# Clearspan Hosted Thin Receptionist User Guide

RELEASE 20.0.33

April 2015

**Mitel**®

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Clearspan Hosted Thin Receptionist User Guide
Release #20.0.33
2854-004
April 2015

# REVISION HISTORY

The following represents the revision history of this publication.

| REVISION NUMBER | DATE COMPLETED | POINT OF CONTACT | DESCRIPTION |
| --- | --- | --- | --- |
| 004 | 03/2015 | Velvet Moore | Updated for R20.0.33; rebranded |
| 003 | 08/2014 | Velvet Moore | R20 |
| 002 | 08/22/2013 | Bev Marsh | R19.0 |
| 001 | 11/30/2011 | Bev Marsh | New Document for R17.0 |

# ABOUT THIS DOCUMENT

This guide provides step-by-step procedures and reference information for Clearspan Hosted Thin Receptionist Release 20.0.33.

Clearspan Hosted Thin Receptionist herein is referred to as Receptionist, Receptionist client, or client.

## HOW THIS GUIDE IS ORGANIZED

The following table identifies the sections to refer to for information about the functionality provided by Receptionist.

| SECTION | OVERVIEW |
| --- | --- |
| Introduction to Receptionist | This section provides an overview of Receptionist. |
| Getting Started | This section describes how to sign in and out of Receptionist, perform the initial setup, change password, and obtain help. |
| Explore Workspace | This section provides an overview of the user interface. |
| Manage Calls | This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls. |
| Record Calls | This section includes information on how to send e-mail messages to contacts. |
| Monitor IM&P Contacts and Chat with Contacts | This section provides information about monitoring your IM&P contacts and chatting with them. |
| Manage Contacts | This section provides information on managing contact directories and searching for contacts. |
| Monitor Contacts | This section describes static and dynamic monitoring and includes information on how to select contacts to monitor. |
| Manage Call History | This section provides information on managing call logs. |
| Manage Queued Calls | This section provides information on managing queued calls. |
| Configure Receptionist | This section describes the settings you |

| | |
|---|---|
| | can configure to set up and customize Receptionist for improved usability. |
| Appendix A: Glossary and Definitions | This appendix contains definitions of call states and phone states used in Receptionist. |
| Appendix B: Keyboard Shortcuts | This appendix describes keyboard shortcuts available in Receptionist. |

# ADDITIONAL RESOURCES

For more information on Receptionist and on Application Server procedures used by group administrators, department administrators, and users, see the following Clearspan guides:

- Clearspan Hosted Thin Receptionist Configuration and Administration Guide

- Clearspan Hosted Thin Receptionist Quick Reference Guide

- Clearspan Application Server Group Web Interface Administration Guide (Parts 1 and 2)

- Clearspan Getting Started Web Interface Administration Guide

# INTRODUCTION TO RECEPTIONIST

Clearspan Receptionist is a carrier-class Internet Protocol (IP) Telephony Attendant Console, specifically developed for hosted environments.  It is used by "front-of-house" receptionists or telephone attendants, who screen inbound calls for enterprises. Clearspan Receptionist realizes the promise of IP telephony by enhancing business processes and delivering rich services in a user-friendly way.

Clearspan Receptionist delivers the following real benefits to users:

- An elegant design that is aesthetically pleasing

- An ergonomic design that follows the natural work "flow" of a call from the left to the right of the screen

- Improved business processes as only "valid" options are presented to the attendant

- Professional call handling as critical information is available in "real time"

- Accurate delivery of messages through a one-step process when people are unavailable

- Web-based interface, accessible from a web browser

- Introduced in Release 17.sp2, Hosted Thin Receptionist is a SaaS Rich Internet Application (RIA) hosted on Clearspan and allows you to manage calls from a web browser.

> **Note**: For information about the web browsers supported by Receptionist, see the *Clearspan Hosted Thin Receptionist Configuration and Administration Guide* or contact your administrator.

This document describes the Clearspan Hosted Thin Receptionist client.

# RECEPTIONIST ENTERPRISE

The Receptionist Enterprise edition is a Clearspan full-featured client, designed to support the needs of front-office personnel in any environment.  It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options, and views, Outlook integration, and other features required in large or distributed organizations.

## USER INTERFACE

*Figure 1* shows the main interface of Receptionist Enterprise.
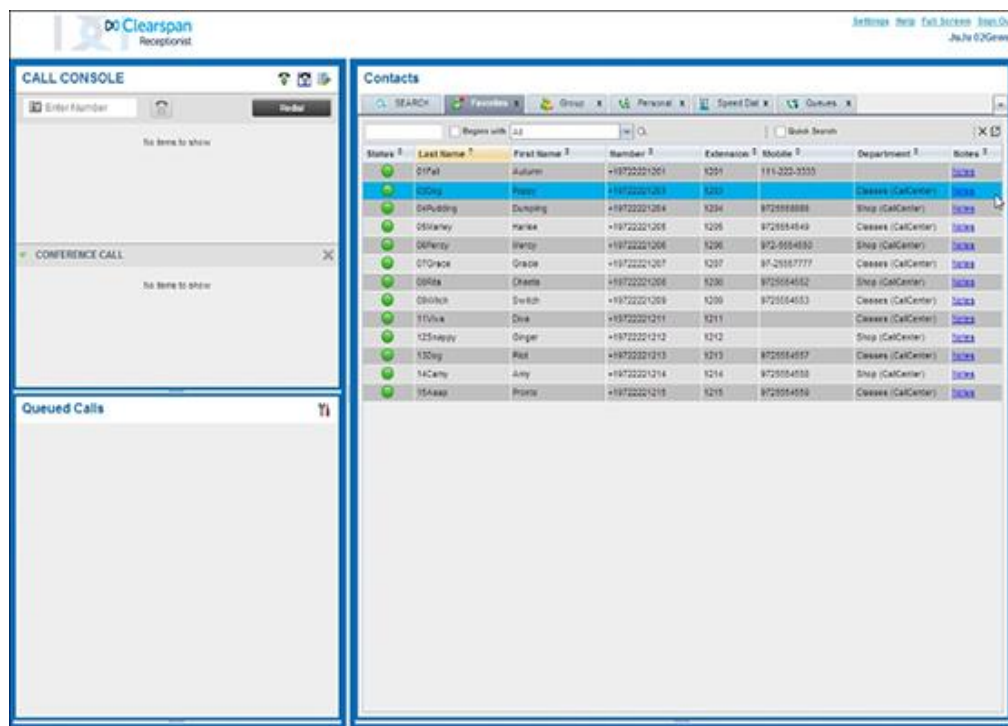


**Figure 1  Receptionist Enterprise Main Interface**

The interface contains the following main work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user.  It also displays error, warning, and information messages to the user.

- **Call Console** – This is where you view and manage your current calls.

- **Queued Calls pane** – This is where you manage queued calls.  You need to have the Clearspan Supervisor service assigned to have access to this feature.

- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.

- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.

- **Call History dialog box** – You use the *Call History* dialog box to view and return your past calls.

- **Chat windows** – You use a *Chat* window to chat with Instant Messaging and Presence (IM&P) contacts.

For more information, see section *Explore Workspace*.

## CONTACT DIRECTORIES

This following table lists the contact directories available in Receptionist Enterprise.  The *Comments* column specifies additional settings required to access the directory.

| DIRECTORY NAME | CONTENTS | COMMENTS |
|---|---|---|
| Favorites | This consists of the contacts whose phone status you are currently monitoring.  The list of contacts to monitor must be configured for you or by you on the web portal. | Monitoring is limited to 200 static contacts enterprise-wide. |
| Group/Enterprise | This consists of all contacts in your Clearspan group or enterprise directory.  This is the same directory that you can access through the web portal.  However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group. | You can dynamically monitor contacts in your Group/Enterprise directory.  The maximum number of contacts you can dynamically monitor is configured by your administrator.  The default is 100. |
| Common | This consists of all contacts in your group's common phone list configured by your administrator on Clearspan. | The directory may be empty if your administrator has not configured any contacts. |
| Monitored Contacts | This consists of contacts whose phone status you are currently dynamically monitoring. | If the directory is empty, it is not shown. |
| Personal | This consists of all contacts in your personal directory on the Clearspan web portal. | |
| Speed Dial | This consists of all speed dial codes configured for you or by you for your Speed Dial services. | You need to have Speed Dial 8 and/or Speed Dial 100 services assigned. |
| Instant Message | This consists of the IM&P users that you are subscribed to. | You need to have the Integrated IM&P or Third-Party IM&P service assigned. |
| Queues | This consists of the call centers and associated DNIS numbers that you are staffing as an agent or supervising.  It allows you to transfer calls into queues quickly. | You need to have Call Center service assigned. |
| LDAP (search only) | This consists of all users found in the configured LDAP directory.  Receptionist provides you with search access to LDAP and results are displayed in the *Search* panel. | The directory needs to be configured by your system administrator.  Otherwise, it is not visible.  You also need to have the LDAP Integration service assigned. |
| Custom: <custom contact directory | This consists of all contacts in your custom contact directories configured | You may not have any contact |

| DIRECTORY NAME | CONTENTS | COMMENTS |
|---|---|---|
| name> | by your administrator on the web portal.  Each custom directory is displayed in a separate panel. | directories or you may have several. |
| Outlook | This consists of all your Outlook contacts. | You need to have Outlook Integration service assigned. |

For information on managing your contact directories, see section *Manage Contacts*; for information on using your contacts to make and manage calls, see section *Manage Calls*; for information on monitoring contacts, see section *Monitor Contacts*.

## CALL MANAGEMENT FUNCTIONS

The Receptionist Enterprise provides the following call management functions:

| FUNCTION | QUICK REFERENCE |
|---|---|
| View Call Details | View Call Information |
| Dial Contact | Dial Contact |
| Dial Ad Hoc Number | Dial Ad Hoc Number |
| Redial | Redial Number |
| Speed Dial | Speed Dial |
| Dial From Call History | Dial from History |
| Answer Call | Answer Call |
| Hold Call | Put Call on Hold |
| Resume Held Call | Resume Held Call |
| End Call | End Call |
| Blind Call Transfer | Blind Transfer Call |
| Supervised Call Transfer | Conduct Supervised Transfer |
| Consulted Call Transfer | Transfer with Consultation |
| Transfer to Voice Mail | Transfer to Voice Mail |
| Transfer to Queue | Transfer to Queue |
| Busy Camp On | Conduct Busy Camp On |
| Group Call Park | Conduct Group Call Park |

| FUNCTION | QUICK REFERENCE |
|---|---|
| Directed Call Pickup | Pick Up Call |
| Operator Call Barge-in | Barge in on Call |
| Start Conference Call | Start Three-Way Conference |
| Add Participant | Add Participant to Conference |
| Hold Conference Call | Hold Conference |
| Resume Conference Call | Resume Held Conference |
| Put Participant on Hold | Put Conference Participant on Hold |
| Take Participant off Hold | Resume Conference Participant |
| End Participant | Remove Conference Participant |
| Leave Conference Call | Leave Conference |
| End Conference Call | End Conference |

For more information, see section *Manage Calls*.

# GETTING STARTED

Receptionist is hosted on Clearspan and is accessed over the network either from your web portal or from a web browser. The sign-in procedure is the same for all Receptionist editions.

> **Notes**: The minimum required screen resolution for Receptionist is 1024 x 768 pixels.
>
> Receptionist does not support signing in as different users from the same machine at the same time.
>
> When using the Outlook Integration feature with Microsoft Outlook 2010 or Outlook 2013 (32- or 64-bit edition), make sure Outlook is running before Receptionist is launched; otherwise, Outlook Integration functionality does not work.

## LAUNCH RECEPTIONIST FROM WEB PORTAL

Clearspan has a Single Sign-On feature. When you access the Receptionist client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

To access Receptionist from the web portal:

1.  Log in to your Clearspan web portal.

2.  From the *Launch* drop-down list at the top right-hand side of the Clearspan *Logo* pane, select the link for your Receptionist service.
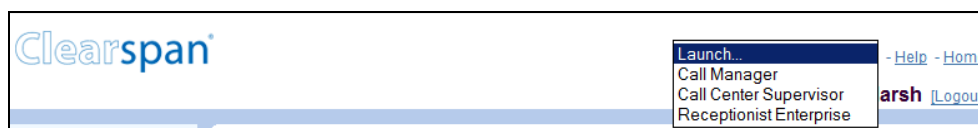


**Figure 2  Clearspan Web Portal Logo Pane – Launching Receptionist**

Receptionist starts and you are automatically signed in.

## SIGN IN FROM WEB BROWSER

When signing in to the client, use the same credentials you use to connect to the web portal.

To access Receptionist from a web browser:

1.  In your web browser, enter the URL of the Receptionist client on Clearspan. The Receptionist *Sign-in* page appears.
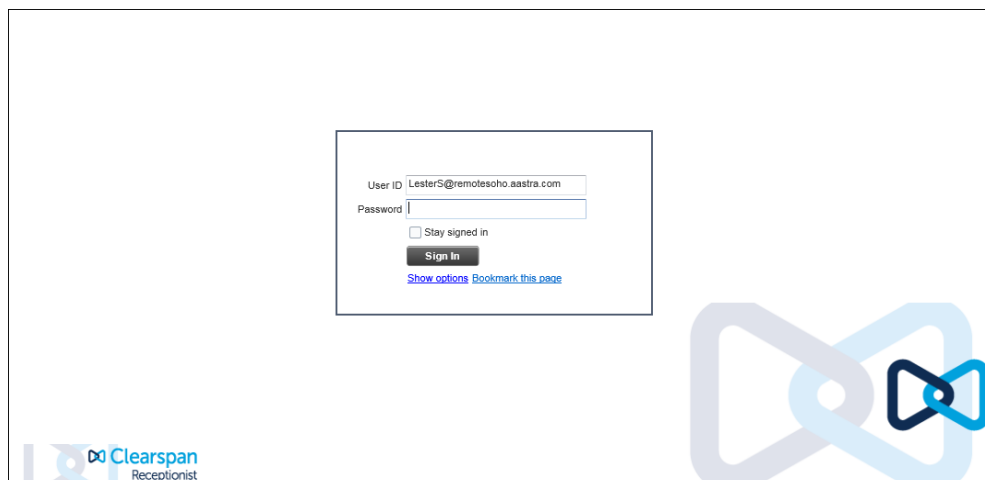
**Figure 3  Receptionist Sign-in Page**

**2.** Enter your Clearspan user ID in *user@domain* format and your password.

If you are unsure of your user ID and password, contact your company (group or enterprise) administrator.

If you use the default domain, you can enter just the *user* part of your ID.  The system then appends the default domain to it before authenticating you.  If your domain is different from the default domain, you have to enter your user ID with the domain name.

Optionally, if your system has been configured to allow it, you can configure your domain name.

**3.** To configure your domain or the Receptionist language, click **Show options**.  The area expands displaying advanced options.



**Figure 4  Receptionist Sign-in Page – Advanced Options**

**4.** To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the default domain.

5. To change the language, from the *Language* drop-down list, select a new language.

6. Check *Stay signed in* to instruct the client to automatically connect and sign in to the server when it detects a network connection.

   This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

7. To add a bookmark to the *Receptionist Sign-in* page in your browser, click **Bookmark this page** and follow the instructions of your browser.

8. Click **Sign In**.

   Receptionist starts and you are signed in.

> **Note**: In some browser/operating system combinations, when you press ENTER instead of the Sign In button, a blank page appears and not the Receptionist main interface.

# SIGN-IN RESTRICTIONS

You can only have one active Receptionist session at a time. When you sign in from a second location, you are automatically signed out from the original location with the following message: "You have been signed out as you have signed in from another location."
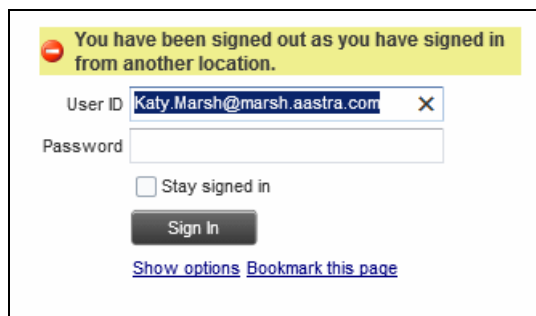


**Figure 5  Sign-in Dialog Box with Error Message**

# GET HELP

Receptionist provides you with online access to a portable document format (PDF) version of this guide.



**Figure 6  Main Interface (Top of Page) – Help Link**

To access this document:

Click the **Help** link at the top right-hand side of the main interface.

# SIGN OUT

To sign out of Receptionist:

**1.** Click the **Sign Out** link at the top right-hand side of the main interface.

A message appears asking you whether you would like to save your current workspace.
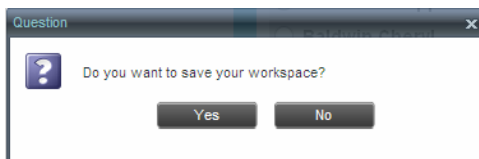
**Figure 7  Question Dialog Box**

2.  Click **Yes** to save your current workspace.  This allows you to retain the same setup at your next session.

3.  For information on workspace elements that can be customized, see section *Workspace*.

## SET UP YOUR ENVIRONMENT

It is recommended that you configure Receptionist as follows when you first log in.

- Select call centers to manage – see section *Select Call Centers to Manage*.

- Join queues and set your post sign-in ACD state – see section *Settings – Application*.

For information about other Receptionist configuration options, see section *Configure Receptionist*.

## CHANGE YOUR IM&P PRESENCE STATE

When you sign in to Receptionist, Receptionist connects to the Instant Messaging and Presence (IM&P) server and sets your presence state to "Available".

