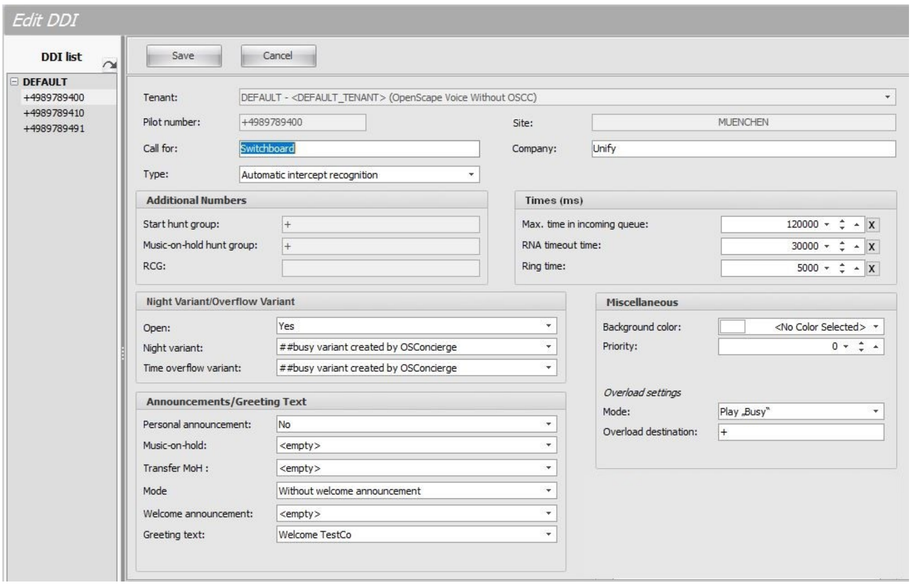
**NOTE**: This feature is not available in case of integration with OpenScape Contact Center!

---

### 6.4.2 DDI Lookup

**Access**


The **DDI Lookup** icon to open the "Edit DDI" window can be found in the "System data" menu.




With the *tenant's manager* account tenant's specific entries are modified in this table.

**Description**

The configuration parameters depend on the connection type of the OSC Server with the Communication platform and whether integration with OSCC is used.
The fields in grey are configured with a *systemmanager* account as described in section 5.1.2. DDI Lookup.

General settings for a DDI List entry are **Tenant** that is given by your account. The entry in the **Site** field comes with your tenant. The **Pilot number** is the number the caller's are dialing to reach the corresponding service. The field **Call for** describes the name of the service. The entry in field **Type** can be choosen from dropdown menu – see help text in System Management. **Company** is an optional field for further customer information.

#### 6.4.2.1 Additional numbers

Under additional numbers the Communication platform entities assigned with the Pilot number are configured with the systemmanager account – see also the pictures below!

**Start Hunt group** requires the Start Hunt group also called *Initial Hunt group* when integrating with OpenScape Contact Center.

**Music-on-hold hunt group** requires MoH Hunt group when integrating with OpenScape Contact Center.

**RCG** requires the RCG assigned to the Pilot number when integrating with OpenScape 4000.

#### 6.4.2.2 Times

**NOTE**:
The **time** values configured here, overwrite the standard **time** settings of the **Tenant** - see section 6.4.1.2 Times.

Set the values to **<empty>** in order to use the standard value of the Tenant by clicking directly on the **X** button next to the fields.

In this area default time settings of the tenant can be overwritten based on the individual pilot number / DDI lookup entry.
**Max. time in incoming queue** describes the time the system will hold the call to wait for agents before the call is routed to the specified *Time Overflow variant*.

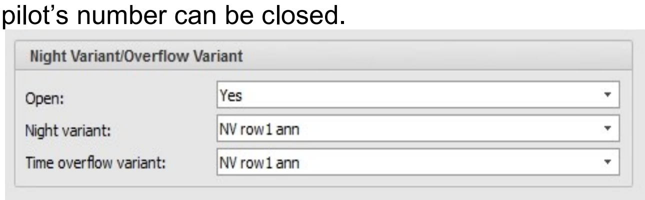
**RNA timeout time** is the maximum time a distributed call is ringing on the Concierge user's phone. If that time is exceeded before the agent accepts the call, CPS takes that call away from the Concierge user and sets the user's routing state to "unavailable". The call will be routed to another available attendant.

**Ring time**
Specifies the time the call rings before Concierge's CPS accepts the call!

See more information about **Times** in section 11 Best practice - DDI related configuration**.**

#### 6.4.2.3 Night Variant – opening/closing a pilot number service

The variant that is assigned under DDI's **Night variant** decides what happens with the call in case that no agent is logged on.
Furthermore this pilot number service can be opened and closed. In case it is closed again that **Night variant** determines further handling.
By choosing **No** in the dropdown list for **Open** in Data Center as well as from Concierge user under Extras → Queues in the Concierge Client GUI, the pilot's number can be closed.




**See more information about "Night Variant" in section 11** Best practice - DDI related configuration**.**

#### 6.4.2.4 Announcements / Greeting Text

Enter the settings for announcements and greeting texts. Basis for some entries are set under:
**System data / Announcements** see section 6.4.3 Announcements and **Basic data** / **Welcome messages** see section 6.2.4 Welcome messages.

#### 6.4.2.5 Miscellaneous

Under "Miscellaneous" a **priority** can be assigned to the incoming call as well as a **background color** used in the Concierge GUI, when the call arrives.

Furthermore **overload settings** can be defined; means what happens if the CPS is overloaded. The mode “busy signal” plays a busy signal; or in the deflect mode the call is routed to an **overload destination** that is a mandatory parameter in this case.

#### 6.4.2.6 Emergency

Defines whether this pilot number will be closed and all incoming calls will be transferred to an emergency line if any pre-authorized user presses the Emergency Button.

---

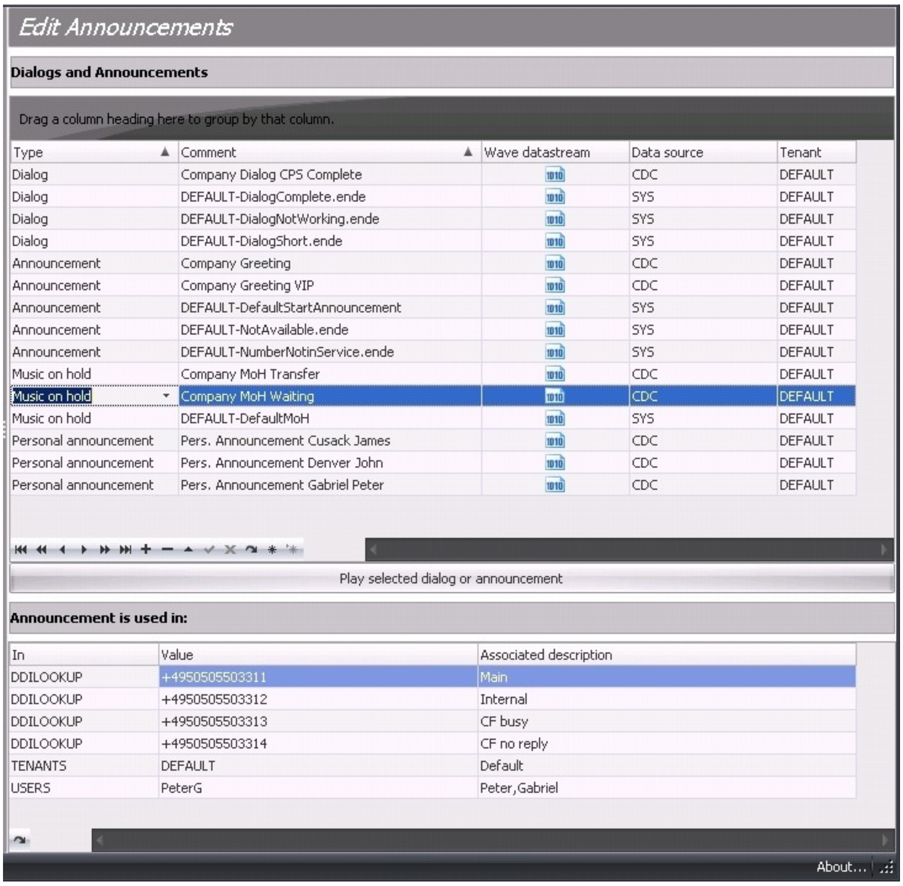
**NOTE:**
This feature is not available in case of integration with OpenScape Contact Center!

---

### 6.4.3 Announcements

**Access**


The **Announcements** icon to open the "Edit Announcements" window in the "System data" menu.



**NOTE:**
For details please refer to section 10 Best practice - Announcements Handling

## 6.4.4 Night Variants

**Access**


The **Night Variants** icon to open the "Edit Night Variants" window in the "System data" menu.

The following subsections describe the handling of night an overflow variants.

Further Information's to Night Variant / Overflow Variant in section 5.1.4 Night Variants

## 6.4.5 CPS number ranges

**Access**


The **CPS number ranges** icon to open the "Edit CPS number ranges" window can be found in the "System data" menu.

**Description**

In this area the extension numbers that are used by CPS for paging and call handling (park, hold, and transfer) – so called *internal resources* – depending on the tenant have to be registered.

**NOTE:**
As these settings are related to configurations in the PABX please refer to the corresponding chapter for the CPS number ranges in system management level, section 5.1.5 CPS number ranges

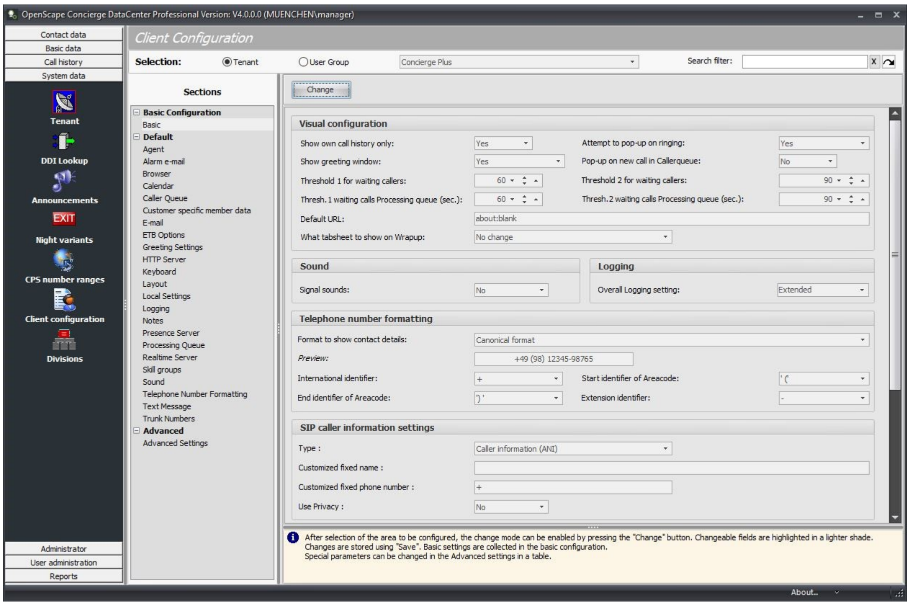
## 6.4.6 Client Configuration

**IMPORTANT NOTE:**
Only trained staff should access the parameters in this section!

The section **Client Configuration** under **System data** offers a huge amount of settings for customizable configurations of access, features and functionalities of the Concierge Client, parameters that used to be in the *concierge.ini* file in older versions.
The available parameters and their meaning are described in the Info section on the bottom of the GUI labeled with a  for information.

**Access**


The **Client Configuration** icon to open the "**Client Configuration** " window in the "System data" menu.



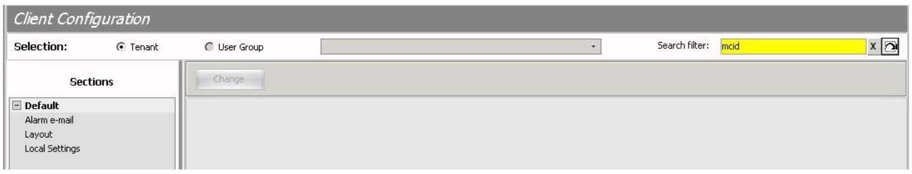

When opening the window, you can select the target group of users that shall work with the settings.
Select **Tenant** or **User Group** (User groups are created under section 6.6 User administration), depending on the needs. Means modifying these settings on a tenant base affects all users for the given tenant, modifying for a user group affects the settings of the attendants are assigned to that group.

---

**NOTE:**
Only Groups that have the checkmark **Has own configuration settings** can be modified here!

---

**Search filter**
A **Search filter** in the upper right corner will help to find quick and easily parameters in this section. Enter the search criteria in this box and click on  to start the query.
If a match of your search criteria was found the background color will change to yellow and on the left hand side the sections are listed where the search criteria can be found




**Sections**
In the left pane under Sections highlight the section you want to modify and press the button **Change** in the uppermost grey field. The fields that you are allowed to modify beome white. Those that are  grey and can’t be changed. Make your settings and changes as required in the right pane and press the **Save** button for saving or the **Cancel** button for discarding the changes.

---

**NOTE:**
By clicking into the field to be modified the lowermost section displays an online help describing the functionality of the corresponding parameter

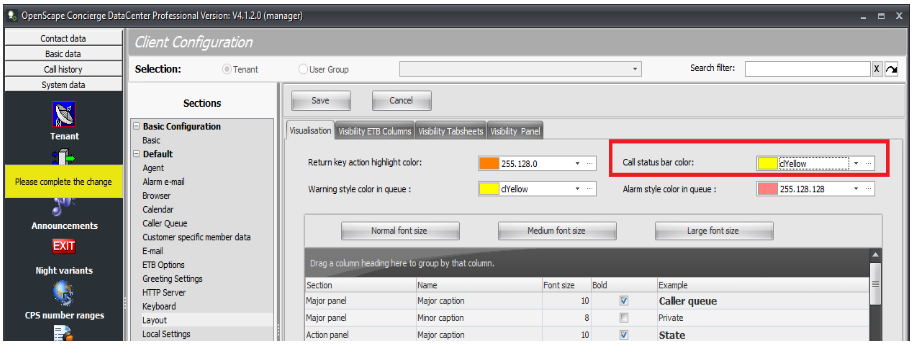
---

#### 6.4.6.1 New settings in OpenScape Concierge V4.0

- “Format of OSV Display Info on incoming call” in section *Telephone Number Formatting*
- *Presence Server* section (former UC Server)

#### 6.4.6.2 Changing call handling status bar color

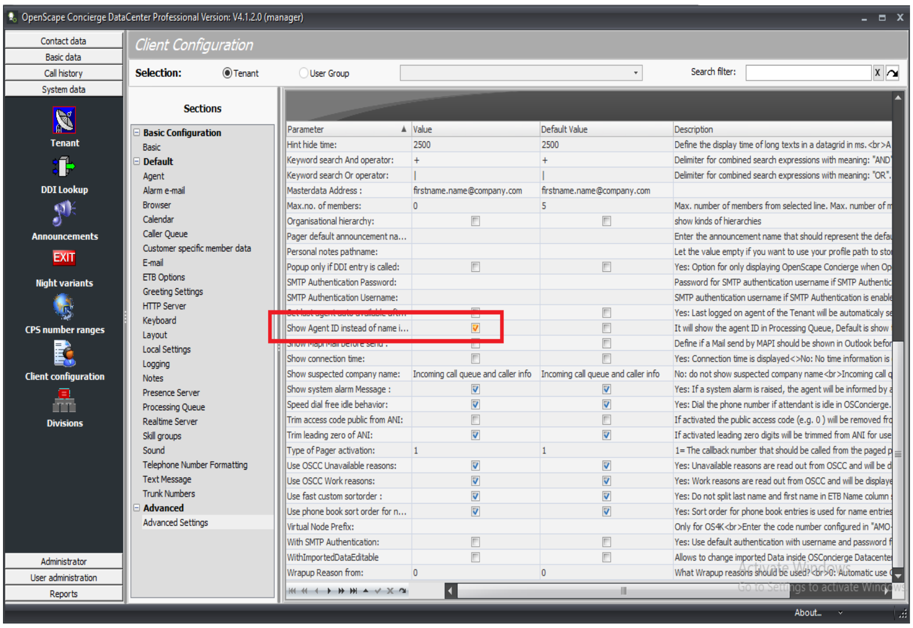
To change the Concierge "Call Handling" status bar color from yellow to another color when the concierge agent is receiving a routes call from OSCC you can use the following menu:




**NOTE**: for the color change take effect it is necessary to restart all Concierge Client instances logged in the respective tenant.

#### 6.4.6.3 Setting Processing queue Attendant ID content

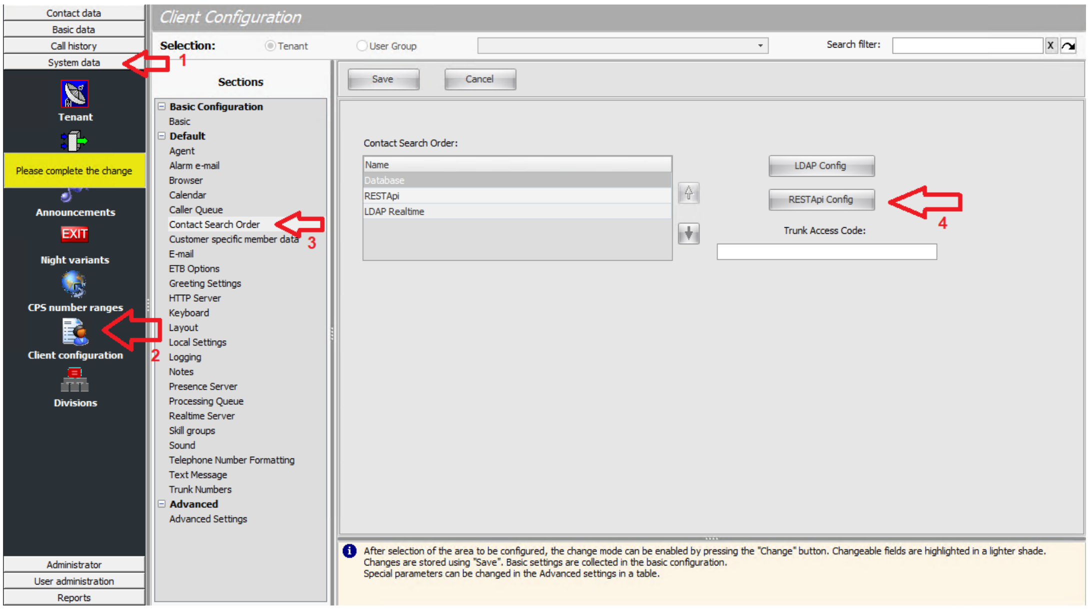
When concierge is connected on OSCC it is possible to configure your processing queue Attendant ID field to present the Attendant ID instead of the Attendant Name. For it you should set the parameter called “Show Agent ID instead of name in Processing Queue” as true.



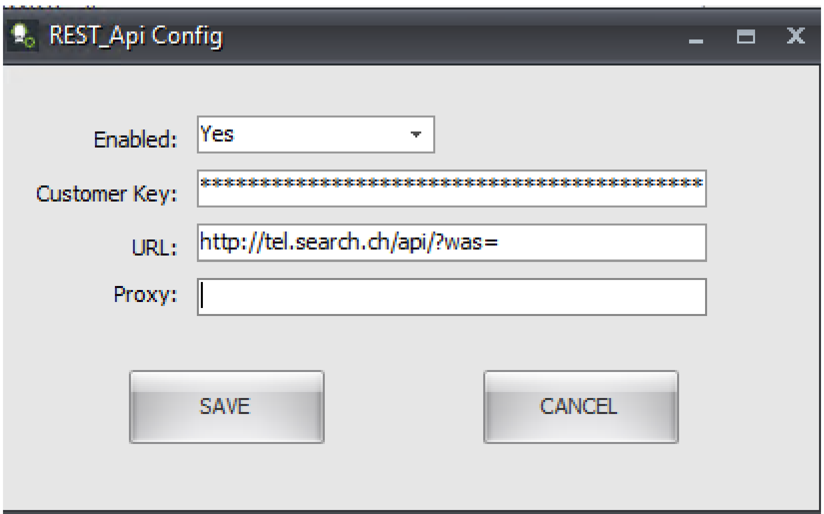
**NOTE**: for the new Attendant ID content take effect it is necessary to restart all Concierge Client instances logged in the respective tenant.

### 6.4.6.4 Rest API Settings

If the customer Concierge License contains the feature called REST API, you can configure the settings in Client Configuration > Contact Search Order.

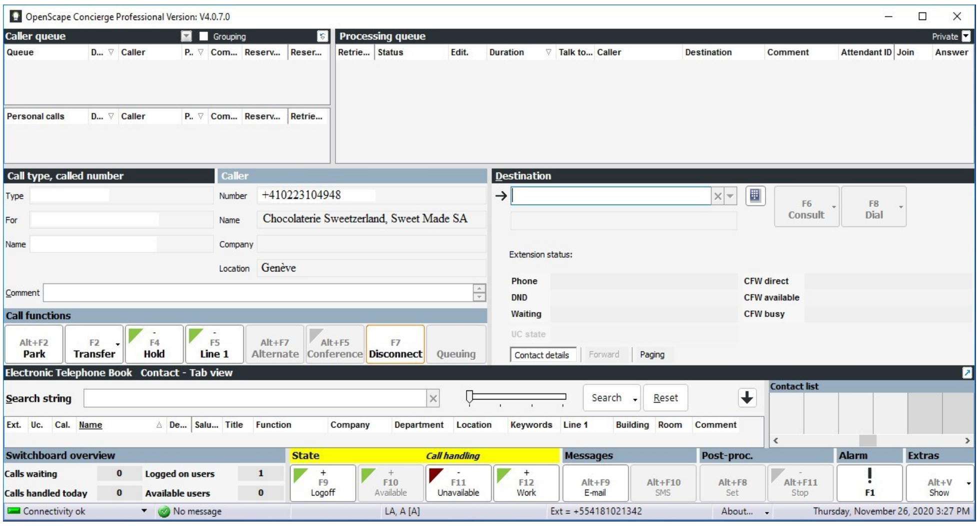



The REST API feature enables the concierge server to perform a consult based in the caller's phone number on a remote phonebook (for example the Swiss public Phonebook - [https://www.search.ch/](https://www.search.ch/)). The queries are executed through a REST API interface.
When the feature is enabled it is necessary to set the Search.ch REST API credentials: Customer Key and URL.




When enabling this feature, for each external call received the concierge will use the caller phone number to make a contact query on the search phonebook service URL (Swiss public phonebook).

The data values (Name and City) returned from phonebook service will be send to the respective attendant who is handling the call and will be displayed in the Caller panel as below:



---

**NOTE**: If this feature is not available in your license the REST Api settings area will not be displayed.

---

---

**NOTE:** If the connection with the phonebook service is either down or not accessible or even the caller phone number was not found, the concierge will leave the Name and City fields empty (blank) on the Caller panel. In these cases, no secondary queries will be executed in the concierge local phonebook. No data from the phonebook service is stored locally.

---

---

**NOTE**: The account and registration are Customer responsibility. Once the registration is done, the Customer will receive an “API key”. This “API Key” will be used in the Concierge to provide the integration**.**

---

---

**NOTE:** Pay attention, for example, Swiss Public Phonebook service allows 1000 queries per month free of charge. Additional queries could be charged. The contract with the Swiss Public Phonebook is a customer responsibility.

---

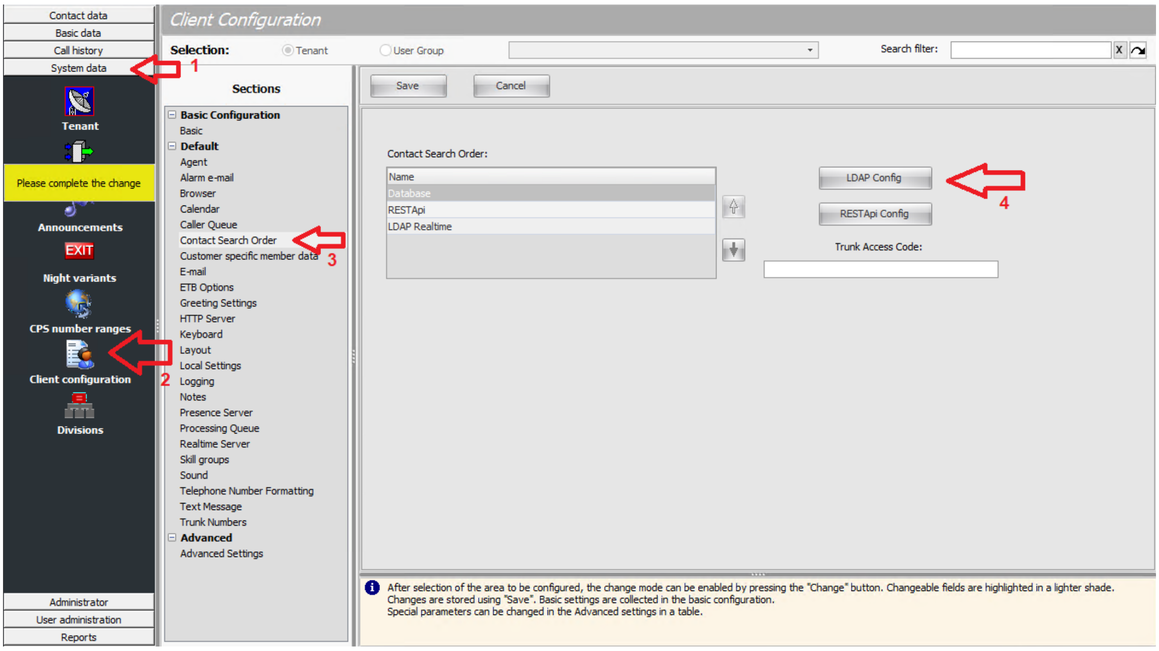
---

**NOTE**: In Client Configuration > Contact Search Order has a configuration to set which type of search to use first (REST Api, LDAP Realtime, Database)

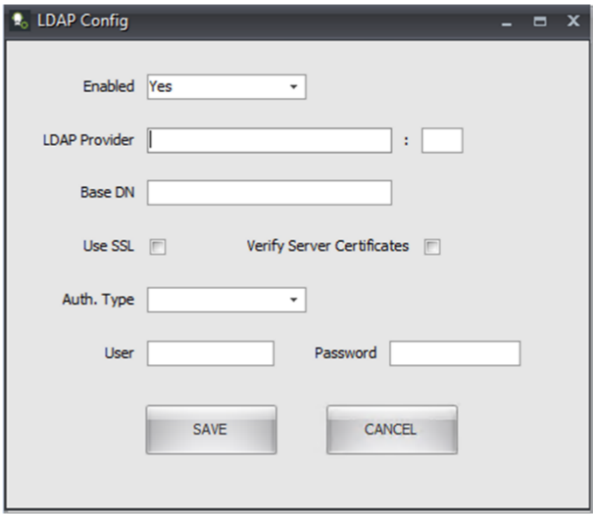
---

## 6.4.6.5 LDAP Realtime Settings

If the customer Concierge License contains the feature called LDAP Realtime, you can configure the settings in Client Configuration > Contact Search Order.




The LDAP Realtime feature enables the concierge server to perform a consult based in the configured LDAP server to show the caller information in Concierge.




In this area, the LDAP Realtime can be enabled or disabled (for each separated Concierge Tenant). In addition, each tenant can contain a different configuration. It means that each different Tenant can use his own credentials to access and make queries on a remote phonebook.

---

**NOTE**: If this feature is not available in your license the LDAP Realtime settings area will not be displayed.

---

**NOTE**: In Client Configuration > Contact Search Order has a configuration to set which type of search to use first (REST Api, LDAP Realtime, Database)

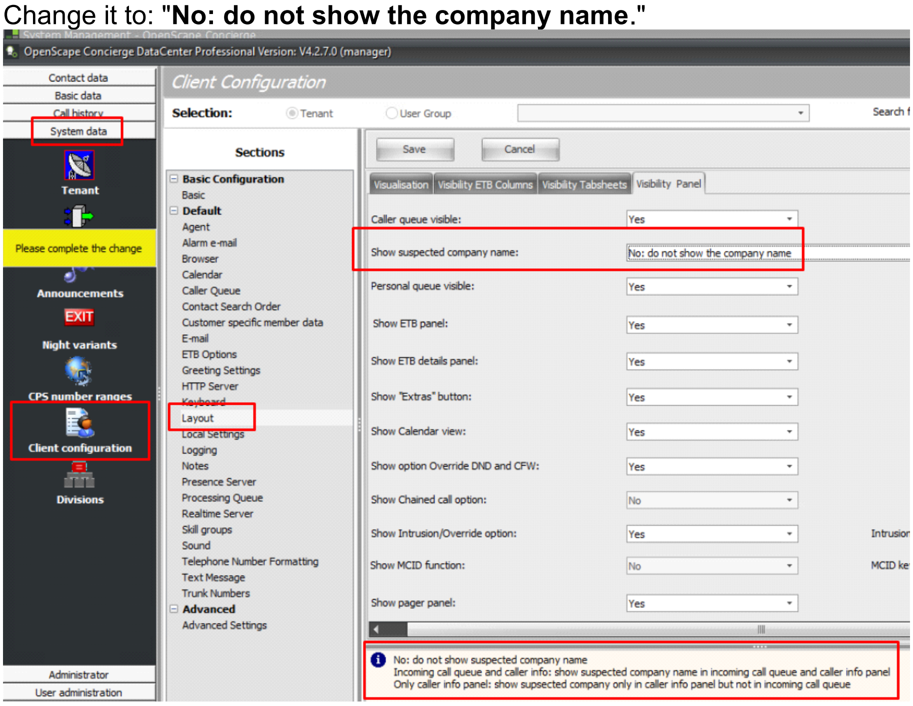
---

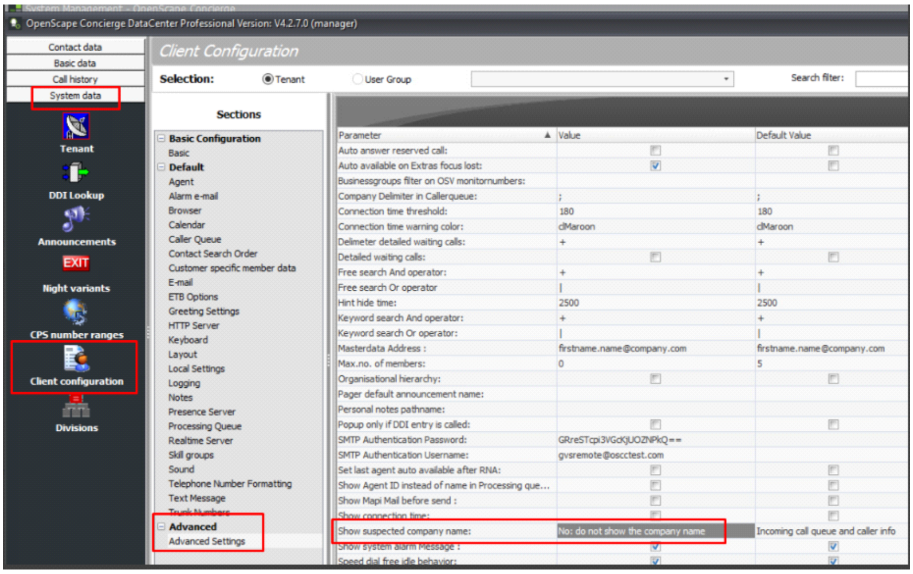
### 6.4.7 Activate/deactivate the "Show Suspect Company Name" feature:

By default, the feature is turned on.

Turn it off in "**System Data**" > "**Client Configuration**" > "**Layout**" > "**Show Suspect Company Name**."
Change the option to: "**No: do not show the company name.**"

After that, go to "**Client Configuration**" > "**Advanced**" > "**Advanced Settings**" > "**Show Suspect Company Name**."
Change it to: "**No: do not show the company name**."





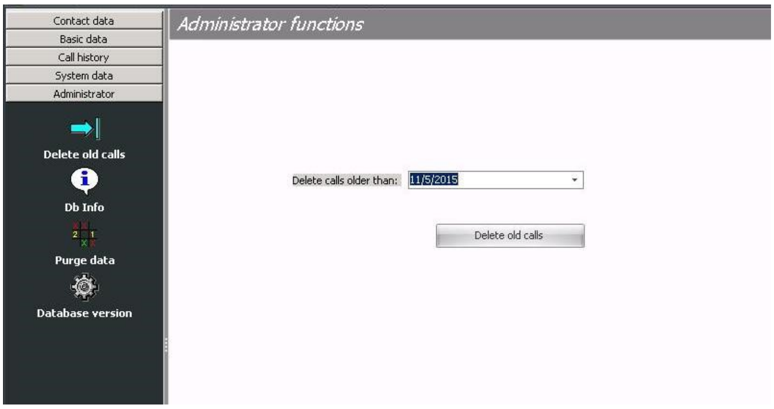

## 6.5 Administrator

| Symbol | Name |
|---|---|
|   | **Delete old Calls** |
|   | **Db Info** |
|   | **Purge data** |
|   | **Database version** |
|   | **GDPR** |

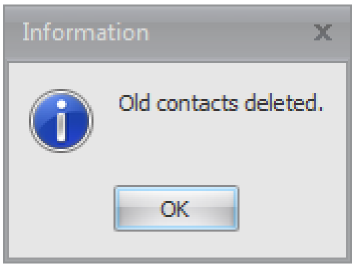
### 6.5.1 Delete old calls

**Access**


With this menu item old calls that are older than a specified date can be deleted from the database.




In order to delete old call data from the Concierge database, choose via the calendar a date. All calls older than this date are deleted when pressing the button „Delete old calls“.

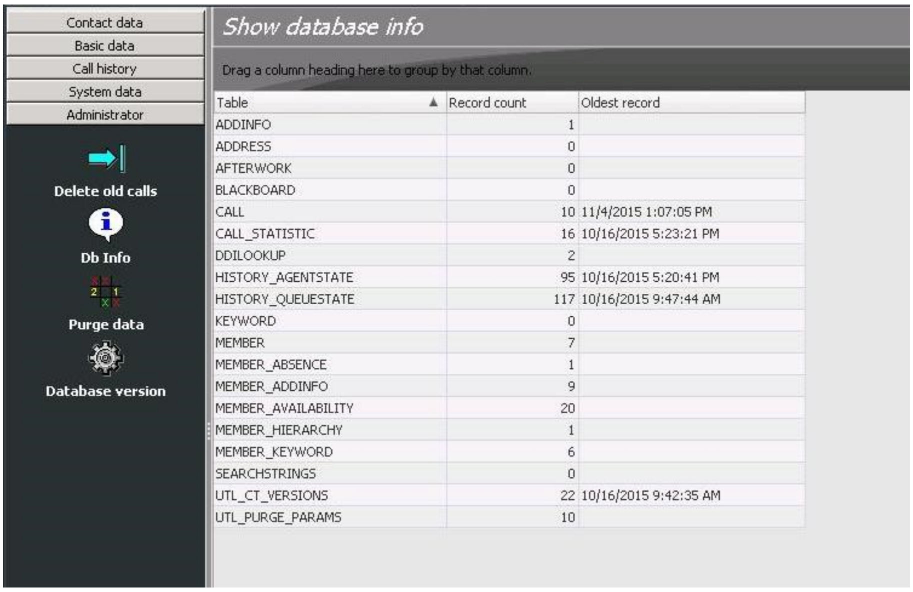



After confirming with OK all entries which are older than specified are deleted and are not shown in the journal anymore.

## 6.5.2 DB Info

### Access


The status information for the database tables are shown here.



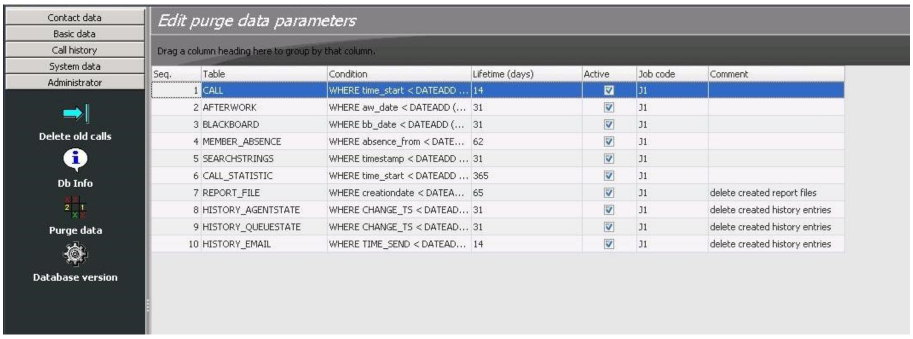

| Table | Record count | Oldest record |
|---|---|---|
| ADDINFO | 1 | |
| ADDRESS | 0 | |
| AFTERWORK | 0 | |
| BLACKBOARD | 0 | |
| CALL | 10 | 11/4/2015 1:07:05 PM |
| CALL_STATISTIC | 16 | 10/16/2015 5:23:21 PM |
| DDILOOKUP | 2 | |
| HISTORY_AGENTSTATE | 95 | 10/16/2015 5:20:41 PM |
| HISTORY_QUEUESTATE | 117 | 10/16/2015 9:47:44 AM |
| KEYWORD | 0 | |
| MEMBER | 7 | |
| MEMBER_ABSENCE | 1 | |
| MEMBER_ADDINFO | 9 | |
| MEMBER_AVAILABILITY | 20 | |
| MEMBER_HIERARCHY | 1 | |
| MEMBER_KEYWORD | 6 | |
| SEARCHSTRINGS | 0 | |
| UTL_CT_VERSIONS | 22 | 10/16/2015 9:42:35 AM |
| UTL_PURGE_PARAMS | 10 | |

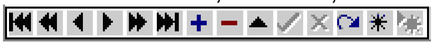
## 6.5.3 Purge data

### Access


The parameters (conditions) for which specific tables are to be deleted in the OpenScape Concierge database can be defined under "Purge data" so that the tables do not overrun "unmanageably

The default in the delivery status is 31 days; the call table is set to 14 days.




Purge parameters can be searched for, modified, added and deleted with the function buttons  (See description in Section 12.1.1 Database functions).
The call journal for the Concierge clients can be deleted up to a definable date via this function.

---

**NOTE for “BLACKBOARD”:**
Entries for the bulletin board (BLACKBOARD) are normally deleted after 31 days (standard). This value can be changed but the amount of data should be considered!
The values “from / until” in the Bulletin board editing form (see section 6.2.1 Bulletin board) have no influence on the deletion time – they are only used as the time period the individual information is send via the bulletin board.

---

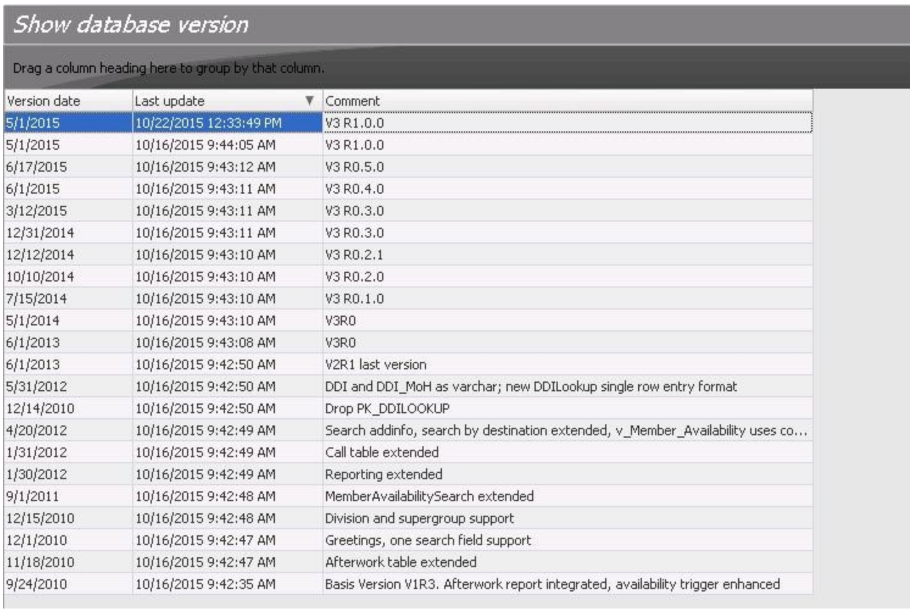
**NOTE for “COMMENT” field for incoming calls:**
Entries for the comment field for incomming calls are normally deleted after 14 days with the system-wide entry under **CALL table**. It is possible to configure this value per Agent Group under **Client configuration** / **Local settings** / **No.of days backwards for last caller info**.
BUT we recommend not to expand the time span!
Otherwise please contact Unify for advice.

---

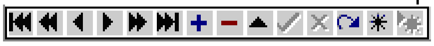
## 6.5.4 DB version

### Access


The database version number is displayed here. This is especially important for error reporting and planned upgrades




| Version date | Last update | Comment |
|---|---|---|
| 5/1/2015 | 10/22/2015 12:33:49 PM | V3 R1.0.0 |
| 5/1/2015 | 10/16/2015 9:44:05 AM | V3 R1.0.0 |
| 6/17/2015 | 10/16/2015 9:43:12 AM | V3 R0.5.0 |
| 6/1/2015 | 10/16/2015 9:43:11 AM | V3 R0.4.0 |
| 3/12/2015 | 10/16/2015 9:43:11 AM | V3 R0.3.0 |
| 12/31/2014 | 10/16/2015 9:43:11 AM | V3 R0.3.0 |
| 12/12/2014 | 10/16/2015 9:43:10 AM | V3 R0.2.1 |
| 10/10/2014 | 10/16/2015 9:43:10 AM | V3 R0.2.0 |
| 7/15/2014 | 10/16/2015 9:43:10 AM | V3 R0.1.0 |
| 5/1/2014 | 10/16/2015 9:43:10 AM | V3R0 |
| 6/1/2013 | 10/16/2015 9:43:08 AM | V3R0 |
| 6/1/2013 | 10/16/2015 9:42:50 AM | V2R1 last version |
| 5/31/2012 | 10/16/2015 9:42:50 AM | DDI and DDI_MoH as varchar; new DDILookup single row entry format |
| 12/14/2010 | 10/16/2015 9:42:50 AM | Drop PK_DDILOOKUP |
| 4/20/2012 | 10/16/2015 9:42:49 AM | Search addinfo, search by destination extended, v_Member_Availability uses co... |
| 1/31/2012 | 10/16/2015 9:42:49 AM | Call table extended |
| 1/30/2012 | 10/16/2015 9:42:49 AM | Reporting extended |
| 9/1/2011 | 10/16/2015 9:42:48 AM | MemberAvailabilitySearch extended |
| 12/15/2010 | 10/16/2015 9:42:48 AM | Division and supergroup support |
| 12/1/2010 | 10/16/2015 9:42:47 AM | Greetings, one search field support |
| 11/18/2010 | 10/16/2015 9:42:47 AM | Afterwork table extended |
| 9/24/2010 | 10/16/2015 9:42:35 AM | Basis Version V1R3. Afterwork report integrated, availability trigger enhanced |

Tables can be searched for and displayed with the function buttons  (See description in Section 12.1.1 Database functions).

## 6.5.5 GDPR

**Access**


GDPR = *General Data Protection Regulation*
Queries for personal data stored in the DB can be made here.

**Permissions**

For information about configuring permissions see section 5.2.5 GDPR

### 6.5.5.1 Processing

**Prerequisites**

Since personal data is processed, special care has to be taken. Prerequisite for working with the GDPR work area is a good understanding of the data stored in the Concierge database.

**Search for a person**

The following search criteria can be used for the search:

4. unique identification features:
   - complete phone number (in + E164 format)
   - E-mail address
   - Personnel number
5. in principle / rather ambiguous features
   - Last name
   - First name
   - free text search

**NOTE:** Specifics name, first name:
Because OSConcierge stores last and first names automatically e.g. in the call data as last name, first name (possibly with a preceding title or prefixed salutation) a composite search term is generated from these two values.

The search entries do not allow wildcards. Furthermore, no AND / OR links are supported.

The following database fields are searched for:

| Search field | Tabel | Search column |
|---|---|---|
| Telephone number | CALL and CALL_STATISTIC | CD_ANI |
| | | CD_DESTINATION |
| | MEMBER_AVAILABILITY | INTERNATIONAL_PCATLINE |
| | MEMBER | DATA_01..DATA_25 |
| Last name | CALL and CALL_STATISTIC | CD_COMMENT |
| Last name and first name | CALL and CALL_STATISTIC | CD_CALLER_NAME |
| | | CD_DESTINATION_NAME |
| | MEMBER | NAME und FIRSTNAME |
| | | DATA_01..DATA_25 |
| E-mail address | MEMBER_AVAILABILITY | CONNECTION |
| Personnel number | MEMBER | Personnel_number |
| | | DATA_01..DATA_25 |
| Free text search | CALL and CALL_STATISTIC | CD_COMMENT |
| | MEMBER | DATA_01..DATA_25 |

**Display during the search process**

During the synchronous search, a yellow highlighted "Searching ..." is shown in the form. The search is over when the yellow search display is no longer visible.
No entry is possible during the search process.
For large data scans, the search can take several seconds / minutes.

**Display of search results**

OSConcierge stores personal data as participant data (table MEMBER and related tables such as MEMBER_AVAILABILITY, MEMBER_ADDRESS, MEMBER_ABSENCE, MEMBER_ADDINFO, MEMBER_KEYWORD) as well as conversation-related data (tables CALL and CALL_STATISTIC). Accordingly, the output in the column **Source** is made as MEMBER or CALL.

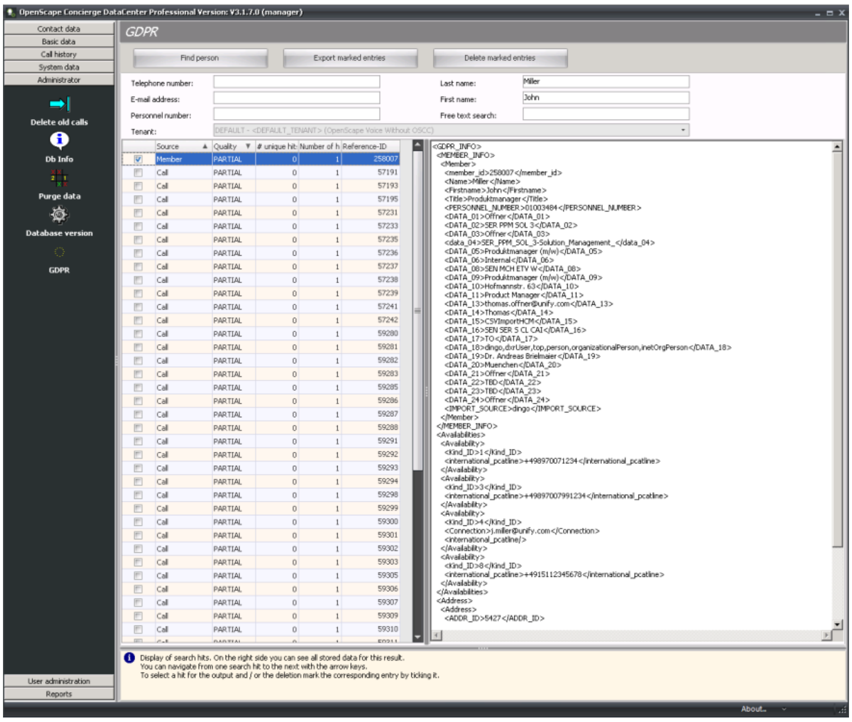
In the search, especially when using ambiguous search criteria, other people can also be found.
The columns **#unique hits** or the "Partial" entry in the **Quality** column can help to diffentiate.

- A unique match is if one of the unique search terms has delivered an exact hit.

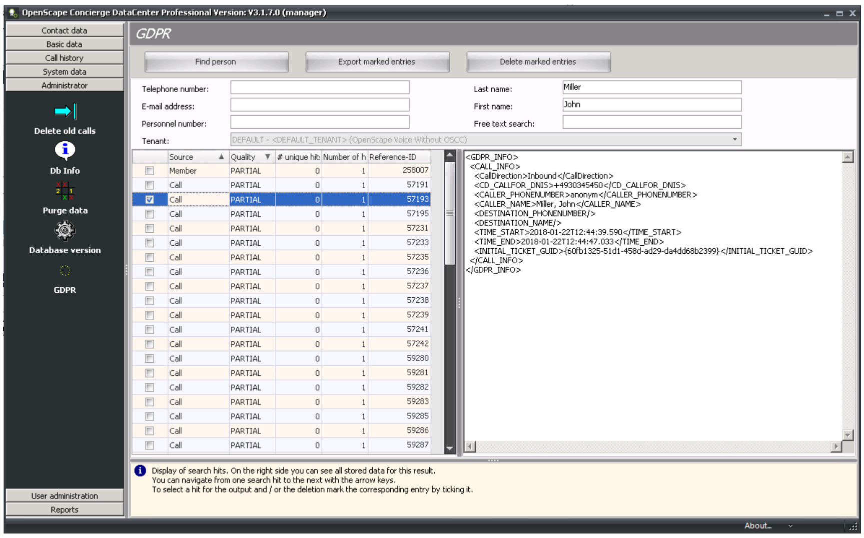
- A partial match occurs if an ambiguous search term has delivered a hit and / or if a search term was recognized as part of a string.

For each hit, a reference ID is also output which produces the unique assignment to a table entry, e.g. for the table MEMBER this is the MEMBER_ID and for the call / call_statistic table the CALL_ID.

On the right side of the GDPR form, an XML listing of the participant or the conversation found, is displayed for the highlighted (highlighted in blue) match.
<u>Example participant record:</u>




<u>Example call record:</u>



**NOTE**:
The selection (tick) of records requires great care and control in order to select personal data and not to select third-party data for processing and / or deletion!

**Output the selected records as an XML file:**

If a hit has been identified as the data record associated with the searched person, it must be selected accordingly via the check box.
All selected records can be saved as XML file via the output button. In this case, the XML records of each selected hit are taken over as a separate line in the XML file.
The default file name is formed from "GDPR_YYYYMMDD_hh_mm_" followed by the search terms entered.
**Example:**
*GDPR_20180525_09_40_Smith_Christine_cm@gdpr.com_+498970070000_Freetextentry.xml*
The save dialog allows customizing the default file name and location.

**Delete data**

1. Find a specific person, as described above under section **Search for a person**.
2. By ticking select the subscriber / call records to be deleted.

   **NOTE**:
   Great manual care and control is necessary!

3. Click the **Delete selected entries** button and confirm the confirmation prompt to permanently delete the data.

**IMPORTANT NOTE:**
Deleted data is currently not stored in a blacklist and can therefore not be recognized and ignored when re-imported.
As a result, data that has already been deleted will be resumed by a renewed import.
For effective long-term deletion it must therefore be ensured that the personal data have also been deleted in the source systems (which underlie the import process).
Otherwise, the deletion must be performed again with the Concierge DataCenter after this has been ensured.

When deleting the subscriber data (Member), the subscriber data record is deleted completely.
When deleting the personal data in the call record (Call) not the entire record is deleted, only the phone number found and / or found name in the record is anonymized. This is done either for the caller or for the destination information.

## 6.6 User administration

| Symbol | Name |
|---|---|
|   | **Accounts** |
|   | **Access groups** |

### 6.6.1 General

With the tenant’s manager account you can create additional users on the management level to log on to the Data Center (for administration of central items as described in this paragraph) as well as attendants to log on to the Concierge Application for your tenant.
In case there is an integration with OpenScape Contact Center, it is possible to download / synchronise OSCC users in the Edit User Accounts window. These accounts and their permissions in the Data Center for your tenant are created and administrated in this menu.

**NOTE:**
These users are not the users that are visible in the ETB

### 6.6.2 Accounts

**Access**


Users working for that tenant can be created, modified and deleted under the "Accounts" menu option

**NOTE:**
The system manager cannot see the accounts as they are visible in the Accounts menu of the tenant configuration.

### 6.6.3 Creating users manually

Under **Edit User Accounts** press the button **New** and specify the required parameters for the new user!

The following Parameter must be defined for each user account:

**Table:** User data

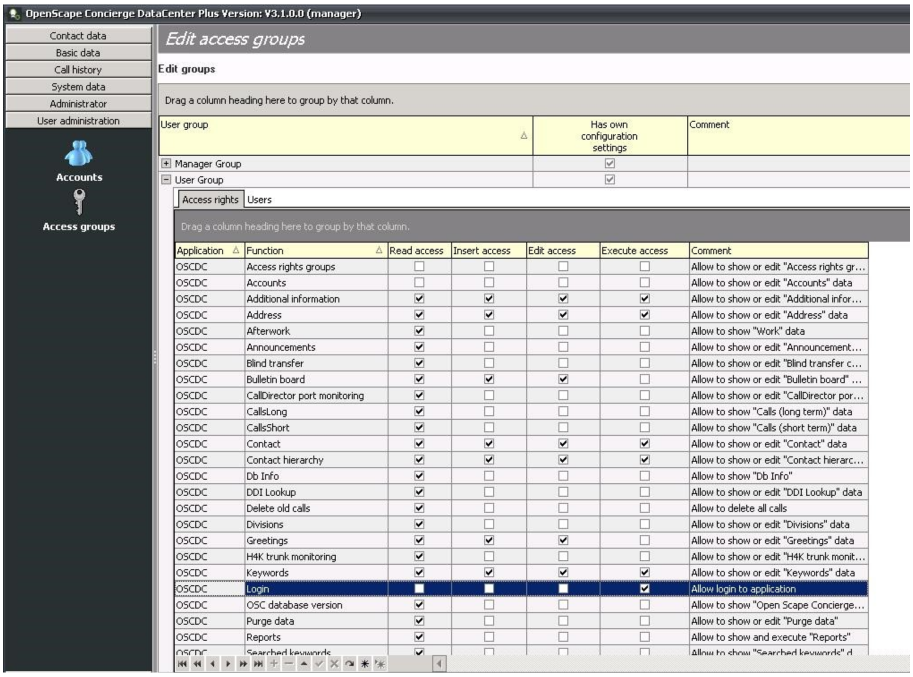
| Heading | Explanation |
|---|---|
| Active | Is this account in use or not? |
| Tenant | Tenant’s name; already filled with Tenant |
| Name | User's last name |

| Heading | Explanation |
|---|---|
| Firstname | User's first name |
| Title | User's title |
| Salutation | User's salutation |
| Windows login | Allow logon with windows domain account<br>See section 3.2 Starting Concierge Client with Windows authentication or 0 logging on to Data Center with Windows authentication |
| Braille Support | User needs braille support?<br>**NOTE:**<br>This option causes changes to the advanced search fields and ETB to allow the use of screen readers based on IAccessibility interface (such as JAWS) to provide audible support for the visually impaired. |
| Login name | User account name for login<br>**NOTE:** For installations **with** OSCC the Users can be gathered from the OSCC database in the **Edit User accounts** window, see next section! |
| Allow Emergency Button | Defines if this user can press the Emergency Button (the Emergency Button will be invisible to users without this permission).<br>**NOTE:**<br>This feature is not available in case of integration with OpenScape Contact Center! |
| Password | User's password; default values for the access groups are:<br>User group: **user**<br>Manager group: **manager**<br>**NOTE:**<br>Also the users synchronized form OSCC do have that default password!<br>The Password can be changed with the button at the end of the field  |
| Comment | Comment field |
| **Personal line settings** | |
| Personal line number | The personal number of the user, a number out of the range of numbers that route to CPS |
| Play pers. announcement | Is the personal announcement used ? |
| Open | Is the personal number in use? |

| Heading | Explanation |
|---|---|
| Music-on.hold | Wave file for MoH for this user |
| Night variant | Type of night variant for the personal line number |
| Time overflow variant | Type of time overflow variant for the personal line number |
| Time Settings | The default time settings as configured for the Tenant can be overwritten for the personal line of the user. |
| **Personal announcement settings – see section 10.6** | |
| Pers. announcement | Wavefile for the personal announcement |
| **Speed dial button settings – see section** 7 | |
| Speed dial buttons conf. | The tenant for whom the manager is logged on is entered here automatically. |
| Changeable | Space for remarks |
| | |
| Group | Choose the group a user is supposed to be assigned to.<br>When creating a manager user account make sure that you assign the account to the manager group. |
| **Font size changes** | |
| Allow font size changes | If set to yes the attendant can change the fonts size within the Concierge Client. Accesible over the Extra Menue → Display |
| **Visible pilot number(s)** | |
| DDI | All the DDI entries that do have the user's **Group** configured, will be visible here. Means calls for that DDI are in the users Caller queue or will automatically be pushed to the user if activated in the Tenant's routing mode, see section 5.1.1 Tenant. |

### 6.6.4 OAccess groups

**AccessGroups** include **Access rights** and **Users.**
Click the **+** next to the group's name to get access to two tabs for Access rights and Users:

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**NOTE:**
The list of users is empty right after the creation of a new group. Assigning members to a group is done in the User settings as described above in section 6.6.2 Accounts

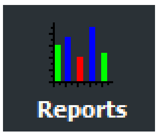
---

You can *modify the Access rights per group*. On the left of each line the application is listed. The abbreviation **OSCDC** stands for OpenScape Concierge DataCenter, **OSConcierge** is the attendant user application. The functions are explained in the **Comment** column.
The following rights can be assigned for every function:

- Read access
- Insert access
- Edit access
- Execute access

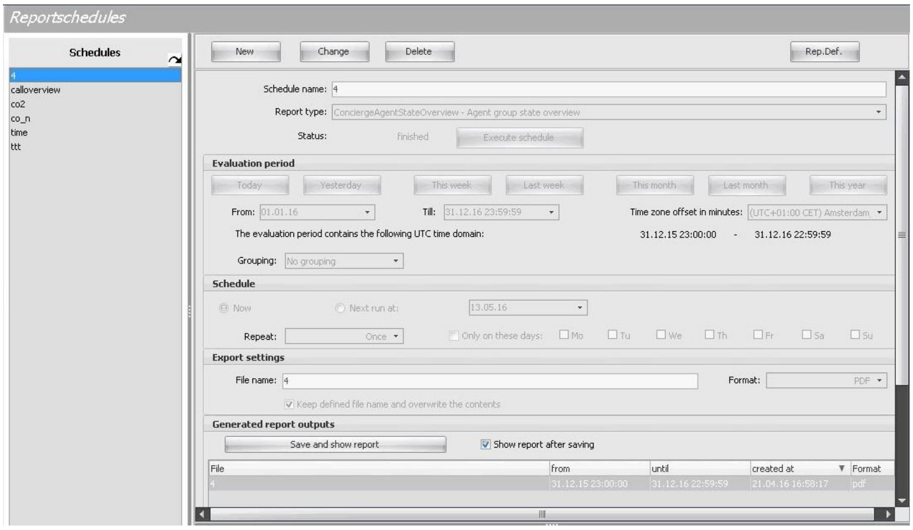
## 6.7 Reporting

### Access




Under Reports find the button **Reports** for starting the **Reportschedules** window.

## 6.7.1 Introduction



Only the *manager* account has rights to access **Reportschedules**.

Concierge Reports support the date formats for the four corresponding languages as displayed:

- DE = dd.MM.yyyy
- FR = dd/MM/yyyy
- EN = yyyy-MM-dd
- ES + BR = dd/MM/yyyy

## 6.7.2 Description

The **Reportschedules** window is used to maintain all scheduled reports of the user. The user can create new schedules or modify existing ones here. On top the three buttons **New**, **Change** and **Delete** allow to *create*, *modify* or *delete* a schedule respectively.
A new schedule requires input in the fields that are white. The same white fields can be modified when an existing schedule is changed.
The options are **Save** and **Cancel** are available when a new report is created or an existing is changed.

## 6.7.3 Creating a new report

Press the **New** button.
Specify general information like **Schedule name** and choose the **Report type** from the drop down menu.

**Four types of reports are available:**

1. Call count overview
2. Call time overview
3. Queue state overview
4. Agent group state overview

**Status** indicates the current status of the selected **scheduled** report. The selected report can be paused or activated again.

### 6.7.3.1 Evaluation Period

Under **Evaluation period** specify the time range that needs to be evaluated: Customizable time periods can be configured using the **From** and **Till** fields. Predefined periods are accessible by pressing the corresponding buttons,. **Today, Yesterday, This week, Last week, This month, Last month** and **This year.**
By pressing one of the buttons the system automatically populates the **From** and **Till** field. Furthermore the Time zone offset can be specified.
The **Grouping** dropdown list allows breaking down summarized values to 15 min, hourly and daily statistics.

### 6.7.3.2 Schedule

In the Schedule area configure the time(s) *when and how often the report has to run.* For immediate information the radio button **Now** can be selected.
For a scheduled creation select **Next run at**. The field for the time stamp becomes white and the **Repeat** dropdown list. The report can be run once at the specified time, hourly, daily, weekly and monthly.
Furthermore there is an option to execute reports only on specific days. If the checkbox **Only on these days** is not selected the report is running every day. When the option is activated, execution of the report can be prevented on individual weekdays by deselecting those.
For instance, when a report has to run daily, Monday to Friday, however not Saturdays and Sundays, deselect the latter ones. The schedule is repeated daily on the working days, Mo - Fr which are selected.

### 6.7.3.3 Generated report outputs

Find the reports that have been created in that pane. This can take a short while. The report is yet not created in the PC's file directory system. It is saved in the OSCADM database. By saving it, the file will be copied into the PCs file system.

**NOTE:**
Press the **Refresh view button** in the Generated report outputs to receive the report if it is created.


Highlight the report you want to save and press the button **Save report**. A window will open for selecting the path to store the document. If the checkmark **Show report after saving** is set, the document will be opened after storage.

**NOTE:**
For automatically opening the document the corresponding program must be available on the PC, like e.g. MS Word for a report of type ***.doc***.

### 6.7.3.4 Best practice hints for user handling

**Ad-hoc creation:**

For an ad-hoc creation of the report, create a new report:
Specify **Name** and **Evaluation Period** and **Save** the report.
The schedule is per default on **Repeat once / now**. The status is **active**.
The Web scheduler worker in the background will create the report.

**NOTE:**
Press the **Refresh view button** in the Generated report outputs to receive the report if it is created.


The report can now be saved with the **Save report** button!

**Evaluation Period versus Grouping**

For a *convenient layout* of the created reports it makes sense to keep the **Grouping** in focus while specifying the **Evaluation period**.
For example when a report evaluates a whole day, the optimum grouping to choose is 1 hour. In that case the layout is optimized to fit the whole report on one page.

Similarly when a report covers the data items of one month, the suggested grouping is 1 day. The report will display all the data items for that one month on a single page.

**Modification of an existing Schedule / Report**

An active schedule can be modified in case parameter need to be adjusted. Highlight your schedule on the left and press the **Change** button. Change the Status of the schedule by pressing the button Stop schedule. Modify your settings and press Execute schedule again and Save.
The Web scheduler worker is set to pause in this time. The reports which usually would have been performed in the paused time period will be done after activation!

### 6.7.4 Report Types

In the following sections we find an overview of the four types of reports available with OpenScape Concierge.

#### 6.7.4.1 Call count overview

The **call count overview report** shows the number of calls for the specified DDI in a summary:

OpenScape Concierge

Overview call summary — from: 2022-02-03 00:00 until: 2022-02-03 23:59

| DDI | Call for | Contacts | Night. | Aband. | Avg. Waittime abandoned | Info | Handled Xfer. | handled not connected | Avg. Waittime handled | Avg. contact time | Number Resubmission |
|---|---|---|---|---|---|---|---|---|---|---|---|
| +4940238548421 | USER1 | | | | | | | | | | |
| 00:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 01:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 02:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 03:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 04:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 05:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 06:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 07:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 08:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 09:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 12:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 13:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 14:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 15:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 16:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 17:00 | | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 3 | 0 |
| 18:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 19:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 21:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 22:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 23:00 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total +4940238548421 | | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 3 | 0 |

**Remark:** The personal lines can also be evaluated like pilot number DDIs

**Table:** Call count summary

| Title | Meaning |
|---|---|
| Call For | The name entered for this service number (Pilot Number) in the DDI lookup table is shown here |
| DDI | Service number that was dialed |
| Contacts | Number of calls received by the attendant, handled and terminated without being transferred |

| Title | Meaning |
|---|---|
| Night | Number of calls forwarded<br>a) to night variant in case queue is closed or<br>b) time overflow variant in case queue was open but call could not be transfered to an attendant in time. |
| Aband. | Depending on configuration:<br>a) without OSCC: Number of abandoned Calls in Queue ( hang up by caller or attendant)<br>b) with OSCC: counted only by OSCC and not reported by OSConicerge. |
| Avg. Waittime abandoned | Average abandoned wait time of the call before it was hung up by the caller (abandoned wait time) |
| Info | Number of calls that have been handled by the attendant without being transferred to another person |
| Handled Xfer | Number of calls successfully transferred to a target person |
| Handled not connected | Number of attempts to transfer a call to a target person, that could not be reached; and the call was taken back from processing queue |
| Avg. Waittime handled | Average wait time of the call before it was answered by the attendant (handled wait time) |
| Avg contact time | Average complete time the attendant spent with a very contact; the time the call spends in the processing queue is not counted. |
| Number Resubmission | A number of calls were initially transferred, but for whatever reason, they were returned to the attendant. |

### 6.7.4.2 Call time overview

The **call time overview report** shows the time / duration of the calls in a summary:

OpenScape Concierge

Overview call time summary from: 2014-05-19 00:00 until: 2014-05-25 23:59

| Service number (DDI) | Call for | Contacts | avg. Waittime abandoned | avg. Waittime handled | Max. contact handling time | avg. Contact time | Avg. attendant time | Avg. answer time |
|---|---|---|---|---|---|---|---|---|
| +498282100853401 | main Nr. 3401 | | | | | | | |
| 2014-05-19 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2014-05-20 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2014-05-21 | | 19 | 8 | 7 | 65 | 138 | 138 | 138 |
| 2014-05-22 | | 13 | 8 | 57 | 193 | 8 | 8 | 8 |
| 2014-05-23 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2014-05-24 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2014-05-25 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total +498282100853401 | | 32 | 8 | 23 | 193 | 97 | 97 | 97 |

**Remark**: The layout is optimized to show for each DDI / personal number the 24 hours period on one page.

**Table:** Call time summary

| Title | Meaning |
|---|---|
| Call for | The name entered for this service number (MLHG) in the DDI lookup table is shown here. |
| Service number (DDI) | Service number that was dialed |
| Contacts | Number of calls received by the attendant, handled and terminated without being transferred |
| Avg. wait time abandoned | Average abandoned wait time of the call before it got abandoned in incoming queue (via hang up by caller or attendant) |
| Avg. wait time handled | Average time the caller spent waiting until the call was answered by the Concierge attendant |
| Max. contact handling wait time | Maximum time a caller spent waiting until the call was answered by the Concierge attendant |
| Avg. handled contact time | Average time the caller spent with beeing handled by the attendant. |
| Avg. attendant time | Average time the caller spent with the attendant |
| Avg. answer time | Average time the caller waited before the call was answered by the attendant |

### 6.7.4.3 Queue state overview

The **queue state overview report** gives an overview on the states of the queues administered by the CPS – for example when they have changed the state (open or closed) due to absence of users or by deactivation through management.