Subsequently, Receptionist displays your unified instant messaging presence, which reflects your presence in various instant messaging clients when you are logged in through several devices and applications.

Your unified presence state can change either when you manually change it or when Receptionist receives information about your presence state change from other clients.

The possible states are *Available*, *Busy*, *Away*, and *Offline*. When you are in the *Available*, *Busy*, or *Away* state, you are considered to be online.

Receptionist also allows you to provide a status message to display to your contacts.

IM&P capabilities are only available when you are online. For more information about the IM&P capabilities of Receptionist, see section *Monitor IM&P Contacts and Chat with Contacts*.

To change your presence state:

Click the **Presence** box at the top right-hand side of the main window and select the new state from the drop-down list.
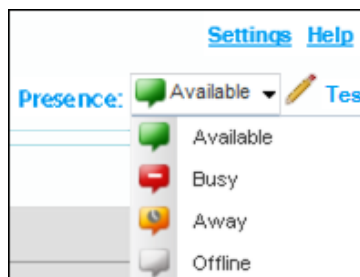


**Figure 8  Logo Pane – IM&P Presence State Control**

When you are online, you can set a status message to display to your contacts.

To set an IM&P status message:

1. Click the **Edit** button ![edit] next to the *Presence* box. The *Set IM Status* dialog box appears.
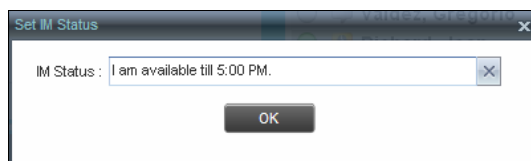
**Figure 9  Set IM Status Dialog Box**

2.  Enter your message and click **OK**.

3.  To see your message, move the mouse over the Edit button .  A ToolTip with your presence massage appears.
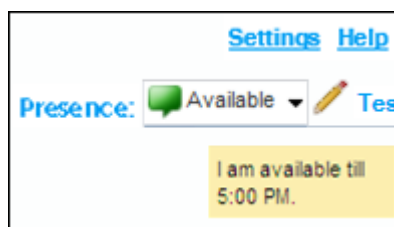


**Figure 10  IM&P Status Message**

# CHANGE YOUR PASSWORD

Remember that this is your web portal password and that you have to use this new password when accessing your web portal.  The password must follow the password rules set on Clearspan.

To change your password:

1.  At the top right-hand side of the main interface, click the **Settings** link.  The *Settings – General* page appears.

2.  In the *Account* area, click the **Change Password** link.  The area expands allowing you to change your password.



**Figure 11  Account – Change Password**

3.  Enter your current and new password and click **Change Password**.

    Note that the Reset button does not reset your password.  It only clears the input boxes.

# EXPLORE WORKSPACE

When you sign in to Receptionist, the main page appears where you perform most of your call management and monitoring tasks.  In addition, the main page provides a link to the *Settings* pages, where you configure various Receptionist settings.
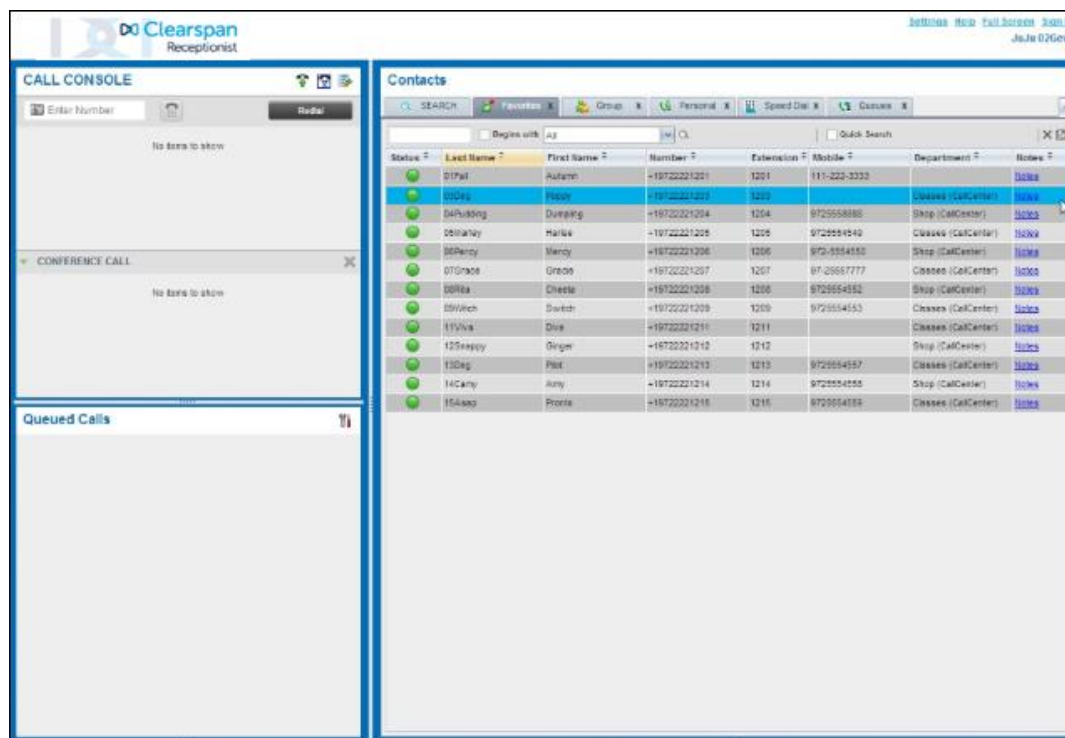


**Figure 12  Receptionist Enterprise Main Interface**

Many visual aspects of Receptionist are configurable.  For example, you can decide which windows should be open and change the size and placement of windows on the screen.  You can then save your workspace and retrieve it the next time you log in.  For more information on saving your settings, see section *Workspace*.

To work in full screen mode, click the **Full Screen** link in the top-right corner of the main window.  The link changes to *Exit Full Screen*, which you can click to exit full screen mode.

> **Notes**: To work in full screen mode, you can also click F11 when the main window is in focus.
>
> The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.
>
> When a window is vertically resized, the panes do not always resize to fill the window.  To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken.  Context-based controls that allow you to take actions on calls are called action buttons.  For the list of controls available in Receptionist, see section *Controls*.  The action buttons are described in section *Call Action Buttons*.

This section describes the following elements of the Receptionist main interface:

- Logo Pane

- Call Console

- Contacts Pane

- Queued Calls Pane

- Controls

The *Settings* pages, accessed via the Settings link and used to configure Receptionist, are described in section *Configure Receptionist*.

The *Call History* dialog box is described in section *Manage Call History*.

The *Chat* windows are described in section *Monitor IM&P Contacts and Chat with Contacts.*

# LOGO PANE

The Receptionist main page and *Settings* pages contain a *Logo* pane, which displays the Receptionist client or company logo, global messages, links to other interface elements or Receptionist functions, and information about the signed-in user.
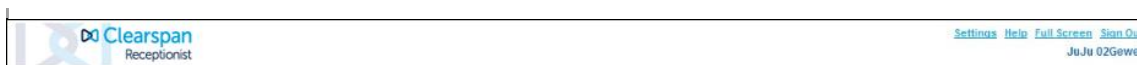


**Figure 13  Receptionist Logo Pane**

## GLOBAL MESSAGE AREA

The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user.  A message is displayed for several seconds and then disappears.

## SETTINGS, HELP, AND SIGN OUT LINKS

The *Logo* pane displays links to the *Settings* pages, where you can configure the client, and the Help and Sign Out links.

## SIGNED-IN USER INFORMATION

Information about yourself, that is, your name, your availability to chat and take calls, and your voice mail status, is displayed at the top right-hand side of the main interface.
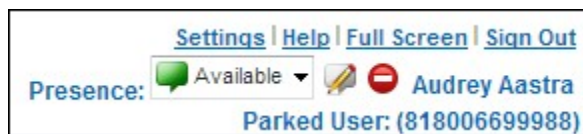


**Figure 14  Signed-in User Information**

Your current availability icons are displayed to the left of your name as follows:

- Presence – This is your unified IM&P presence state.  The possible states are *Available* (🟢), *Busy* (🔴), *Away* (🟡), or *Offline* (⚪).

- Information about the following services and features:

- Calendar Presence Integration

- In a Meeting ● – Your Exchange calendar shows that you are currently busy (in a meeting).

- Away ● – Your Exchange calendar shows that you are out of the office.

- Call Forwarding Always (CFA) ➡ – You have activated the Call Forwarding Always service.

- Do Not Disturb (DND) ⊖ – You have activated the Do Not Disturb service.

- Voice Messaging 📼.

The information is presented in the following format:

<In a Meeting/Away/CFA/DND> <Voice Messaging>

The *<In a Meeting/Away/CFA/DND>* state is represented by one icon with the *In a Meeting/Away* states having precedence over the CFA and DND states, and the CFA state having precedence over the DND state.

If your Exchange calendar state is not *In a Meeting* or *Away* and DND and CFA services are not turned on, this icon is not displayed.

The Voice Messaging icon is present only if you have outstanding voice messages.

In addition, if a call is parked against your extension, the following information appears:

Parked User:  <First Name> <Last Name> (<Phone Number/Extension>).

# CALL CONSOLE

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section *Manage Calls*.
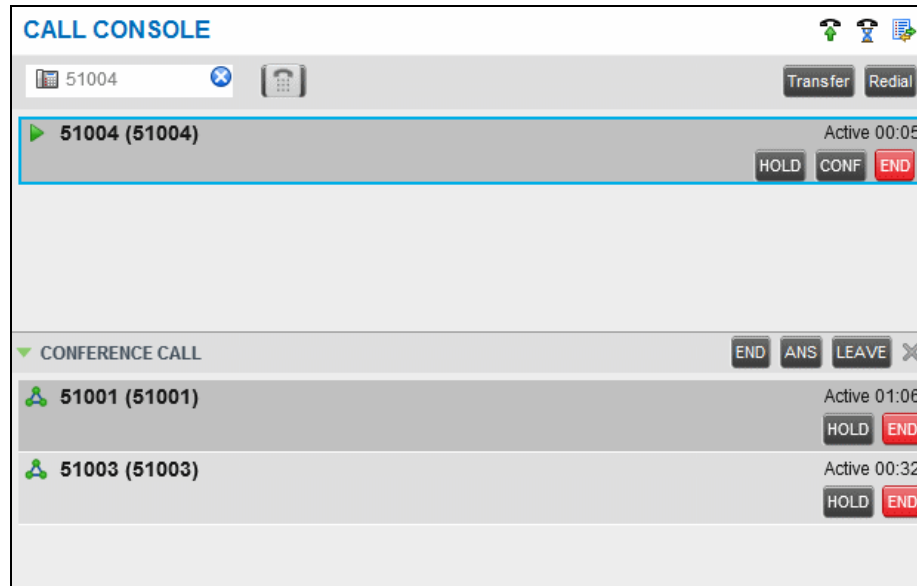


**Figure 15  Call Console**

The *Call Console* contains the following areas:

- Header

- Dialer

- Current Calls

- Conference Call Panel

## HEADER

The Call Console header contains the following controls:

- Call History button  – This allows you to access the list of your previous calls.

- Call Waiting button  – This allows you to enable the Call Waiting service.

- Auto Answer button  – This allows you to answer your calls automatically.

DIALER

The *Dialer*, located at the top of the *Call Console*, below the header, allows you to make ad hoc calls.
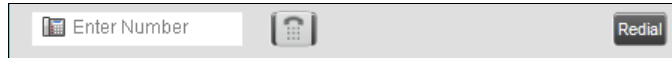


**Figure 16  Call Console – Dialer**

- The *Enter Number* text box is where you enter the number to dial.

- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls.  For more information, see sections

*Call States and* Actions and 0*Call Action Buttons.*

## CURRENT CALLS

The *Call Console* displays your current calls and allows you to take actions on them.

If you are involved in a conference call, its details are displayed in the *Conference Call* panel at the bottom of the *Call Console.* The *Conference Call* panel is described in the following section.
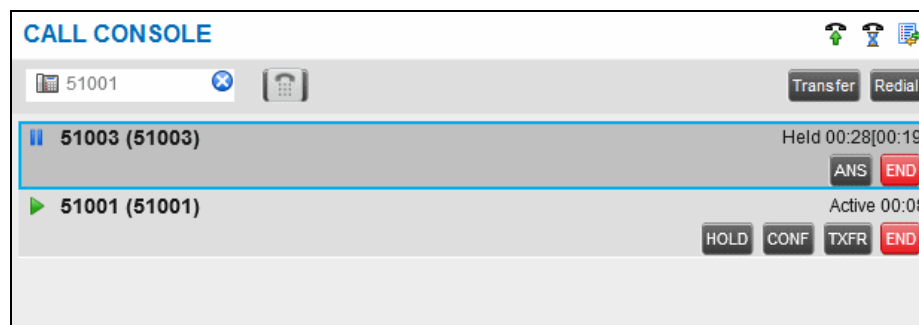


**Figure 17  Call Console – Current Calls**

Each call is listed on a separate line with the following information:

- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.

  For a recalled call, the following information appears:  Recall :  <Caller's name>; via: <Call parked against user>.

- Call State icon – This is a visual representation of the current state of the call.  For more information, see section

*Call States and* Actions.

- Call State name – This is the display name of the state the call is currently in.

- Call duration [Held duration] – This is the duration of the call from the time the call was received from Clearspan and it accurately reflects how long the call has been present in the system.  In addition, for held calls, the time a call has been on hold is also displayed.

- Security Classification (if applicable) – This is the security classification level of the call.

- Action buttons – These buttons are for the operations that you can currently take on the call.  For more information, see sections

*Call States and* Actions and *Call Action Buttons.*

## CONFERENCE CALL PANEL

The *Conference Call* panel displays your current conference and allows you to manage your conference calls.  You can only be involved in one conference call at a time.
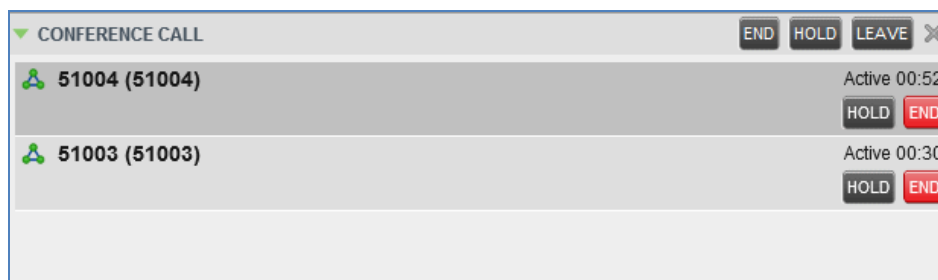


**Figure 18  Conference Call Panel**

The header bar contains various controls that allow you to manage the conference:

- Hold Conference button ![HOLD] – This allows you to place the conference on hold.

- Resume Conference button ![ANS] – This allows you to resume a held conference.

- Leave Conference button ![LEAVE] – This allows you to leave the conference.

- End Conference button ![END] – This allows you to end the conference.

The panel lists the call legs that make up your current conference.  Each two-way call is displayed on a separate line.  The information displayed for each call leg is the same as the information displayed for a two-way call.  For information, see section 0*Current Calls*.

## CALL STATES AND ACTIONS

The following table lists the possible call states and actions that can be performed in each state.

| CALL STATE | DISPLAY NAME | DISPLAY ICON | CALL PERSONALITY | CALL ACTIONS |
|---|---|---|---|---|
| Ringing In (Local) | Incoming Local | | Click-To-Dial | Answer, End |
| Ringing In (Remote) | Incoming | | Terminator | Answer, Conference, End |
| Ringing Out, Outgoing | Outgoing | | Originator | Conference, End |
| Active | Active | | Any | Transfer, Hold, Park, Camp, End, Conference |
| On Hold | Held | | Any | Transfer, Resume, Park, Camp, End, Conference |
| On Hold (Remote) | Remote Held | | Any | Transfer, Hold, End, Conference |
| Active (In Conference) | Active | | Conference | Transfer, Hold, End |
| Held (In Conference) | Held | | Conference | Resume, Transfer, End |
| Ringing In (Recalled Call) | Recalled | | Terminator | Answer, Conference, End |
| Parked Call | Parked (<DN>) | | Any | Answer, End |

# CONTACTS PANE

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls.  For information on using contacts to manage calls, see section *Manage Calls*.  For information about organizing and managing your contact directories, see section *Manage Contacts*.



**Figure 19  Receptionist Enterprise Contacts Pane**

The tabs you see depend on your Receptionist edition, system configuration, as well as the services assigned to you.  For information, see section *Introduction to Receptionist* or see your administrator.