**NOTE:**
There is no output for OSCC queues nor the Personal queue!

OpenScape Concierge

Queue Overview From: 2014-05-21 00:00 Till: 2014-05-21 23:59

| Change date | Status | Reason | Night variant | Overflow variant | Duration |
|---|---|---|---|---|---|
| DDI | Call for | | | | |
| +498282100853401 | main Nr. 3401 | | | | |
| 5/21/2014 1:11:20PM | closed | | ##busy varia ... | ##busy varia ... | 02:52:22 |
| 5/21/2014 4:03:42PM | open | | ##busy varia ... | ##busy varia ... | 00:09:14 |
| 5/21/2014 4:12:56PM | closed | | ##busy varia ... | ##busy varia ... | 00:00:20 |
| 5/21/2014 4:13:16PM | open | | ##busy varia ... | ##busy varia ... | 00:16:53 |
| 5/21/2014 4:30:09PM | closed | | ##busy varia ... | ##busy varia ... | 00:00:26 |
| 5/21/2014 4:30:35PM | open | | ##busy varia ... | ##busy varia ... | 00:07:54 |
| 5/21/2014 4:38:29PM | closed | | ##busy varia ... | ##busy varia ... | 00:00:13 |
| 5/21/2014 4:38:42PM | open | | ##busy varia ... | ##busy varia ... | 00:00:26 |
| 5/21/2014 4:39:08PM | closed | | ##busy varia ... | ##busy varia ... | 00:00:13 |
| 5/21/2014 4:39:21PM | open | | ##busy varia ... | ##busy varia ... | 00:24:27 |
| 5/21/2014 5:03:48PM | closed | | ##busy varia ... | ##busy varia ... | 00:00:38 |
| 5/21/2014 5:04:26PM | closed | | NV row1 ann | NV row1 ann | 00:00:33 |
| 5/21/2014 5:04:59PM | open | | NV row1 ann | NV row1 ann | 14:47:35 |

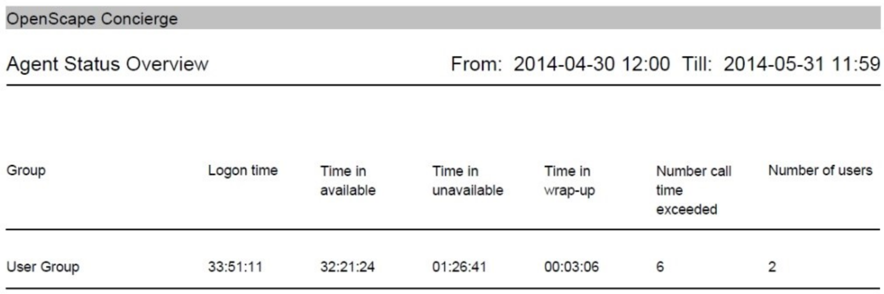
**Table:** Work summary

| Title | Meaning |
|---|---|
| Call for | The name entered for this service number (MLHG) in the DDI lookup table is shown here. |

| Title | Meaning |
|---|---|
| DDI | Service number that was dialed |
| Status | The event/status: Closing / opening when the night variant configuration was changed |
| Reason | Reason why the night variant status was changed |
| Night variant | Name of the night variant that was activated / deactivated |
| Overflow variant | Name of the overflow variant that was activated / deactivated |
| Duration | Duration how long the night variant / overflow variant was in the corresponding state |

### 6.7.4.4 Agent group state overview

The **Agent group state overview** report shows the statistics of user groups, like the total logon time and the corresponding states the users of the given group spent their time.


OpenScape Concierge

Agent Status Overview From: 2014-04-30 12:00 Till: 2014-05-31 11:59

| Group | Logon time | Time in available | Time in unavailable | Time in wrap-up | Number call time exceeded | Number of users |
|---|---|---|---|---|---|---|
| User Group | 33:51:11 | 32:21:24 | 01:26:41 | 00:03:06 | 6 | 2 |

**Table:** Agent group state overview

| Title | Meaning |
|---|---|
| Group | Group name where the agents /users are configured in |
| Logon time | Total logon time of all users in that group |
| Time in available | Total available time of all users in that group |
| Time in unavailable | Total unavailable time of all users in that group |
| Time in wrap-up | Total time of all users in that group spent in wrap up / afterwork |
| Number call time exceeded | Total number of calls where the RNA (Ring No Answer) time was exceeded |
| Number of users | Number of different users in that group in the reported period |

# 7 OpenScape Concierge Button Configuration

The Button Configuration tool is an integrated tool for creating, modifying and maintaining layouts for **Direct Dial button tabs** and associated **Speed Dial Buttons**.
The tool can be started in the Data Center under **Basic data \ Button configuration** in using the *tenant's manager* account where multiple layout templates, so called ***configurations*** can be created, saved and assigned to the Concierge users.

---

**NOTE:**
A Concierge user that has the corresponding permission can also change the button configuration that is assigned to him. Configuration changes take effect after restarting the Concierge Client.

---

## 7.1 General

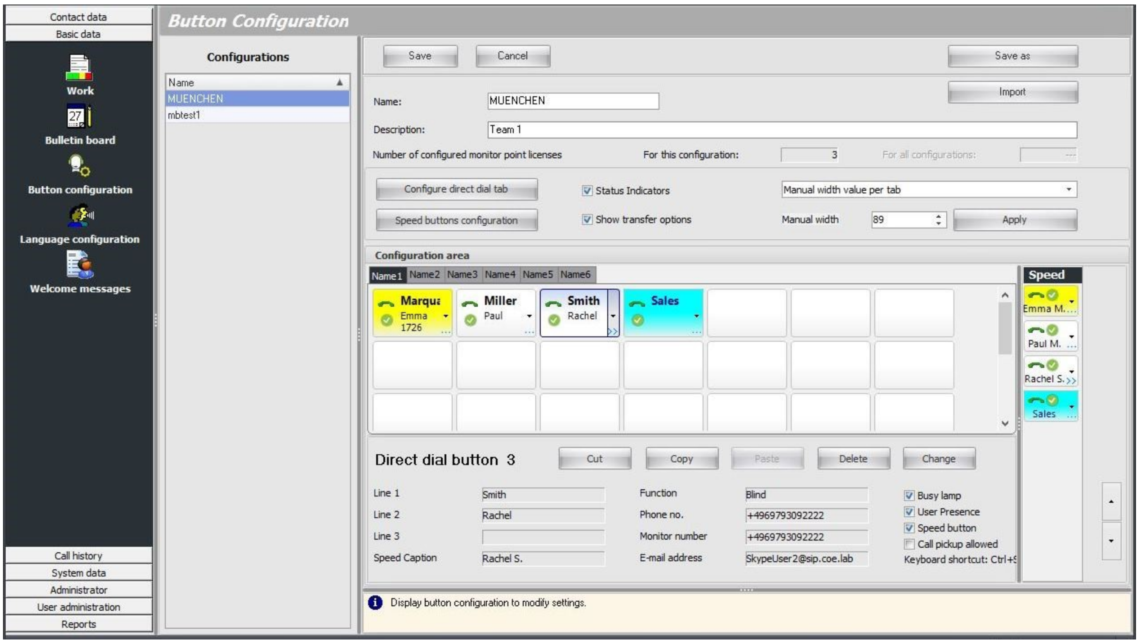
*Direct dial buttons* and *speed buttons* simplify call handling for the Concierge user for specified extensions. The button allows transfering a call or picking up a call from the specified device with one mouse click.
*Blind transfer* and *Comfort transfer* are possible. If the target device is busy the attendant can create an email notification by pressing the button; the GUI opens the email window with the address of the assigned user already preconfigured.
The buttons can be configured using *tabs*. All together a total amount of **252 Direct Dial buttons** can be configured.
Furthermore the buttons can act as ***busy lamp indicators***, the current telephony status of the extension will be displayed.
Also possible is to show the ***UC, Circuit, Skype or Microsoft Teams presence status*** of this extension as well as an ***activated call forwarding***.

**Speed buttons**

It is possible to *place direct dial buttons directly in the Concierge client* window. These are called **speed buttons** and work with busy lamp indication, UC, Circuit or Skype status and activated call forwarding status.

**Button Configuration tool**

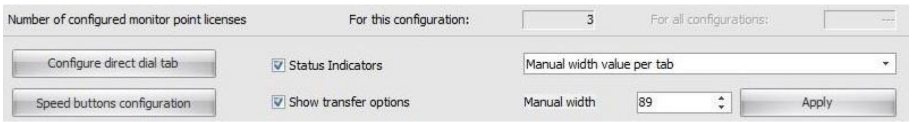
The **Button Configuration** tool that is started from Data Center or from the Concierge client GUI is used to centrally administrate the described functionalites.
Under **Basic data** start **Button configuration** in Data Center. The **Button Configuration window** opens. Under **Configurations** the **Name** field lists configurations available, after the first start it is empty.
The uppermost configuration in the list on the left is highlighted and displayed in detail.
Three buttons are available, **New**, **Change** and **Delete** to create a new configuration, modify an existing one or delete one respctively.




## 7.2 Configuration

### 7.2.1 Create a new configuration

Press the **New** button and specify a name and a description.
Right below the **Description** field several settings can be made:




The buttons on the left are meant for defining the layout of the six direct dial tabs and for the speed buttons sizing.

By setting the checkmark **Show Indicators** the buttons will include symbols for showing the phone state, the UC, Circuit, Skype or Microsoft Teams presence state and an activated call forwarding of devices which can be monitored.

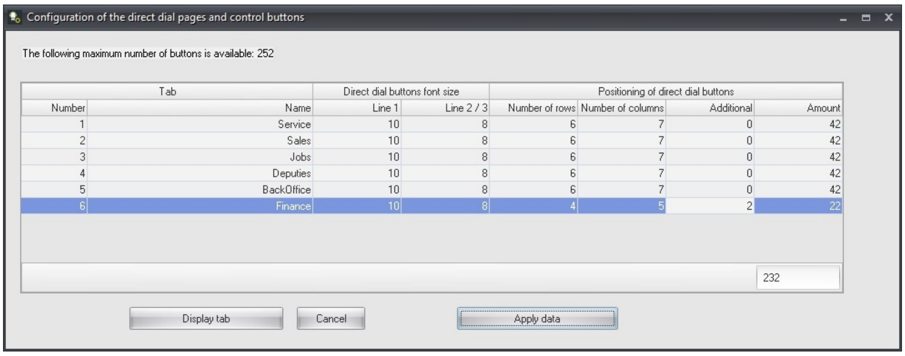
If **Show transfer options** are set, the button indicates dropdown functionality on each button that allows choosing call pickup, blind transfer, comfort transfer or email.

The dropdown list allows different *options for the width of the buttons on the six tabs*. If an automatic width is selected, the option to manually define the width is deactivated.
By specifying the **Manual width** value and clicking the **Apply** button the buttons in the selected tab below will change the size.

The **Number of configured monitor point licenses** shows the amount of used Monitor points for the given configuration and for all configurations together. This value is of interest in case the customer has purchased only a limited number of monitoring point licenses.

## 7.3 Configure direct dial tabs

Press the button **Configure direct dial tab** for specifying the *general layout parameters* like names of the tabs, the font sizes of the description lines and the amount of buttons.




The number of direct dial buttons per tab can be modified. **252** are available in total and can be spread over 6 tabs.

On the left the number of tabs is visible together with the tab name.
The **font size** for the head line (Line 1) and the lines 2 and 3 can be specified for the butttons of the corresponding tab.

On the right the number of rows and columns is defined:
6 rows with 7 columns each comprises **42** buttons by default per tab. It is possible to place all 252 buttons on one tab.

In case less buttons per tab are required, it is also possible to define that. In the image above the tab *Finance only has 4 rows with 5 solumns* each, altogether 20 buttons. But in addition there are two additional buttons, so the **amount is 22 buttons**.

The total amount of all buttons is visible on the rightmost colum for all the tabs.

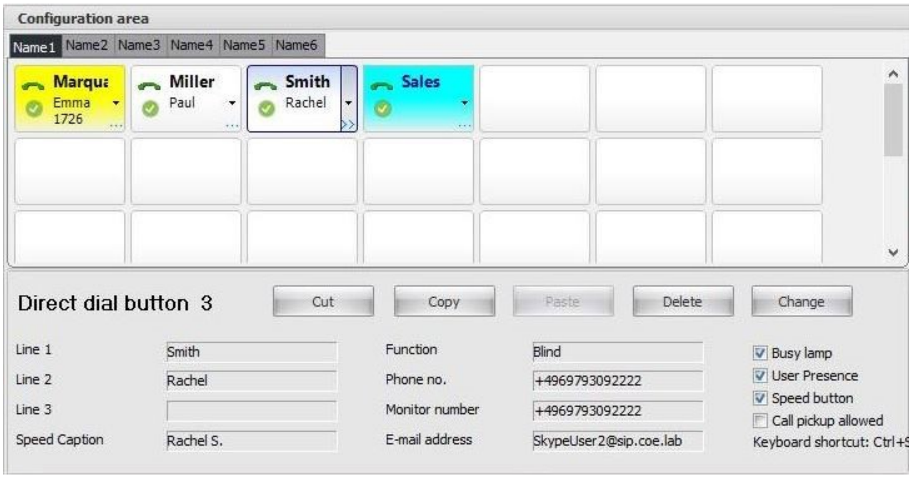
Click on **Apply data** and close the window with **Display tab**.

### 7.3.1 Setting button width

As described above, the width of the buttons can be defined manually or automatically.
The settings from the dropdown list allow:

- Automatic width per tab
- Automatic width for all tabs
- Manual value per tab
- Manual value for all tabs

## 7.3.2 Configure a new direct dial button




- Here are **3 description lines** as well as a **Speed Caption** that is used to label the corresponding speed button.

- The **Function** field defines the default function when clicking the button once.

- **Phone no** of the participant for transfering the call.

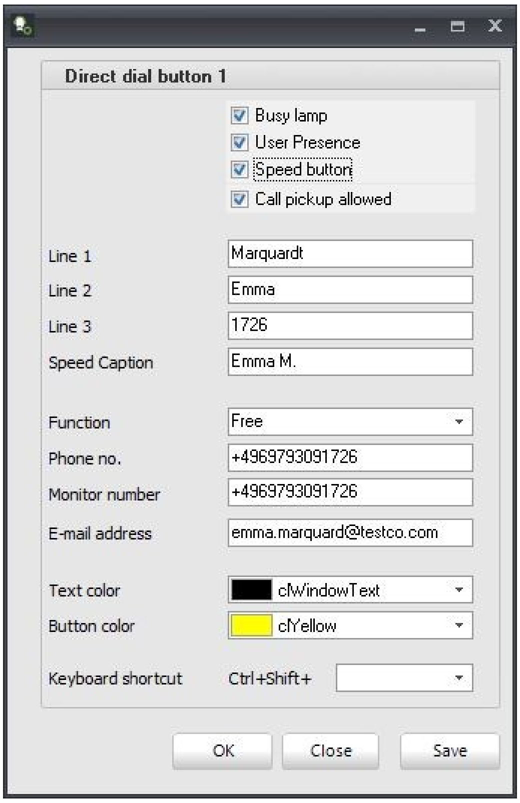
- **Monitor number** is the number of the monitored device, usually the same as the phone no.

- In case User Presence is checked **E-Mail address** field is used to reference an Skype for Business Ciruit or Microsoft Teams Presence System account.

- On the right on can see whether this button allows **Busy lamp (CTI and UC), User Presence (Skype, Circuit or Microsoft Teams), Speed button** and **Call pickup** functionality.

To configure a new direct dial button, click the desired direct dial button followed by the **Change** button or open the configuration window by right-clicking the button.

The fields for this button are now editable:




#### 7.3.2.1 Busy lamp

A busy lamp shows the phone state of the subscribers line. Possible states are: **idle**, **busy, out of service** or in an **unknown** state.
It is available on CTI and OpenScape UC extensions.

---

**NOTE:**
This is only possible for telephone system lines of the Main site or Monitored sites, see OpenScape Concierge Configuration Manual!

To ensure the functionality of the busy lamps, a functional number must always be specified in E164 format both for a OS4000 and for OpenScape Voice, for example +4969123302.

---

When activating the checkbox for the busy lamp you have to fill in the telephone number of the extension to be monitored into the field **Monitor number**.
The number of busy lamps is limited by the number of available licenses for monitoring the lines that are described in section 7.2.1 Create a new configuration.

A telephone symbol appearing on the configured button indicates whether the monitored line is free (green), busy (red) or out of service (grey).

An extension that cannot be monitored because the corresponding phone number is not properly configured is indicated with a red question mark.

If one drags the mouse over a button the status of the corresponding phone is displayed also in the Tool tip.

#### 7.3.2.2 User Presence

OpenScape Concierge can be connected to one Presence information system (OpenScape UC, Circuit, Skype for Business or Microsoft Teams).

**For UC**

When using OpenScape UC as presence system and the Busy lamp flag is checked the monitor number is used to reference the users account and (depending on configuration) it may be possible to change the users presence state within the Concierge client.

The following states can be displayed:

| Icon | State |
|---|---|
| | Unknown |
| | Offline |
| | Busy |
| | Away |
| | Do not disturb |
| | Available |

**For Skype, Circuit or Microsoft Teams**

When activating the checkbox for the user presence of a Circuit, Skype or Microsoft Teams Presence information system you have to fill in the **E-Mail address** the presence user account uses to logon.

---

**NOTE:**
Presence state changes are not possible for Circuit, Skype or Microsoft Teams Presence

---

**Skype -** The following states can be displayed:

| Icon | State |
|---|---|
| | Offline |
| | In a meeting |
| | Busy |
| | In a conference call |
| | In a presentation |
| | Be right back |
| | Away |
| | Do not disturb |
| | Off work |
| | Out of office |
| | Out of office (Auto answ.) |
| | Online |

**Circuit -** The following states can be displayed:

| Icon | State |
|---|---|
|  | Unknown |
|  | Offline |
|  | Circuit call |
|  | Away |
|  | Do not disturb |
|  | Online |

**Microsoft Teams -** The following states can be displayed:

| Icon | State |
|---|---|
| | Unknown |
| | Offline |
| | Circuit call |
| | Away |
| | Do not disturb |
| | Online |

**NOTE**: Some buttons can display the Microsoft Teams presence status and are periodically updated. To set the update frequency, go to Data Center > System Data > Client Configuration > Presence Server > Presence Status Update Timer (default 5 seconds)

**NOTE**: Values lower than 5 seconds are not recommended.

### 7.3.2.3 Speed button

Define whether the direct dial button should also be a **speed button**. A speed button is a constantly visible direct dial button in the Concierge client, see below.
If the checkbox for the speed button is ticked, the **Speed caption** field should also be filled.
A maximum number of 20 speed buttons is recommended but not limited.

### 7.3.2.4 Call pickup allowed

Activate this Checkbox if a call pickup for the phone number is allowed.

**NOTE:**
The function „Call pickup“ is available via CSTA and requires a filled monitor number.

### 7.3.2.5 Function

Under **Function** a dropdown shows the available functionality that is used when clicking on the button with the left mouse key.
**Blind transfer, Comfort transfer, Email** and **Free** are allowed.

**NOTE:**
***Free*** just copies the phone number into the **Destination** field in the Concierge Client.
As mentioned the option **Show transfer options** allows all types of Transfer options via right mouse clicks’ choice, see section 7.2.1 Create a new configuration.

Under **Text color** and **Button color** the corresponding colors can be chosen for the different buttons.
Finally a **Keyboard shortcut** can be define; for example with pressing the keys **Ctrl** and **Shift** and **”3”** the associated button can be used without mouse interaction.

### 7.3.3 Deleting a direct dial button

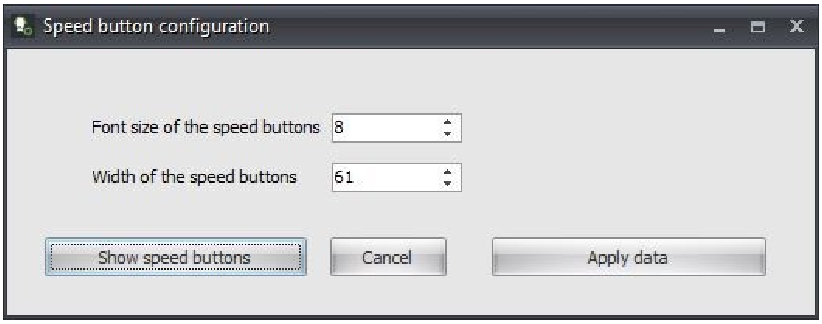
Click the button you want to delete. Use the delete symbol in the button properties panel to delete the button. The button will be blank and thus not visible in the tab.
Still, as configured in the tab properties, an empty placeholder remains in the layout.

### 7.3.4 Importing a file

In order to import an older version of the direct dial button configuration which was stored in older Concierge version as a ***.csv*** file, use the Import button in the upper right area of a configuration.

## 7.4 Speed Buttons Configuration

A speed button is a constantly visible direct dial button in the Concierge client, see above. Press the button **Speed Buttons Configuration** to modify the layout of the speed buttons on the Concierge client.



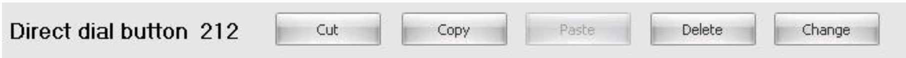

The **Font size** and the **Width of speed buttons** can be configured in the window.


The picture shows the Speed buttons as of a given configuration.
The Speed caption should not exceed the space that is available on the button as configured above. Change font size if required.
The dropdown area on the right of the button allows the different transfer options as defined under section 7.3.2.5 Function above.

Do not forget to configure a Speed caption!

### 7.4.1 Cut and Paste

It is possible to cut a Direct Dial Button from its existing position and paste it either in the same tab or in a different tab to a new position. All properties remain set.




**Procedure:**

1. Select the desired Button

2. Click on Cut
3. Select the new desired position
4. Click on Paste
5. Button is moved to the new position

### 7.4.2 Drag and Drop

You can easily move the position of a Button with Drag and Drop mechanism to a new position.

**Procedure:**

1. Select the desired Button
2. Click on the Button with the left Button of your mouse
3. Move the mouse to the new position with still pressed left mouse button
4. Drag the object with releasing the left mouse button
5. Button is moved to the new position

### 7.4.3 Saving a configuration

You can save a configuration within the DataCenter by clicking on the “**Save as**” Button. Saved configurations will appear on the left hand side in a list “Configurations” beside the configuration window.
Configurations can be modified and saved with a different name and assigned to other attendants.

---

**NOTE:**
***Assigning of Button Configurations*** is performed in the User configuration.

**NOTE:**
When a configuration is assigned to an user the Concierge Client has to be restarted that the changes take effect.

---

# 8 OpenScape Concierge Layout Management

## 8.1 General

Two types of Layout modifications for the Concierge Client GUI are possible: First, in Data Center – logged on as tenant's manager – under System Data\ Client Configuration there is the section Layout. In this section predefined layout modifications are available, like visibility of GUI elements or font sizes that are helpful for people with a debility of sight for example.
If there are modification requirements that cannot be handled with the options in Data Center or fine tuning is required, the OpenScape Concierge Layout Manager offers the possibility to adapt and customize the OpenScape Concierge client interface in relation to color, position, size, visibility.

---

**NOTE:**
Use of the OpenScape Concierge Layout Manager is depending on the OpenScape Concierge Version used. A conversion of an OpenScape Concierge Layout from an older version is not possible.

**It should therefore be ensured that changes in the OpenScape Concierge Layout are properly documented so that these changes can be performed again later if necessary!**

---

**Remarks:**

- The labels (**text** fields) in the OpenScape Concierge interface are not adapted with the Layout Manager. The labeling of the layout objects is done using **OSConcierge_Lang.Custom.*xx*.ini** file for the respective language, in *English* for example **OSConcierge_Lang.Custom.*en*.ini**. – see section Language Files 3.1 Language files.
- The visibility of the tabs in the electronic phonebook depends on button configuration in with the Button Config Tool that is covered in chapter 7 OpenScape Concierge Button Configuration. Only tabs which contain at least one button are visible.
- The operation of the Layout Manager is based on current programming environments. Knowledge in this area makes it easier to get to grips with the Layout Manager.
- **No objects may be deleted** with the Concierge Layout Manager. Deleted objects are to be reinserted at the correct position. If individual objects are not required, they have to *be switched to invisible* via the ***visibility*** property.

**Installation folder**

The OpenScape Concierge Layout Manager is installed with the OpenScape Concierge setup choosing the setup type "Custom" and is located in the installation path under the "\...\bin\Concierge Management\ Layout Management" folder.

## 8.2 Starting Layout Management

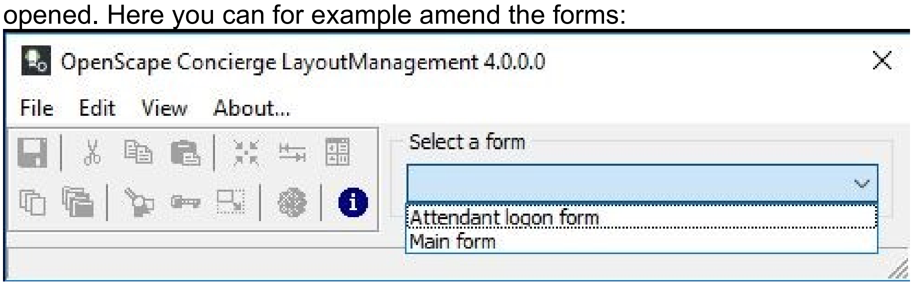

The tool can be started from the Windows Start Menu:
.

## 8.3 Selecting the required form

The Layout Management provides the following interfaces:

- OpenScape Concierge LayoutManagement tool interface
- Object inspector
- Forms:
  - Attendant logon form
  - Main form

After OpenScape Concierge Layout Manager is started the Tool interface is opened. Here you can for example amend the forms:

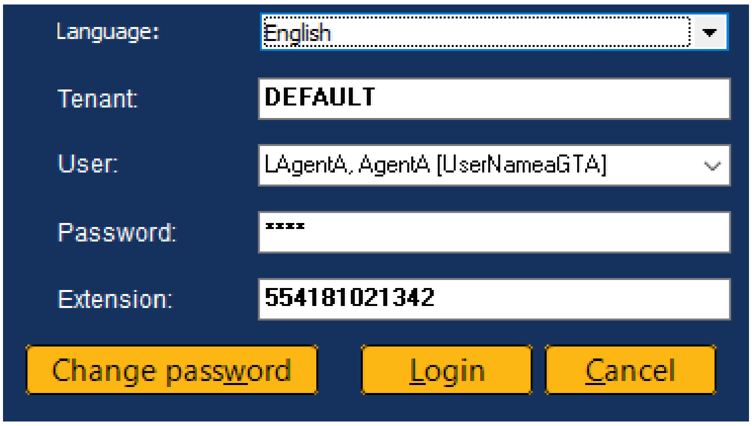



---

**NOTE:**
The original forms always remain in the **Concierge.exe** file. Thus these can be restored easily by renaming or deleting the present individual layout files, if required!

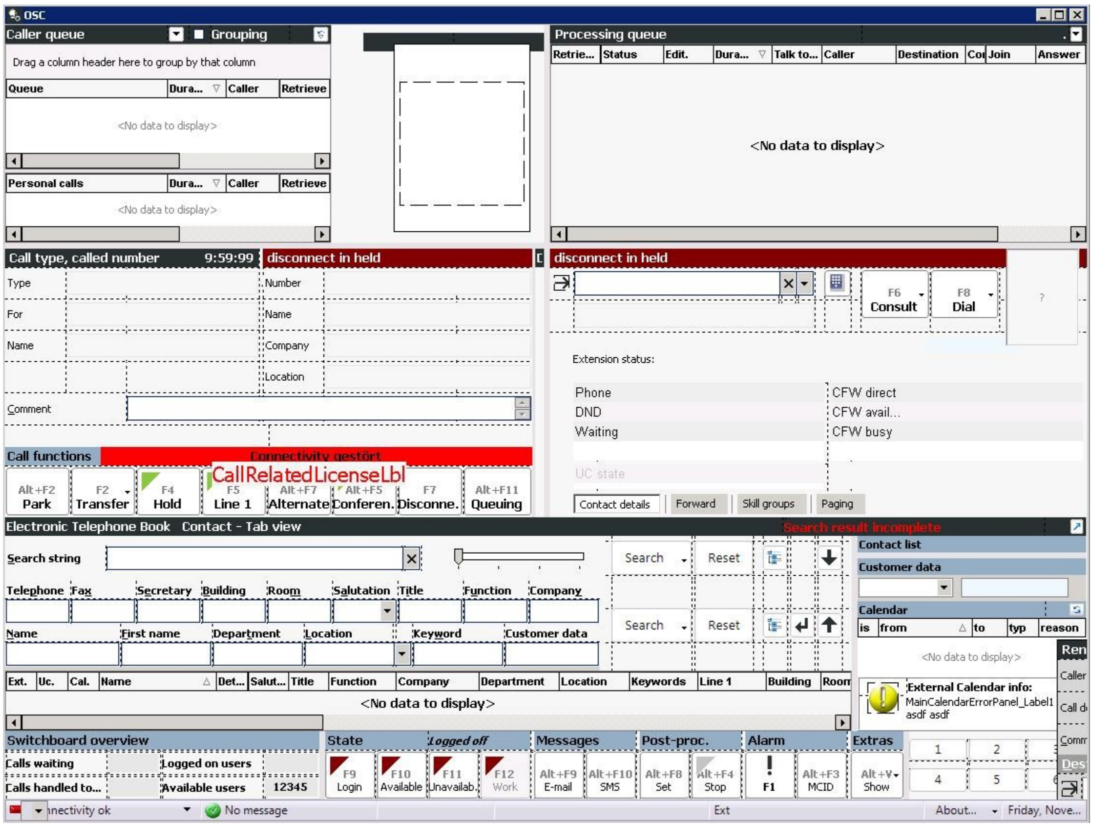
---

**Attendant logon form**




**Main form**

The main form defines the OpenScape Concierge client user interface.



## 8.4 Selecting objects

The forms comprise a **Main Form**, **Containers** and **Objects**, which can be nested above or within each other over several levels.
Clicking an object selects an individual object.
If the Shift key is kept pressed while making a selection additional objects can be selected.
If an object that was already selected is chosen, it is removed again from the selection set, if the Shift key is pressed.
If the Shift key is kept pressed down and the mouse is dragged over a rectangular selection area, *all objects within* the rectangular area are selected when the mouse is released.
Note that multiple containers is not possible.
Also note that these containers often seem to be invisible because they adjust to the surrounding form area.
The Escape key (Esc) can be used to jump from a selected object to one level higher up as far as the Main Form.
Selected objects can be changed in terms of size and position with the mouse pointer. Alternatively, changes are possible using the mouse pointer or the Object Inspector described below or the other menu options. The effects are the same in each case.