When you click a contact in any contact directory, the contact expands and information about the contact appears as well as the action buttons for the operations that you can currently perform on that contact.
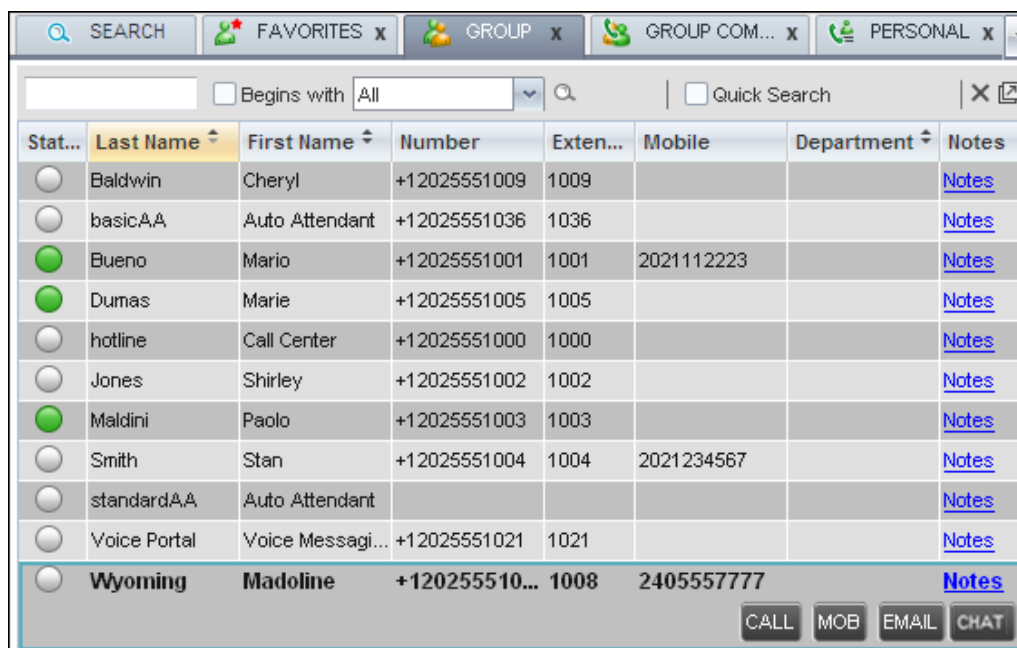
**Figure 20  Group Tab – Contact in Focus with Action Buttons**

For the list of action buttons available in Receptionist, see section *Call Action Buttons*.

## SEARCH TAB

You use the *Search* tab to look for specific contacts in your contacts directories and, if available, in the configured *LDAP* directory.  For information on performing directory searches, see section *Search Contacts*.
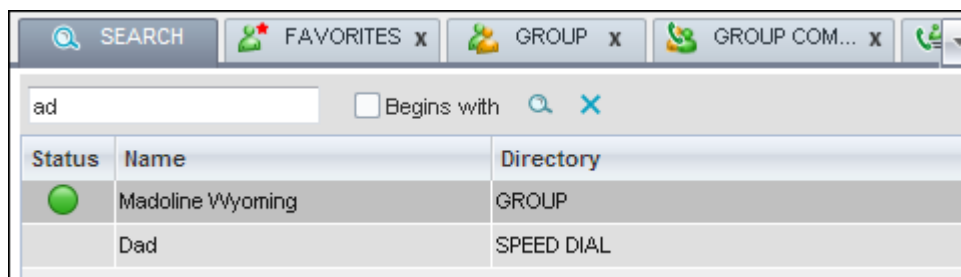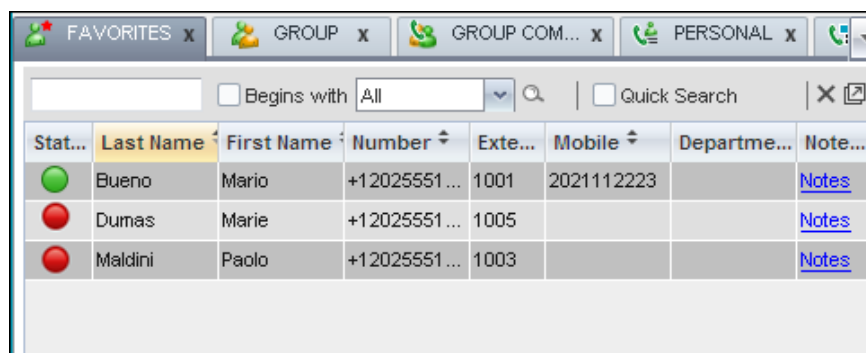


**Figure 21  Contacts Pane – Search Tab**

The search results can contain contacts from several directories, and the following information can be displayed for each contact (as applicable):  phone state, IM&P state, contact name, and the directory where the contact was found.

## FAVORITES TAB

You use the *Favorites* tab to monitor the phone state of selected contacts. The *Favorites* directory provides the following information for each contact (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

The contacts to monitor must be configured on the web portal. This is referred to as static monitoring. For more information, see section *Monitor Contacts*.
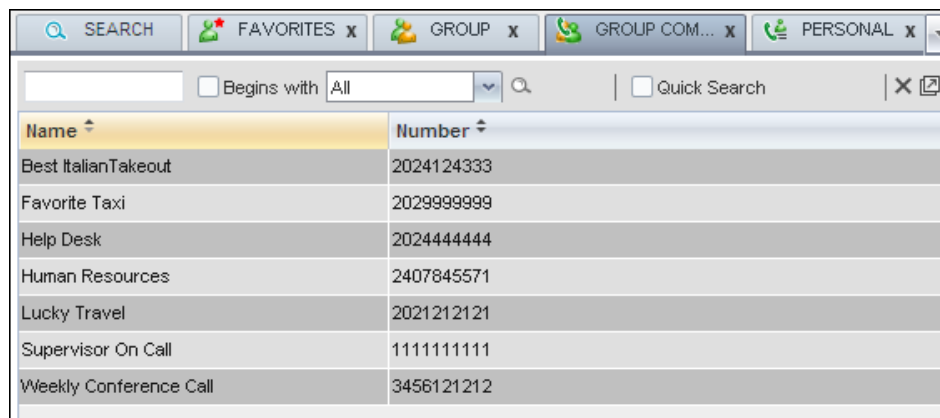


**Figure 22  Contacts Pane – Favorites Tab**

## ENTERPRISE/GROUP TAB

The *Group/Enterprise* tab contains the contacts in your Clearspan group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise). However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts from your group directory.

If you have the Receptionist, you can also monitor selected contacts without having to configure them on the web portal. This is referred to as dynamic monitoring. For information, see section *Dynamic Monitoring* .



**Figure 23  Contacts Pane – Group Tab**

## COMMON TAB

The *Common* directory contains the contacts in your group's common phone list configured by your administrator on Clearspan.
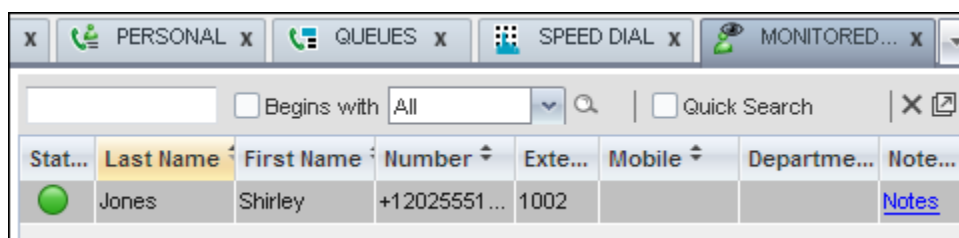


**Figure 24  Contacts Pane – Common Tab**

## MONITORED CONTACTS TAB

The *Monitored Contacts* directory contains the contacts that you are dynamically monitoring.  When you start dynamically monitoring a contact, that contact is added to the *Monitored Contacts* directory.  This directory is only visible if there are any dynamically monitored contacts.  For more information, see section *Monitor Contacts*.

The following information is displayed for each contact (as applicable):  call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state.  (The Exchange calendar state is only visible when you expand the contact.)



**Figure 25  Contacts Pane – Monitored Contacts Tab**

## PERSONAL TAB

The *Personal* tab contains the contacts from your personal phone list on the Clearspan web portal.

You can edit your personal contacts in Receptionist.  For information about managing your personal contacts, see section *Manage Personal Contacts*
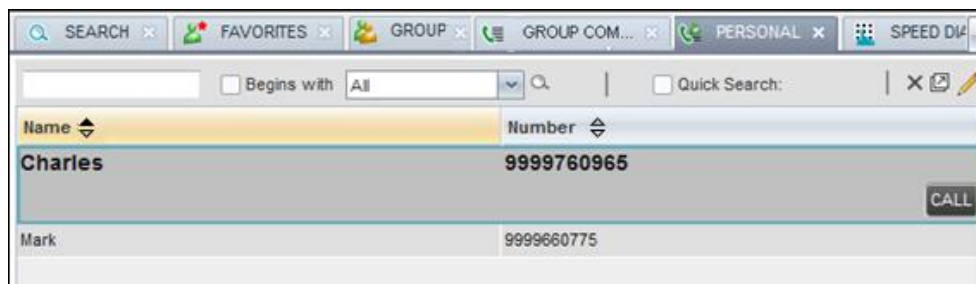


**Figure 26  Contacts Pane – Personal Tab**

## SPEED DIAL TAB

The *Speed Dial* tab displays your Speed Dial 8 and Speed Dial 100 contacts.  It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the contacts for that service in your Speed Dial directory.

You can edit your speed dial entries in Receptionist.  For information about managing your speed dial entries, see section *Manage Speed Dial Entries*.
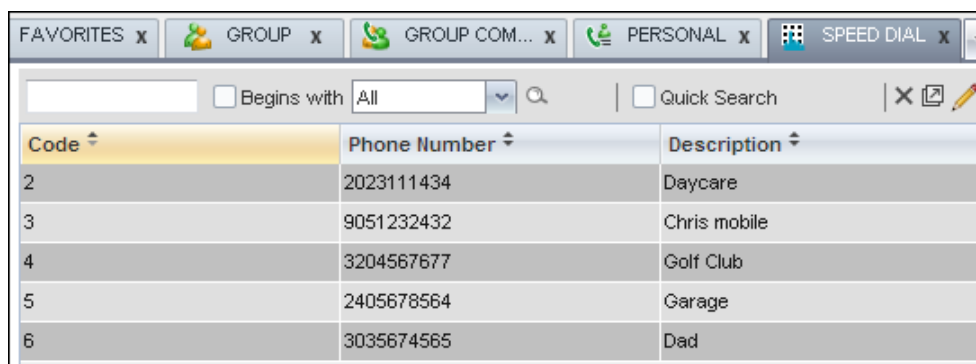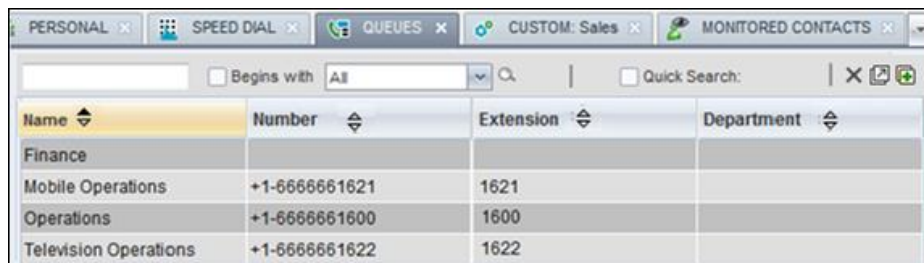


**Figure 27  Contacts Pane – Speed Dial Tab**

## QUEUES TAB

The *Queues* tab displays the list of call centers and associated DNIS numbers that a call center agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues.

**Figure 28  Contacts Pane – Queues Tab**

## CUSTOM DIRECTORIES TABS

If your administrator has configured custom contact directories for your group, you can access them from Receptionist.

**Note**:  A custom directory has the same properties as the Group/*Enterprise* directory, and you can perform the same operations on contacts in a custom directory as in the Group/*Enterprise* directory.
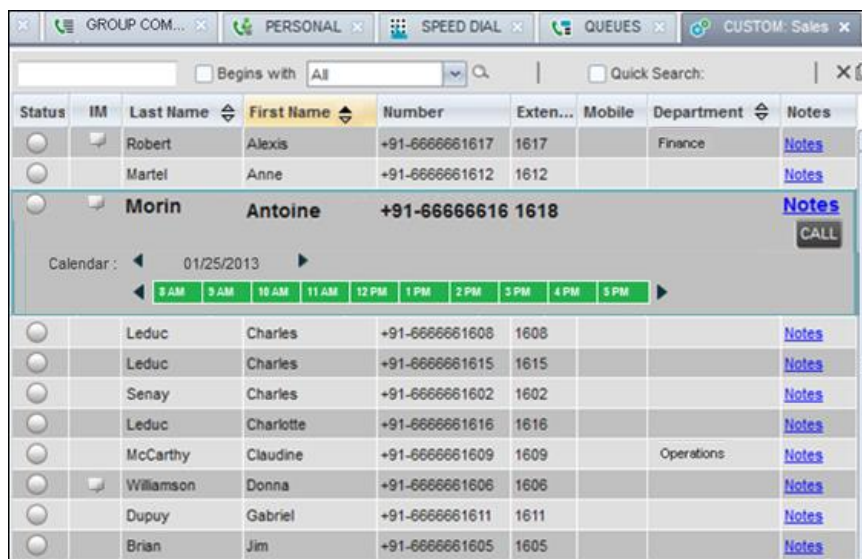
**Figure 29  Contacts Pane – Custom (Directory) Tab**

## INSTANT MESSAGE TAB

The *Instant Message* tab displays IM&P contacts you are subscribed to and their presence state.  For information on subscribing to and chatting with IM&P contacts, see section *Monitor IM&P Contacts and Chat with Contacts*.

The tab appears if you have been assigned the *Integrated IM&P* or *Third Party IM&P* service.

When your presence state is set to "Offline*"*, the panel is empty.  To change your IM&P presence state, see section *Change Your IM&P Presence State*.
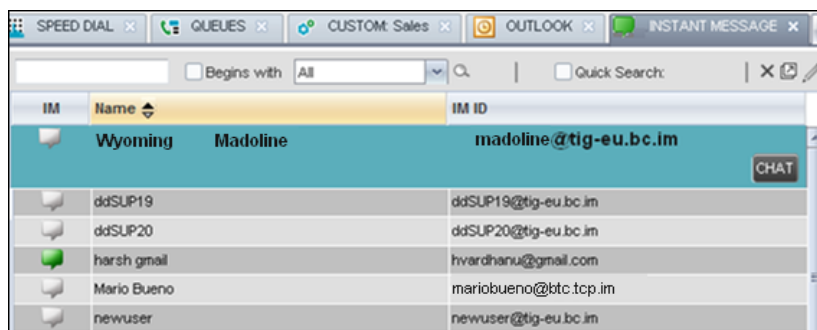


**Figure 30  Contacts Pane – Instant Message Tab**

## OUTLOOK TAB

The *Outlook* tab contains your Outlook contacts.  This feature is available to you if you have the Outlook Integration service enabled and configured.  For more information, see section *Settings – Plug-ins*.
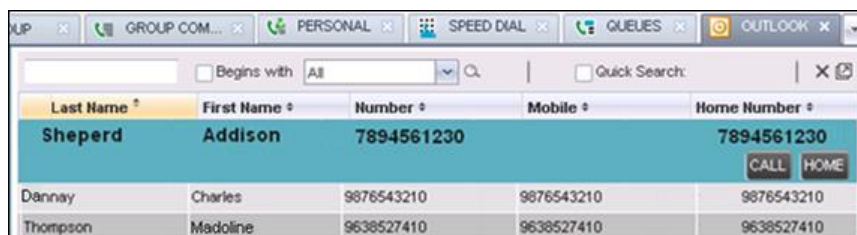


**Figure 31  Contacts Pane – Outlook Tab**

## SEARCH RESULTS TABS

When you perform a search on a directory, you can keep the results of the search and save them in a new contacts directory.  The name of the new directory is the same as the name of the directory on which the search was performed, but the directory icon has an arrow similar to the arrow used on shortcut icons .
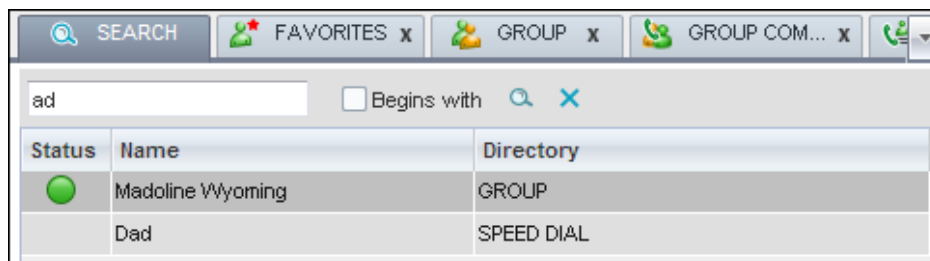


**Figure 32  Contacts Pane – Search Results Tab**

**Note**:  A search results directory has the same properties as the original directory, and you can perform the same operations on contacts in a search results directory as in the original directory.

You can perform a search on a search results directory and keep the results under another tab.  The number of search results directories you can create is limited to ten.

Search results directories are only available for the current sign-in session.  In addition, once closed, they cannot be restored.  If required, perform the same search again.

## QUEUED CALLS PANE

You use the *Queued Calls* pane to manage queued calls in the selected call centers.  For more information about managing queued calls, see section *Manage Queued Calls*.
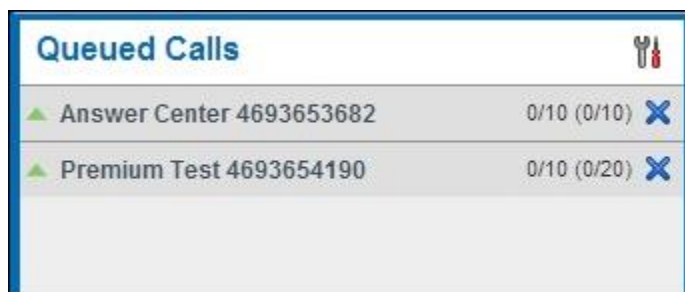


**Figure 33  Queued Calls Pane**

The pane lists queued calls for the selected call centers.  For information on selecting call centers to display, see section *Select Call Centers to Manage*.

Each call center is displayed in a separate panel.  The panel's header displays the following information:

- The name of the call center

- The primary phone number of the call center

- The number of calls currently displayed for the queue against the maximum number of calls that can be displayed for a queue.

- The number of calls in queue against the queue length

A *Message Waiting* icon  indicates that there are outstanding messages for the call center.

When you expand the panel for a call center, the list of calls queued in that call center appears, with calls listed according to their position in the queue.
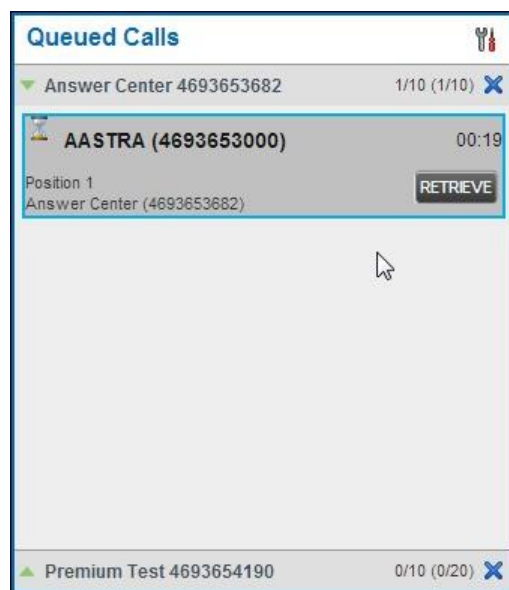


**Figure 34  Queued Calls Pane – Call Center Panel (Expanded)**

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of the following:

  - Waiting  – The call is queued, waiting to be answered.

  - Announcement  – An announcement is being played to the caller.

  - Reordered  – The position of the call in the queue has been changed.

  - Bounced  – The call has been bounced.

- Name (if available) and phone number of the calling party.

- The total call time, including the time in the current priority bucket (in parentheses).

Clicking a call expands the call to show additional data:

- Position of the call in the queue.

- Priority of the call (<span style="color:red">Premium Call Center</span>).

- The name (if available) and the phone number of the call center (or DNIS, if applicable) that was called.

When you move the mouse over a queued call, the action buttons that can be applied to the call appear. For information, see section *Call Action Buttons*.

# CONTROLS

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons. They are described in section 0*Call Action Buttons*.

The following table lists the general controls used in Receptionist and the controls displayed on the headers in the panels.

| NAME | DESCRIPTION |
|---|---|
| **Common Controls** | |
| Options | This allows you to organize items in lists. |
| Expand/Collapse | This shows or hides the contents of a window or panel. |
| Close | This closes an interface element, such as window, pane, or panel. |
| Edit | This allows you to edit contacts in some directories. |
| **Call Console Controls** | |
| Call History | This displays your call logs. |
| Call Waiting | This allows you to turn Call Waiting on or off. |
| Auto Answer | This automatically answers your incoming calls. |
| END End Conference | This ends a conference call. |
| LEAVE Leave Conference | This allows you to leave the conference while allowing other participants to continue the call. |
| HOLD Hold Conference | This places a conference call on hold. |

| NAME | DESCRIPTION |
|---|---|
| ANS Resume Conference | This resumes a held conference. |
| Web Pop URL | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| Pull Out Directory | This places a selected directory below the Call Console. |
| Clear Search | This clears the search results. |
| Group Queues | This groups queues by call center. |
| **Call Notification Pop-up Window** | |
| Web Pop URL | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| vCard | This saves the caller's phone number and personal information as a vCard in Microsoft Outlook. |
| Transfer to Voice Mail | This transfers an incoming call to your voice mail. |
| **Chat Window** | |
| Call | This places a call to your chat partner. |
| Add User to Chat | This allows you to select users to add to the chat. |
| INVITE Invite | This invites selected users to the chat. |
| Pop-out | This takes a chat window out of the main interface and makes it a free-floating window. |
| Pop-in | This anchors a free floating chat window inside the main interface. |
| Minimize | This minimizes the chat window. |
| Close | This closes the chat window. |

## CALL ACTION BUTTONS

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, a call line, a call history log, or a directory entry.

Action buttons are contextual, that is, they appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry (with the exception of the Mon button on virtual user entries).

**Note**: Virtual users cannot be monitored even when the Mon button appears on expanded virtual user entries.



**Figure 35 Custom Contacts Directory – Contact in Focus with Action Buttons**

The following table lists action buttons available in Receptionist.

| BUTTON | DESCRIPTION |
|---|---|
| Dial | This dials the number you entered in the *Dialer*. |
| CALL | This places a call to the selected contact or to a number from Call History. |
| Redial Redial | This redials the last dialed number. |
| EXT Extension | This dials the contact's extension. |
| MOB Mobile | This dials the contact's mobile number. |
| EMAIL E-mail | This brings up a new e-mail message window with the contact's e-mail address, allowing you to send an e-mail to the contact. |
| Transfer Transfer | This transfers a call to an ad hoc number entered in the Dialer. |
| TXR Transfer | This transfers a call to a selected number or contact. |
| VM Transfer to Voice Mail | This transfers a call to the selected contact's voice mail. |
| ANS Answer | This answers an incoming call, answers an unanswered call for a contact, or resumes a held call. |

| BUTTON | DESCRIPTION |
|---|---|
| **HOLD** Hold | This places a call on hold. |
| **END** End | This ends a call. |
| **CONF** Conference | This establishes a conference call or adds a call to a conference. |
| **CAMP** Camp | This camps the call on a busy contact. |
| **BARGE** Barge In | This barges in on a contact's call. |
| **PARK** Park | This parks a call on a contact. |
| **MON** Monitor | This starts monitoring the state of the selected contact, except when the contact is a virtual user.  Virtual users cannot be monitored. |
| **CHAT** Chat | This opens a chat window allowing you to chat with an IM&P contact. |
| **PROMOTE** Promote | This promotes a selected call to the next higher priority bucket. |
| **RETRIEVE** Retrieve | This retrieves a selected call from the queue to the supervisor's device. |
| **REORDER** Reorder | This changes a selected call's position in the queue. |
| **www.** Web Pop URL | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| Delete Call Log | This deletes a call log from Call History. |

# MANAGE CALLS

This section includes information and procedures on how to manage current calls.  You use the *Call Console* to view and manage your current calls.
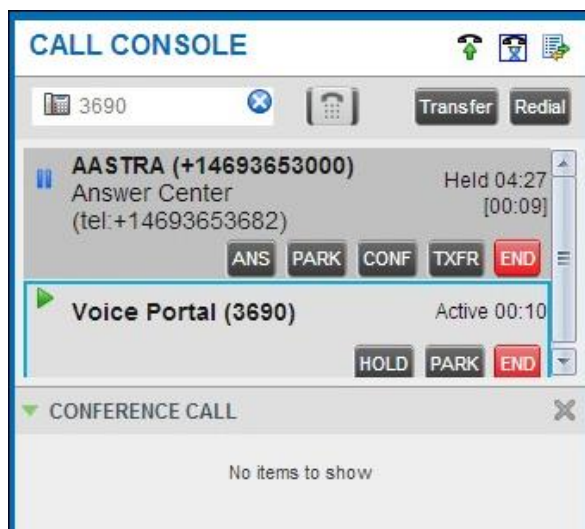


**Figure 36  Call Console**

## DRAG AND DROP CALL ONTO CONTACT

For operations on calls that involve a contact, you can drag a call from the *Call Console* and drop it on a target contact in one of your contact's directories.  This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green arrow appears.  When the call is dropped onto a contact, no action is taken on the call.  The target contact expands and you can select the action button for the operation you want to perform on that call.



**Figure 37  Dragging Call and Dropping it on Contact**

# VIEW CALL INFORMATION

Call information is provided in the *Call Console* and in the *Call Notification* pop-up window that appears on top of the system tray for incoming calls.

## VIEW CURRENT CALLS

Your current calls are always visible in the *Call Console*.

To view your conference call:

In the *Conference Call* panel, click the **Expand** button [icon].

## VIEW INCOMING CALL DETAILS

If the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when an inbound call is received.

- *Direct inbound calls* – For calls to your direct number or extension, the following information is displayed:
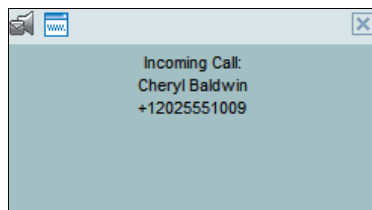  - Calling party name
  - Calling party number



**Figure 38  Call Notification Pop-up Window for Non-ACD Call**

- *Calls from a call center* – For calls from a call center, the call center name is displayed in addition to the caller's name and phone number.
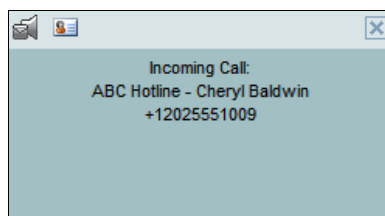


**Figure 39  Call Notification Pop-up Window − Call from Call Center**

**Notes**:  You must have only one tab open in the browser running Receptionist to receive call notifications.

If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

## SAVE VCARD

When you receive a call, a *Call Notification* pop-up window is visible on top of the system tray.  From this window, you can save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save caller's information as a vCard:

In the *Call Notification* pop-up window, click the **Add vCard** button  .

This button is present only when Outlook is running.

## OPEN URL

For any current call, you can open a page in your browser that contains information about the calling party encoded in its URL.

This can be done either from the *Call Notification* pop-up window that appears on top of the system tray for an incoming call or from the *Call Console* for any current call.

This feature is configured on the *Settings – General* configuration page.  For more information, see section *Settings – General*.

To open a URL for the incoming call:

In the *Call Notification* pop-up window, click the **Web Pop URL** button  .

To open a URL for any call:

In the *Call Console*, click the **Web Pop URL** button   for the target call.

# VIEW AND CHANGE SECURITY CLASSIFICATION OF CALLS

Receptionist displays the security classification level of your current calls and allows you to change your assigned security classification level if you have the Security Classification service assigned and your security classification level is not "Unclassified", which is the lowest level.

The security classification level of a call is the lowest security classification level for all call participants.  Users who do not have a security level assigned are considered to have the security level of "Unclassified".

**Figure 40  Security Classification of Calls**

## CHANGE SECURITY CLASSIFICATION

You can change your security classification, but only to a level lower than your assigned level, and you can only do so while in an active call.  The security classification level of your calls is then recalculated.

The security classification of a call can also change when other participants change their security classification level or when participants join or leave the call.  If a security classification level of a call changes the new level is displayed.

After all your calls end, your security classification level is reset to your assigned security classification level.
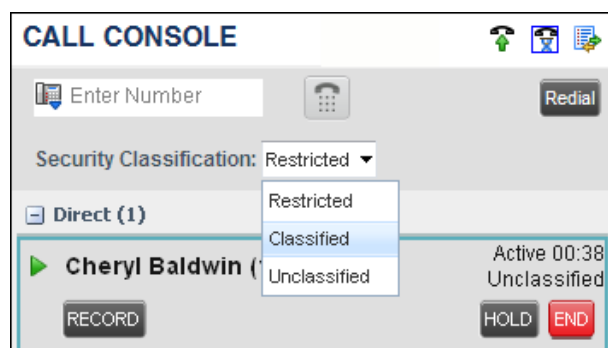


**Figure 41  Security Classification Levels**

To change your current security classification:

From the *Security Classification* drop-down list, select a new security classification level.

## ANSWERING CALLS

You can answer your own incoming calls and calls for other users in your group.  If you have the Auto Answer service, you can also answer calls automatically.

## ANSWER CALL

Your incoming calls appear in the *Call Console.* To answer a call, the call state must be *Incoming.*

To answer an incoming call:

Move the mouse over the call and click **Answer** ANS . The call state changes to *Active*.

| | |
|---|---|
| 📝 | **Note**: Double-clicking a call, does not answer it. |

To answer an incoming call from a Call Notification pop-up window:

Click anywhere on the text in the window.

To answer calls automatically:

In the *Call Console*, click the **Auto Answer** button. The button changes to this to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the client or by the administrator on the server.

| | |
|---|---|
| 📝 | **Note**: If this feature is enabled by your administrator, you must **not** enable the client-based Auto Answer using the Auto Answer button. |

## PICK UP CALL

The Directed Call Pickup service allows you to answer a call that is incoming on another user. Depending on your setup, you can answer calls for users in your group or in the entire enterprise. This is useful when the user is currently not on hand to answer the call.

| | |
|---|---|
| 📝 | **Note**: To pick up a contact's call, you need to have the Directed Call Pickup service assigned. |

To answer a call for a contact:

1.  Expand your *Group/Enterprise* or *Favorites* directory and click the target contact to expand it. The contact's state must be *Ringing*.

2.  Move the mouse over the contact and click **Answer** ANS .

The call appears as *Incoming* in the *Call Console.*

# HOLD AND RESUME CALLS

You can only put an active call on hold.

## PUT CALL ON HOLD

To put a call on hold:

Move the mouse over the call and click **Hold** HOLD .

## RESUME HELD CALL

To resume a held call:

Move the mouse over the call and click **Answer** ANS .

📝 | **Note**:  Double-clicking a call does not take the call off hold.

# MAKE AND END CALLS

Receptionist provides you with several ways in which you can make calls.  When you dial a number or contact, the call appears in the *Call Console* as *Incoming Local.*

## DIAL AD HOC NUMBER

You use the *Dialer* to place a call to an ad hoc number.
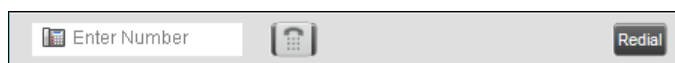


**Figure 42  Dialer**

To dial an ad hoc number:

**1.** In the *Dialer*, enter the phone number and click **Dial** .  The call appears in the *Call Console* as *Incoming Local* and your phone rings.

**2.** Click **Answer** ANS for that call.  An outbound call is placed and the call state changes to *Outgoing.*

REDIAL NUMBER

Receptionist keeps up to ten most recently dialed numbers.

To redial one of the recently dialed numbers:

1.  In the *Dialer*, place the cursor in the text box and start entering a number.  A list of recently called numbers that start with the entered digits appears.
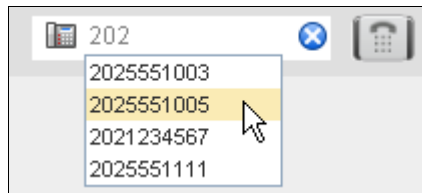


**Figure 43  Dialer – Select Recently Dialed Number**

2.  Select the number to dial and click **Dial** .

The client issues a Click-To-Dial attempt to the selected number.

Alternatively, click the **Redial** button and select the number from the list that appears.
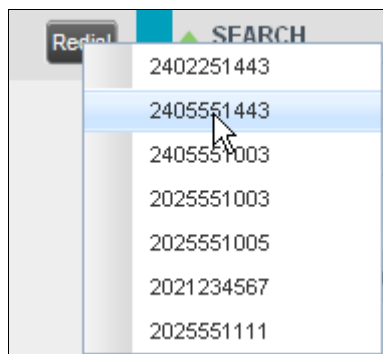


**Figure 44  Dialer – Redialing Number**

DIAL CONTACT

You can dial contacts from any directory available in Receptionist.

To dial a contact:

1.  In the *Contacts* pane, expand the directory from which you want to dial a contact.

2.  Click the contact to expand it and click **Call** for that contact.  A Click-To-Dial action is initiated and your phone rings.
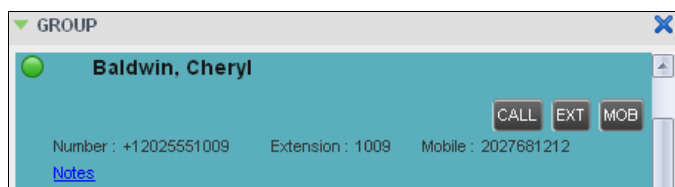
**Figure 45  Group Panel – Contact in Focus with Call and Mobile Buttons**

**3.** Answer the phone.  An outbound call is placed.

**4.** Alternatively, to dial the contact's mobile number, click **Mobile** .

## SPEED DIAL

To speed dial a contact:

**1.** In the *Contacts* pane, expand the *Speed Dial* panel.

**2.** Click the contact to expand it and click **Call** .

## DIAL FROM HISTORY

You can dial any number that is available in Call History.

To dial from Call History:

**1.** In the *Call Console*, click the **Call History** button .  The *Call History* dialog box appears.
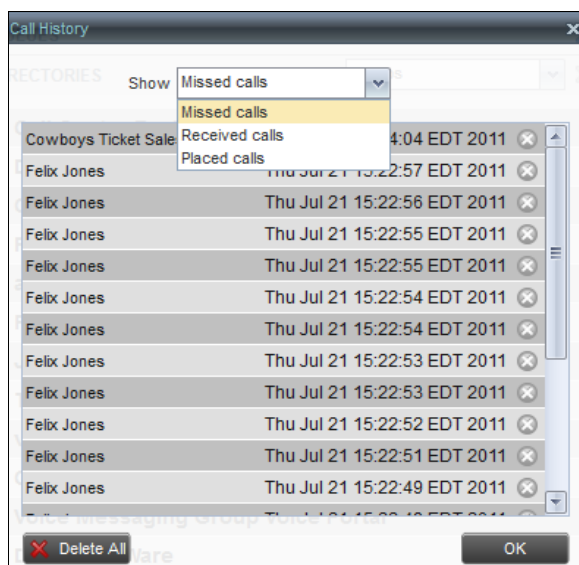


**Figure 46  Call History Dialog Box**

**2.** From the *Show* drop-down list, select the grouping you want.

**3.** Scroll through the list of call logs to find the entry you need.

**4.** Click the entry to expand it and click **Call** CALL .

# END CALL

To end a call:

Click **End** END for that call.

# TRANSFERRING CALLS

There are a number of ways in which you can transfer a call.  You can blind transfer calls or transfer calls with consultation or supervision.  You can also transfer calls directly to voice mail or to a queue.