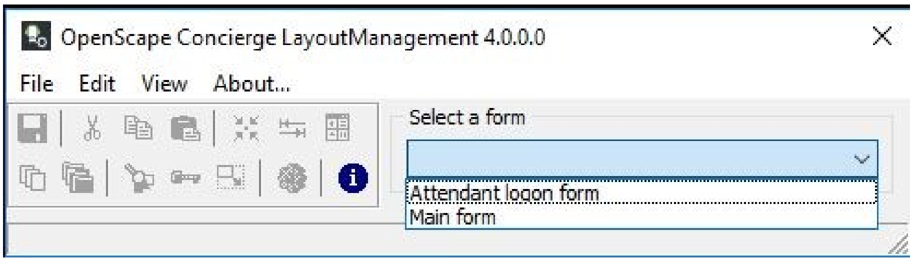
## 8.5 Closing Layout Management

Click **File > Close**. If the selected form was changed, a confirmation message opens which asks to save the changes or not. Confirm the message to finish Layout Management is closed.
This custom-tailored layout is now saved in a file.
This layout file with the ending ***.dfm*** also has to be stored in the users' roaming profile where the *LoginData.ini* or the customized *language ini* files are stored, see section 3.1.1 Customizing the language *file*.

*If the **.dfm file** is located in that directory, the corresponding layout is used for the given user*. If it does not exist, the layout as of the delivery status is used.

## 8.6 Menu bar

In this section, the menus and menu commands are listed. The commands can be also used via the tool bar. For detailed description of the commands, refer to section 8.7 Toolbar.



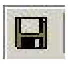

**Commands**

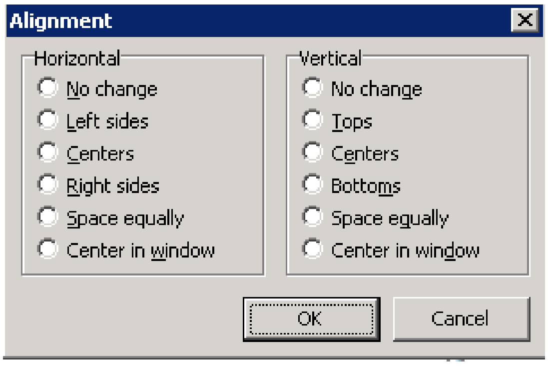
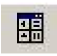
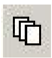
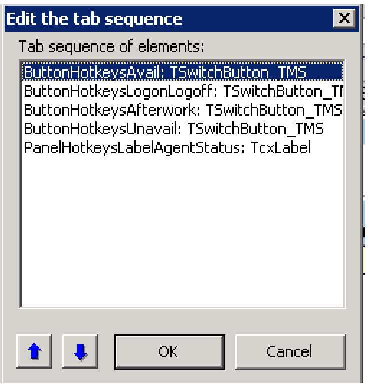
The several menus include the following commands:

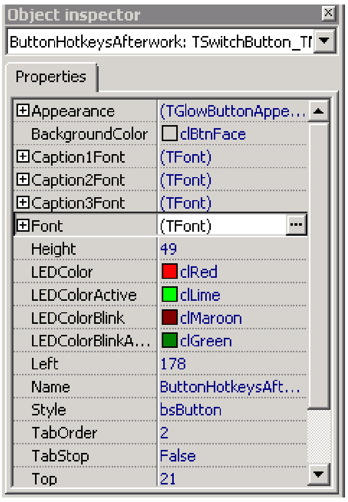
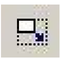
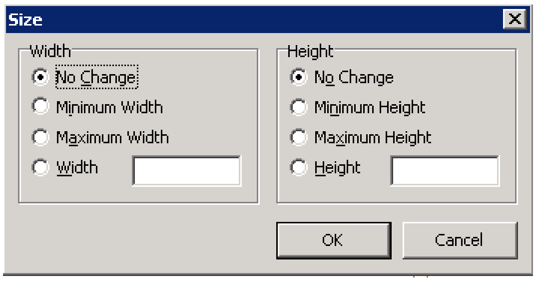
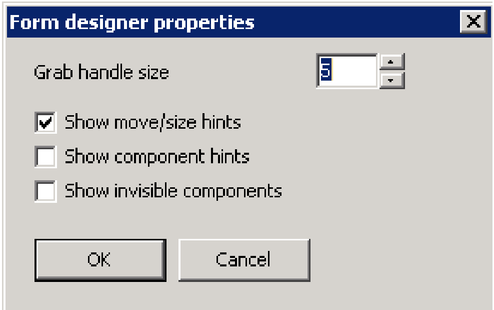
- File
  - Save
  - Close (not in the toolbar)
- Edit
  - Cut
  - Copy
  - Paste
  - Select all
- View
  - Align
  - Align to grid
  - Align palette
  - Log elements
  - Object inspector
- About

## 8.7 Toolbar

**Table:** Toolbar

| Pictogram | Menu item | Description |
|---|---|---|
|  | Save | Saves all changes to the form. It can be seen in the status line where the new form was saved. The storage location is in the user roaming profile path. The path is shown in the status line of the Layout Management ToolForm. |
|  | Cut | Delete and copy to clipboard |
|  | Copy | |
|  | Paste | Inserts cut or copied objects into the form |
|  | Align to grid | Aligns the selected object(s) to the grid |

| Pictogram | Menu item | Description |
|---|---|---|
|  | Align | the properties available for aligning the selected object(s) are displayed. The selected objects are aligned in accordance with the defined properties then.<br><br> |
|  | Align palette | the properties available for aligning the selected objects are displayed. The selected objects are aligned one to another in accordance with these defined properties.<br><br> |
|  | Select all | All objects in a form are selected. |
|  | Tab sequence | The sequence of all tabs in the form can be changed here with the arrow keys. To do this, select the desired tab and position it at the desired position using the blue arrow keys.<br><br> |

| Pictogram | Menu item | Description |
|---|---|---|
|  | Object Inspector | Opens the Object Inspector.   |
|  | Lock elements | Fixes selected object(s) – prevents inadvertent displacement for example. |
|  | Size | The possible properties for changing the size of the selected object(s) are displayed and the selected objects are changed in accordance with the defined properties.   |
|  | Properties | The possible properties in the form are displayed and can be changed here.   |
|  | About... | The software version of OpenScape Concierge Layout Management is displayed. |

## 8.8 Object inspector of OpenScape Concierge

The **Properties** of the individual objects are displayed and can be changed in ***Object inspector***.

> **NOTE:**
> Not all properties of the individual objects can be changed in each instance because some objects get their status automatically from the status of the environment objects.

### 8.8.1 Object inspector properties

This is a list of commonly used properties. Not all are listed here.

> **NOTE:**
> Properties are object-specific.

**Table:** Object inspector

| Properties | Data type, values | Description |
|---|---|---|
| *Appearance…..* | | Display attributes |
| BackgroundColor | Color value | Background color |
| BorderColor | Color value | Border color |
| BorderColorChecked | Color value | Border color in "checked" state |
| BorderColorDisabled | Color value | Border color in "disabled" state |
| BorderColorDown | Color value | Border color in "down" state |
| BorderColorHot | Color value | Border color in "hot" (mouse over control element) state |
| *Caption…..* | | Caption attributes |
| Charset | List box | Determines the character set for the font |
| CheckColor | Color value | Color of "checked selection" |
| Color | Color value | Color |
| ColorChecked | Color value | Color in "checked" state |
| ColorCheckedTo | Color value | Color of color gradient "to" in "checked" state |
| ColorDisabled | Color value | Color in "disabled" state |
| ColorDisabledTo | Color value | Color of color gradient "to" in "disabled" state |
| ColorDown | Color value | Color in "down" state |
| ColorDownTo | Color value | Color of color gradient "to" in "down" state |
| ColorHot | Color value | Color in "hot" state |
| ColorHotTo | Color value | Color of color gradient "to" in "hot" state |
| ColorMirror | Color value | Color of mirrored area |
| ColorMirrorChecked | Color value | Color or mirrored area in "checked" state |
| ColorMirrorCheckedTo | Color value | Color of color gradient "to" of mirrored area in "checked" state |
| ColorMirrorDisabled | Color value | Color or mirrored area in "disabled" state |
| ColorMirrorDisabledTo | Color value | Color of color gradient "to" of mirrored area in "disabled" state |
| ColorMirrorDown | Color value | Color or mirrored area in "down" state |
| ColorMirrorDownTo | Color value | Color of color gradient "to" of mirrored area in "down" state |
| ColorMirrorHot | Color value | Color of mirrored area in "hot" state |

| Properties | Data type, values | Description |
|---|---|---|
| ColorMirrorHotTo | Color value | Color of color gradient of mirrored area "to" in "hot" state |
| ColorMirrorTo | Color value | Color of color gradient "to" of mirrored area |
| ColorTo | Color value | Color of color gradient "to" |
| *Font…..* | | Character set attributes |
| fsBold | True / False | Bold type |
| fsItalic | True / False | Italics |
| fsStrikeOut | True / False | Strikethrough |
| fsUnderline | True / False | Underline |
| Height | -99 to 99 | Font height/ The height of a font can be defined in pixels with "Height". If the value is negative, the internal distance above the individual text lines is not considered. If the value for the height is positive, the height is calculated from the font height plus the internal distance. |
| Height | 0 to 9999 | Specifies the height of the control element in pixels. |
| HoverColor | Color value | Color in "hot" state |
| HoverFontColor | Color value | Color of font in "hot" state |
| LEDColor | Color value | Color of LED on telephony buttons |
| LEDColorAOpenScape Concierge ive | Color value | Color of LED on telephony buttons in "active" state |
| LEDColorBlink | Color value | Color of LED on telephony buttons in "flashing" state |
| LEDColorBlinkAOpenScape Concierge ive | Color value | Color of LED on telephony buttons in "flashing active" state |
| Left | 0 to 9999 | Horizontal coordinates of left component border relative to its higher-level object in pixels |
| Name | Text selection | Name of character set |
| ParentColor | True / False | True = Color of higher-level control element is used, False = Own color definition is used |
| Pitch | Text selection | Defines whether all characters use the same character width |
| Size | 0 to 99 | Pixel size of font |
| *Style….* | | Display attributes |
| TabOrder | 0 to 999 | Tab sequence |
| TabStop | True / False | Defines whether the control element can be reached with the tab |
| Text Color | Color value | Text color |
| Top | 0 to 9999 | Vertical coordinates of upper border relative to its higher-level object in pixels |
| Visible | True / False | Switches an element to visible / invisible |
| Width | 0 to 9999 | Specifies the width of the control element in pixels. |

## 8.8.2 Predefined color values

**NOTE:**
DO NOT change these values!

Data type: Color value: -$7FFFFFFF-1..$7FFFFFFF

**Table:** Predefined color values

| Predefined color values | Description |
|---|---|
| clNone | White in Windows 9x, Black in NT. |
| clScrollBar | Current color of scrollbar |
| clAqua | Aqua |
| clBackground | Current background color of Windows desktop |
| clBlack | Black |
| clAOpenScape Concierge iveCaption | Current color of title bar of active window |
| clBlue | Blue |
| clInaOpenScape Concierge iveCaption | Current color of title bar of inactive window |
| clCream | Cream |
| clMenu | Current background color of menus |
| clDkGray | Dark gray |
| clWindow | Current background color of window |
| clFuchsia | Fuchsia |
| clWindowFrame | Current color of window frame |
| clGray | Gray |
| clMenuText | Current text color of menus |
| clGreen | Green |
| clWindowText | Current text color of window |
| clLime | Lime |
| clCaptionText | Current text color of title bar of active window |
| clLtGray | Light gray |
| clAOpenScape Concierge iveBorder | Current border color of active window |
| clMaroon | Maroon |
| clInaOpenScape Concierge iveBorder | Current border color of inactive window |
| clMedGray | Medium gray |
| clAppWorkSpace | Current color of application workspace |
| clMoneyGreen | Mint green |
| clHighlight | Current background color of selected text |
| clNavy | Navy blue |
| clHightlightText | Current color of selected text |
| clOlive | Olive green |
| clBtnFace | Current color of button |
| clPurple | Purple |

| Predefined color values | Description |
|---|---|
| clBtnShadow | Current shadow color of button |
| clRed | Red |
| clGrayText | Current color of shaded text |
| clSilver | Silver |
| clBtnText | Current text color of buttons |
| clSkyBlue | Sky blue |
| clInaOpenScape Concierge iveCaptionText | Current text color of title bar of inactive window |
| clTeal | Teal |
| clBtnHighlight | Current highlight color of buttons |
| clWhite | White |
| cl3DDkShadow | Windows 95 and NT 5.0 only: Dark shadows for 3-dimensional elements |
| clYellow | Yellow |
| cl3DLight | Windows 95 and NT 5.0 only: Bright color for 3-dimensional elements (for edges that point to light source) |
| clInfoText | Windows 95 and NT 5.0 only: Text color for info texts |
| clInfoBk | Windows 95 and NT 5.0 only: Background color for info texts |
| clGradientAOpenScape Concierge iveCaption | Windows 98 or 2000: Right-hand color in color gradient of title bar of active window – clAOpenScape Concierge iveCaption indicates the color of the left-hand side |
| clGradientInaOpenScape Concierge iveCaption | Windows 98 or 2000: Right-hand color in color gradient of title bar of inactive window – clInaOpenScape Concierge iveCaption indicates the color of the left-hand side |
| clDefault | The default color of the control element to which the color is assigned |

### 8.8.3 Object types

The object types (classes) are listed below. There is a unique assignment to the properties per object depending on the object type.

**NOTE:**
DO NOT change property name for a standard object!

**Table:** Object type

| Object type | Meaning |
|---|---|
| *TAdvGlowButton* | Graphical button |
| *TAdvOfficeCheckBox* | Selection box in office style |
| *TAdvPanel* | Container object with title |
| *TcxCheckListBox* | Selection list |
| *TcxDBTreeList* | List with tree view |
| TcxDBTreeListColumn | List column with tree view |
| TcxGridColumn | Column in tabular view |
| TcxGridDBBandedColumn | Column in banded tabular data-related view |
| TcxGridDBColumn | Column in tabular data-based view |
| *TcxGroupBox* | Container object of a group |
| *TcxLabel* | Text object |
| *TcxMemo* | Multiline editable text object |
| *TcxRadioButton* | Radio button |
| *TcxSplitter* | Delimiter for graphical spacer |
| *TcxTabSheet* | Page with tabs |
| *TcxTextEdit* | Edit field |
| *TdxBarDockControl* | Container object for toolbar |
| *TMainForm* | Main form |
| *TScrollBox* | Box with scrollbars |
| *TShape* | Graphical element (rectangle, ellipse or line) |
| *TSwitchButton_TMS* | Switch with multiline information and graphical LED capability |

## 8.9 Application examples

### 8.9.1 Switching buttons invisible

Buttons can be made invisible by selecting a button and then setting the Visible property to False (for each selection).
Make sure when this form has been loaded again that the button is actually invisible. This button may have to be made visible again in a text editor (Visible = True).

### 8.9.2 Changing the color of call signaling on the line 1 key

To change the flashing signaling of an incoming call, one or two flashing colors can be changed with the OpenScape Concierge Layout Manager. The Line 1 key has to be selected first. The flashing effect is controlled by the "LEDColor" and "LEDColorBlink" properties. These two colors are shown alternately.
If, for example, "LEDColorBlink" changes to clRed, the flashing occurs with an alternating green and red LED color. Other alternating colors may be more distinct for some users of OpenScape Concierge. A change to "LEDColorBlink"= clBlue may make sense especially in the case of users who have red/green visual impairment.

## 8.10 Restoring the delivery status

A custom-tailored layout can be created for the given forms with the OpenScape Concierge Layout Manager. This custom-tailored layout is saved in a file for each form.
This layout file with the ending ***.dfm*** has to be stored in the users' roaming profile where the *LoginData.ini* or the customized *language ini* files are stored, see above.
*If this file is available in that directory, the corresponding layout is used*. If it does not exist, the default layout as of the delivery status is used.
Therefore, in case there are mistakes or undesired effects in relation to the customized layout, the layout files can simply be deleted or renamed. OpenScape Concierge then needs to be restarted and shows the default layout settings.

- For the main form layout **Main Form** the file is called *OSConciergeLayout_MainForm_**en**.dfm* in the ***En***glish language version
- For the logging on layout **Agent login form** the file is called *OSConciergeLayout_AgentLoginForm_**en**.dfm* in the ***En***glish language version.

---

**NOTE**:
Direct dial tabsheets and speed buttons are configured and sized in the Button Configuration Tool.

---

For other languages as German or French the suffix is <**de**> or <**fr**> instead of <***en***> respectively.
The OpenScape Concierge *application has to be restarted* after every change made in the OpenScape Concierge Layout so that the changes are visible in Concierge GUI.
The storage format of these layout files is ***Ascii***. Every layout file can consequently be processed with a typical text editor.
This requires internal knowledge of the storage structures and the associated naming environments.

# 9 Contact Data Provider – Importing Contact Data

## 9.1 General

Contact Data Provider (CDP) offers a tool for automatically importing contact data into the Concierge database OSCADM. The management GUI of CDP is integrated in Concierge Data Center; it will only be displayed when systemmanager account is used for logging on to Data Center.
The management GUI of CDP can be reached under Administrator \ Contact Data Provider, and shows with a top-down view the available data sync jobs.
For creating a new sync job it is necessary to specify an *import source* first. With this source a mapping or assignment of the source's data fields to the contact data's fields can be arranged. Finally the *mapping* together with a *schedule* defines a ***Contact Data Sync Job***.
In the next section the different types of data sources are displayed. Then we find a description of how to create a complete ***contact data sync job*** from scratch, exemplified by a text file import source.
The following sections display the specifications of the further source types.

## 9.2 Types of data sources

There are five different types of sources that can be integrated in a contact data sync job:

- CDP can connect to an **LDAP** server and extract contact data.
- CDP can import OpenScape Voice extension information from a **MP2 file** that is created **in OSV** and stored in a dedicated folder for CDP to access it. The required script for the creation of the MP2 file is delivered.
- CDP can import **a text file** with comma separated values (.csv) that is created by third party applications.
- CDP supports an **OLE DB** (Object Linking and Embedding, Database) interface.
- CDP supports integration with the Import / Export API of OpenScape 4000 to gather user information from the **OpenScape 4000 ODFs** (object description files).

This CDP job stores the necessary data into the OSCADM database tables that are used for the ETB search.

---

**NOTE**:
If the data to be imported into the Concierge database comes across a new contact tenant that does not have a matching tenant in the Concierge database, the contact will be imported into the default Concierge tenant.

---

## 9.3 CDP Import Job

In the following a description of a CDP job is exemplified by .csv / text file import.

- First the data source has to be defined – that is the text file.

- Then a Mapping / Assignment can be created.
- With this one can create a job that can run manually or scheduled!

### 9.3.1 Summary of tasks

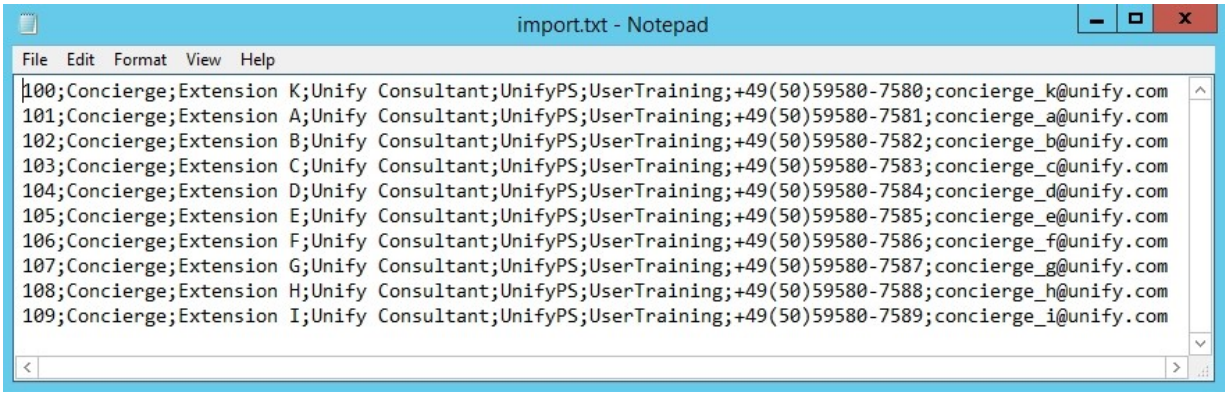
A new import job is created by pressing the right mouse button and choosing ***Add Job***!

- A window appears “Add Contact Data Sync Job” that requires assigning a Job name with a *Mapping* and a *Schedule*!
  The *schedule* defines the times and repetitions of these import jobs!

- The *mapping* defines how the columns of the *import source* are mapped to the required columns of the ETB data tables.
  Before mapping the fields the source has to be defined!

- The import source has to be added using the ***Add Source*** Icon in Assignment section!

All required steps are exemplified with an import text file: ***c:\import.txt.***
The text file looks as follows:




```
100;Concierge;Extension K;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7580;concierge_k@unify.com
101;Concierge;Extension A;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7581;concierge_a@unify.com
102;Concierge;Extension B;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7582;concierge_b@unify.com
103;Concierge;Extension C;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7583;concierge_c@unify.com
104;Concierge;Extension D;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7584;concierge_d@unify.com
105;Concierge;Extension E;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7585;concierge_e@unify.com
106;Concierge;Extension F;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7586;concierge_f@unify.com
107;Concierge;Extension G;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7587;concierge_g@unify.com
108;Concierge;Extension H;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7588;concierge_h@unify.com
109;Concierge;Extension I;Unify Consultant;UnifyPS;UserTraining;+49(50)59580-7589;concierge_i@unify.com
```

In the first column you can see a unique identifier (used as *personal number*), followed by last name and first name, some empty fields and the job title and department. The term *UserTraining* can be used as keyword. In the last part of each line one can see the phone number in canonical format. This is used as Line1 phone number in ETB. Due to its well-defined format it can be split into country, area and trunk code and extension number.

---

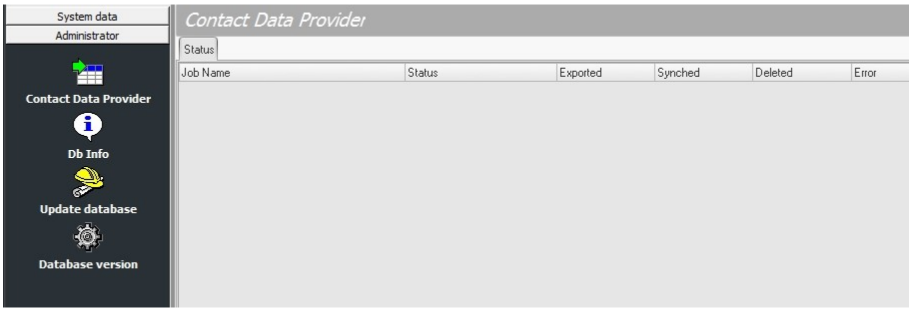
**NOTE:**
The phone number field does not need to have explicitly the canonical format. The correct conversion will be configured under Data Translation\ Split Rules section 9.6.1 Split Rules.

---

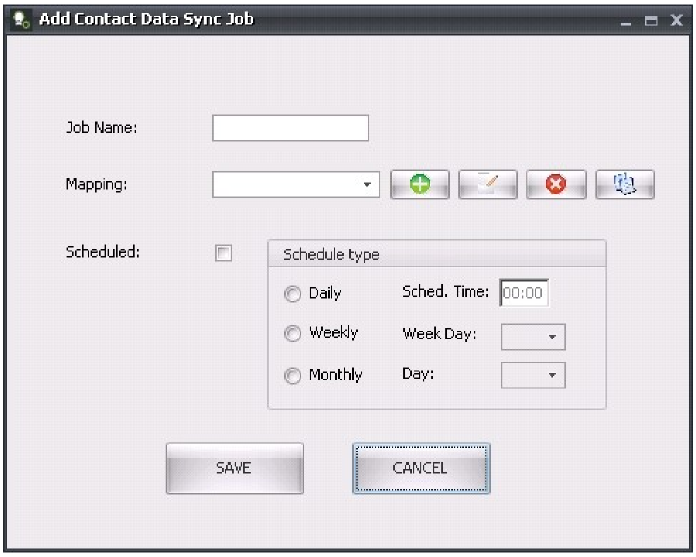
### 9.3.2 Steps for a new import job (exemplified with .csv file)

#### 9.3.2.1 Add new Contact Data Sync Job

1. Log on with System Manager Account
2. Change to Administrator and press **Contact Data Provider**
   The Contact Data Provider Job List appears.
3. With right mouse click create a new Job by choosing **Add Job**.



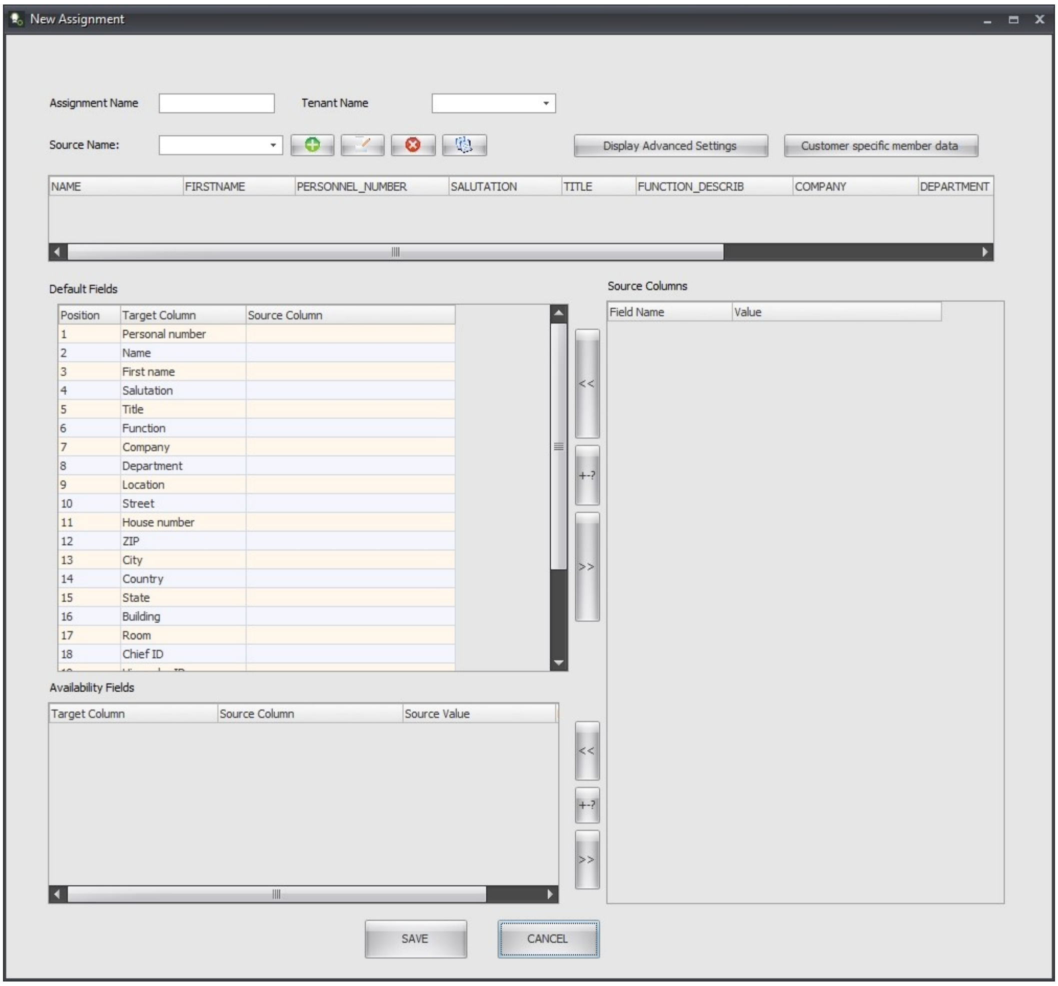

The Add Contact Data Sync Job window appears.




4. First time the dropdown list Mapping is empty.

### 9.3.2.2 Create New Assignment (Mapping)

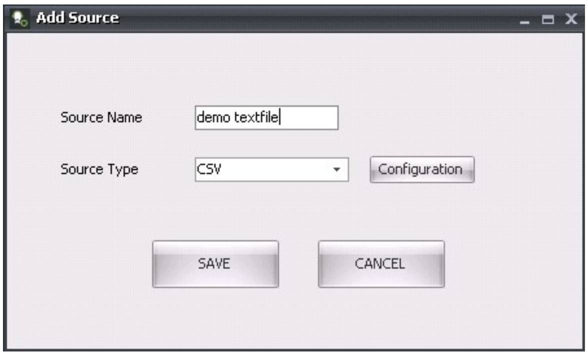
5. Press the green PLUS button right besides the dropdown list to create a new mapping.




The Mapping (Modify Assignment) is empty; a source is required.

### 9.3.2.3 Define new import source

6. Press the green PLUS button besides the Source Name dropdown list to define a new source.
7. Give the source a meaningful name. Under Source Type choose the type of source – here the CSV text file.




### 9.3.2.4 Configure new import source (exemplified with .csv file)

8. Press the button **Configuration**.
9. Under **CSV preview file** enter the file name with its path.

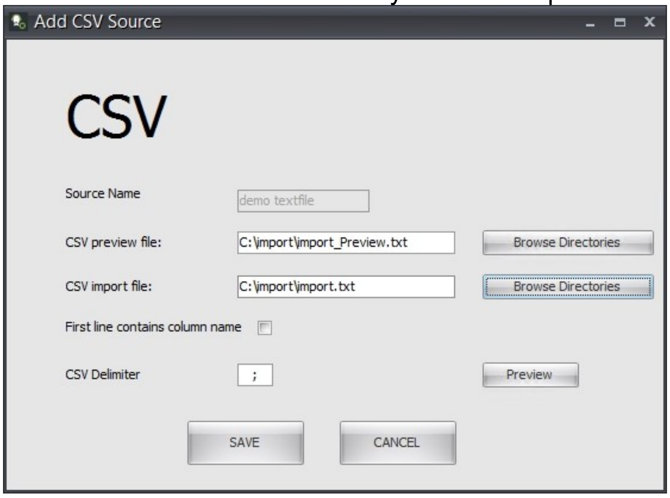
   **NOTE**: Make sure the file is not on a Shared-Folder.

10. Under **CSV import file** enter the file name with its path.

    **NOTE 1**: Make sure the file is not on a Shared-Folder.
    **NOTE 2**: With Release 3.1.3 it is also possible to use Wildcards in import file name. (*i.e. C:\import\import_abc*.txt*) – for CSV files only!

11. Check the option “**First line contains column name**” if required.

12. Choose the **CSV delimiter** key as of the import file.




---

**NOTE:**
The **CSV preview file** should be different file then the **CSV import file**, as the import file will be deleted after import process.
The preview file can be a copy of the import file with a different name.

---

"Browse Directories"-Button is disabled, when Data Center is started on a client system, since the import file path is only for the server point of view.

**Remark:**
The system waits until the file with the specified name or with matched wildcard configuration is available in the configured folder.
The process of reading import file takes place as soon as the file is available. In case of wildcard usage: if wildcard condition matches more than one file, the files will be concatenated automatically. The process of writing the new data into the ETB database happens right afterwards, if no schedule is configured. If a schedule is configured, the system starts writing data into the DB at the scheduled time.
The wildcard usage is only supported, if unique personal number assignment is used.

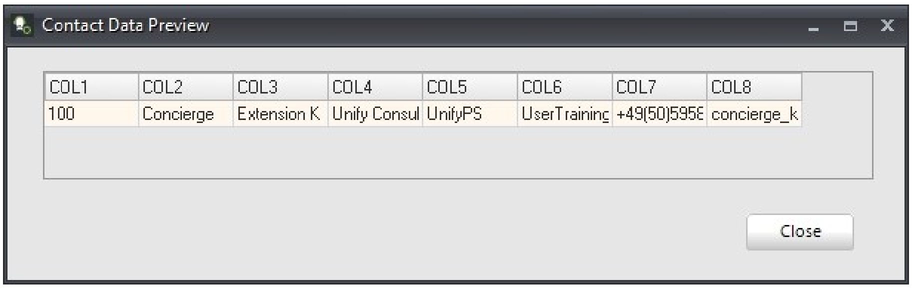
---

**NOTE:**
With the CSV import it is useful to not use a schedule. The system will import data as soon as the import file is available in the specified folder.

---

With Preview Button the content of the first line in the preview file will be shown.

13. Press the button **Preview**:




14.Close the preview.

15.Save the source configuration by pressing **SAVE**:

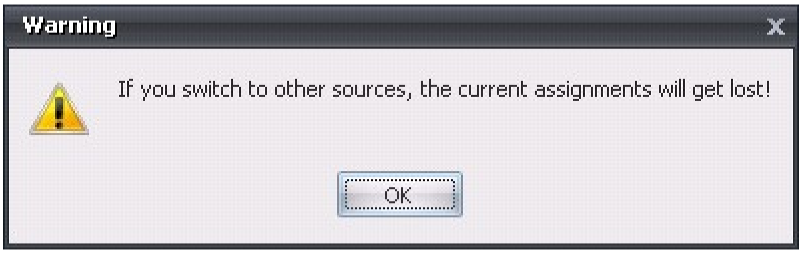
16.Save the source by pressing **SAVE**.

The empty Modify Assignment (Mapping) window appears.

- Choose the created source from the dropdown list.

---

**NOTE:** A warning message appears here in case an existing assignment configuration is modified, like e.g. if another source is used in the existing mapping.
In this case the mapping of parameters gets lost. Use the right most **Duplicate source** button in case the mapping should stay similar.




Acknowledge the warning by pressing **OK**

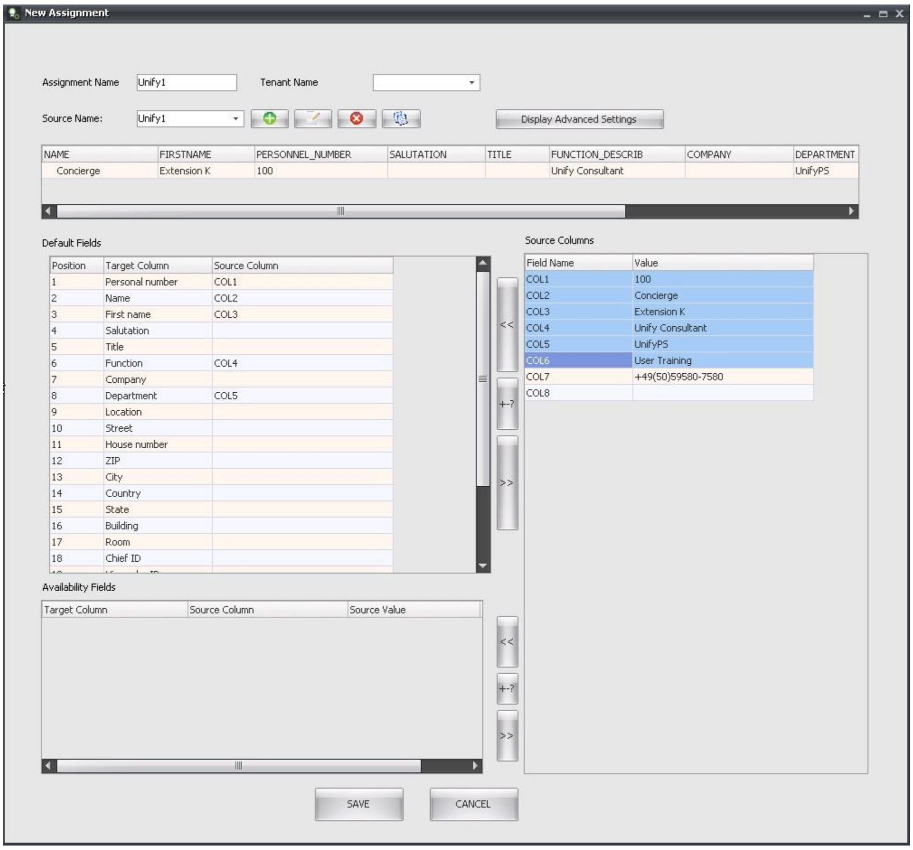
---

**NOTE:** In case the special characters (like ä,ü,ö,β,etc.) are not presented in the preview, it could be caused by the source text file not being in UTF-8 format. For converting the source file to UTF-8 use a proper text editor or any other tool.

---

### 9.3.2.5 Mapping: Assign contact data fields

The source columns are visible in the right pane. On the left the default fields in the database are displayed.




17. Highlight the column on the left and on the right and press the button **<<** for assigning the values to each other.

Right above the two panes a kind of preview is available displaying the first line of the source file assigned to the contact data fields.

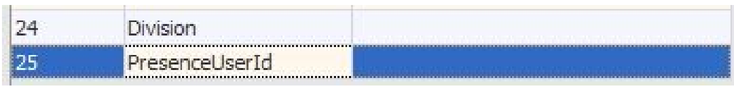
---

**NOTE:**
The name of the contact is a mandatory field to configure for a properly working import, please choose a name in any case!

---

### 9.3.2.6 Presence user account for Skype or Circuit

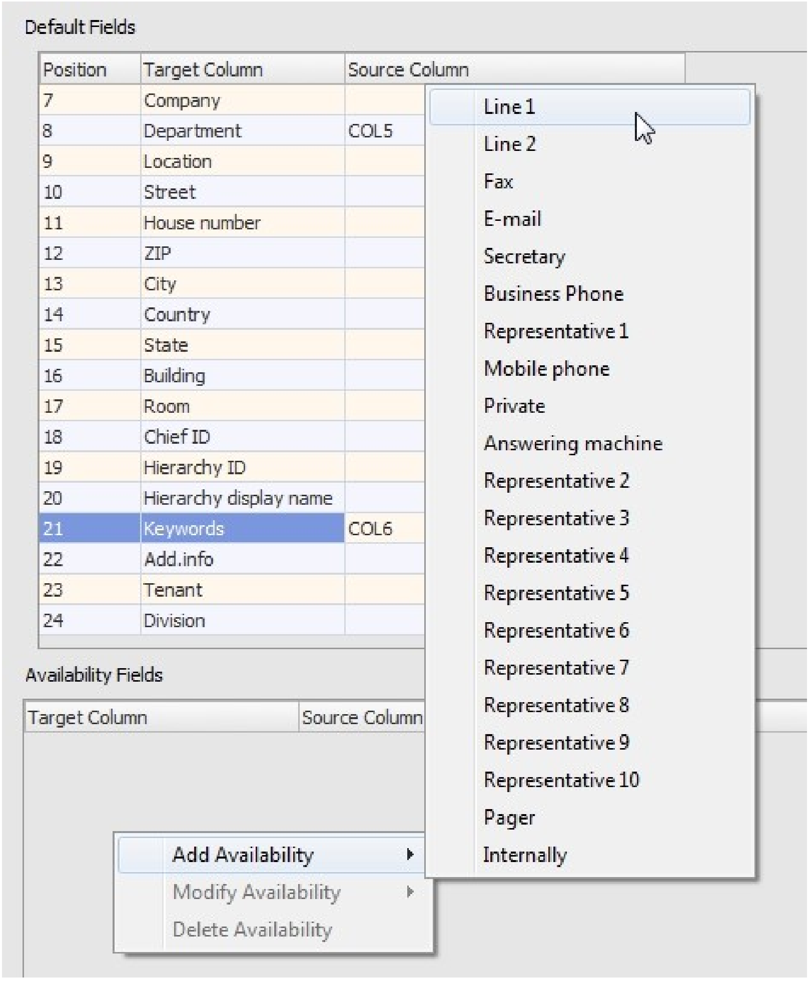
You can map an e-mail address to reference the Skype, Circuit or Microsoft Teams user account by selecting **Presence User ID** under Default fields on the left and map it to the Skype, Circuit or Microsoft Teams account logon e-mail address on Source Columns.




### 9.3.2.7 Assign Availabilities

For assigning the availabilities proceed as follows:

18. Right mouse click in the pane Availability Fields and choose Add availability. Specify the kind of availability – here Line1.



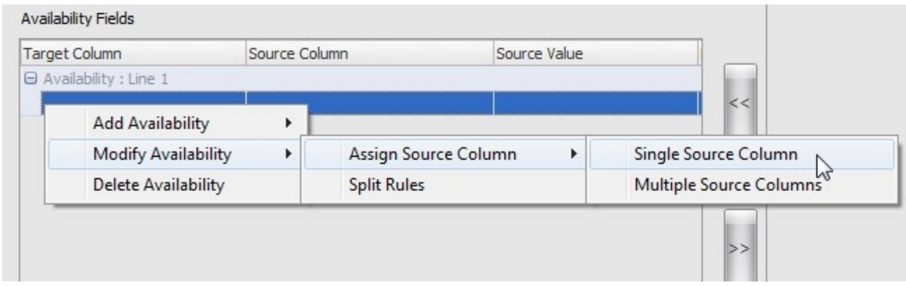

19. Expand the new entry by clicking the “+” element on the left of the entry.

---

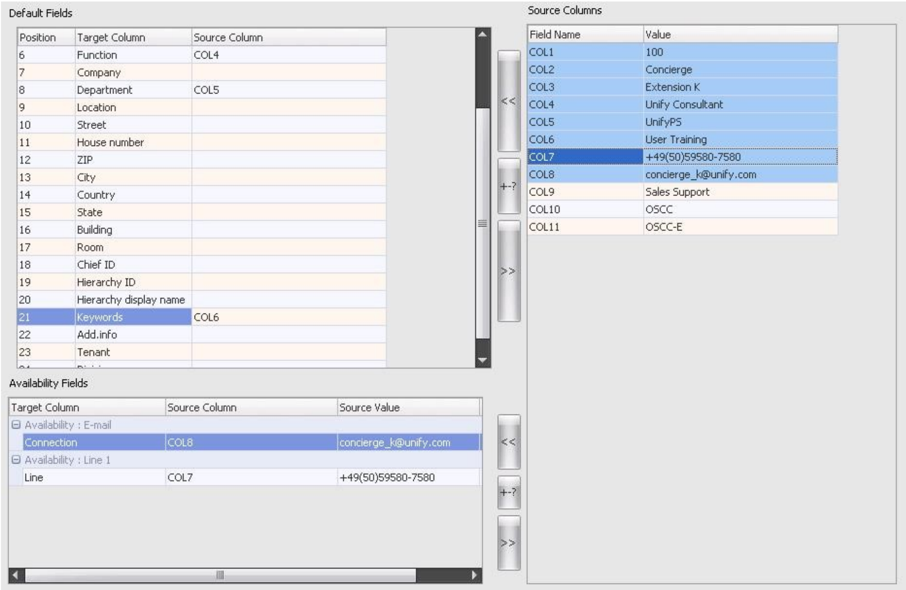
**NOTE**
The phone number information in source is stored in one field.

---

20. Highlight the new line and right mouse click and choose Modify Availability → Assign Source column and choose ***Single Source Column***.



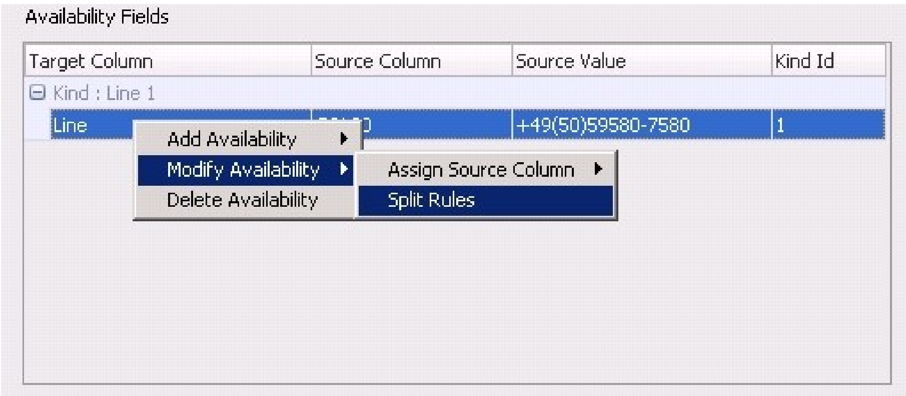

21. Assign column 7 to Line1’s highlighted area by highlighting the line on the left and the column 7 on the right and pressing the button **<<.**



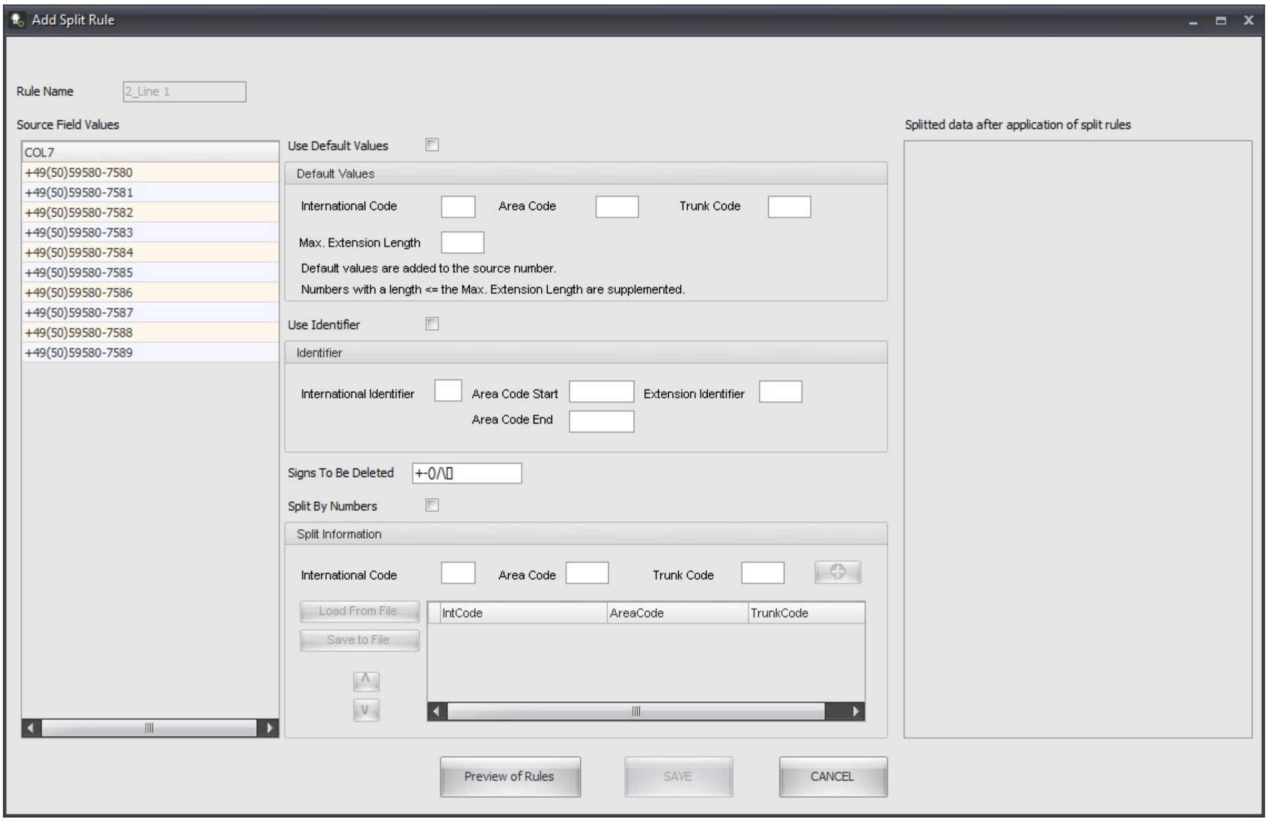

NOTE: Before the ***Split Rules*** can be defined, the mapping must be saved: Give the Mapping a name and assign a tenant. Save the Assignment/Mapping and re-open it.

### 9.3.2.8 Working with Split rules

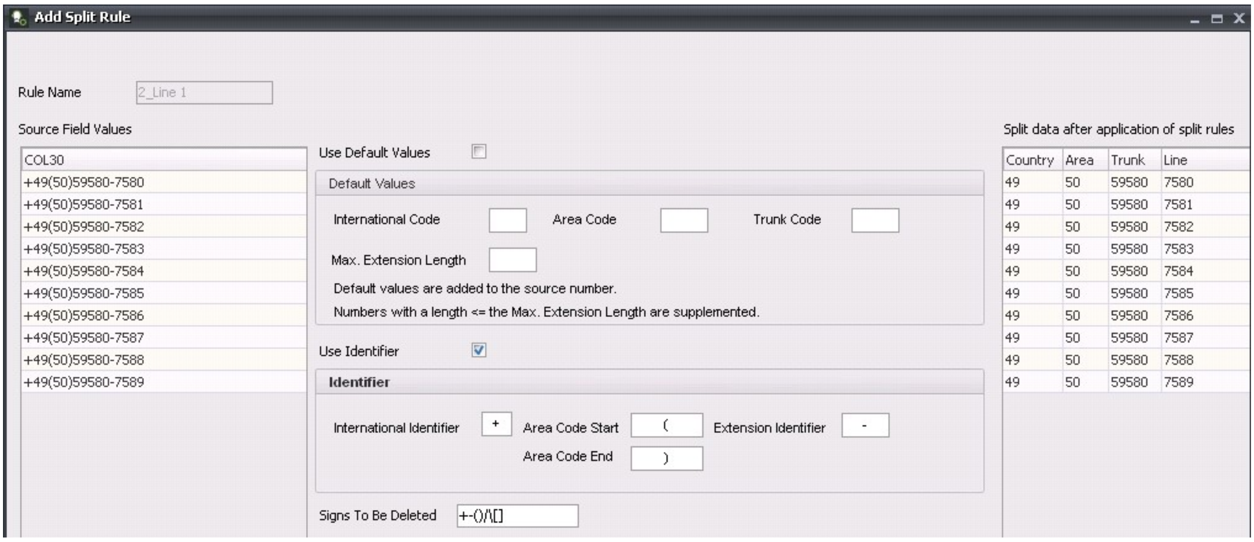
22. Highlight the line and right mouse click ***Modify Availability → Split Rules***.




The canonical format under **Source Value** can be separated into the values for Country code, Area Code, Trunk Code and Extension.




23. For splitting the canonical format specify the delimiters as visible and press the button **Preview of Rules**:




24. Close the Window Add Split Rules by pressing **SAVE**.

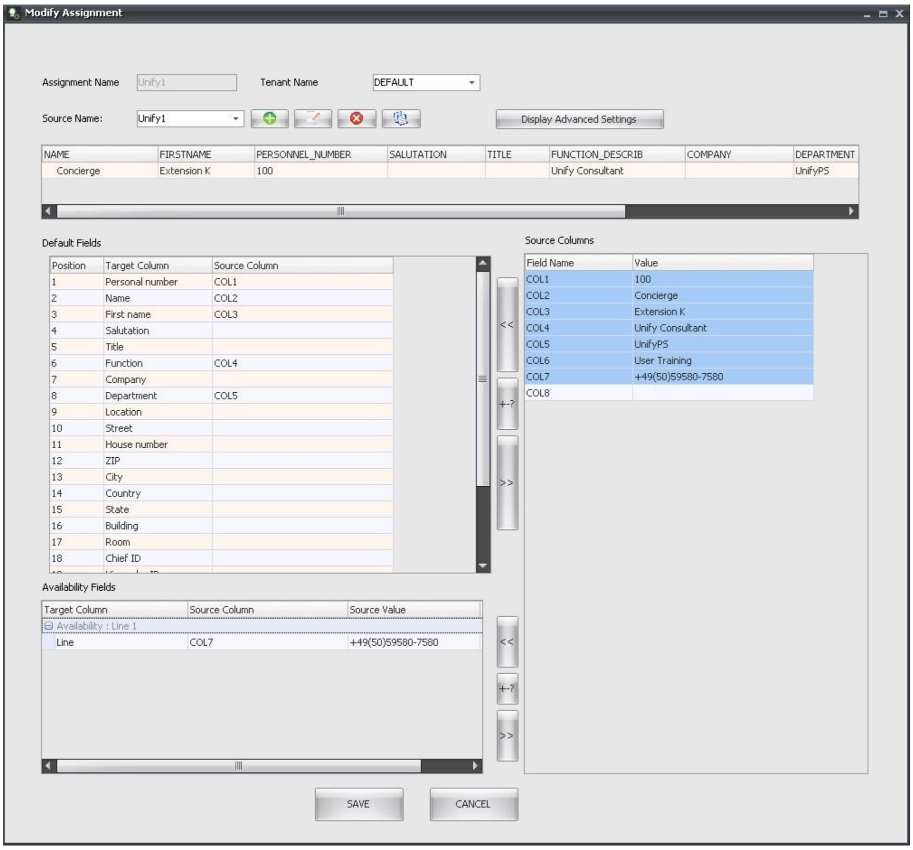
---

**NOTE:**
For a detailed description on the Split Rule functionality and the Regular Expressions, please refer to section 9.6 Data Translation Tips.

---

### 9.3.2.9 Finish mapping

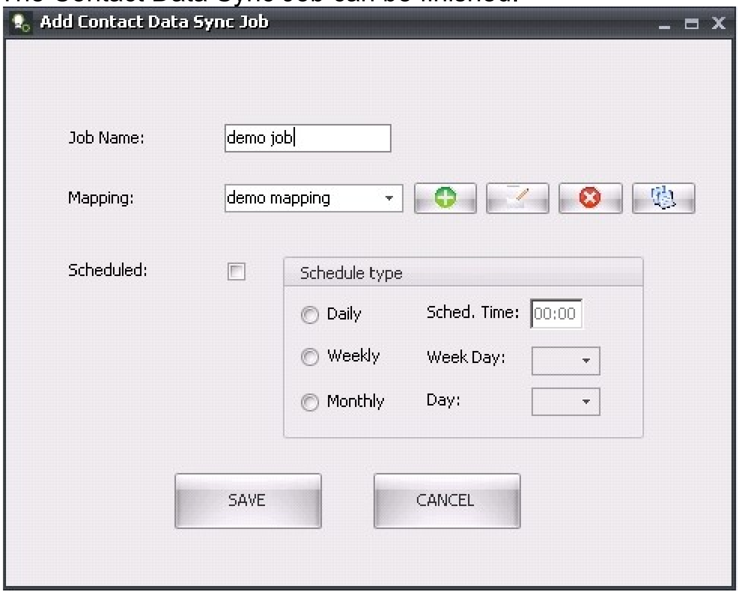
The mapping is finished.



25.Verify Tenant Name and Source Name and press **SAVE**.

### 9.3.2.10 Finish new Contact Data Sync Job

The Contact Data Sync Job can be finished.




26.Choose the mapping from the dropdown menu

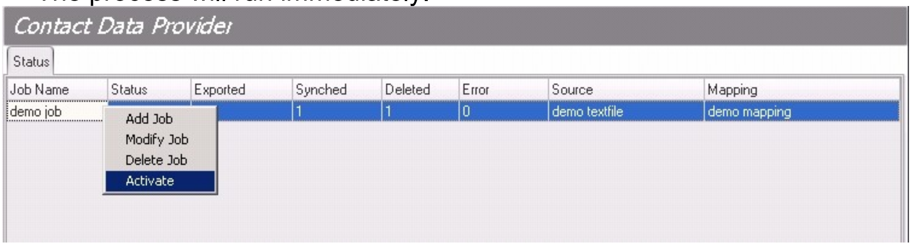
27.Specify whether the job should be scheduled or not.

**NOTE:** For a first test uncheck the Schedule and activate the job manually – see next section!

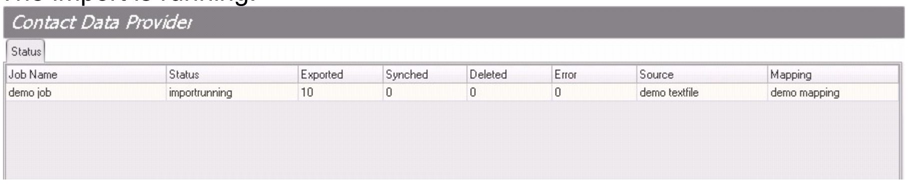
28.Give the Contact Data Sync Job a meaningful name and press **SAVE**

### 9.3.3 Test Contact Data Sync Job:

1. Verify that the schedule is deactivated and test the *Contact Data Sync Job* in the *Job list* window by right mouse clicking and choosing ***activate***. The process will run immediately.

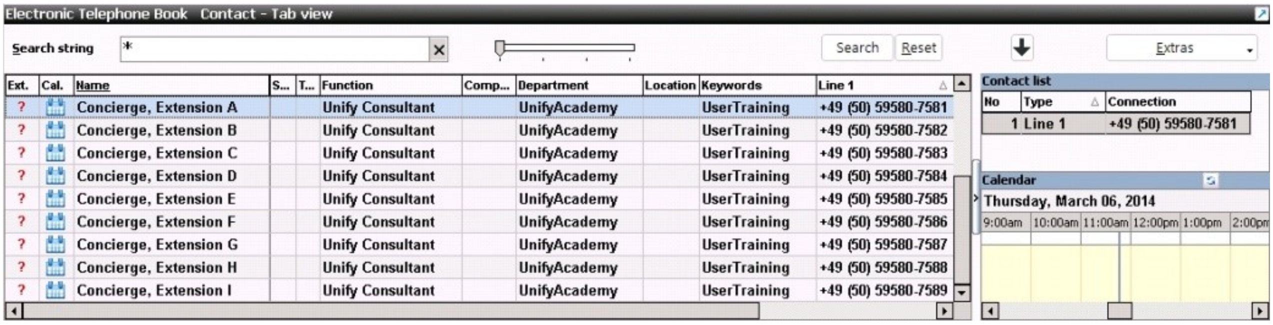



The import is running!




**NOTE:**
If the CSV file is not located under the configured directory, then status will be changed to ***waiting***. The import starts automatically whenever the CSV file is available under its specified directory.

2. Open Concierge Data Center with the tenant's manager account or use Concierges ETB to check a successful import.



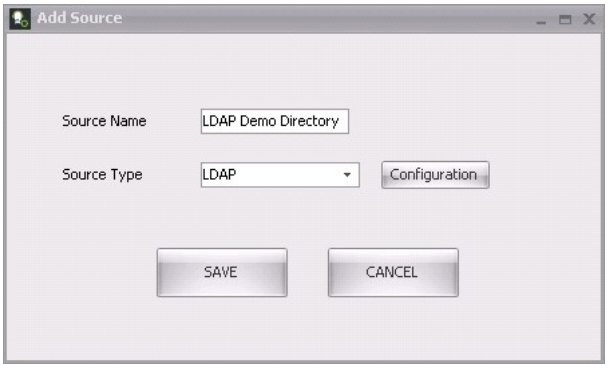

## 9.4 Defining other types of import sources

The following describes usage of other import sources.

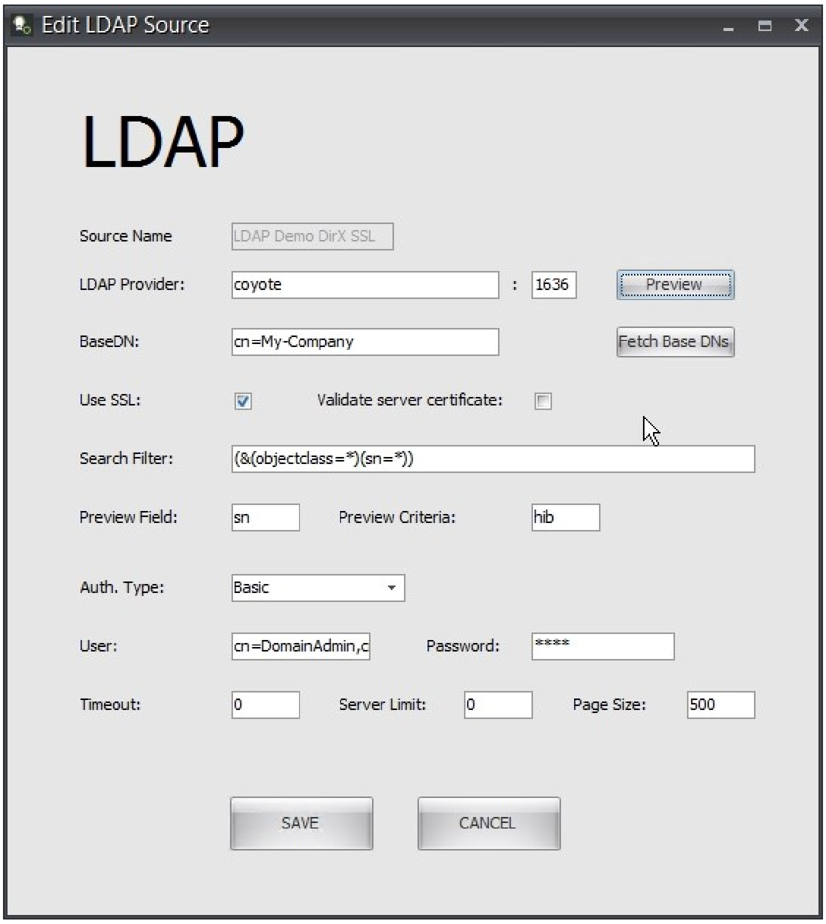
### 9.4.1 Import source LDAP

Creating a new import job with a LDAP directory as source is done in similar steps as the configuration displayed in section 9.3.2 Steps for a new import job (exemplified with .csv file).
Proceed as follows for connecting to a LDAP directory when reaching step 9.3.2.3 Define new import source.

1. Give the new LDAP source a meaningful name. Under Source Type choose LDAP.




2. Press the button **Configuration**.
3. The Edit LDAP Source window opens.




4. Enter the LDAP server name under **LDAP Provider**. Verify that the server can be accessed by this name.
5. Enter the Base Distinguish Name in the **BaseDN** field or “**Fetch Base DNs**” to choose from the Base DNs witch the LDAP Server provides.
6. Specify the **Search Filter** and **Authentication Type** with the corresponding credentials if required.
7. With **Preview Field** and **Preview Criteria** the Preview window can be opened by pressing the **Preview** button on the right top

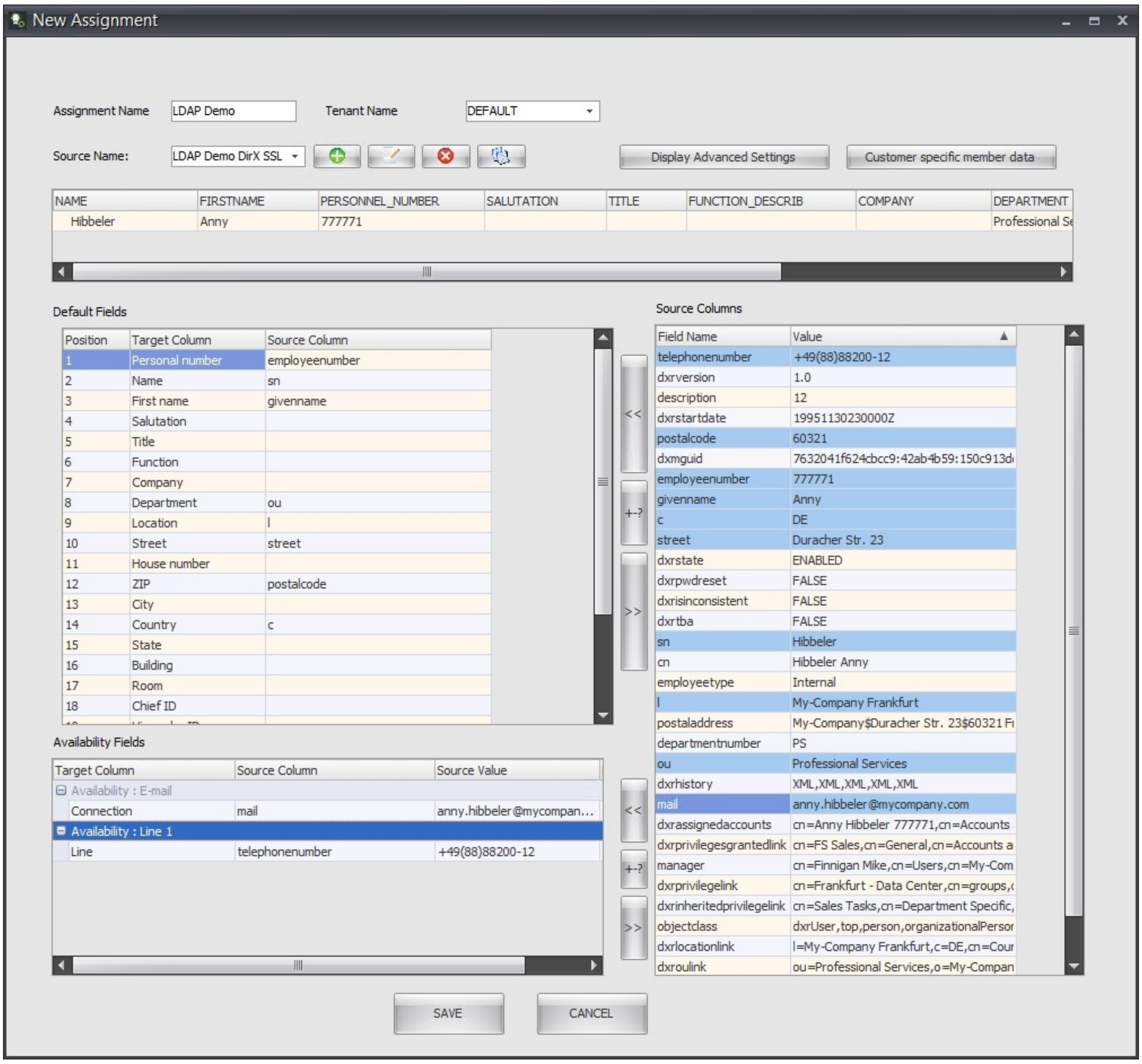
8. Verify that the connection settings to the LDAP server are okay. **Close** the preview.
9. Save the LDAP configuration by pressing **SAVE**.
10. Save the new LDAP source by pressing **SAVE**.