## BLIND TRANSFER CALL

A blind transfer occurs when a call is transferred without an introduction.  Calls may be blind transferred while active, held, or ringing (in) on your phone.  If a call is ringing (in), blind transfer allows the call to be redirected before it is answered.  You can blind transfer a call to an ad hoc number or to a contact.

To blind transfer a call to an ad hoc number:

**1.** In the *Call Console*, select the call to transfer.

**2.** In the *Dialer*, enter the destination number and click **Transfer** TXR .  The call is transferred and removed from the *Call Console*.

To blind transfer a call to a contact:

**1.** In the *Call Console*, select the call to transfer.

**2.** In the *Contacts* pane, expand the panel from which you want to select a contact.

**3.** Click the destination contact to expand it, and click **Transfer** TXR for that contact. The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target contact and click **Transfer** TXR for that contact.

## CONDUCT SUPERVISED TRANSFER

When you have an active inbound call that you want to transfer, you can follow this procedure.

To conduct a supervised transfer:

1.  In the *Call Console*, select the call to transfer.

2.  Dial the number or contact to whom you want to transfer the call.

3.  If the dialed contact is busy, either retry or dial another contact.

4.  Move the mouse over the new, non-selected call and click **Transfer** TXR.

## TRANSFER WITH CONSULTATION

Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To transfer a call with consultation:

1.  Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold. The new call appears in the *Call Console*.

2.  Wait until the called party accepts your call and speak to the party.

3.  When ready to transfer, in the *Call Console*, select one of the two calls.

4.  Move the mouse over the non-selected call and click **Transfer** TXR.

    The calls are connected and removed from the *Call Console*.

## TRANSFER TO VOICE MAIL

You can transfer a call to a monitored contact's voice mail or to your own voice mail. Calls may be transferred while active, held, or ringing (in) on your phone.

To transfer a call to voice mail:

1.  In the *Call Console*, select the call to transfer.

2.  In the *Contacts* pane, expand the *Group/Enterprise* or *Favorites* directory and find the contact. Find yourself if you want to transfer the call to your voice mail.

3.  Click the contact and click **Transfer to Voice Mail** [VM] for that contact.

Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail** [VM] for that contact.

> 📝 | **Note**:  This option is only available if the contact has the Voice Messaging service assigned and enabled.

You can also transfer an incoming call to voice mail from the *Call Notification* pop-up window.

To transfer an incoming call to your voice mail:

In the *Call Notification* pop-up window that appears when you receive a call, click

**Transfer to Voice Mail** [icon] .

## TRANSFER TO QUEUE

You can transfer a current call to any queue that appears in your *Queues* panel.  The call is placed at the bottom of the new queue.

To transfer a call to a queue:

1.  In the *Call Console*, select the call to transfer.

2.  Expand the *Queues* panel.

3.  Click the destination queue and click **Transfer** [TXR] .

    The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target queue and click **Transfer** [TXR] for that queue.

# PARKING AND CAMPING CALLS

Call parking or camping allows you to find a temporary parking place for the call.  If the parked or camped call is not answered within the predefined time, the call is recalled and reappears in your *Call Console*.

## CONDUCT BUSY CAMP ON

Busy Camp On allows you to place a call at a busy contact.  The call is automatically transferred to the destination when the contact becomes available to take the call.  A call

to camp must be active or held, and the destination contact must be either *Busy* or *Ringing*.

> **Note**: To use the feature, you need to have the Busy Camp On service assigned and active.

To camp a call on a busy contact:

1. In the *Call Console*, select the call to camp.

2. In your *Group/Enterprise* or *Favorites* directory, click a *Busy* or *Ringing* contact and click **Camp** CAMP. Once the call is camped, it is removed from the *Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

## CONDUCT GROUP CALL PARK

Group Call Park searches within a predefined hunt group for an available line on which to park a call. After a designated time, the call returns to the originating operator or a specified hunt group (depending on how the service is configured). If the parking attempt fails for any reason, the call remains in your *Call Console*.

To perform a Group Call Park:

In the *Call Console*, move the mouse over an active or held call and click **Park** PARK. The call is parked on an available extension and removed from *the Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call may be recalled to your device and reappear in your *Call Console*.

## MANAGE CONFERENCE CALLS

You manage your conferences in the *Call Console*.

- You use the top area of the *Call Console* to establish a conference and add participants to it.

- You use the *Conference Call* panel to manage or end an active conference.

You can only have one active conference at a time.
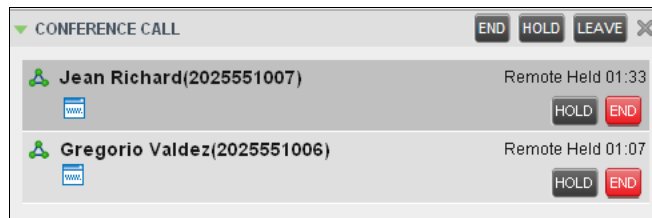


**Figure** 47  **Call Console – Conference Call Panel**

To conduct an N-Way conference you must first start a Three-Way conference and then add participants to it.

> **Note**:  To conduct a conference you must have the Three-Way Call or N-Way Call service assigned.

## START THREE-WAY CONFERENCE

To start a conference you need to have at least two current calls.

To start a conference:

1.  If necessary, place calls to participants using any of the methods described in section *Make and End Calls*.

2.  In the *Call Console,* select one of the two calls.
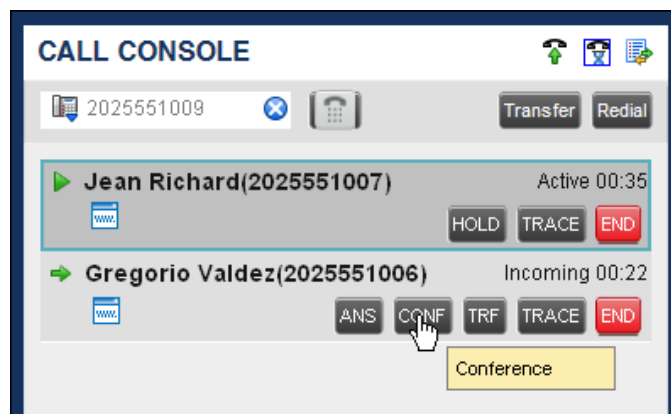


**Figure 48  Starting Conference**

3.  Move the mouse over the non-selected call and click **Conference** CONF.  A Three-Way Conference is established and the connected calls are moved to the *Conference Call* panel.

## ADD PARTICIPANT TO CONFERENCE

To perform this operation, you need to have the N-Way Call service assigned.

To add participants to a conference:

1. If the call you want to conference in is not yet established, place the call using any of the methods described in section *Make and End Calls*.

2. In the *Call Console*, move the mouse over the call to add and click **Conference** CONF. The caller is added to the conference.

## HOLD CONFERENCE

To put an active conference on hold:

In the *Conference Call* panel, click **Hold Conference** HOLD. This allows other conference participants to continue their conversation.

## RESUME HELD CONFERENCE

To resume a held conference:

In the *Conference Call* panel, click **Resume Conference** ANS. All the calls in the conference become active.

## PUT CONFERENCE PARTICIPANT ON HOLD

To put a specific conference participant on hold:

1. Expand the *Conference Call* panel.

2. Move the mouse over the target call and click **Hold** HOLD.

## RESUME CONFERENCE PARTICIPANT

To resume a conference participant:

1. Expand the *Conference Call* panel.

2. Move the mouse over the target call and click **Answer** ANS.

## LEAVE CONFERENCE

To leave the conference:

In the *Conference Call* panel, click the **Leave Conference** LEAVE button.

| | **Note**: This function is only available for Three-Way Conferences. |

## REMOVE CONFERENCE PARTICIPANT

To end a selected call in the conference:

1.  Expand the *Conference Call* panel.

2.  Move the mouse over the call and click **End** END .

## END CONFERENCE

To end the conference:

In the *Conference Call* panel, click **End Conference** END .  This releases all the calls that participate in the conference.

## BARGE IN ON CALL

Call Barge-in allows you to barge in on a contact's call.  This is useful when you want to enter a call that is already established between two other people.

| | **Note**: This functionality is only available if you have been assigned this service by your administrator. |

Depending on your setup, you can barge in on contacts in your group or enterprise.

To barge in on a call:

1.  Expand the *Group/Enterprise* or *Favorites* directory.

2.  Click the target contact and click **Barge In** BARGE .  The contact's status must be *Busy.*

    You enter an ongoing call, thereby establishing a Three-Way Conference.  The calls appear in the *Conference Call* panel.

Alternatively, drag the call onto the target contact and click **Barge In** [BARGE] for that contact.

You can now perform any conference operation on the call.

# RECORD CALLS

You can record calls manually or have the system automatically record your calls.  When a call is being recorded, the *Recording* state message appears on the line for the call.
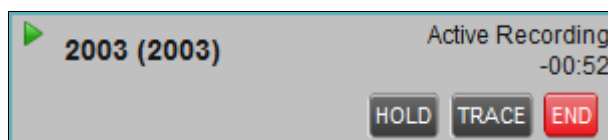


**Figure 49  Call Being Recorded**

## MANUALLY RECORD CALL

To manually record calls, you have to have the Call Recording service assigned and set to "On Demand*".*  For information on configuring your services, see the *Clearspan Application Server User Web Interface Administration Guide.*

To record a call, select the call in the *Call Console* and click **Record** [RECORD].

## AUTOMATICALLY RECORD CALLS

To automatically record all calls, you have to have the Call Recording service assigned as "Always*".*  For information on configuring your services, see the *Clearspan Application Server User Web Interface Administration Guide.*

# MESSAGE CONTACTS

Receptionist allows you to send e-mail messages to contacts that have messaging configured in the system.  You must also have the Messaging feature enabled within Receptionist.  For information, see section *Settings – Messaging*.

## SEND E-MAIL TO CONTACT

To send an e-mail message to a contact:

1.  In the *Group/Enterprise*, *Favorites, Custom, or Monitored Contacts* directory, click the contact that has an e-mail address configured.

2.  Click the **E-mail** button  for the contact.  This brings up a new e-mail window for the configured Messaging service.

3.  Write your message and click **Send**.

# MONITOR IM&P CONTACTS AND CHAT WITH CONTACTS

When you have an IM&P service assigned on Clearspan, you can chat with other IM&P users and see the unified IM&P presence state of selected IM&P users directly from Receptionist.

The unified presence state of a contact is their combined instant messaging presence state when they are logged in through multiple devices or applications.  For more information, see section 0 *View Presence State of Contacts*.

You have to be online to use IM&P capabilities of Receptionist.  For information on setting your IM&P presence state, see section *Change Your IM&P Presence State*.

## MONITOR IM&P CONTACTS

To view the presence state of an IM&P contact, you have to first subscribe to the contact.  Otherwise, Receptionist displays the contact's state as *Unsubscribed*.  When you send a subscription request to a contact and are waiting for a reply, Receptionist displays the contact's state as *Pending Subscription*.

The following panels display the IM&P state of contacts:  Instant Message, Agent, Supervisor, Enterprise/Group, Custom, Search, and Directories.

> **Note**:  The Instant Message panel does not include IM&P contacts in the *Unsubscribed* state.

You can subscribe to a contact either by sending a subscription request to the contact or by adding the contact to the *Instant Message* directory.

For information about the operations related to subscribing to contacts and viewing their presence state, see the following sections:

- Subscribe to Contact

- Add Contact to Instant Message Directory

- Modify Contact

- Unsubscribe from Contact

- Accept or Reject Subscription Request

- View Presence State of Contacts

## SUBSCRIBE TO CONTACT

To send a subscription request to a contact:

1. Click the IM&P presence icon of an unsubscribed contact 🖵 in any directory where the presence state of contacts is displayed. The *Contact (IM) Subscribe* dialog box appears.
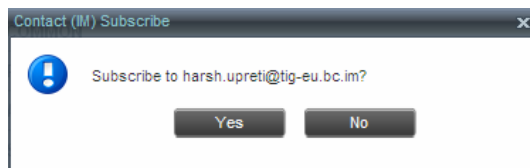


**Figure 50  Contact (IM) Subscribe Dialog Box**

2. Click **Yes**.

   A subscription request is sent to the contact, and the contact is added to the *Instant Message* directory. The contact's state is set to "Pending Subscription" 🖵 .

   When the subscription is accepted, the contact's presence state is updated to their actual presence state.

3. To resend a subscription request at any time, click the contact's presence icon again and click **Resend** in the dialog box that appears.
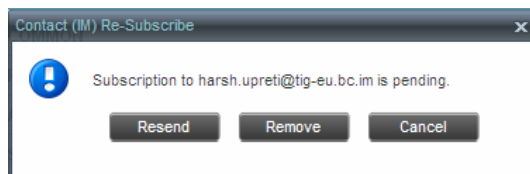


**Figure 51  Contact (IM) Re-Subscribe Dialog Box**

## ADD CONTACT TO INSTANT MESSAGE DIRECTORY

When you add a contact to the *Instant Message* directory, the system automatically sends a subscription request to the contact.

To add a contact to the Instant Message directory:

1. In the *Instant Message* panel, click **Edit** 🖉. The *Edit Instant Message Contacts* dialog box appears.

2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.
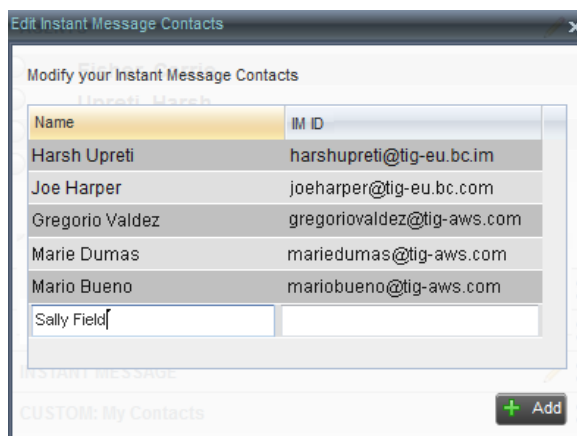
**Figure 52  Edit Instant Message Contacts Dialog Box – Add Contact**

**3.** In the *Name* text box, enter the display name of the contact to add.

**4.** In the *IM ID* text box, enter a valid IM&P ID of the contact.

**5.** To save the changes, click anywhere in the dialog box outside the entry.

A subscription request is sent to the contact, the contact's presence state is set to "Pending Subscription"*,* and the contact is added to the *Instant Message* panel.

If the contact accepts your request, then the contact's state changes to the actual presence state.

## MODIFY CONTACT NAME

You can modify the display name of an existing contact.

To modify the display name of a contact:

**1.** In the *Instant Message* panel, click **Edit**  .  The *Edit Instant Message Contacts* dialog box appears.

**2.** Double-click the contact and enter the new name in the *Name* text box.

**3.** To save your changes, click anywhere in the dialog box outside the entry.
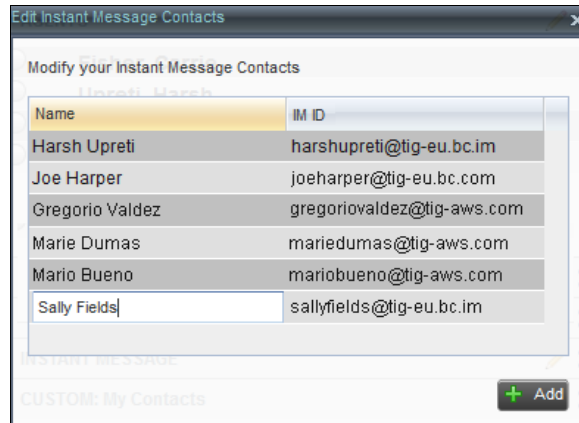
**Figure 53  Edit Instant Message Contacts Dialog Box – Modify Contact**

## UNSUBSCRIBE FROM CONTACT

To stop monitoring a contact:

**1.** Click the presence icon of the contact.  The *Contact (IM) Unsubscribe* dialog box appears.
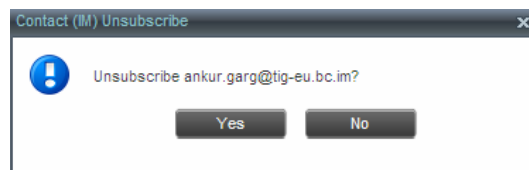


**Figure 54  Contact (IM) Unsubscribe Dialog Box**

**2.** Click **Yes**.  The contact is removed from the *Instant Message* directory and its presence status changes to *Unsubscribed* in other directories.

## ACCEPT OR REJECT SUBSCRIPTION REQUEST

When you receive a request from another user, a dialog box appears allowing you to accept or deny the request.
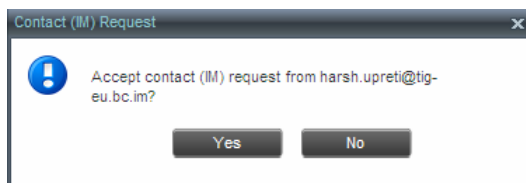


**Figure 55  Contact (IM) Request Dialog Box**

To accept the request, click **Yes**.  If the contact is not yet in your *Instant Message* directory, a request is sent to add the user to the directory.

To reject the request, click **No**.

You can also close the dialog box and ignore the request.  If you ignore the request, the dialog box will reappear the next time you go online.

## VIEW PRESENCE STATE OF CONTACTS

You can view the presence state of IM&P contacts in the *Instant Message, Agent*, *Supervisor*, *Enterprise/Group*, *Custom, Directories,* and *Search* panels.  The presence icon is displayed to the left of the contact's name.

Receptionist displays the unified instant messaging presence states, which indicates your contacts' availability to communicate using client applications such as Hosted Thin Call Center, Hosted Thin Receptionist, Clearspan Communicator Desktop, or Clearspan Communicator Mobile.