The Modify Assignment (Mapping) window appears.

11. Choose the new created LDAP source from the dropdown list. A Warning message appears:
12. Acknowledge the warning by pressing **OK**

The source columns are visible in the right pane. On the left the default fields in the database are displayed.

13. Assign the source fields with the contact data fields in the mapping / assignment window as described in section 9.3.2.5 Mapping: Assign contact data fields.




Right above the two panes a preview is available displaying the first line of the source file assigned to the contact data fields.

14. Specify the **Assignment Name** and the **Tenant Name** and **save** the new mapping for LDAP!

15. Proceed with the scheduling of a new Contact Data Sync Job as described in section 9.3.2.10 Finish new Contact Data Sync Job

### 9.4.2 Import source OLE DB

The OLE DB integration is exemplified by a connection to a MS Access 2007 database with four example users as displayed in the next picture.

ContactData

| ID | LastName | FirstName | Extension | E164 | Canonical | Street | PersonalNumber |
|---|---|---|---|---|---|---|---|
| 8 | Finnigan | Mike | 7581 | 4950505807581 | +49(50)505807581 | Main Street | 0815 |
| 9 | Slater | Christian | 7582 | 4950505807582 | +49(50)505807582 | Maple Street | 0818 |
| 10 | Jones | Peter | 7583 | 4950505807583 | +49(50)505807583 | Side Street | 0816 |
| 11 | Krueger | Fred | 7584 | 4950505807583 | +49(50)505807584 | Elm Street | 0817 |

The table name is **ContactData; LastName, FirstName**, **etc**. are the column's names.

An OLE DB driver / OLE DB provider Software must be available / installed on the OSC Server.

If your server has 64Bit Operating System, please install 64Bit OLE DB driver.

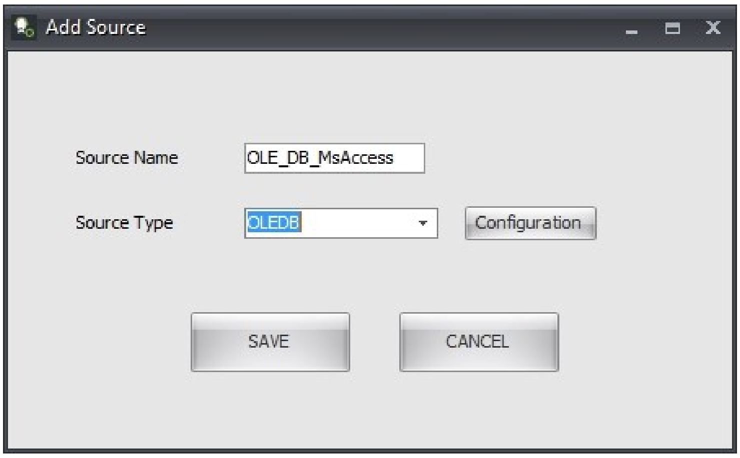
---

**NOTE:**
For the example MS Access, the OLE DB provider can be downloaded from the Microsoft support pages.

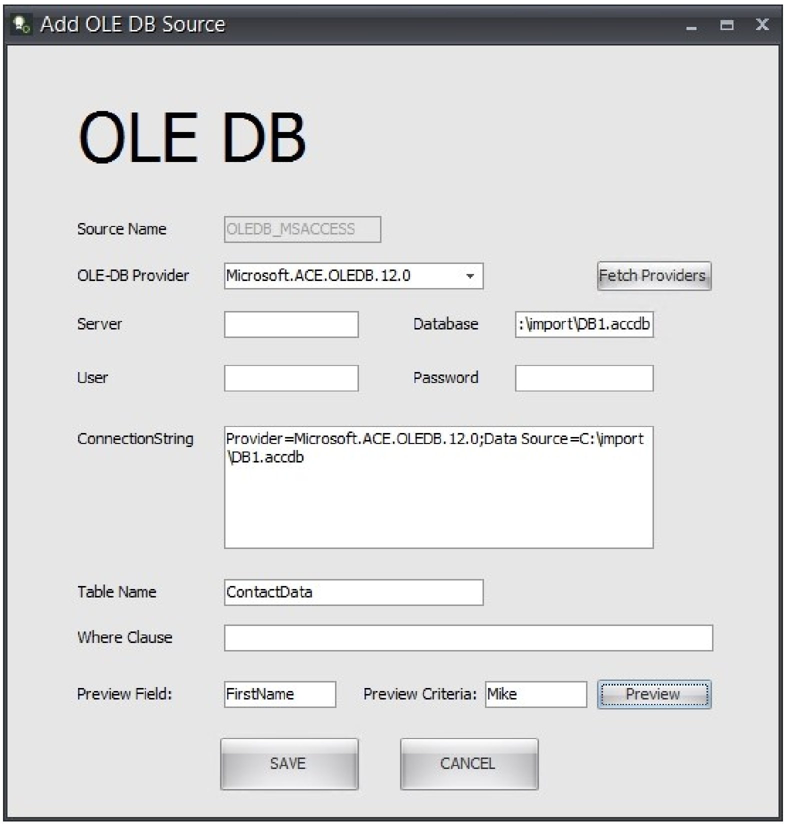
---

Creating a new import job with an OLE DB as source is done in similar steps as the configuration displayed in section 9.3.2 Steps for a new import job (exemplified with .csv file).
Proceed as follows for connecting to the OLE DB when reaching step 9.3.2.3 Define new import source.

1. Give the new OLE DB source a meaningful name. Under **Source Type** choose **OLEDB**.




2. Press the button **Configuration**.
The Edit OLE DB Source window opens.



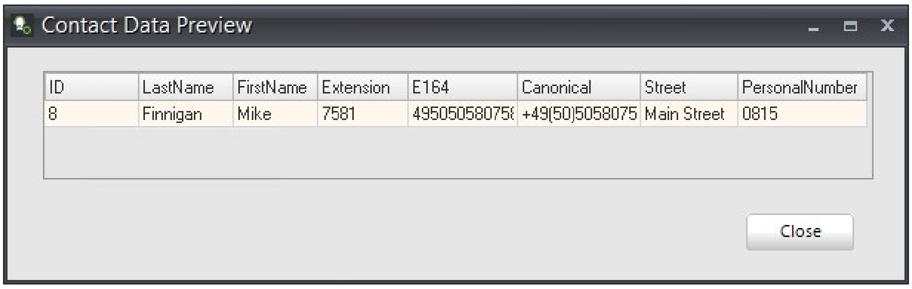

3. If Installation works properly the OLE-DB Provider can be chosen from the dropdown list after pressing the **Fetch Providers** button.
4. Choose the right OLE DB Provider as of your database requirements. Specify the database file with its path information. Enter user credentials, if required.

---

**NOTE:**
In case the database is on another PC, map the folder where the database is located to a local drive!

---

5. Test the connection by using the Preview option:
   Enter the preview criteria that matches the database's structure and content and press the Preview button.




6. Close the preview and save the Edit OLE DB window.
7. Save the OLE DB configuration by pressing **SAVE**.
8. Save the new OLE DB source by pressing **SAVE**.

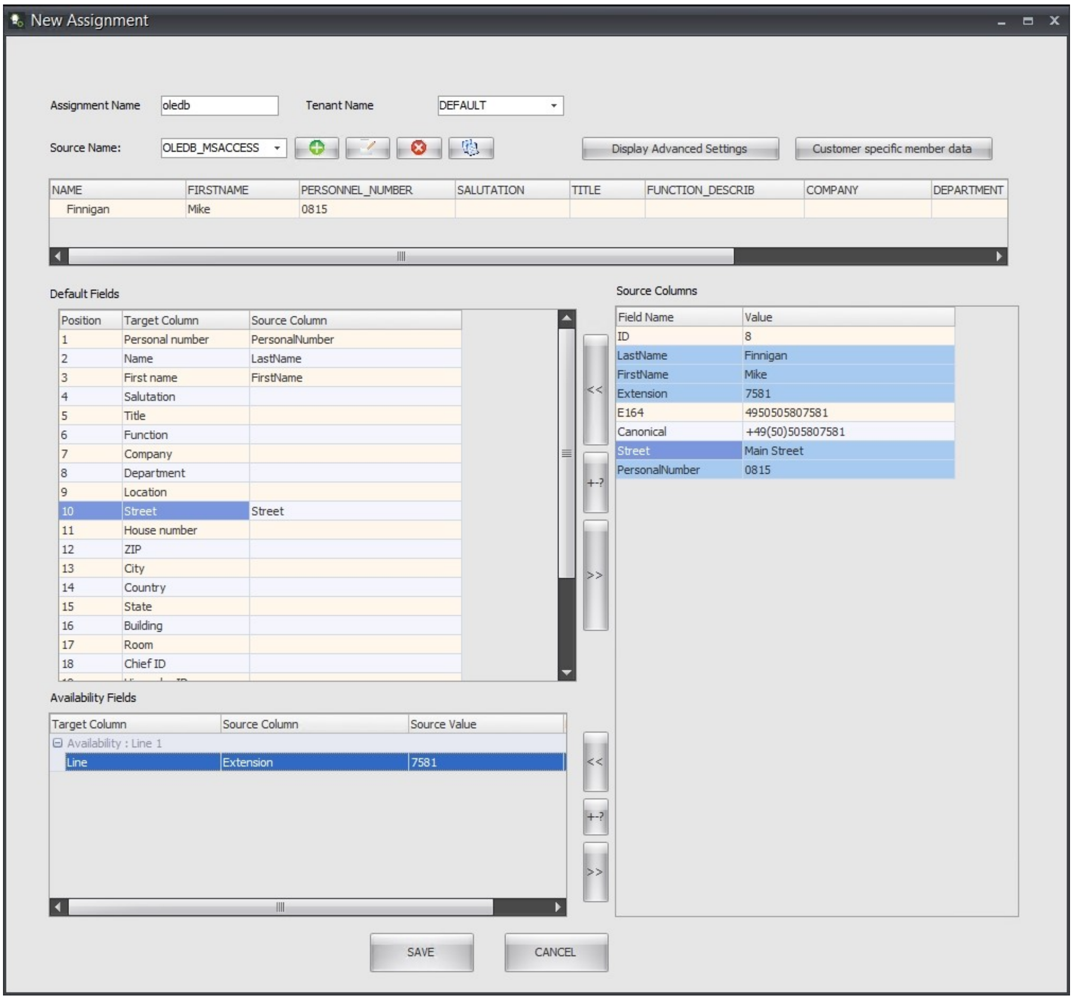
The Modify Assignment (Mapping) window appears.

9. Choose the new created OLE DB source from the dropdown list. A Warning message appears:

10. Acknowledge the warning by pressing **OK**

The source columns are visible in the right pane. On the left the default fields in the database are displayed.

11. Assign the source fields with the contact data fields in the mapping / assignment window as described in section 9.3.2.5 Mapping: Assign contact data fields.




Right above the two panes a preview is available displaying the first line of the source file assigned to the contact data fields.

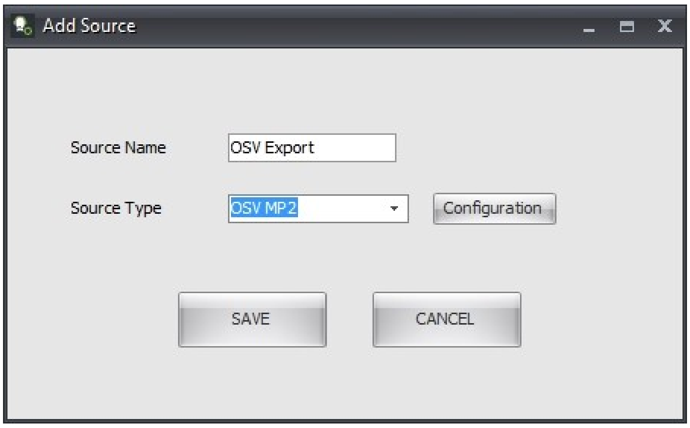
12. Specify the **Assignment Name** and the **Tenant Name** and **save** the new mapping for OLE DB!

13. Proceed with the scheduling of a new Contact Data Sync Job as described in section 9.3.2.10 Finish new Contact Data Sync Job

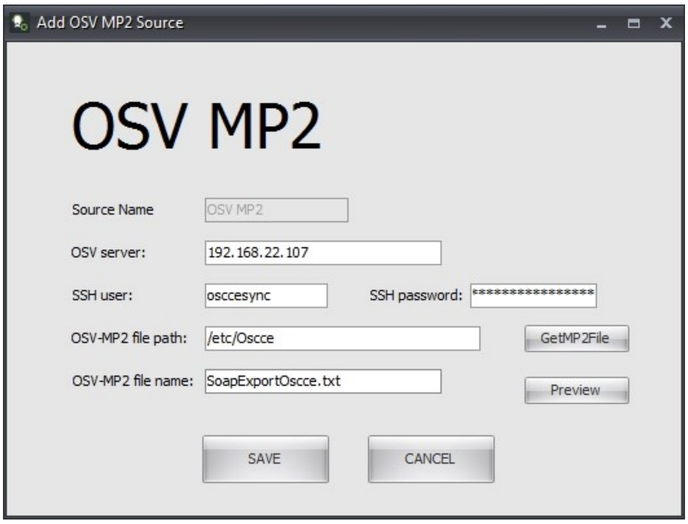
### 9.4.3 Import source OSV

Creating a new import job with OSV MP2 data as source is done in similar steps as the configuration displayed in section 9.3.2 Steps for a new import job (exemplified with .csv file).
Proceed as follows for connecting to OSV MP2 data when reaching step 9.3.2.3 Define new import source.

1. Give the new OSV MP2 source a meaningful name. Under Source Type choose OSV MP2.




2. Press the button **Configuration**.
The Add OSV MP2 Source window opens.




3. Enter the IP address of the OSV under **OSV server**. Verify that the OSV can be accessed.
4. Enter the **SSH User credentials** as of the script that was installed for the Export Job in OSV. The user credentials to log on to the OSV for downloading the MP2 file are:
   User: osccesync and Password for OSV >= V9: always open the script with a viewer and check current password.
5. Enter the **OSV-MP2 file path** as of the script that was installed for the Export Job in OSV.
6. Press the **GetMP2File** button to download an MP2 file from OSV and use the preview functionality by pressing the button **Preview** to see the file structure.

---

**NOTE:**
The OpenScape Voice must be prepared to permanently provide the MP2 file with present phone numbers and display names to use for import. A description is available in section 9.7 OSV Data Export.

---

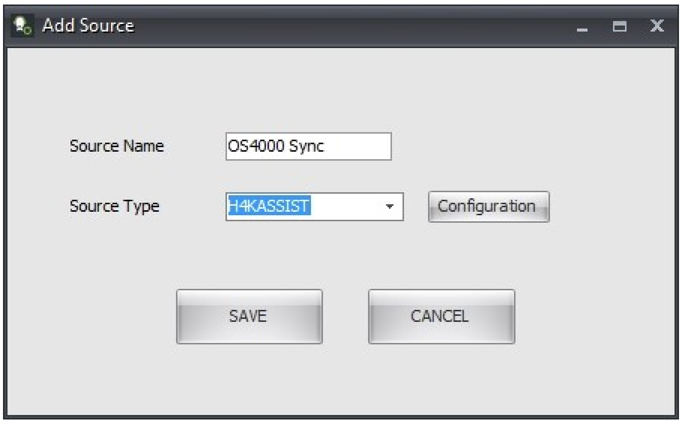
7. Verify that the connection settings to the OSV server are okay. **Close** the preview window.

8. Save the OSV MP2 settings by pressing **SAVE**.
9. Save the new OSV MP2 source by pressing **SAVE**.
   → The Modify Assignment (Mapping) window appears.
10. Choose the new created OSV source from the dropdown list. A Warning message appears:
11. Acknowledge the warning by pressing **OK**
    The source columns are visible in the right pane. On the left the default fields in the database are displayed.
12. Assign the source fields with the contact data fields in the mapping / assignment window as described in section 9.3.2.5 Mapping: Assign contact data fields.
    → Right above the two panes a preview is available displaying the first line of the source file assigned to the contact data fields.
13. Specify the **Assignment Name** and the **Tenant Name** and **save** the new mapping for OSV MP2!
14. Proceed with the scheduling of a new Contact Data Sync Job as described in section 9.3.2.10 Finish new Contact Data Sync Job

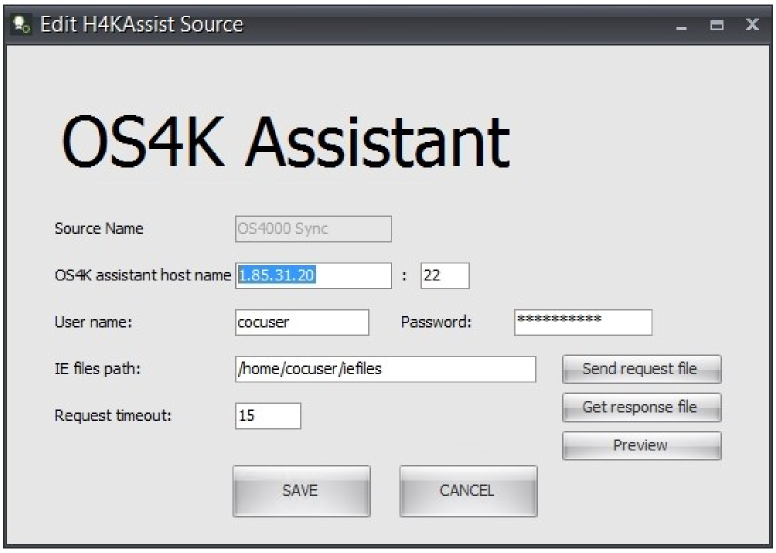
### 9.4.4 Import source OS4000

CDP supports integration with the **Import / Export API** of OpenScape 4000 Assistant to gather user information from the **OpenScape 4000 ODFs** (object description files).
Creating a new import job with OpenScape 4000 Assistant data as source is done in similar steps as the configuration displayed in section 9.3.2 Steps for a new import job (exemplified with .csv file).
Proceed as follows for connecting to OS4000 Assistant data when reaching step 9.3.2.3 Define new import source.

1. Give the new OS4000 Assistant source a meaningful name. Under Source Type choose **OS4KASSIST**.




2. Press the button **Configuration**.
The Add OS4KAssist Source window opens.




3. Enter the IP address of Assistant host server under **OS4K assistant host name**, the default port number is 22. Verify that the Assistant can be accessed.
4. Enter the **log on credentials** for logging on to the Assistant.
5. Enter the **IE files path** where the ODF files can be accessed.
6. Press the **Send request file** button to make CDP create a request file which will be sent to the corresponding path.

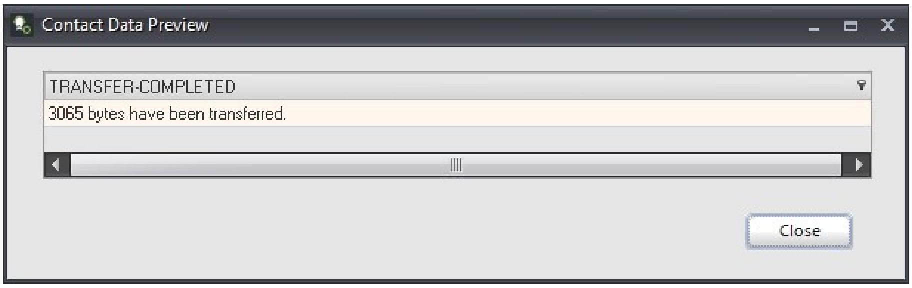
---

**NOTE:**
Use WinSCP or a similar tool to check whether the request file was sent and if the response file was created.

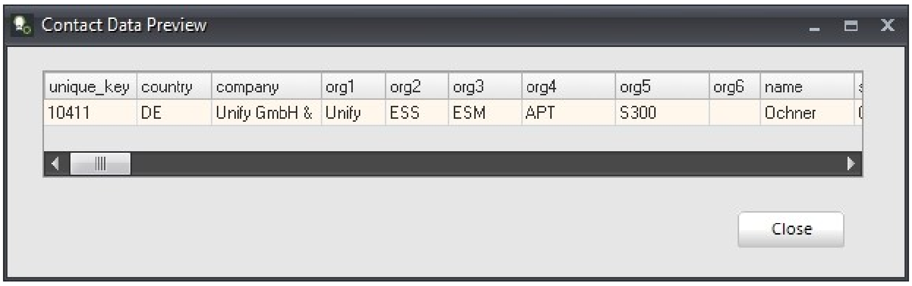
Creation of response file may take up to 15 minutes depending on OS4K configuration.

---

7. Press the **Get response file** button to download the response file.




8. Use the preview functionality by pressing the button **Preview** to see the file structure.



---

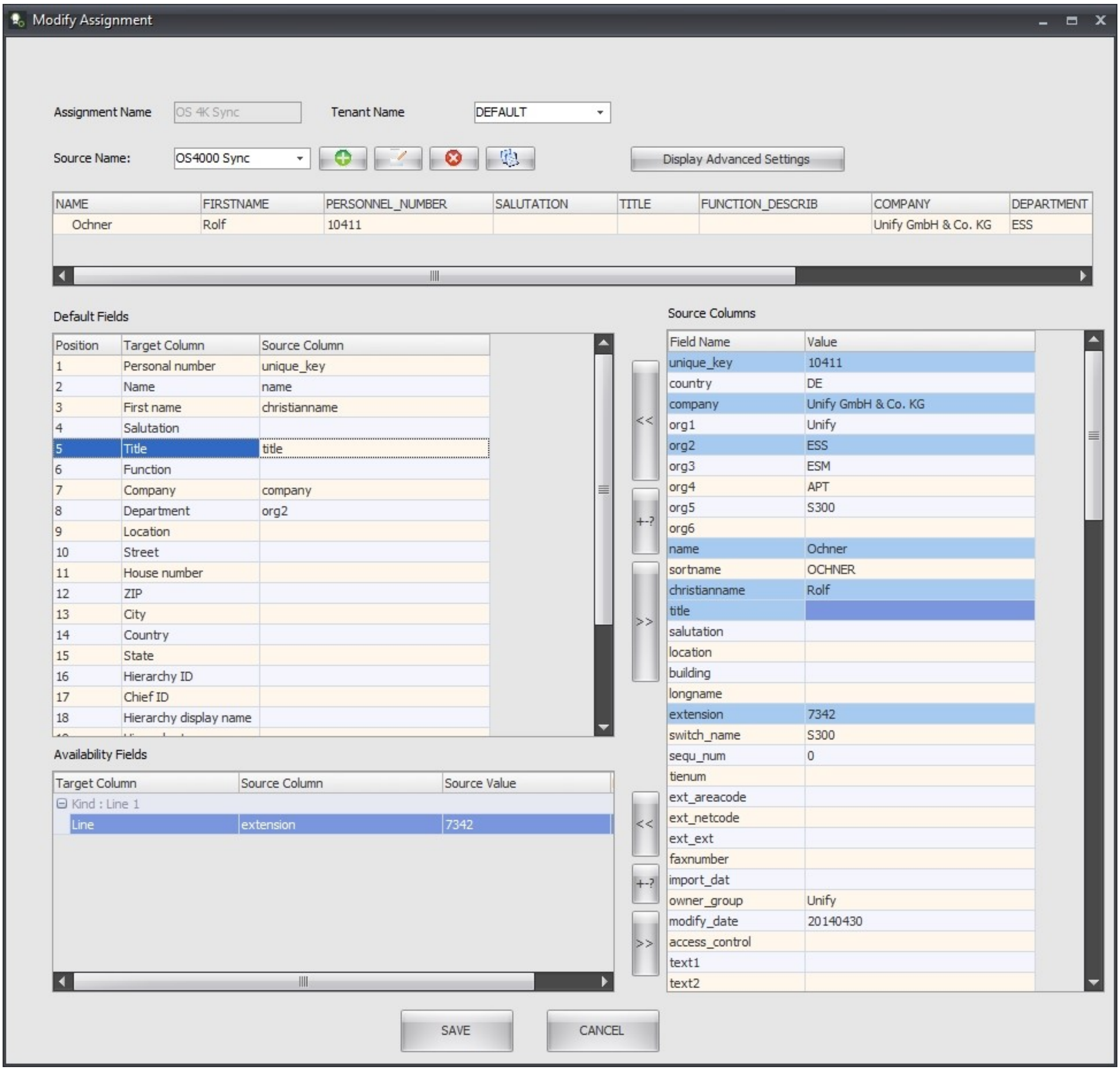
**NOTE:**
The content of the ODF file is defined in the OpenScape 4000 Assistant or in a networked environment in OpenScape 4000 Manager. Please refer to the OpenScape 4000 administration manuals for further details.

---

9. Verify that the connection settings to the OS4000 Assistant are okay. **Close** the preview.
10. Save the OS4000 Assistant configuration by pressing **SAVE**.
11. Save the new OS4000 Assistant source by pressing **SAVE**.

The Modify Assignment (Mapping) window appears.

12. Choose the new created OS4000 Assistant source from the dropdown list. A Warning message appears:
13. Acknowledge the warning by pressing **OK**



The source columns are visible in the right pane. On the left the default fields in the database are displayed.

14. Assign the source fields with the contact data fields in the mapping / assignment window as described in section 9.3.2.5 Mapping: Assign contact data fields.
15. Right above the two panes a preview is available displaying the first line of the source file assigned to the contact data fields.
16. Specify the **Assignment Name** and the **Tenant Name** and **save** the new mapping for OS4000 Assistant!
17. Proceed with the scheduling of a new Contact Data Sync Job as described in section 9.3.2.10 Finish new Contact Data Sync Job.

## 9.5 Additional information – best practice

This section displays best practice tips regarding creation and deletion of Contact Data, Advanced Settings and Error handling personal numbers and full import versus delta import.

### 9.5.1 Remarks regarding Data Integrity:

Generally, the customer is responsible for the content and the quality of his data sources.
There are several options during import definition to enhance the phone number quality, like e.g. short numbers can be extended by default values, formatted numbers can be identified.

---

**NOTE:**
Due to the optimization regarding the data quality for dial able and searchable phone numbers, unformatted numbers are not allowed in the Concierge DB.

---

Numbers that are not in international format can be normalized into an international number during the mapping by using ***regular expressions***.
International numbers can be split by phone number identification.

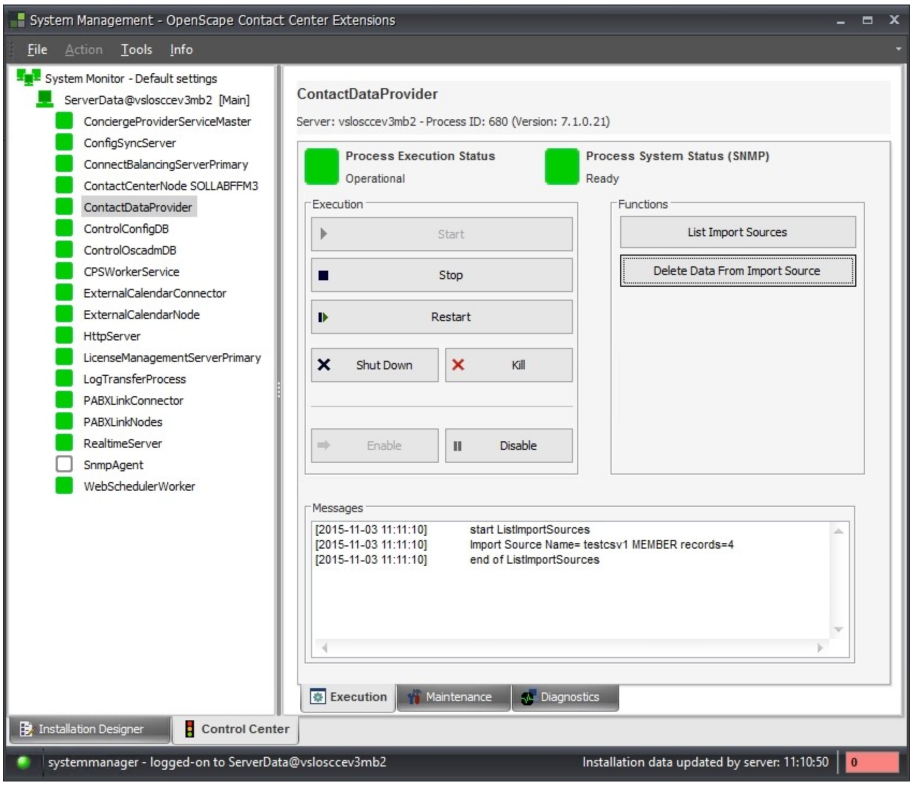
---

**NOTE:**
Test the split rules with the corresponding preview-option; see section 9.6 Data Translation Tips.

---

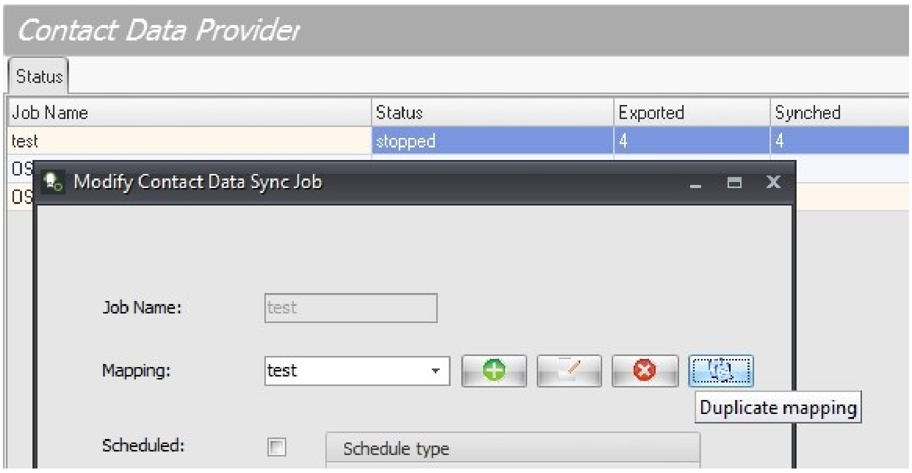
### 9.5.2 Deletion of Contact Data from a single import source

In case contact data records from a dedicated import source needs to be deleted, this can be done in **System Management** in the Control Center area under **ContactDataProvider**.
In the pane **Functions** on the right there is an option **List Import sources** and an option **Delete Data from Import Source**.
Press the button to perform the action. Specify the import source to delete all data from one import source.




## 9.5.3 Copying assignment / mapping

It is possible to copy a configured assignment / mapping. If the structure and type of the source stays similar, then this can be changed in the copy of the present mapping. The mapping itself will stay as it is. In case the type or structure of the new data source differs from the original, the mapping will be lost.




Press the Duplicate mapping button to create a copy of an existing mapping!

**NOTE:**
Please be aware that the split rules will not be duplicated. In a duplicated mapping you need to configure them once more!

---

**NOTE:**
Please verify that the *Import Source* name is different for each mapping. Unless two mappings shall update the same records (i.e. delta update) use different import source names, see section 9.5.6 Advanced settings.

---

### 9.5.4 Status indicator

If the Contact Data Provider Service is up and running, this is displayed via the green LED at the bottom of the DataCenter window. The **Contact Data Provider** option window has to be active.