The actual unified presence state of a contact is displayed only if you are subscribed to the contact.  Otherwise the contact's state is displayed as *Unsubscribed* or *Pending Subscription*.
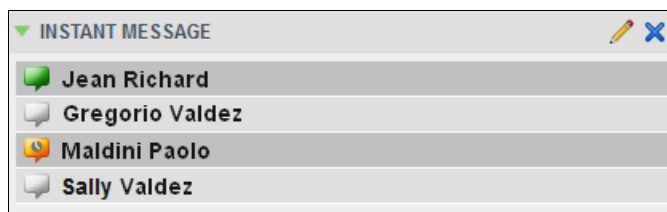


**Figure 56  Instant Message Panel – Unified Presence State of Contacts**

The following table lists the possible IM&P presence states in Receptionist:

| IM&P STATE | ICON | DESCRIPTION |
|---|---|---|
| **Subscribed states** | | |
| *Available* | | The contact is online, available on one or more devices, and not busy on any device. |
| *Busy* | | The contact is online, but currently busy on one or more devices.  Do not disturb. |
| *Away* | | The contact is connected but away from one or more devices and not busy on any device. |
| *Offline* | | The contact is offline on all devices. |
| **Unsubscribed states** | | |
| *Pending Subscription* | | You sent a subscription request to the contact, but it has not yet been accepted.  Clicking the icon resends the request. |
| *Not subscribed* | | The contact has the IM&P service but you are not subscribed to monitor their state.  The contact does not appear in the *Instant Message* pane.  Clicking this icon sends a subscription request to the contact. |

# CHAT WITH IM&P CONTACTS

You can chat with more than one contact at the same time, either in one-on-one sessions or by participating in multiuser chats.  Each session requires a separate window.

*Chat* windows appear at the bottom-right hand side of the Receptionist main interface. Subsequent windows open to the left of the latest opened *Chat* window.

*Chat* windows can be taken out of the main interface and placed elsewhere on the screen.

The number of concurrently open *Chat* windows depends on the browser window size and screen resolution.  The oldest *Chat* window is closed when there is no more room for a new *Chat* window to open.  This only applies to *Chat* windows that are placed within the main interface.

You can start a chat session with a contact or accept a request from another user.  A one-on-one session can be converted into a multiuser chat by inviting more participants. You can also receive an invitation to a multiuser chat from another user.

When your IM&P contact is in your group/enterprise, you can phone them directly from the *Chat* window.

The tasks related to instant messaging are described in the following sections:

- Start Instant Messaging Session

- Place Call from Chat Window

- Establish Multi-User Chat Session

- Manage Instant Messaging Sessions

## START INSTANT MESSAGING SESSION

You can start an instant messaging session with an IM&P contact from any of the following panels:  *Instant Message, Agent*, *Supervisor*, *Enterprise/Group*, *Custom, Search,* and *Directories*.

To start an instant messaging session with a contact:

1.  In the *Contacts* pane, click the target contact.  The entry expands displaying available action buttons.
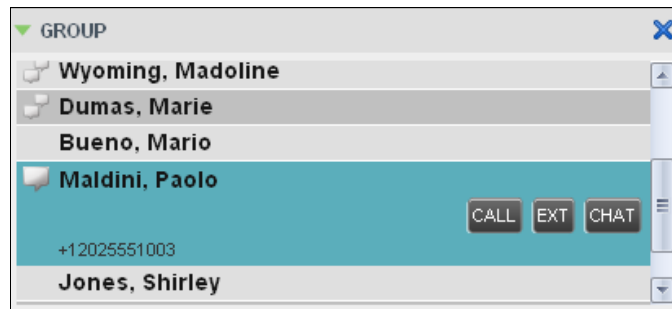
**Figure 57  IM&P Contact with Chat button**

2.  Click **Chat**  on the line for the contact.  A *Chat* window appears, displaying your contact's information on the title bar.



**Figure 58  Chat Window**

> **Note**:  A *Chat* window also appears when another IM&P user initiates a chat session with you.

3.  Type your message in the text box at the bottom of the window and click ENTER on the keyboard.  Your message is sent to your contact.

    The messages you send and receive appear in the *Chat Logs* area at the top of the window, below the title bar.  Up to 50 messages per contact are kept in the log for the duration of your IM&P session, even if you close the *Chat* window and later start exchanging messages again with the same contact.  The messages are cleared when you go offline.

## PLACE CALL FROM CHAT WINDOW

If the user with whom you are chatting is also a contact in your *Group/Enterprise* directory, you can call the contact directly from the *Chat* window.

To place a call from the *Chat* window:

Click the **Call** button at the top right-hand side of the *Chat* window.

The Receptionist client issues a Click-To-Dial attempt to the contact's phone number and the call appears in the *Call Console*.

## ESTABLISH MULTI-USER CHAT SESSION

You can invite other contacts to your chat session, thus converting your one-on-one chat to a multi-user chat. An incoming multi-user chat invitation opens a window for a new multi-user chat.

To add users to a chat:

1.  Click the **Add User to Chat** button in the *Chat* window. A drop-down list of available contacts appears.
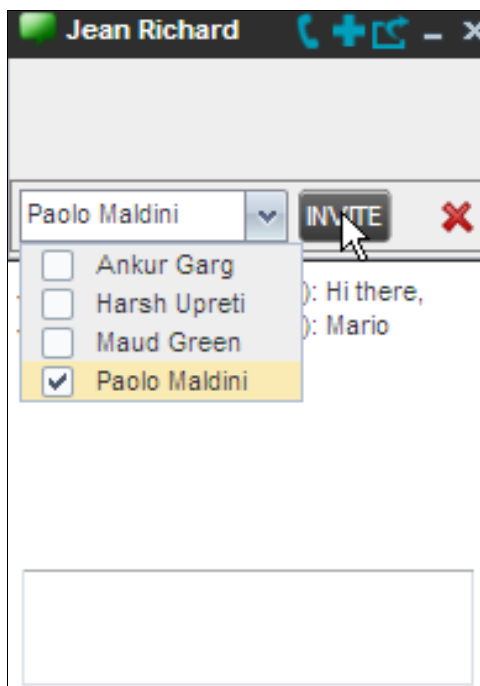


**Figure 59  Add Participants to a Chat**

2.  Select the check box next to each contact to invite and then click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the

*Chat* window. The participants (other than you) are also listed at the top of the window.
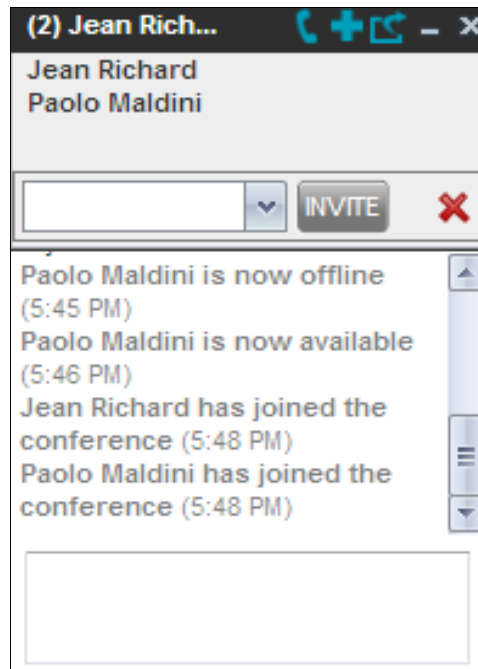


**Figure 60  Multiuser Chat**

3. To leave the multi-user chat, close the *Chat* window.

## MANAGE INSTANT MESSAGING SESSIONS

If a *Chat* window is not in focus and an incoming message is available for you to read, the color of the window is light brown as shown in the following figure. This changes back to black as soon as the window is in focus.
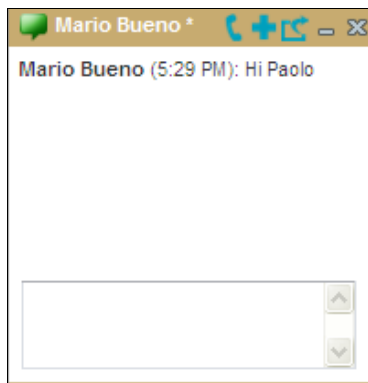


You can also close, minimize, or pop out a *Chat* window, that is, take the *Chat* window out of the Receptionist main interface and place in elsewhere on the desktop.

To pop out a *Chat* window:

Click the **Pop-out** button  at the top right-hand side of the window.

The window is placed on the desktop outside of Receptionist main interface and the Pop-out button becomes the Pop-in button.

To place the window back within the Receptionist main interface:

Click the **Pop-in** button  at the top right-hand side of the window.

To minimize or close a *Chat* window:

Click the **Minimize** or **Close** button at the top right-hand side of the window. When a window is closed, the windows to the left (if present) shift to the right. This only applies to *Chat* windows that are placed within the Receptionist main interface.

# MANAGE CONTACTS

Receptionist allows you to view, search, and organize your contact directories.

You use the *Contacts* pane to manage your contact directories, to monitor selected contacts, and to use your contacts to make or manage calls.

| Stat... | Last Name | First Name | Number | Exten... | Mobile | Department | Notes |
|---|---|---|---|---|---|---|---|
| ◯ | Baldwin | Cheryl | +12025551009 | 1009 | | | Notes |
| ◯ | basicAA | Auto Attendant | +12025551036 | 1036 | | | Notes |
| 🔴 | Bueno | Mario | +12025551001 | 1001 | 2021112223 | | Notes |
| 🟢 | Dumas | Marie | +12025551005 | 1005 | | | Notes |
| ◯ | hotline | Call Center | +12025551000 | 1000 | | | Notes |
| ◯ | Jones | Shirley | +12025551002 | 1002 | | | Notes |
| 🔴 | Maldini | Paolo | +12025551003 | 1003 | | | Notes |
| 🟢 | Smith | Stan | +12025551004 | 1004 | 2021234567 | | Notes |
| ◯ | standardAA | Auto Attendant | | | | | Notes |
| ◯ | Voice Portal | Voice Messagi... | +12025551021 | 1021 | | | Notes |
| 🟠 | Wyoming | Madoline | +12025551008 | 1008 | 2405557777 | | Notes |

**Figure 61  Contacts Pane**

For the list of contact directories available in your version of Receptionist, see section *Introduction to Receptionist*.

For information on monitoring contacts, see section *Monitor Contacts*; for information on managing IM&P contacts, see section *Monitor IM&P Contacts*; for information on call-related functions, see section *Manage Calls*.

## SHOW/HIDE DIRECTORIES

Receptionist allows you to specify which directories should be visible in the *Contacts* pane.
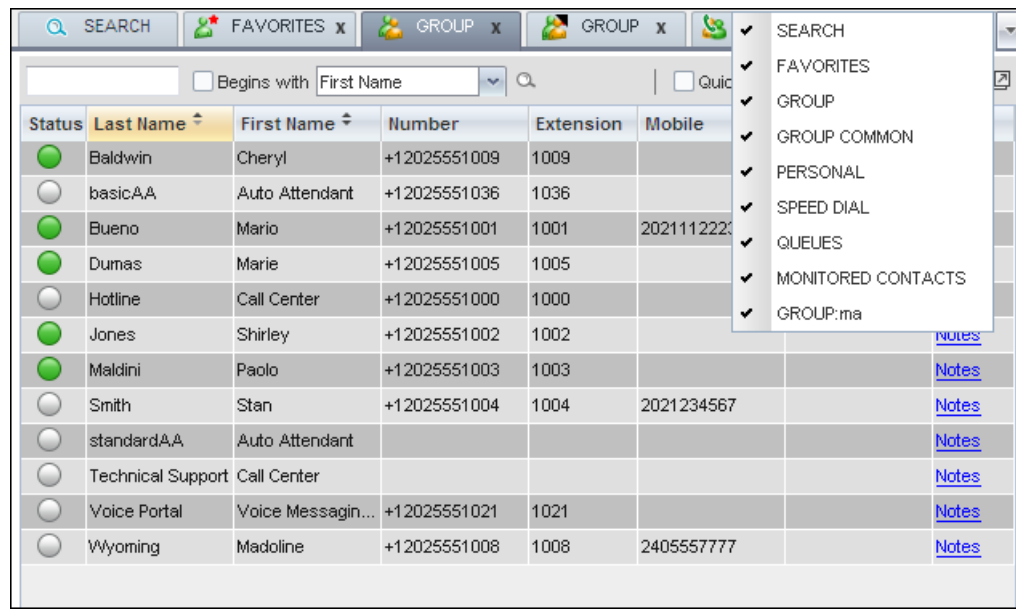
**Figure 62  Contacts Pane – Expanded Options Menu**

To display or hide a directory tab in the Contacts pane:

**1.** At the top right-hand side of the *Contacts* pane, click the drop-down arrow [ ].

**2.** From the list that appears, select the directory to display.  The selected directory appears and its tab is displayed at the top of the *Contacts* pane.

To hide a directory tab, click the **Close** button [X] on that directory's tab.

Note that once you close a directory containing search results, you cannot display it again by selecting it from the list.

# VIEW DIRECTORY CONTENT

Your directories are displayed as tabs at the top of the *Contacts* pane, with the details of only one directory visible at a time.  The information displayed about each contact depends on the directory you are viewing.
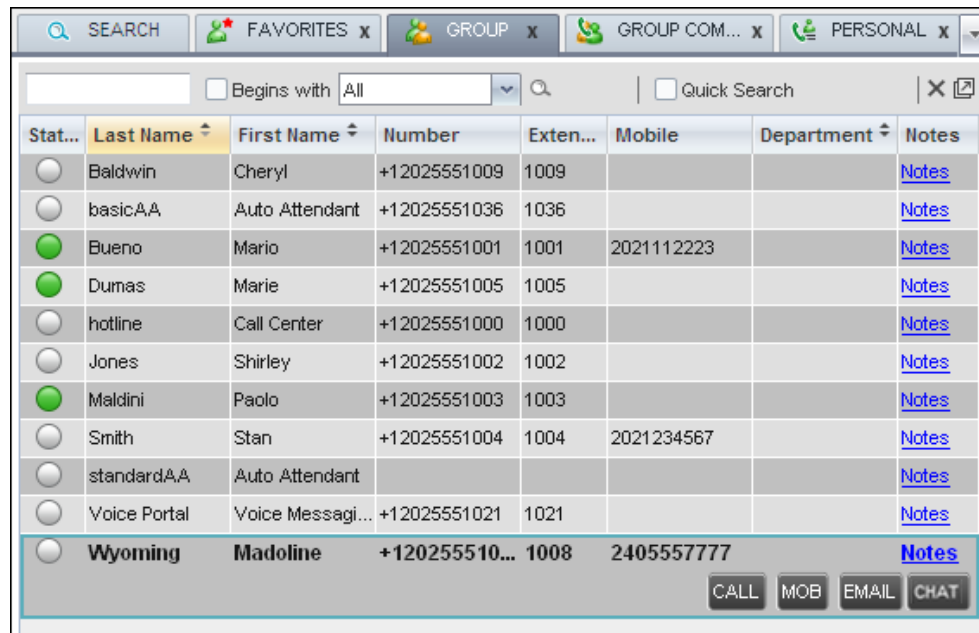
To view contacts in a directory:

In the *Contacts* pane, click the tab for that directory.  The directory listing appears in the *Contacts* pane.

To view additional information about a contact:

Click the contact to view.  This expands the row for the contact displaying applicable action buttons and in some directories also the contact's Exchange calendar.  For more

information about the action buttons, see section *Call Action Buttons*.  For more information about the contact's calendar, see section *Monitored User's Calendar* .



**Figure 63  Group Directory – Contact Details**

Only one contact can be expanded at a time.  When you click a contact, the system automatically hides the details of the previously expanded contact.

## SEARCH CONTACTS

Receptionist allows you to search for contacts several different ways.  You can perform a search on a specific directory or on all directories at once.  You can perform a regular search or a quick search, and you can create a new directory from search results.

You use the following procedures to search for contacts:

- Perform Quick Search

- Perform Regular Search

- Create Directory from Search Results

- Perform Search on Search Results

## PERFORM QUICK SEARCH

A quick search searches on a specific column in a selected directory for entries that start with a character entered by you.  The column on which the search is performed is the column by which the directory is currently ordered.

A quick search can be performed on any directory, but is not available in the *Search* tab.

**Note**:  The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.
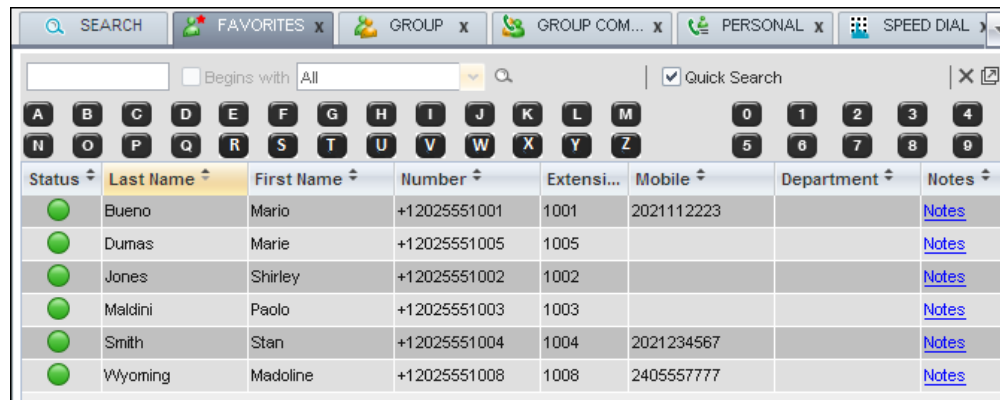


**Figure 64  Contacts Pane – Perform Quick Search**

To perform a quick search:

1. Click the directory tab where you want to perform the search.

2. Order the directory by the column on which you want to perform the search.

3. Check the *Quick Search* box.

4. From the keypad that appears, select a character (a single letter or digit) by which you want to search.  The contacts that start with the selected character (in the selected column) are displayed in the directory.

5. To perform another search on the same column, select another character.  The new search is performed on the original directory and not on the results of the previous search.

## PERFORM REGULAR SEARCH

You can search for contacts in a specific directory or in all directories at once.

When you search for contacts in a specific directory, you can search on a specific column or on all columns.  When you use the *Search* tab, the search is always performed on all directories and columns.
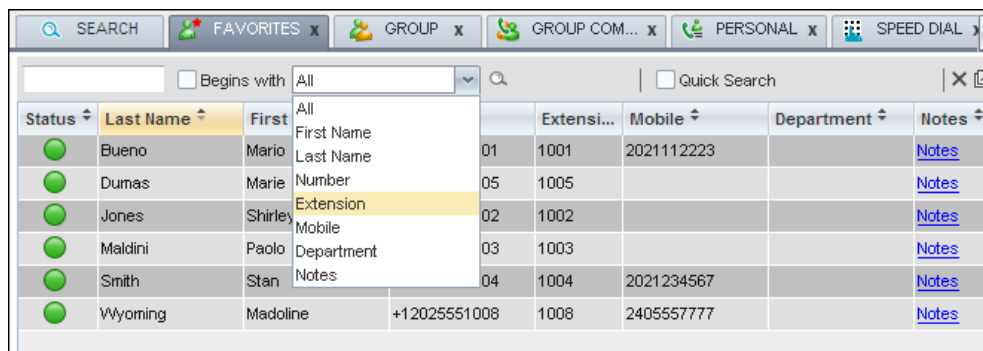


**Figure 65  Contacts Pane – Perform Regular Search**

To search in a specific directory:

1. Select the directory.

2. Make sure that the *Quick Search* box is unchecked.

3. In the *Search* text box, enter the text for which you want to search.  You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.
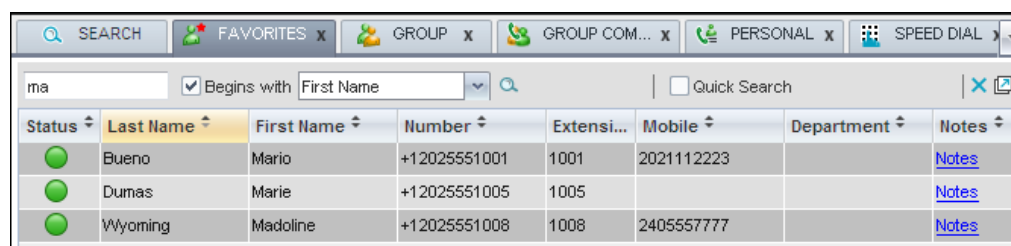
   For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

4. To restrict the search to contacts that start with the entered string, check the *Begins with* box.  Otherwise, the search results also include contacts that contain the entered string.

5. From the drop-down list, select the column by which you want to search.  You can select a specific column or all columns.

6. Click the **Search** button [Q].

   The text you entered is matched against the selected column (or all columns) of every entry of the selected directory.  Search results are displayed in the tab where the search was performed.

   Duplicate search results in Clearspan directories are not displayed; the first match for a given contact is displayed.

   Duplicate search results in other directories are displayed.

**Figure 66  Contacts Pane – Search Results**

The search returns either all the contacts (in the selected directory) that contain the entered keyword or all the contacts that start with the entered keyword.
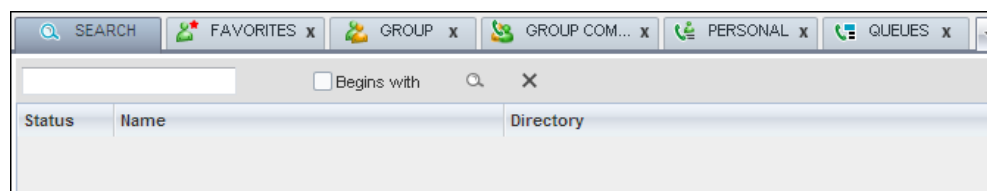
In the first case (*Begins with* not checked), entering "Ann" returns all contacts with the name "Ann", but it also returns all contacts with names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.

In the second case (*Begins with* checked), entering "Ann" returns all contacts with names such as "Ann", Anne", and Ann Marie", but not "Marianne" or "Mary Ann".

7.  To clear the search results, click **Reset** [×].

To search in all directories:

1.  Click the **Search** tab.



**Figure 67  Perform Search Using Search Tab**

2.  In the *Search* text box, enter the text for which you want to search.  You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

    For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

3.  To restrict the search to contacts that start with the entered string, check the *Begins with* box.  Otherwise, the search results also include contacts that contain the entered string.

4.  Click the **Search** button [🔍].

    The text you enter is matched against all columns in all directories (except for the *Notes* column).  Search results are displayed in the Search tab.

Duplicate search results in Clearspan directories are not displayed; the first match for a given contact is displayed. Duplicate search results in other directories are displayed.
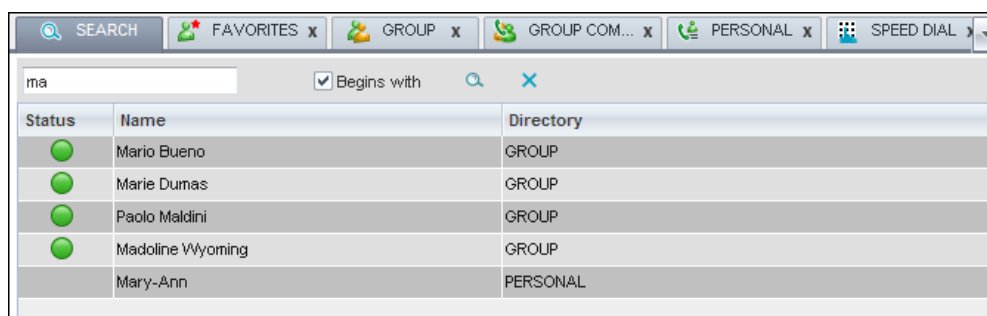


**Figure 68  Contacts Pane – Search Results in Search Tab**

5.  When you click a contact, the entry expands displaying contact details. The information depends on the directory for which the contact was selected.

> 📝 **Note**: Contact entries displayed in the Search tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

## CREATE DIRECTORY FROM SEARCH RESULTS

When you perform a search in a directory, you can create a new directory from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.

> 📝 **Note**: The Pullout button is not available in the Search directory.

To create a directory from search results:

1.  Select the directory where you want to perform the search.

2.  Perform a quick search or enter the search criteria.

3.  When the results are displayed, click the **Pullout** button , which becomes active. A new tab is created containing the results of the search.

> 📝 **Note**: Contact entries displayed in the Search tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

## PERFORM SEARCH ON SEARCH RESULTS

If you perform a search in a specific directory, the search is always performed on the entire directory even if only search results are displayed. To search in search results, you first need to create a new directory from the search results.

To perform a search on search results:

**1.** After you perform the original search, create a directory from the search results.

**2.** Perform a new search in the new directory.

> 📝 **Note**: Searching within the search results cannot be performed on the same column that the original search was performed.

## ORDER DIRECTORY ENTRIES

Receptionist allows you to order directory entries is ascending or descending order. The columns by which the directory can be ordered have the sort icon displayed ⬍ next to their name. The following table lists the directories and the columns by which they can be ordered.

| DIRECTORY | SORT COLUMNS | DEFAULT SORT COLUMN |
|---|---|---|
| Enterprise/Group | First Name, Last Name, Department | Last Name |
| Favorites | First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM | Last Name |
| Group/Enterprise Common | Name, Number | Name |
| Personal | Name, Number | Name |
| Speed Dial | Code, Description, Number | Code |
| Queues | Name, Number, Extension, Department | Name |
| Custom | First Name, Last Name, Department | Last Name |
| Outlook | Last Name, First Name, Number, Mobile, Home Phone | Last Name |
| Instant Message | Name, IM ID, IM | Name |
| Monitored Contacts | First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM | Last Name |

Note that you cannot order the contacts in the Search directory.

The sorting order for the *Status* column is as follows (from highest to lowest): Private, On a Call, Ringing, Away, In a Meeting, Call Forwarding Always, Do Not Disturb, and Available. For information on the different states, see section *Monitored User States*.

The sorting order for the IM column is as follows (from highest to lowest): Busy, Away, Available, Offline, Pending Subscription, Not subscribed.

To order a directory:

1. Click the header of the column by which you want to order the directory.

2. To reverse the order, click the same column header again.



**Figure 69  Sort Directory**

The contacts in the selected directory are reordered based on the selected column. The sort order is saved on sign-out and preserved between sessions.

# MAKE NOTES ABOUT CONTACT

Receptionist allows you to make notes about the contacts in your *Group/Enterprise, Favorites,* or *Monitored Contacts* directory.

To make a note about a contact:

1. In the Group/Enterprise, Favorites, Custom, or Monitored Contacts directory, click the **Notes** link. The Notes for <Contact Name> dialog box appears.
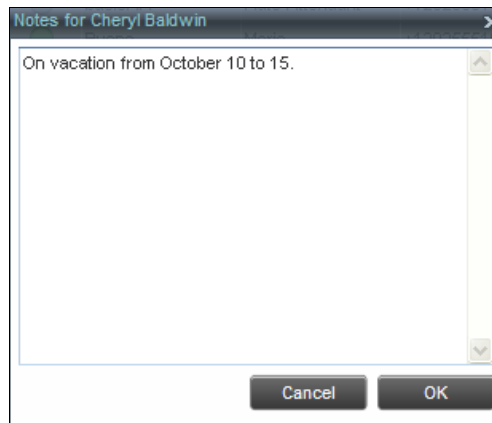
**Figure 70  Notes for Cheryl Baldwin Dialog Box**

**2.** Enter the desired text or view or modify the existing text in the *Notes* text box.

**3.** To save your changes and close the dialog box, click **OK**.

   To close the dialog box without saving, click **Cancel**.

**Figure 71  Group Directory – Contact Notes**

# MANAGE PERSONAL CONTACTS

You can add or remove personal contacts via the web portal or in Receptionist, and the updates appear in both places.  However, the updates that you make via the web portal appear in Receptionist at the next sign-in.



**Figure 72  Personal Panel**

You can perform the following operations on personal contacts:
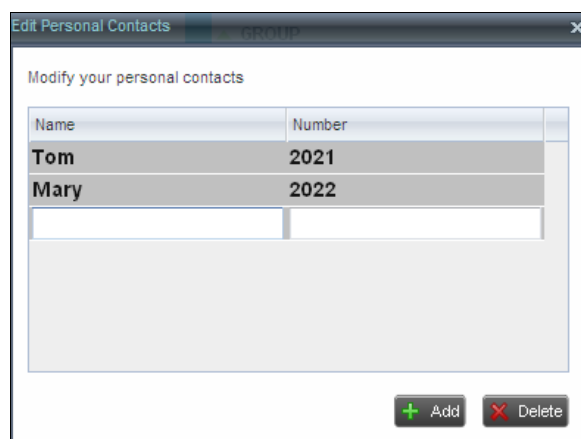
- Add Personal Contact
- Delete Personal Contact

You cannot modify a personal contact entry in Receptionist.  To modify information for a personal contact, delete the entry and add it again.

## ADD PERSONAL CONTACT

To add a personal contact:

1.   In the *Personal* panel, click **Edit** [icon].  The *Edit Personal Contacts* dialog box appears.

2.   Click **Add**.  A new line is added below the existing entries, allowing you to define a new entry.



**Figure 73  Edit Personal Contacts Dialog Box – Add Entry**

3.   In the *Name* text box, enter the contact's name or description, as you want it to appear.

4.   In the *Number* text box, enter the phone number of the contact.

5.   To save the changes, click anywhere in the dialog box outside the entry.

## DELETE PERSONAL CONTACT

To delete a speed dial entry:

1.   In the *Personal* panel, click **Edit** [icon].  The *Edit Personal Contacts* dialog box appears.

2.   Select the entry to delete and click **Delete**.
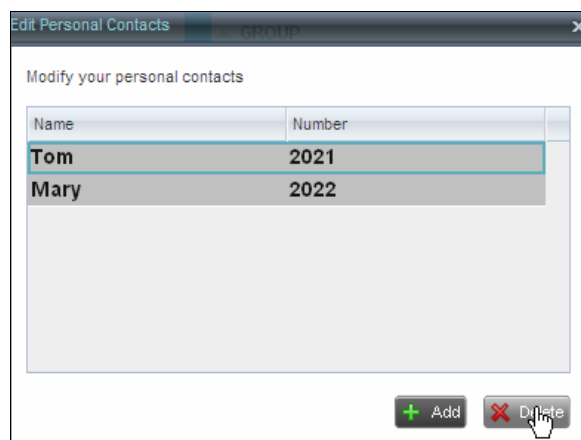
**Figure 74  Edit Personal Contacts Dialog Box – Delete Entry**

# MANAGE SPEED DIAL ENTRIES

This directory allows you to manage and use your Speed Dial 8 and Speed Dial 100 entries.  To use this feature, you need to have Speed Dial 8 and/or Speed Dial 100 service assigned.  If you only have one of these services, you see the entries for that service only in your *Speed Dial* panel.
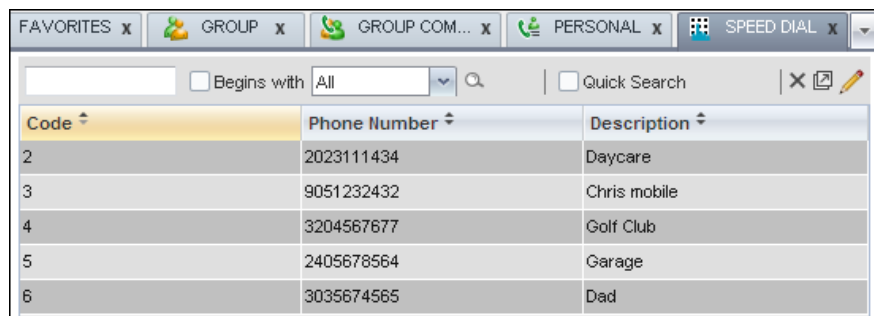


**Figure 75  Speed Dial Panel**

You can add or remove entries via the web portal or the Receptionist client, and the updates appear in both places.  However, the updates that you make via the web portal appear only at the next sign-in to Receptionist.
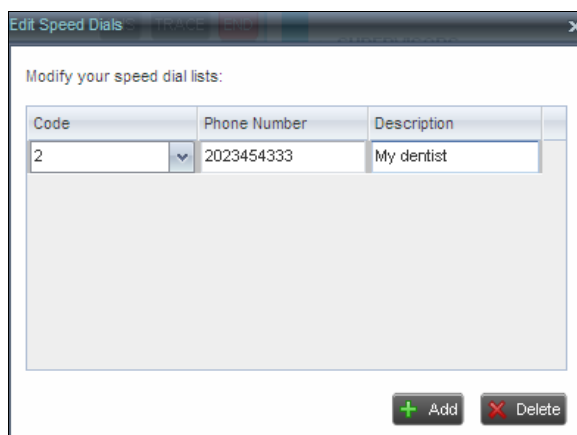
To update speed dial entries using the client, perform the following operations:

- Add Speed Dial Entry

- Modify Speed Dial Entry

- Delete Speed Dial Entry

## ADD SPEED DIAL ENTRY

To add a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** ✏️ .  The *Edit Speed Dials* dialog box appears.

2. Click **Add**.  A new line is added below the existing entries, allowing you to define a new entry.



**Figure 76  Edit Speed Dials Dialog Box – Add Entry**

3. From the *Code* drop-down list on the left, select a speed dial code.

4. In the *Phone Numbe*r text box, enter the phone number to assign to the code.

5. In the *Descriptio*n text box, enter a description that allows you to identify the entry.

6. To save the entry, click anywhere in the dialog box outside the entry.

## MODIFY SPEED DIAL ENTRY

To modify a speed dial entry:

1. In the *Speed Dial* panel, click the **Edit** ✏️ button.  The *Edit Speed Dials* dialog box appears.

2. Double-click the entry to modify.  The entry becomes modifiable.
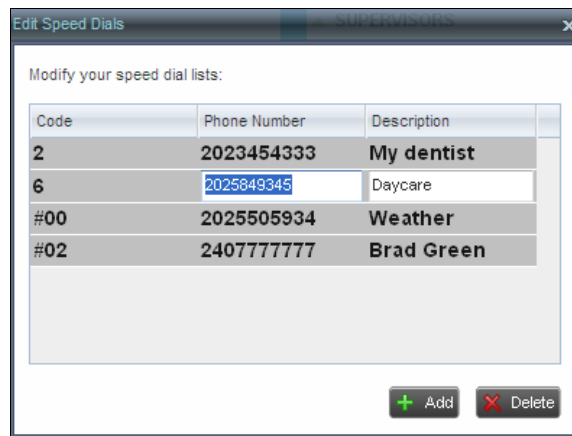
**Figure 77  Edit Speed Dials Dialog Box – Modify Entry**

3.  Modify information as required.

4.  To save the changes, click anywhere in the dialog box outside the entry.

## DELETE SPEED DIAL ENTRY

To delete a speed dial entry:

1.  In the *Speed Dial* panel, click **Edit** [pencil icon]. The *Edit Speed Dials* dialog box appears.

2.  Select the entry to delete and click **Delete**.



**Figure 78  Edit Speed Dials Dialog Box – Delete Entry**

# MONITOR CONTACTS

Receptionist allows you to monitor the call state of selected contacts.  Receptionist allows you to monitor contacts configured through the web portal.  This is referred to as static monitoring.  In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

You use the *Favorites* panel to view the phone state of statically monitored contacts and the *Group/Enterprise* panel to view the phone state of dynamically monitored contacts.