---

**NOTE:**
For scheduled jobs, Data Center does not need to be up and running!

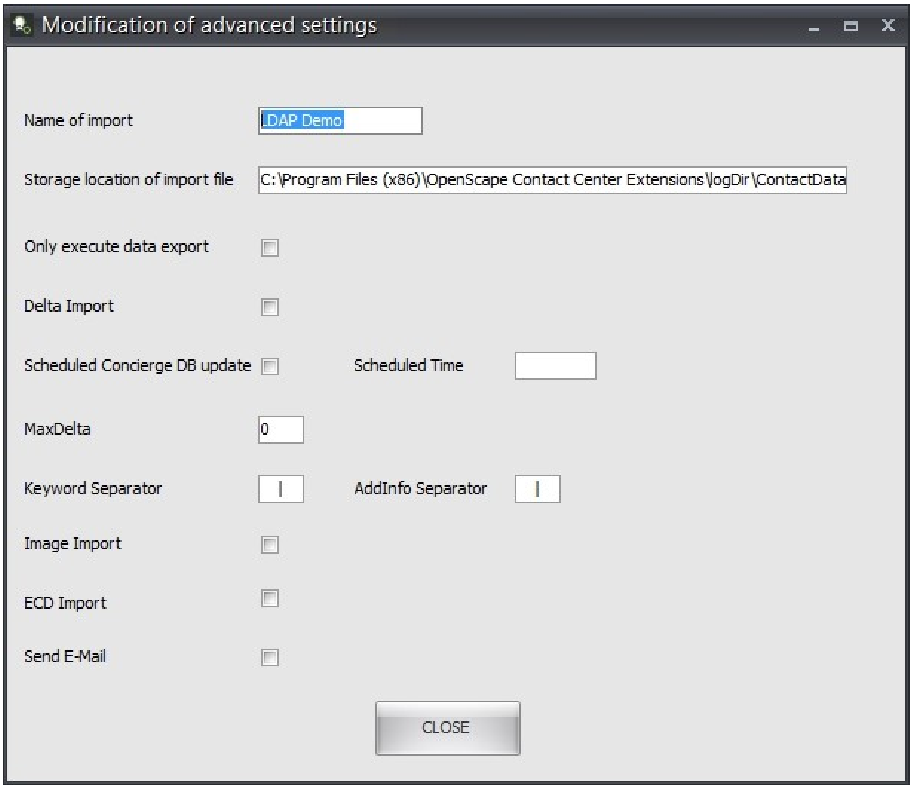
---

### 9.5.5 Error file

An error file is available with all import data if import fails:
In the same folder where the import file is located the system creates a new folder named “errors”, by default this is the folder “C:\Program Files (x86)\OpenScape Concierge\LogDir\ ContactDataProvider\errors”.
The import file storage location can be found under the Advanced Settings which can be set under the ***Display Advanced Settings*** button in the **Modify Assignment** Window.

### 9.5.6 Advanced settings

Find the Advanced Settings under the ***Display Advanced Settings*** button in the **Modify Assignment** Window.
Advanced settings usually are not required – depends on customer data file and infrastructure.




The picture shows **advanced options** regarding the Assignment / data sync job.

- The value of “**Name of import”** file is *a temporary text file* that is created right after the export of the data source. It is stored in the corresponding **Storage location of import file**; (as a consequence in case of error the error folder will be found there also). The name of the import file defines the name of the *Import Source* of these data records.

---

**NOTE:**
Please verify the *Import Source* name is different for each mapping. Unless two mappings shall update the same records (i.e. delta update) use different import source names.

---

- By checking the **Only execute data export** checkmark, the system will only create but not import the upper mentioned *text file*; it will keep the export, like e.g. in the displayed case the LDAP data.
- Check the **Delta Import** checkmark in case only update information shall be imported and not a full contact data import to the system.
- Under **Scheduled Concierge DB update** one can activate a time schedule, when the temporary files will be written into the productive database.
- The **MaxDelta** value specifies the max percentage value of new data that is allowed to differ from the existing data. With this one can prevent the CDP from changing an active database to an empty one due to an error situation.
- The **Separators for Keywords and Additional Information** fields can be specified.

### 9.5.7 Full import / delta import

It is possible to perform a full import or – by setting the checkmark – choosing a delta import.
When a full import is performed and the customer does not have Personal number as a "key", the system will delete all data and reload everything from scratch. In this time the Concierge users do not receive any result when searching in the ETB database.

Therefore it makes sense to use a personal number as a key and perform the full import once in the night and if necessary during the day time just delta imports.
To do this, you should create a second job, use the same Import Source identification and check Delta Import under Advanced settings.

---

**NOTE:**
With Fix Release 3.1.3 it is also possible to use Wildcards in cvs import file names. (i.e. C:\import\import_ab*.txt) – this might be useful with delta imports.

---

### 9.5.8 Personal numbers

Usage of personal numbers is strongly recommended. The personal number must be a unique identifier for a contact data record. It can be a number, but also an email address for example as usually email addresses are unique as well.
When the personal number is in use and the system performs a data import, each new data record is checked against the existing data record – where the identification is based on the personal number.
In case there are no differences in the data field, nothing happens.
If the data field values differ from each other an update takes place. This allows data imports event during the opening hours, because the users have data always available!
With the usage of personal numbers the manually entered member data via Data Center (i.e. Keywords) will not get lost after a new import performed.

### 9.5.9 Permanently monitoring for import text file

In case the import source file is a text file, the CDP is permanently monitoring the location of that source file. As soon as the service detects a new file, it will start extracting that and tries importing of the new data records.
To do this, just activate the related job without any schedule information.

---

**NOTE:**
This function can be overwritten in the **Advanced Settings** window, that allows specifying a fixed time for the import process into the productive tables.

---

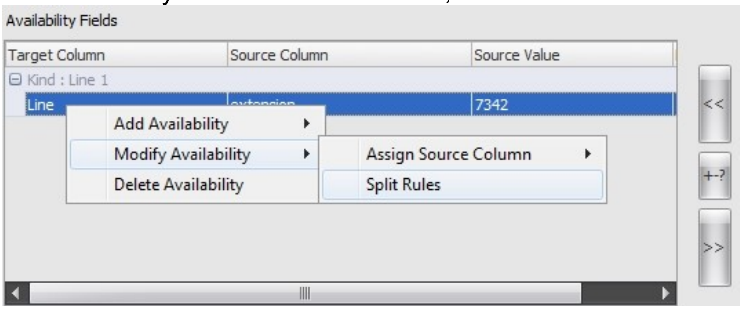
A Windows API prevents CDP from accessing the new contact data file while it is still copied on the target folder. CDP does not start import before copying is complete.

**NOTE:**
There is a Delay parameter. This is the time that passes between reading the new contact data into the temporary tables and writing it into the tables of the productive system.

# 9.6 Data Translation Tips

## 9.6.1 Split Rules

The available phone numbers from a data source can be modified as required during the import process with help of several split rule types or regular expressions.
If for example only the trunk code and extension numbers are available, but not the country codes and area codes, the latter can be added automatically.



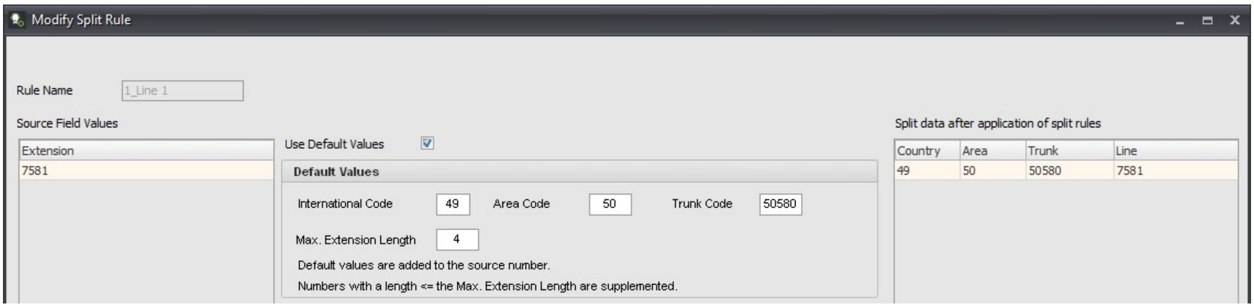

Right mouse click on the phone number to be modified; Choose **Modify Availability \ Split Rules.**

The **Modify Split Rules** window opens.

Different Options are available:

### 9.6.1.1 Use Default values

Set the checkmark ***Use Default Values*** to add preliminary information like country code if this is not available, or if only extension numbers are available the full E164 information can be added automatically.




In the picture we see the Area code added to the extensions on the left.

**NOTE:**
In case the source data cannot be assigned properly, the source field values on the left and the result (Split data after application …) on the right become red.

### 9.6.1.2 Use Identifier

Use identifier, like”+”or ”-“or ”(“ or “)” or “/” to separate an existing number in a given format, like e.g. in Canonical format.

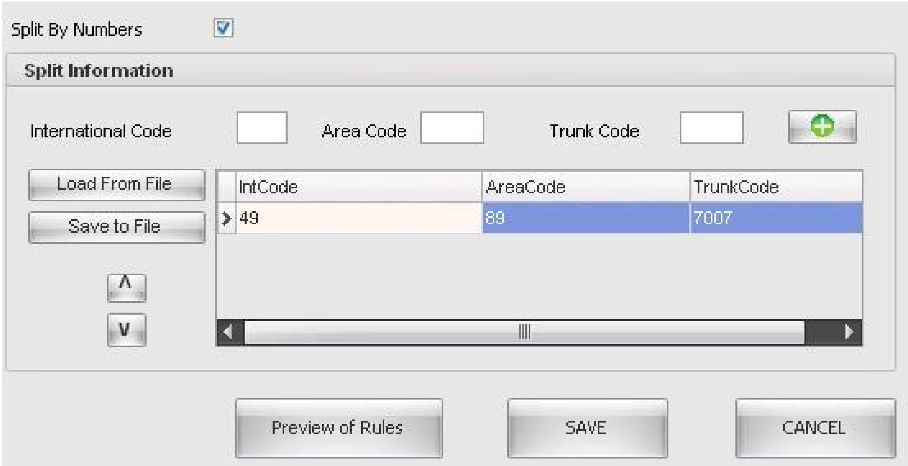
**Example:**

For a given number **+49(89)722-12345**
Configure
International identifier = “+”
Area code start = ”(“
Area code end = ”)”
Extension identifier = “-”

The application will split into the correct fields for International (**49**), Area code (**89**), Trunk code (**722**) and extension (**12345**).

### 9.6.1.3 Split by numbers

Split file can be used in case the E164 format is available and the number of combinations of international code, area code and trunk codes are limited.
In this case specify the split information can be used to separate the E164 numbers into the corresponding sections for international code, area code and trunk codes.
**Example:** The availabilities in the data source are given in a format like 3189700710001, 3189700710002, etc.
10001, 10002 are the extension numbers, 31 is the country code and 89 is the area code. Set the checkmark at split by numbers and create an entry like displayed in the picture.
The system will separate the codes as defined by the lines in the Split Information table.
The table can be saved by pressing the **Save to File** button.
A split file can be uploaded into the system by pressing the **Load from File** button.




---

**NOTE:**
Only International Code and Area Code are mandatory. The trunk code is optional.

---

Working with placeholders (*)

**Example:**

Area code 8* matches every two digit area code between 80 to 89.

**Example:**

Trunk code 7*** matches every four digit trunk code between 7000 to 7999.

---

**NOTE:**
If you need multiple split entries, the order of the entries is important. The following order will not successfully retrieve the required information.

The order of split entries can be re-arranged by using the Arrow Up/Down Buttons.

---

49|*||
49|8*||
49|89|7007|

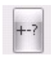
You have to locate the specific numbers without placeholders to the first place:

49|89|7007|
49|8*||
49|*||

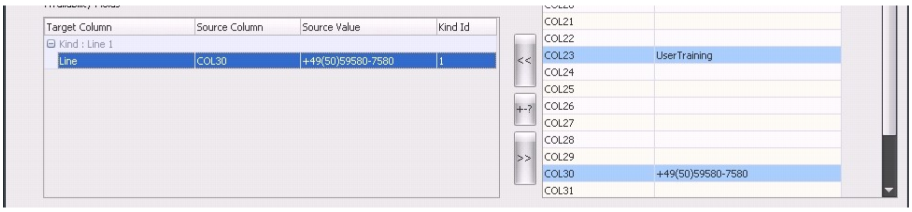
You can also find two sample split files in Software DVD (under directory “\Tools”). The first one has the split entries for all countries in the world. The second one has additionally the split entries for all area codes in Germany. You may modify them and use them by clicking on "Load from file" button, and choosing the file.

## 9.6.2 Regular Expressions

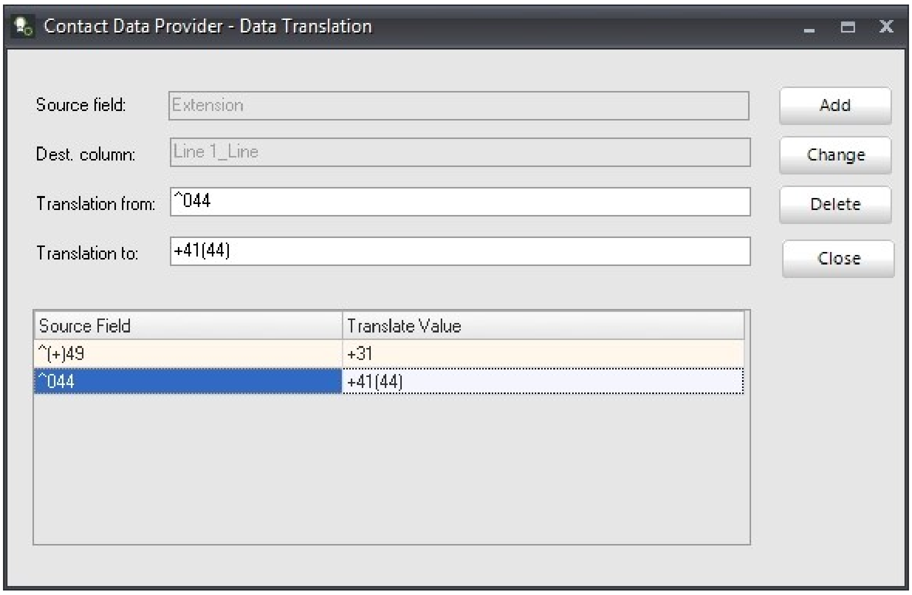
CDP allows modification of source values by use of "regular expressions". A **regular expression** is a special text string for describing a search pattern, which is kind of wildcards in a DOS command. With the special search pattern the corresponding data can be modified with the given replacement string.

Access the Data Translation Window by highlighting the availability to be modified and pressing the button 

between the source and target columns in the **Assignment** window.




The **Contact Data Provider – Data Translation** window opens.




In the displayed example CDP searches for the string “+49” and replaces this with “+31” as of the first line of expressions.
The second line searches for the string “044” and replaces this with the country code “+41” followed by “(44)” as in canonical format.

**Private Numbering**

If you want to import a private number (e.g. a transit number containing only the extension 12398765 or +123987654) you can divide the number into an n-digit trunk (in the sample below 3) and the rest as line.
Concierge requires at least a trunk and an extension.
To do so you can use regular expressions, e.g. capturing groups in () like (\D?)([\d]{3})([\d].*) with a Replace value
for trunk as $2  and
for line as $3 in DC .
You can test/ create regex expressions here: [https://regex101.com/](https://regex101.com/).
You need to expand SUBSTITUTION panel.


If the source number includes other signs like 123-98765 you may use another capture group like (\D?)([\d]{3})(\D+|\D?)([\d].*) and use $2 and $4 as replacements.

**NOTE:**
Please do not assume that all the regular expression syntaxes are supported from CDP, since the product has only been tested for a few samples. In case of questions inquiring support for regular expressions, you should be aware that only the professional services in time an material base can be offered.

## 9.7 OSV Data Export for CDP and synchronizing PABX Extensions.

For the OSV data export procedure which can be used to import OSV user data via CDP into Concierge, a script is available that modifies OSV settings correspondingly.

**NOTE:**
The same script is used for accessing the OSV when database routing is required as described with the PABX Connections in System Management – see OpenScape Concierge Configuration, Administrator Documentation.

The script is available on the installation DVD. The procedure is as follows

**Procedure**

1. Bring shell script (.\Tools\OSVExport\installExportForOsc.sh) to OSV. If using FTP, **do NOT** use Binary mode, but Text or Default mode.
2. Run the script using the **root** account:

- The script creates a Cron Job that creates the MP2File
- The script creates a path where the MP2File is created
- The script creates a user that can access the OSV and download the MP2File.

The user credentials to log on to the OSV for downloading the MP2 file are: User: **osccesync** and Password for OSV => V9: *always open the script with a viewer and check current password.*

**IMPORTANT NOTE:**
Whenever an update of OSV is performed, the procedure has to be done again!

Make sure that the OSV’s host key (rsa2 key fingerprint) is cached in the registry of the OSC server. This can be done by once logging on to the OSV using PuTTY from the OSC server.

# 10 Best practice - Announcements Handling

This section describes the different types of announcements and wave files used by Concierge, where they are configured and how they are used.

## 10.1 General information

For using an announcement / wave file with Concierge it has to be registered in Data Center beforehand. This can be done under System data, section Announcements. There the Edit Announcements window shows all wave files that are registered in Concierge Data Center.
If logged on with a *systemmanager* account you can see all wave files for all tenants; if you are logged on with the tenant's manager account all wave files that are registered for that tenant are visible.

---

**NOTE:**
It is recommended to log on with the tenant's manager account in Data Center whenever it is required to make changes on announcements/ wave files, as with the *systemmanager* account settings can only be seen, but cannot be modified.

---

## 10.2 Types of announcements

OpenScape Concierge hosts four types of announcements / wave files that are used in conjunction with CPS to serve the caller in multiple scenarios, these are:

1. Announcements
2. Dialogs
3. Music on Hold
4. Personal Announcements

### 10.2.1 Announcements

Announcements are used where information is shared with the caller, like e.g. a greeting or other information that does not ask for further reaction from the caller.

### 10.2.2 Dialogs

Dialogs are used in case a caller's input is required, like e.g. in the paging scenarios. CPS offers the target person a menu which allows pressing a key for connection with the waiting caller.

### 10.2.3 MoHs

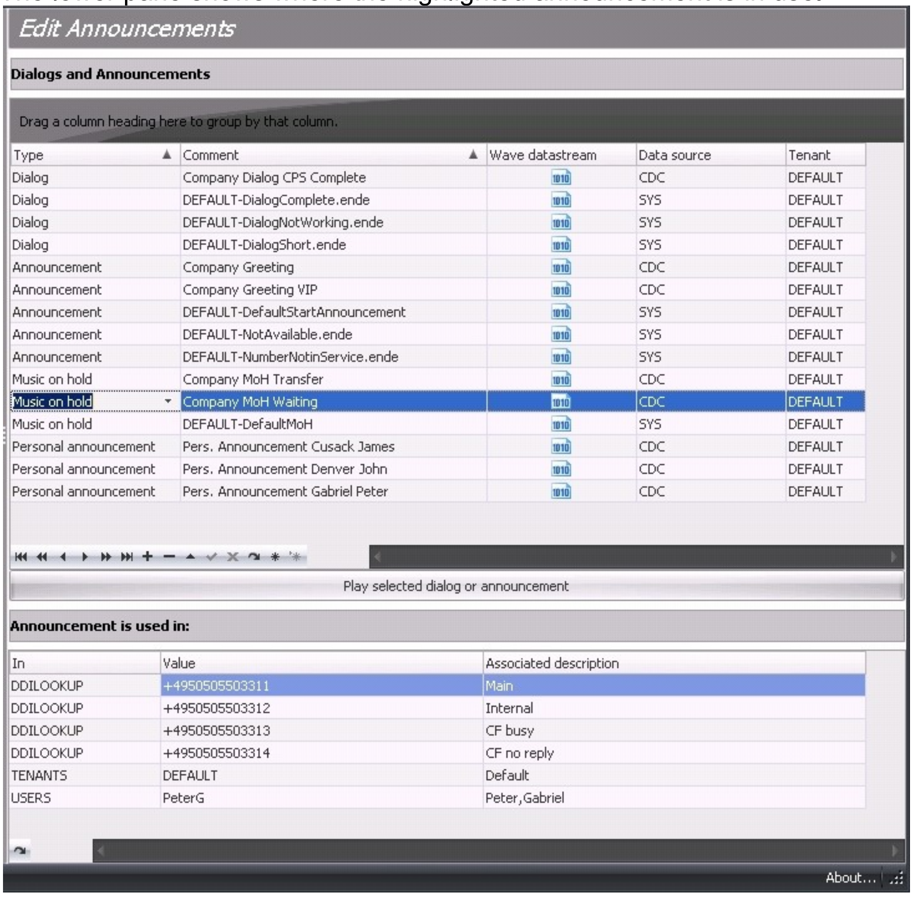
Music on Hold (MoH) wave files are used for providing waiting music / waiting messages. These are used when callers wait for the attendants, if they are parked or during the transfer process until the system has established the connection with the target person.

### 10.2.4 Personal Announcements

Personal Announcements can optionally be used by the attendant to automatically greet the caller. The personal announcement is played right after the general company's greeting and just before the call is connected with the attendant. Both, the caller and the attendant listen to the personal announcement.

## 10.3 Uploading wave files

For uploading, means registering a wave file in the system, go to System data section Announcements. The **Edit Announcement** window opens. The upper pane displays wave files that are registered; the type of file, a comment, the path to the assigned wave file as well as the tenant's name is displayed.
The lower pane shows where the highlighted announcement is in use.




Register a new wave file by pressing the + button and entering the required information in the table. By specifying the **Wave destination** and pressing the checkmark the wave file will be uploaded to the Concierge system.

### 10.3.1 Format of Wave files

Announcements / wave files have to be in the format:
**MS Wave – PCM format 128 Kbit, sample size 16 Bit, mono, sampling rate 8 kHz.**

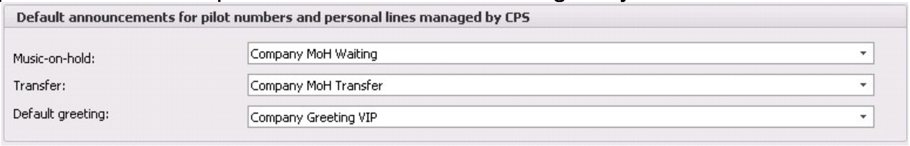
---

**NOTE:**
Delivered dialogs and announcements can be found on the setup DVD under .\Tools\Announcements_CPS.

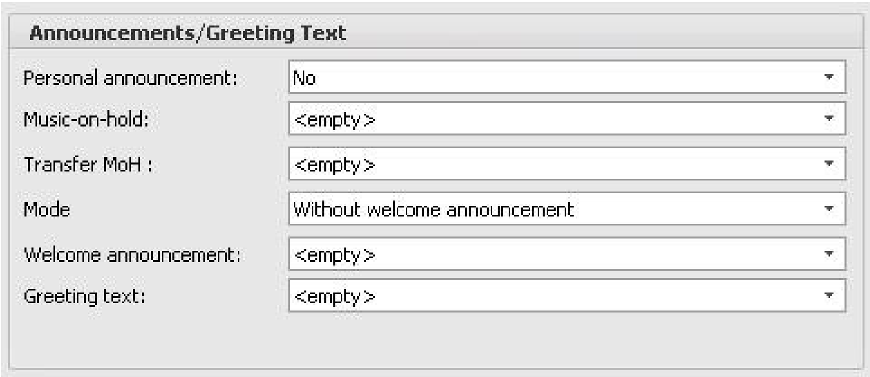
---

## 10.4 Announcements for MoH / Transfer Music

MoH announcements are used in the *tenant's general settings* in **the Edit tenants** window on the bottom area, named "Default announcements for pilot numbers and personal line numbers managed by CPS".



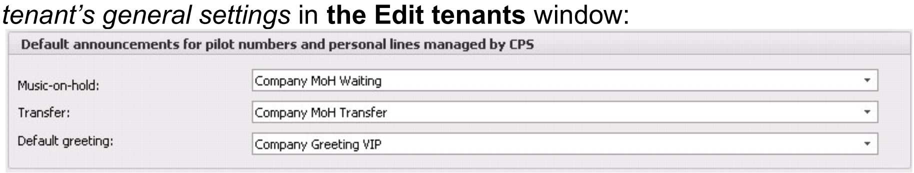

The MoH music can be overwritten on a pilot number's base in the *DDI List entries*.




Transfer MoH can be separately defined as Music on hold.

## 10.5 Tenant's greeting Announcement

The default greeting announcement for a tenant is also specified in the *tenant's general settings* in **the Edit tenants** window:




This default greeting can be overwritten on a pilot number's base in the *DDI List entries*. Under Mode it is possible to choose whether a welcome announcement shall be used or not.


**NOTE:**
Greeting announcements are always played until the end of the announcement – even if an agent is available.

## 10.6 Personal Announcements

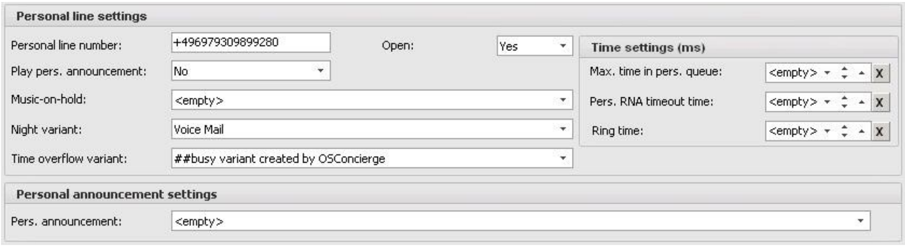
**Description**

Personal Announcements can optionally be used by the attendant to automatically greet the caller in addition to the company's greeting announcement.

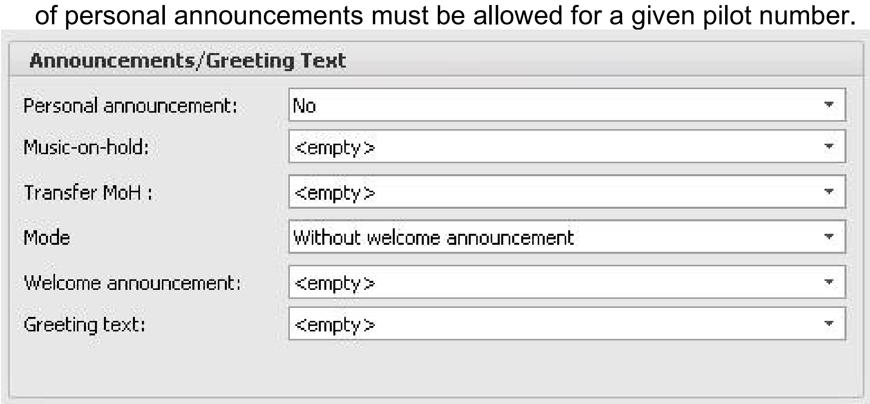
The personal announcement is played right after the general company's greeting and just before the call is connected with the attendant. Both, the caller and the attendant listen to the personal announcement before they are connected to each other.

**Three steps are required for a personal announcement:**

5. Under System data, section announcements the wave file must be registered as personal announcement – see section 8.3.
6. Under User administration section Accounts the Concierge user's settings have to be set correspondingly.
   In **Personal announcement settings** the value for **Play pers. Announcement** must be set to **Yes** and
   the **Pers. announcement** field must have the corresponding wave file active.




7. In the DDI Lookup table under **Announcements / Greeting Text** the use of personal announcements must be allowed for a given pilot number.




## 10.7 Announcements for night variants/ overflow variants

**Description**

The night variant settings under System data allow three modes of night variants, one of them is to play an announcement to the caller, that nobody can take the call right now; like for example "Sorry, our service hotline is closed for today – please try during our opening hours…"
When creating a night variant for this mode, the system offers those uploaded wave files from type "Announcement" as it is described in section 10.2.1 Announcements.

# 11 Best practice - DDI related configuration

This section describes the interworking of the DDI Lookup entry with other items that are e.g. responsible for routing, visibility and handling of calls.

## 11.1 Times

### 11.1.1 RNA timeout time

This is the maximum time a distributed call is ringing on the Concierge user's phone. If that time is exceeded before the attendant accepts the call, CPS takes that call away from that user and puts the user's routing state into "unavailable". The call will be routed to another available attendant.

---

**NOTE**:
This value is not used in case of integration with OpenScape Contact Center! It overwrites the *Default RNA timeout* time specified in the Tenant's settings.

---

**Automatic Availability for last agent**

For environments with e.g. one single Concierge attendant the feature Ring No Answer (RNA) can be edited.
If the feature **Automatic Availability for last agent** is enabled, the Concierge user will automatically return to the **Available** status when the RNA timer expires and the waiting call is offered again.

This feature can be enabled or disabled in the Concierge Data Center under ***System Data / Client Configuration / Advanced Settings***. By default, the function is deactivated.

<u>Function ENABLED:</u>
Scenario 1:

- Only 1 attendant within the tenant is logged on (regardless of any groups used).
- The attendant is offered a waiting call.
- The attendant does not accept the call.
- The RNA timer expires, in the background the attendant is set to **Unavailable** and the call is returned to the original call queue.
- Now the function "Automatic Availability for Last Agent" works. The attendant is returned to the **Available** status and the call is offered to him/her again.
- This is repeated a maximum of times until the setting for the longest waiting time ("Maximum time in the input queue") has been reached, because then the time overflow variant configured for this is used.

Scenario 2:

- More than 1 attendant is logged on for the tenant
- An attendant is offered a waiting call.
- The attendant does not accept the call.
- The RNA timer expires, the attendant is set to **Unavailable**. The call is processed according to the configured timeout for the processing queue.

**NOTE in connection with the use of the group feature:**
The function only works if only 1 agent is logged on for the tenant (regardless of any groups used).
If no agent is logged on to a group anymore, the DDIs of this group are closed. Calls still in progress are processed according to their overflow setting

**NOTE when used with integrated OSCC:**
RNA control is the responsibility of the OSCC. It is recommended to leave the parameter set to disabled (default).
If the Automatic Availability function controlled by the client is to be used in conjunction with an OSCC, this may only be done taking into account the routing concept configured in the OSCC!

Function DEACTIVATED (default):

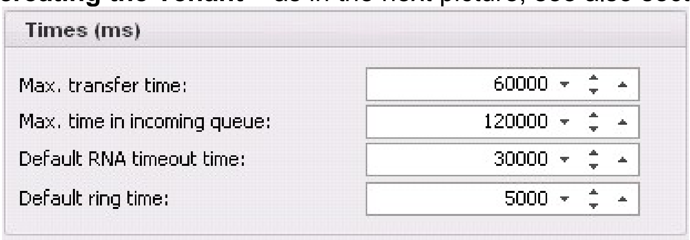
- An agent remains in **Unavailable** / RNA status
- The RNA timeout (set under Tenant or DDI) functions as described (e.g. first section within this chapter), regardless of whether attendant employees are logged on or not.

### 11.1.2 Time Overflow Variant / Maximum time in incoming queue

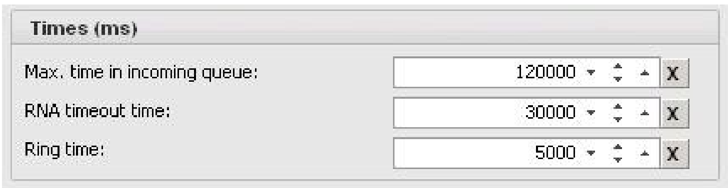
The value **Maximum time in incoming queue** describes the maximum time the system will hold the call to wait for agents before the call is routed to the specified **Time overflow variant**.

**Access**

Go to **System data \ Tenants**
The default variant is specified in **the default Times settings when creating the Tenant** – as in the next picture, see also section 5.1.1 Tenant.



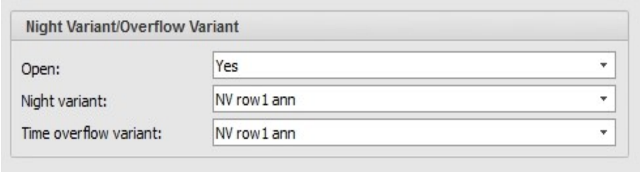

These **default tenant's values** can be overwritten on a DDI lookup entry base:




We see the entries in the **DDI List** set to empty in order to use the default values of the tenant.
More detailed the sections **Times** and **Night Variant/ Overflow Variant**:

**NOTE:**
For each DDI that value - DDI’s **Times** section - is used unless this value is set to **<empty>**.
In case it is empty the *Tenant’s default value for the Max. time in incoming queue* is taken.
Use the button **X** right beside the value to set it to <empty>.

After exceeding this threshold the call is handled by the **DDI**’s **Time overflow variant** selection.




### 11.1.3 Maximum Processing Queue time for a call

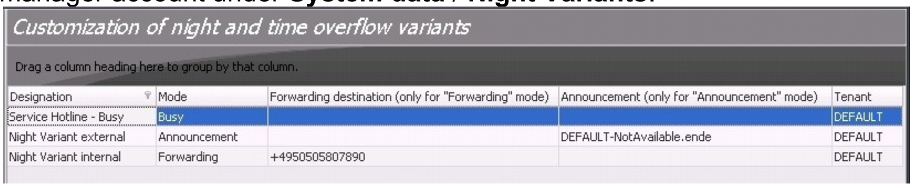
If a call stays in the processing queue due to an unsuccessful transfer, a recall or parking and no further attendant / instance is able to handle that call, it will be handled as of these settings after exceeding the threshold **Effective after (seconds)**, which is a **Tenant** specific configuration:


## 11.2 DDI linked with Night Variants / Time Overflow

Night and time overflow variants define the options for what shall happen with an incoming call in scenarios when:

- no or not enough attendants are available for handling the call or
- the service number is closed.

Configure night variants and time overflow variants with the tenant’s manager account under **System data** / **Night Variants**.


Customization of night and time overflow variants

Drag a column heading here to group by that column.

| Designation | Mode | Forwarding destination (only for "Forwarding" mode) | Announcement (only for "Announcement" mode) | Tenant |
|---|---|---|---|---|
| Service Hotline - Busy | Busy | | | DEFAULT |
| Night Variant external | Announcement | | DEFAULT-NotAvailable.ende | DEFAULT |
| Night Variant internal | Forwarding | +4950505807890 | | DEFAULT |

Three **modes** of night or time overflow variants can be configured:

- **Busy:** A busy signal is played to the caller
- **Announcement:** An announcement is played to the caller, telling that no attendant is available
- **Forwarding:** The call will be forwarded to an extension number. This can be an answering machine or an overflow hotline for example.

By choosing **No** in the dropdown list for **Open** in Data Center as well as from Concierge user under **Extras → Queues** in the Concierge Client GUI, the pilot’s number can be closed.

**Procedure**

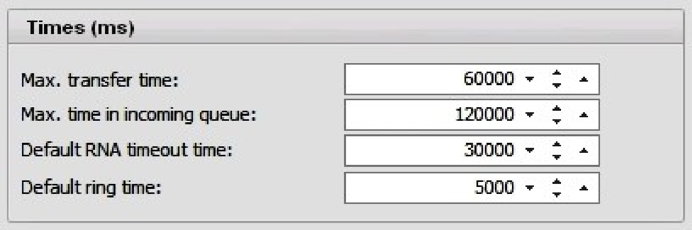
1. Use the + button on the bottom line to create a new entry. Specify a designation. Choose a mode as described above.
2. In case the mode **Forwarding** is used, configure the forwarding destination.

3. In case the mode **Announcement** is used, choose an Announcement from the dropdown list.

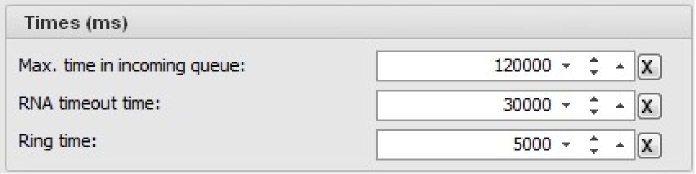
The tenant's name is assigned automatically

### 11.2.1 Time Overflow Variant / Maximum time in incoming queue

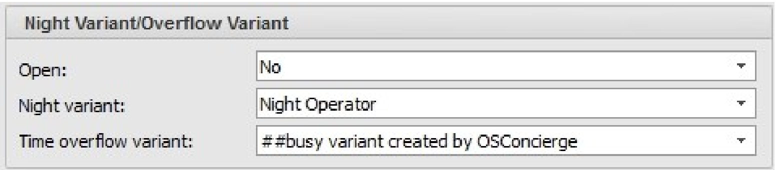
The value **Maximum time in incoming queue** describes the maximum time the system will hold the call to wait for agents before the call is routed to the specified Time overflow variant.
The default variant is specified in **the times settings of the tenant** as in the given picture, see also section 6.4.1.2 Times.




The default tenant's value can be overwritten on a DDI Lookup entry base:



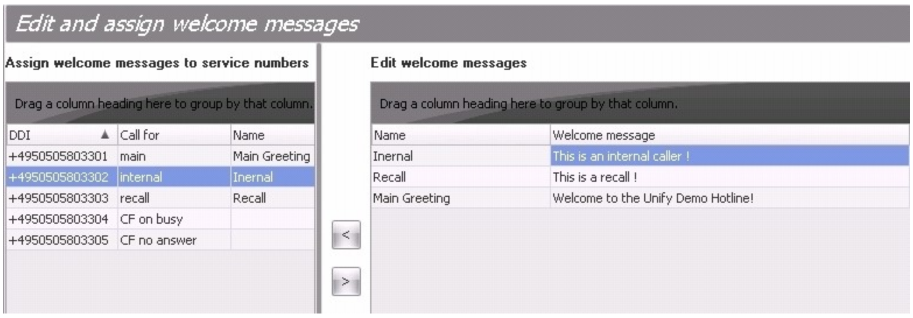

For each DDI the value in DDI's Times section is used unless this value is set to <empty>. In case it is empty the Tenant's default value for the **Max. time in incoming queue** is taken. User the button **X** right besides the value to set it to <empty>.
After exceeding this threshold the call is handled by the DDI's **Time overflow variant** selection.




## 11.3 DDI linked with Welcome messages

Welcome messages are used to inform the attendant about the incoming call and to offer him a correct greeting to the customer. For each pilot number one welcome message can be assigned. When the call arrives on the attendant's desk the **Welcome message** is displayed.
Specify the Welcome message under **Basic data** / **Welcome messages**. Highlight the pilot number on the left and highlight the required Welcome message on the right. By pressing the button < the message is assigned to the pilot number.

**NOTE:**
The duration the message is displayed can be specified!

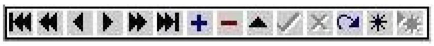


# 12 Appendix

## 12.1 Administration of data records in Data Center

### 12.1.1 Database functions

The database functions can be selected with these function buttons, which can then be used to search for, change, create and delete entries.



The following functions are possible depending on the view:

**Table:** Function buttons

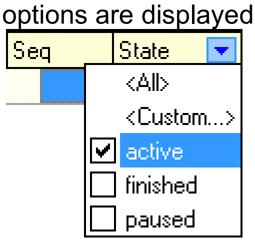
| Button | Function |
|---|---|
|  | Jumps to the start / end of the list |
|  | Jumps back / forward one page |
|  | Jumps back / forward one entry |
|  | Adds a new (blank) entry |
|  | Deletes the selected entry (a confirmation prompt follows) |
|  | Processing of the selected entry is started |
|  | Processing of the selected or new entry is completed and the data is transferred to the database |
|  | Processing of the selected or new entry is canceled |
|  | The data is called up again from the database |
|  | Defines a bookmark for the selected entry |
|  | Selects the entry for which the bookmark was set |

### 12.1.2 Table filter functions

#### 12.1.2.1 Filter options

**Access**

Always when the mouse pointer is moved over a column header, a black arrow is displayed on the right-hand site. After clicking the arrow, the filter options are displayed in a drop-down list:




**Options**

The following options can be selected:

- **<All>**: The filter is switched off. All table entries are displayed.
- **<Custom...>**: The "User-defined filter" window opens. This window is used to filter more accurately. Refer to section 12.1.2.2 User-defined filter.
- Context-sensitive filter options which are generated based on the column entries.

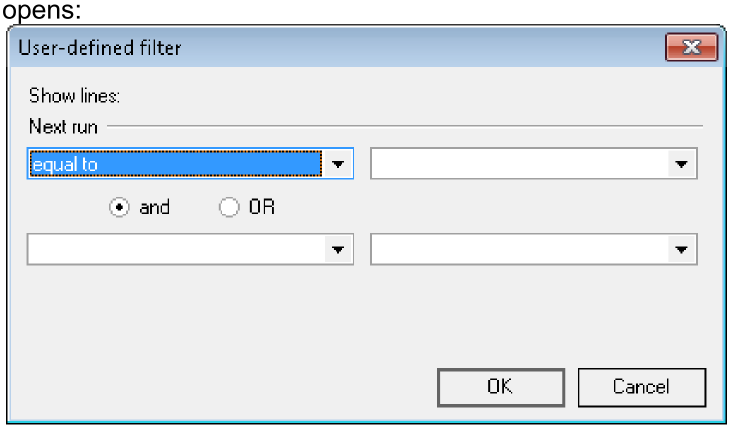
Example: If in the "State" column the **active**, **finished** and **paused** states of the several table entries are displayed, these ones are displayed as filter options.

If one of the filter options is selected, only those table entries are displayed which agree to the selected filter option.

### 12.1.2.2 User-defined filter

**Access**

After clicking the **<Custom...>** option, the "User-defined filter" window opens:




**Upper left drop-down list box**

After clicking on the upper left drop-down list box, a subset of the following options is displayed:

| | |
|---|---|
| • equal to | • greater than or equal to |
| • not equal to | • is empty |
| • less than | • is not empty |
| • less than or equal to | • True |
| • greater than | • False |

Which options are displayed, depends on the type of entries in the selected table column. One of these options can be selected.

**Upper right drop-down list box**

After clicking on the upper right drop-down list box, the entries of the selected column are displayed, and one of them can be selected.

Example: If in the upper left drop-down list box the **equal to** entry was selected, and in the upper right drop-down list box the **active** entry, all table entries which are in the **active** state are displayed.

**Lower left and lower right drop-down list boxes**

These two drop-down list boxes provide the same functions like the drop-down list boxes which were described above. They can be associated to these drop-down list boxes via the and or **OR** options.

Example: If all table entries, which are in the **active** and **pause** state shall be displayed, the following settings have to be done:

- In the upper drop-down list boxes select the **equal to** and **active** options.
- In the lower drop-down list boxes select the **equal to** and **paused** options.
- Activate the **OR** option.

**Enter of wildcard characters**

Wildcard characters are used to enter only a part of a word which shall be applied to words which contain the same string. The following wildcard characters can be entered within, on the beginning and/or on the end of a word:

- "_": The underscore character replaces an individual character.
- "%": The percent character replaces a series of characters.

**Filter bar**

After clicking **OK** in the "User-defined filter" window, the reports are filtered and displayed or not displayed in accordance with the filter settings. On the table bottom, a bar with the defined filter is displayed. The filter can be deleted, displayed and changed via the filter builder.


In the filter bar, the following options are offered:

- Check box to delete the filter
- Check box to activate and deactivate the filter
- Drop-down arrow to display the filter settings
- **Customize** button to open the "Filter builder" window

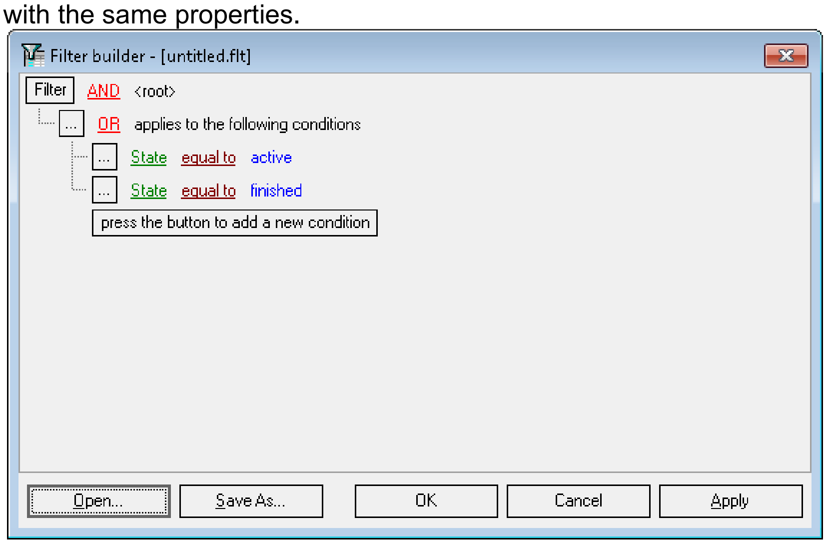
### 12.1.2.3 Filter builder

**Access**

After clicking the **Customize** button in the filter bar, the "Filter builder" window opens.

**Description**

In the "Filter builder" window, the filter which was primarily created in the "User-defined filter" window can be improved. This function can be used to reduce a big number of displayed table entries and to display table entries with the same properties.




**Menu tree**

In the menu tree, the following operating elements are offered:

- **Filter** element: After clicking **Filter**, a drop-down menu opens which offers the following menu items:
  - **Add Condition**: A new condition is added on the root of the menu tree.
  - **Add Group**: A new condition group is added on the root of the menu tree.

- **Clear All**: All condition groups and conditions are deleted in the menu tree.

- Logic operations: After clicking a logic function, e.g. AND, a drop-down menu opens which offers the **AND**, **OR**, **NOT AND**, **NOT OR** logic operations.
- Three-point element: After clicking the three-point element, a drop-down menu opens which offers the following menu items:
  - **Add Condition**: A new condition is added on the selected branch of the menu tree.
  - **Add Group**: A new condition group is added on the selected branch of the menu tree.
  - **Remove Row**: The selected condition or condition group is deleted from the menu tree.
- **press the button to add a new condition** button: This button is always located on the last branch of the menu tree. After clicking the button, a new condition is added on this branch.

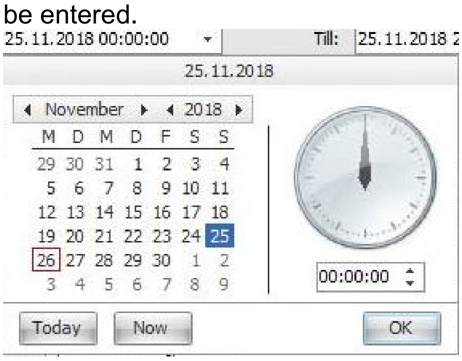
**Buttons**

On the bottom of the window, the following buttons are offered:

- **Open**: The "Open an existing filter" window opens in which an already defined filter can be opened.
- **Save As**: The "Save the active filter to file” window opens. The name of the filter file and the location were the file shall be saved must be entered.
- **OK**: The changes are confirmed, the filter rules are executed, and the “Filter builder” window is closed.
- **Cancel**: The changes are not saved and the “Filter builder” window is closed.
- **Apply**: The changes are confirmed, the filter rules are executed, and the “Filter builder” window remains open.

## 12.1.3 Calendar function

The calendar function is used everywhere in the user interface if a time must be entered.




**Calendar**

The calendar provides the following options:

- Month and year can be selected by clicking the arrow buttons.
- The required day can be marked.

**Clock**

The time can be defined by clicking the arrow buttons of the digital time display.

**Buttons**

The following buttons can be used:

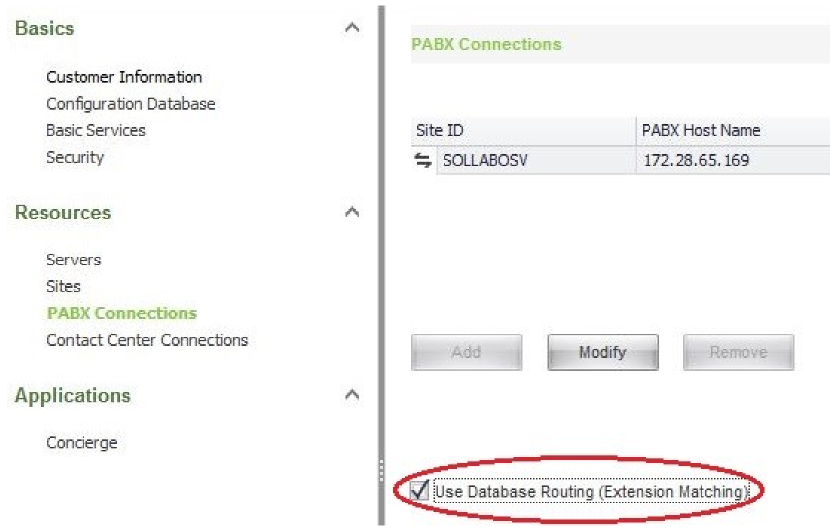
- **Today**: The entry is set to the current day, the window is instantly closed and the day is transferred into the table cell. The point in time remains on its value.
- **Now**: Day and time are set to the current value, the window is instantly closed and the value is transferred into the table cell.
- **OK**: After clicking this button, the window is instantly closed and the defined day and time settings are transferred into the table cell.

## 12.2 Private Numbering Plan

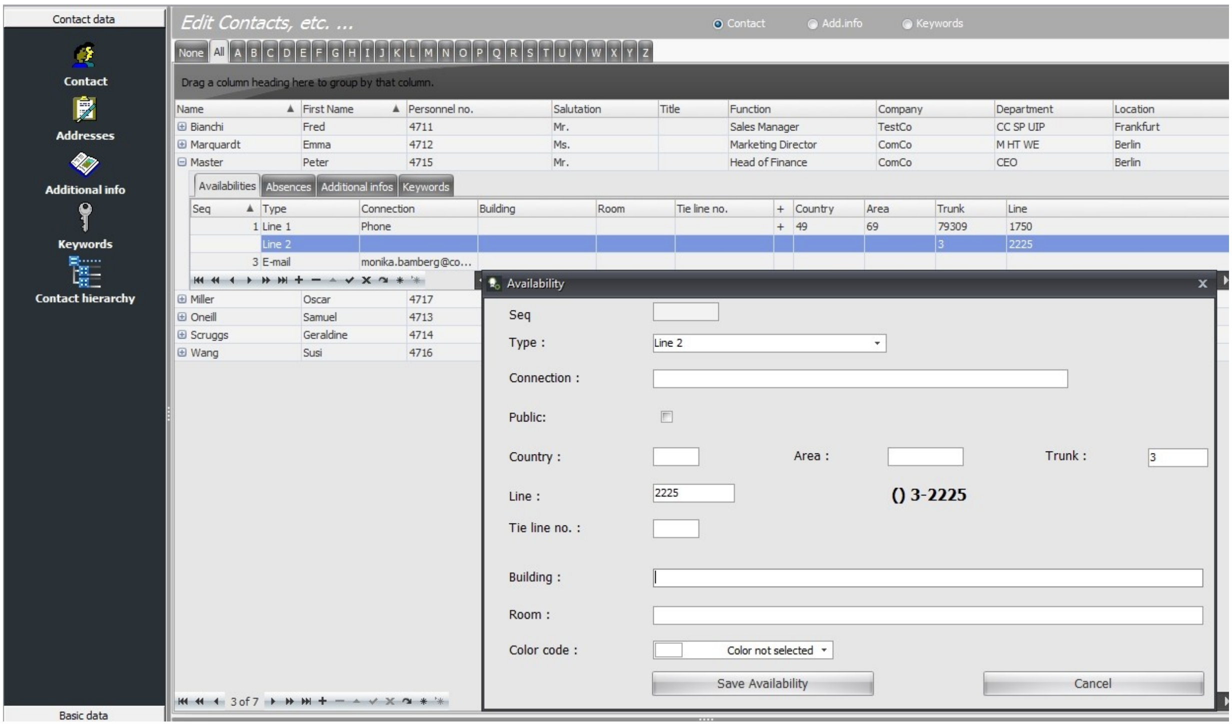
For countries with the need for a Private Numbering Plan, configure your system as follows.

**Procedure**

1. To use Private Numbering you have to synchronize PABX Extensions, therefore open System Management under Ressouces/PABX Connections and check **Use Database** Routing if not already set by default:




2. Change to **Control Center** within System Management. Make sure **ConfigSyncServer** is up and running and activate **Sync Now** under **Functions**.
3. Leave System Management and open **Concierge DataCenter** with manager login.
4. Under **Contact data** / **Availabilities** you can configure every single contact information as public (default) or private by ticking the **Public** setting or not.

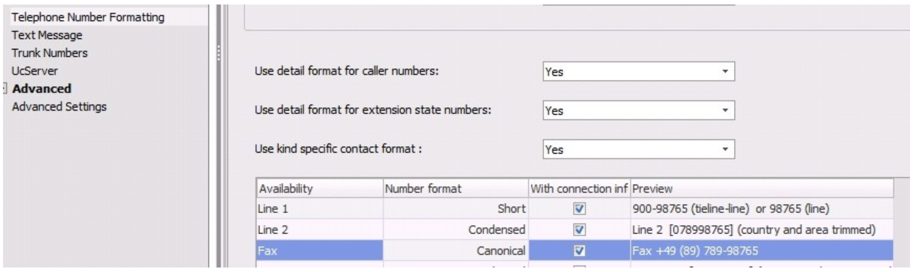



In the Availabilities tab you can clearly see the difference between private and public setting in the column **+**.
 + (Plus) indicates public, <empty> indicates private.

**NOTE**:
Changing imported member entries requires **With imported data editable** under **System data / Client configuration** (**Advanced** display level) / **Extended settings**.

**HINT:**
To use contact kind specific display in Concierge Client you have to configure it under **System data / Client configuration** (**Advanced** display level) / **Telephone Number Formatting**.

- Set Use kind specific contact format to Yes.
- Now you can choose the number format for every contact entry: Short / Condensed / Canonical:




## 12.2.1 Further information for Private Numbering within Concierge:

You can also import private numbers. The target column is named **Is_Public**. If you import data from an OSV file, the Is_Public column is filled automatically. Thereafter you can also assign a '+' for all are public or a "space" (**NOT** empty string) for all that are private or regular expressions.

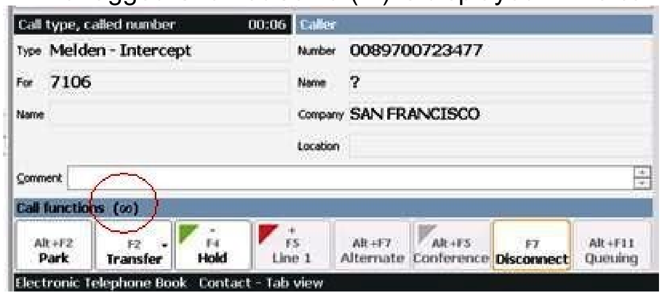
In the **ButtonConfiguration** tool, you can now assign private numbers (without a '+') to the monitor point.

In the Concierge client, public numbers are shown with ‘+’, private numbers without. In case of a short or a condensed format no difference is shown.

## 12.3 Chained calls (for external calls on OS4K >= V8R0)

With the **Chained Call** option a call can be tagged, so the call can be transferred several times. This means a caller wants to successively talk to several participants, therefore the call is tagged as **Chained Call** before it is transferred.
When the transfer destination disconnects the call, the caller will be transferred back to the CPS through the intercept mechanism of the OS4K and is signaled again at the Concierge Client. This process can be repeated as often as needed. The option **ChainedCall** must be activated during each transfer operation by the client and is available for single step transfer and consult calls.

With a tagged ChainedCall a (∞) is displayed in the call functions title bar.




The **ChainedCall** tag is not visualized in the processing queue. It is not possible to change the ChainedCall tag in the processing queue (for example, if the transfer destination changed).

After a successful transfer and termination of the call by the C-participant (the transfer destination), the call is signaled as an attendant intercept for the configured intercept extension.

**NOTE:**
On a blind transfer, the chained call tag can be identified and is pre-assigned accordingly.
On a consult transfer the chained call tag not always identified.

**NOTE:**
This feature is deactivated in default. To activate it, please contact a Unify technician.

## 12.4 European country-specific characters

**Introduction**

European country-specific characters are supported in phonetic search in the Electronic Phonebook. The following table shows the supported characters.

**Table:** European country-specific characters

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Upper case A with grave accent | **À** | | | | x | x | | | | | | | | A |
| Upper case A with Acute | **Á** | | x | | | | | | | | x | | x | A |
| Upper case A with Circumflex | **Â** | | | | x | | | | x | | | | | A |
| Upper case A with Tilde | **Ã** | | | | | | | | x | | | | | A |
| Upper case A Umlaut (Diaeresis) | **Ä** | x | | x | | | | | | | | | | AE |
| Upper case A with Ring on top | **Å** | | | | | | x | | | | | | | A |
| Double letter of upper case A and upper case E | **Æ** | | | | x | | x | | | | | | | AE |
| Upper case C with Cedilla | **Ç** | | | | x | | | | x | | | x | | C |
| Upper case E with Grave accent | **È** | | | | x | x | | | | | | | | E |
| Upper case E with Acute | **É** | | x | | x | x | | | | | x | | x | E |
| Upper case E with Circumflex | **Ê** | | | | x | | | | x | | | | | E |

|  | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Upper case E with Diaeresis (Trema) | **Ë** |  |  |  | **x** |  |  |  |  | **x** |  |  |  | E |
| Upper case I with Grave accent | **Ì** |  |  |  |  | **x** |  |  |  |  |  |  |  | I |
| Upper case I with Acute | **Í** |  | **x** |  |  | **x** |  |  |  |  | **x** |  | **x** | I |
| Upper case I with Circumflex | **Î** |  |  |  | **x** |  |  |  |  |  |  |  |  | I |
| Upper case I with Diaeresis (Trema) | **Ï** |  |  |  | **x** | **x** |  |  |  | **x** |  |  |  | I |
|  | **Đ** |  |  |  |  |  |  |  |  |  |  |  |  | D |
| Upper case N with Tilde | **Ñ** |  |  |  |  |  |  |  |  |  | **x** |  |  | N |
| Upper case O with Grave accent | **Ò** |  |  |  |  | **x** |  |  |  |  |  |  |  | O |
| Upper case O with Acute | **Ó** |  | **x** |  |  | **x** |  | **x** | **x** |  | **x** |  | **x** | O |
| Upper case O with Circumflex | **Ô** |  |  |  | **x** |  |  |  | **x** |  |  |  |  | O |
| Upper case O with Tilde | **Õ** |  |  |  |  |  |  |  | **x** |  |  |  |  | O |
| Upper case O Umlaut (Diaeresis) | **Ö** | **x** |  |  |  |  |  |  |  |  |  | **x** | **x** | OE |
| Upper case O with Slash | **Ø** |  |  |  |  |  | **x** |  |  |  |  |  |  | O |
| Upper case U with Grave accent | **Ù** |  |  |  | **x** | **x** |  |  |  |  |  |  |  | U |
| Upper case U with Acute | **Ú** |  | **x** |  |  | **x** |  |  |  |  | **x** |  | **x** | U |
| Upper case U with Circumflex | **Û** |  |  |  | **x** |  |  |  |  |  |  |  |  | U |

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Upper case U Umlaut (Diaeresis) | **Ü** | x | | | | | | | | | | x | x | UE |
| Upper case Y with Acute | **Ý** | | x | | | | | | | | | | | Y |
| Esszett, Double letter of s and z | **ß** | x | | | | | | | | | | | | SS |
| Lower case a with Grave accent | **à** | | | | x | x | | | | | | | | A |
| Lower case a with Acute | **á** | | x | | | | | | | | x | | x | A |
| Lower case a with Circumflex | **â** | | | | x | | | | x | | | x | | A |
| Lower case a with Tilde | **ã** | | | | | | | | x | | | | | A |
| Lower case a Umlaut (Diaeresis) | **ä** | x | | x | | | | | | | | | | AE |
| Lower case a with Ring on top | **å** | | | x | | | x | | | | | | | A |
| Double letter of lower case a and e | **æ** | | | | x | | x | | | | | | | AE |
| Lower case c with Cedilla | **ç** | | | | x | | | | x | | x | x | | C |
| Lower case e with Grave accent | **è** | | | | x | x | | | | | | | | E |
| Lower case e with Acute | **é** | | x | | x | x | | | | | x | | x | E |
| Lower case e with Circumflex | **ê** | | | | x | | | | x | | | | | E |
| Lower case e with Diaeresis (Trema) | **ë** | | | | x | | | | | x | | | | E |

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Lower case i with Grave accent | **ì** | | | | | **x** | | | | | | | | I |
| Lower case i with Acute | **í** | | **x** | | | **x** | | | | | **x** | | **x** | I |
| Lower case i with Circumflex | **î** | | | | **x** | | | | | | | **x** | | I |
| Lower case i with Diaeresis (Trema) | **ï** | | | | **x** | **x** | | | | **x** | | | | I |
| Lower case n with Tilde | **ñ** | | | | | | | | | | **x** | | | N |
| Lower case o with Grave accent | **ò** | | | | | **x** | | | | | | | | O |
| Lower case o with Acute | **ó** | | **x** | | | **x** | | **x** | **x** | | **x** | | **x** | O |
| Lower case o with Circumflex | **ô** | | | | **x** | | | | **x** | | | | | O |
| Lower case o with Tilde | **õ** | | | | | | | | **x** | | | | | O |
| Lower case o Umlaut (Diaeresis) | **ö** | **x** | | | | | | | | | | **x** | **x** | OE |
| Lower case o with Slash | **ø** | | | | | | **x** | | | | | | | O |
| Lower case u with Grave accent | **ù** | | | | **x** | **x** | | | | | | | | U |
| Lower case u with Acute | **ú** | | **x** | | | **x** | | | | | **x** | | **x** | U |
| Lower case u with Circumflex | **û** | | | | **x** | | | | | | | | | U |
| Lower case u Umlaut (Diaeresis) | **ü** | **x** | | | | | | | **x** | | **x** | **x** | **x** | UE |
| Lower case y with Acute | **ý** | | **x** | | | | | | | | | | | Y |

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Lower case y with Diaeresis | ÿ | | | | x | | | | | | | | | Y |
| Upper case A with Ogonek | Ą | | | | | | | x | | | | | | A |
| Lower case a with Ogonek | ą | | | | | | | x | | | | | | A |
| Upper case C with Acute | Ć | | | | | | | x | | | | | | C |
| Lower case c with Acute | ć | | | | | | | x | | | | | | C |
| Upper case C with hácek | Č | | x | | | | | | | x | | | | C |
| Lower case c with hácek | č | | x | | | | | | | x | | | | C |
| Upper case D with hácek | Ď | | x | | | | | | | | | | | D |
| Lower case d with hácek | ď | | x | | | | | | | | | | | D |
| Upper case E with a single point on top | Ė | | | | | | | | | x | | | | E |
| Lower case e with a single point on top | ė | | | | | | | | | x | | | | E |
| Upper case E with Ogonek | Ę | | | | | | | x | | | | | | E |
| Lower case e with Ogonek | ę | | | | | | | x | | | | | | E |
| Upper case E with hácek | Ě | | x | | | | | | | | | | | E |
| Lower case e with hácek | ě | | x | | | | | | | | | | | E |
| Upper case G with Breve | Ğ | | | | | | | | | | | x | | G |

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Lower case g with Breve | ğ | | | | | | | | | | | x | | G |
| Upper case I with a single point on top | İ | | | | | | | | | | | x | | I |
| Lower case i ohne Punkt | ı | | | | | | | | | | | x | | I |
| Upper case L with Slash | Ł | | | | | | | x | | | | | | L |
| Lower case l with Slash | ł | | | | | | | x | | | | | | L |
| Upper case N with Acute | Ń | | | | | | | x | | | | | | N |
| Lower case n with Acute | ń | | | | | | | x | | | | | | N |
| Upper case N with hácek | Ň | | x | | | | | | | | | | | N |
| Lower case n with hácek | ň | | x | | | | | | | | | | | N |
| Upper case O with double-Acute | Ő | | | | | | | | | | | | x | O |
| Lower case o with double-Acute | ő | | | | | | | | | | | | x | O |
| Double letter of upper case O and E | Œ | | | | x | | | | | | | | | OE |
| Double letter of lower case o and e | œ | | | | x | | | | | | | | | OE |
| Upper case R with hácek | Ř | | x | | | | | | | | | | | R |
| Lower case r with hácek | ř | | x | | | | | | | | | | | R |
| Upper case S with Acute | Ś | | | | | | | x | | | | | | S |
| Lower case s with Acute | ś | | | | | | | x | | | | | | S |

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Upper case S with Cedilla | **Ş** | | | | | | | | | | | **x** | | S |
| Lower case s with Cedilla | **Ş** | | | | | | | | | | | **x** | | S |
| Upper case S with hácek | **Š** | | **x** | | | | | | | **x** | | | | S |
| Lower case s with hácek | **š** | | **x** | | | | | | | **x** | | | | S |
| Upper case T with hácek | **Ť** | | **x** | | | | | | | | | | | T |
| Lower case t with hácek | **ť** | | **x** | | | | | | | | | | | T |
| Upper case U with Ring (Krouzek) on top | **Ů** | | **x** | | | | | | | | | | | U |
| Lower case u with Ring (Krouzek) on top | **ů** | | **x** | | | | | | | | | | | U |
| Upper case U with double-Acute | **Ű** | | | | | | | | | | | | **x** | U |
| Lower case u with double-Acute | **ű** | | | | | | | | | | | | **x** | U |
| Upper case Y with Diaeresis | **Ÿ** | | | | **x** | | | | | | | | | Y |
| Upper case Z with Acute | **Ź** | | | | | | | **x** | | | | | | Z |
| Lower case z with Acute | **ź** | | | | | | | **x** | | | | | | Z |
| Upper case Z with single point on top | **Ż** | | | | | | | **x** | | | | | | Z |
| Lower case z with single point on top | **ż** | | | | | | | **x** | | | | | | Z |
| Upper case Z with hácek | **Ž** | | **x** | | | | | | | **x** | | | | Z |

| | Special Letter | German | Czech | Finish | French | Italian | Norwegian | Polish | Portuguese | Russian (Transkription) | Spanish (Castellano) | Turkish | Hungarian | International Substitute |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Lower case z with hácek | ž | | x | | | | | | | x | | | | Z |

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