**Note**:  If a call is parked against the contact that you are monitoring, the information about the parked call also appears.
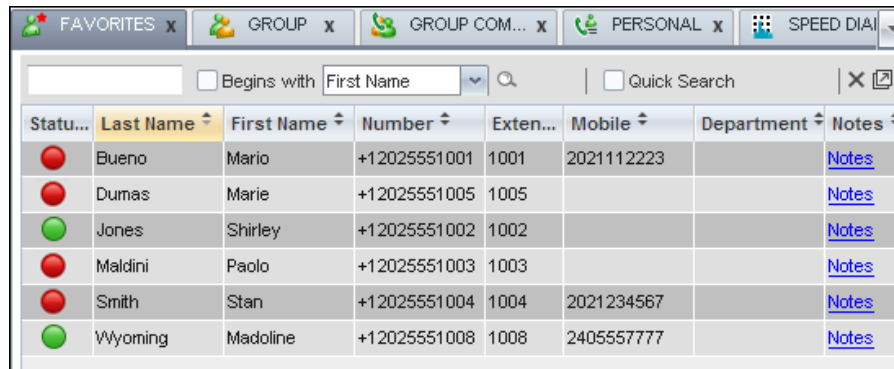
The following sections describe information and procedures related to monitoring contacts:

- Static Monitoring

- Dynamic Monitoring

- Request Dynamic Monitoring

- Monitored User's Calendar

-

Contact States

# STATIC MONITORING

To statically monitor contacts, the list of contacts to monitor must be configured on your web portal.  The selected contacts appear in your *Favorites* directory.  However, the updates that you make to the list of contacts to monitor appear in Receptionist at the next sign-in.



**Figure 79  Favorites Directory with Monitored Contacts**

# DYNAMIC MONITORING

Dynamic Monitoring allows you to view the call state of selected contacts in your *Group/Enterprise* directory.  You must request that a contact be monitored.  Selected contacts cannot be unselected.  When the number of monitored contacts reaches the maximum limit (the default is 100), the first contact that was selected to be monitored is unselected and stops being monitored.  The state of a contact that is not monitored is shown as *Unknown*.



**Figure 80  Group Directory with Monitored Contacts**

> 📝 **Note**:  If a contact in your *Enterprise/Group* directory is statically monitored, then their phone state is displayed without the need to explicitly request dynamic monitoring; however, it counts toward the total number of dynamically monitored contacts.

# REQUEST DYNAMIC MONITORING

The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

To monitor a contact:

In the *Group/Enterprise* directory, click the contact to expand it and then click the **Monitor** button MON for that contact.



**Figure 81  Group Directory – Requesting Contact Monitoring**

This requests state notifications from Clearspan for this contact; the contact's state is updated in real time.

**Figure 82  Group Directory – Monitored Contact**

# MONITORED USER'S CALENDAR

When you expand the entry for a monitored contact, the entry displays calendar details for the contact, with information downloaded from the Microsoft Exchange server, if the Calendar Presence Integration feature is enabled.
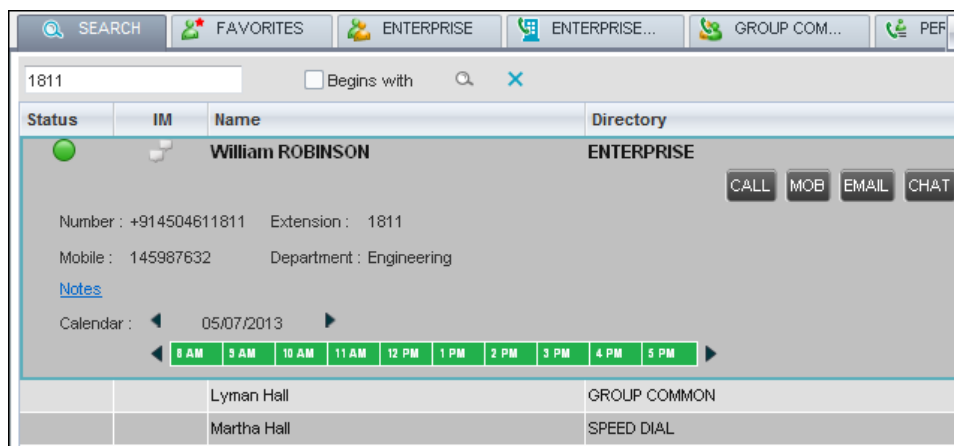


**Figure 83  Contacts Pane – Monitored User's Calendar Details**

The calendar is divided into one-hour blocks.  Those blocks can be displayed in red (when the user is busy), green (when the user is free), or partly in red and partly in green (when the user is busy only during part of the one hour block).  When you move the mouse over a partially busy time block, the ToolTip shows the meeting's start and end time (for example, 9:00 AM to 9:30 AM).

By default the calendar displays the time between 8:00 AM and 6:00 PM for the current day.  You can change the date and the time displayed on the calendar, by using the Back ◀ and Forward ▶ buttons.  Clicking the button shifts the displayed time period by one day/hour.

The calendar details are displayed in the time zone of your local machine.

# CONTACT STATES

The state of a contact is represented by an icon located to the left of the contact's name. This state integrates the state of the contact's line, the contact's Microsoft Exchange calendar presence, and the state of services such as Call Forwarding Always, Do Not Disturb, and Privacy. The following table lists the possible contact states:

| ICON | STATE IN RECEPTIONIST | DND | CFA | PRIVACY | EXCHANGE CALENDAR STATE | CALL STATE |
|---|---|---|---|---|---|---|
| 🔒 | Private | N/A | N/A | On | N/A | N/A |
| 🔴 | On a Call | N/A | N/A | Off | N/A | Active call |
| 🟠 | Ringing | N/A | N/A | Off | N/A | Ringing call, no active calls |
| 🟡 | Away | N/A | N/A | Off | Out of Office | No active calls |
| 🔴 | In a Meeting | N/A | N/A | Off | Busy | No active calls |
| ➡ | Call Forwarding Always | N/A | On | Off | Free or Tentative | No active calls |
| ⛔ | Do Not Disturb | On | Off | Off | Free or Tentative | No active calls |
| 🟢 | Available | Off | Off | Off | Free or Tentative | No active calls |

# MANAGE CALL HISTORY

You can organize call logs and delete selected call logs or all call logs from Call History.

## VIEW CALL HISTORY

Receptionist allows you to view your passed calls.  By default, the calls are grouped into placed, received, and missed calls.

To view your call history:

1.  In the *Call Console*, click the **Call History** button .  The *Call History* dialog box appears displaying your past calls.  The calls are grouped into placed, received, and missed calls.  By default, missed calls are displayed.
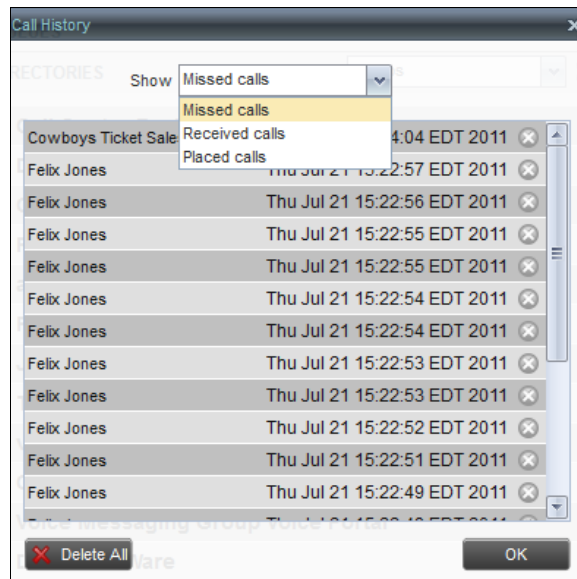


**Figure 84  Call History Dialog Box**

2.  To show calls in a specific group, select that group from the *Show* drop-down list.

## DELETE CALL HISTORY

You can delete a selected call log or all call logs from Call History.

To delete call logs from Call History:

1.  In the *Call Console*, click the **Call History** button .  The *Call History* dialog box appears.

2.  To delete all call logs, click **Delete All** ❌ Delete All .

3.  From the *Show* drop-down list, select a grouping.

4.  To delete a selected log, click **Delete Call Log** ⊗ for that log.

# MANAGE QUEUED CALLS

Receptionist allows you to manage calls in selected call centers (up to five) and monitor calls in real time.  You manage queued calls using the *Queued Calls* pane.  This functionality is only available if you are supervising call centers or if you have been assigned the Clearspan Supervisor license.



**Figure 85  Queued Calls Pane**

This section describes the following procedures you perform to manage queued calls:

- Select Call Centers to Manage

- Modify Number of Calls to Display

- Retrieve Call from Queue

- Transfer Call to Ad Hoc Number

- Transfer Call Between Queues

- Transfer Call to Top of Queue (Premium Call Center)

- Promote Call in Queue (Premium Call Center)

- Group Calls

- Order Queued Calls

## SELECT CALL CENTERS TO MANAGE

After you sign in to Receptionist, select the call centers you want to manage (up to five).

To select call centers:

**1.** In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option.
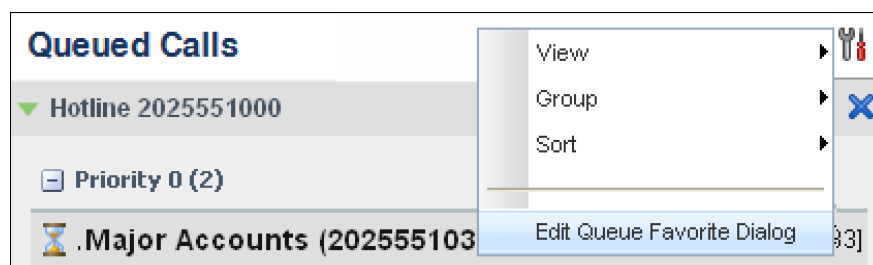
**Figure 86  Queued Calls – Options – Edit Queue Favorite Dialog.**

The *Edit Queue Favorites* dialog box appears.
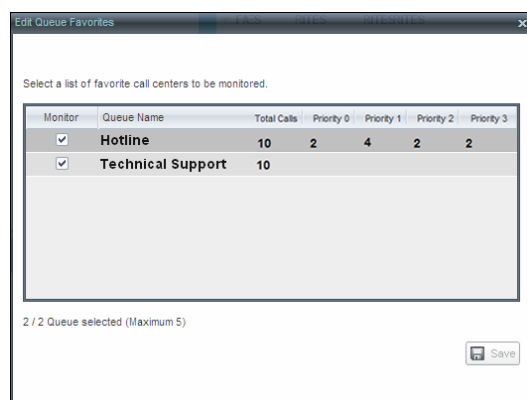


**Figure 87  Edit Queue Favorites Dialog Box**

2. Select the check boxes for the call centers you want to monitor.

3. Click **Save**.

   The selected call centers appear in your *Queued Calls* pane.

## MODIFY NUMBER OF CALLS TO DISPLAY

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed.  For each Premium call center you can modify the maximum number of calls that can be displayed in each priority bucket.  The total number of calls to display for a call center cannot exceed 50.

1. In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option.  The *Edit Queue Favorites* dialog box appears.

2. For each Standard call center you are monitoring, set the total number of calls to display.

3. For each Premium call center you are monitoring, set the number of calls to display in each priority bucket.  The total number of calls in all priority bucket cannot exceed 50.

# VIEW QUEUED CALLS

To view calls in a queue:

Click the **Expand** button [icon] for that queue.

# RETRIEVE CALL FROM QUEUE

You can retrieve a call from a queue to your phone device.

To retrieve a call from the queue:

In the *Queued Calls* pane, click the call to expand it and click **Retrieve** [RETRIEVE] for that call.

Once you retrieve the call, the call appears in the *Call Console*, and you treat it as any other call.

# TRANSFER CALL TO AD HOC NUMBER

To transfer a call to an ad hoc number:

1.  In the *Queued Calls* pane, select the call.

2.  In the *Dialer*, enter the destination number and click **Transfer** [Transfer].
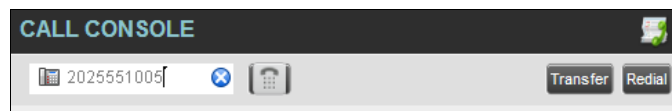


**Figure 88  Ad Hoc Queue Transfer**

The call is transferred and removed from the queue.

# TRANSFER CALL BETWEEN QUEUES

To transfer a call to another queue:

1.  In the *Queued Calls* pane, select the call.

2.  In the *Contacts* pane, expand the *Queues* panel.

3.  Click the target queue and click **Transfer** [TXR] for that queue.

    The call is transferred and removed from the original queue.

# CHANGE POSITION OF CALL IN QUEUE

To change the position of a call in the queue:

1.  In the *Queued Calls* pane, click the call and click **Reorder** [REORDER] .
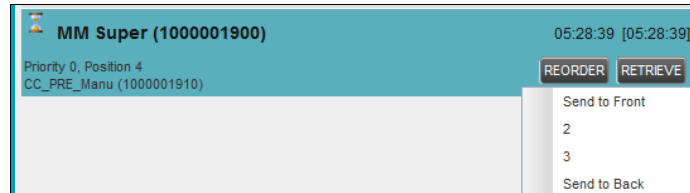


**Figure 89  Reordering Queued Call**

2.  In the drop-down box that appears, select the new position in the queue.

    The call is placed at the new position.

> **Note**:  The list can contain a maximum of 24 reorder positions that you can choose from to reorder a call in the queue, in addition to the *Send to Back* and *Sent to Front* options.

# TRANSFER CALL TO TOP OF QUEUE (PREMIUM CALL CENTER)

If your administrator has configured the call center with the Transfer to Top feature, follow this procedure to transfer the call to the top of the queue.

You can only transfer a call to the top of the highest priority bucket (bucket with priority "0").  There need to be at least two calls in the target queue.

1.  In the *Queued Calls* pane, click the target call to expand it.

2.  Click **Reorder** [REORDER] and select *Send to Front* from the list that appears.
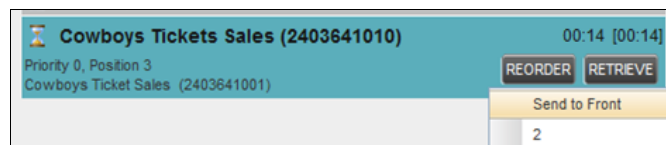


**Figure 90  Transferring Call to Top of Queue**

## PROMOTE CALL IN QUEUE (PREMIUM CALL CENTER)

In Premium call centers, a priority is attached to an incoming call based on the DNIS number on which the call is received.  You can manually promote calls from a lower priority bucket to a higher priority bucket.  A promoted call ends up as the last call in the higher priority bucket with a wait time of zero seconds.

To promote a call, that is, to change its priority:

In the *Queued Calls* pane, select the call to promote and click **Promote** PROMOTE .

The queued call is promoted to the end of the next highest priority bucket.

## GROUP CALLS

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

1.  In the *Queued Calls* pane, click **Options** ![icon], select *Group,* and then select or deselect *Group by priority*.  This action applies to all monitored call centers.
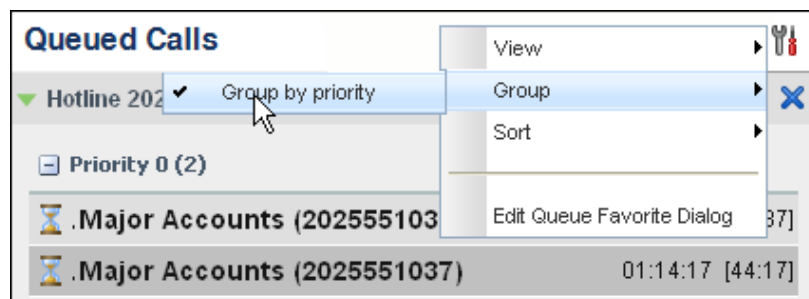


**Figure 91  Queued Calls – Options – Group**

2.  To ungroup calls, unselect the *Group by priority* option*.*

## ORDER QUEUED CALLS

Queued calls can be ordered according to their total waiting time or according to their waiting time in the current priority bucket.

To order queued calls:

1.  In the *Queued Calls* pane, click **Options** ![icon].

**2.** Select *Sort* and then the ordering option you want.  This operation applies to all monitored call centers.
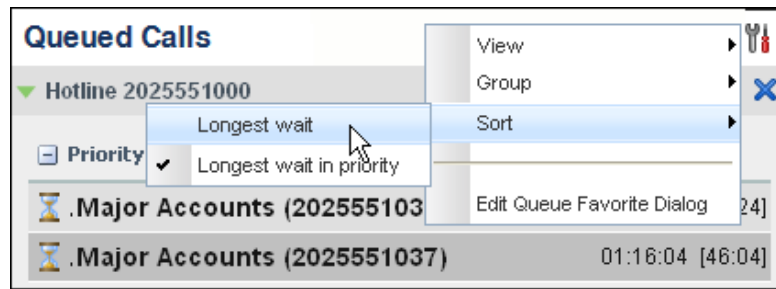


**Figure 92  Queued Calls – Options – Sort**

**Note**:  The ordering does not work when calls are grouped.  If required, first ungroup the calls.

# CONFIGURE RECEPTIONIST

You use the Settings link at the top right-hand corner of the main page to access the *Settings* page where you can configure various aspects of the Receptionist application.

📝 | **Note**:  Do **not** use the internet browser's Back button to return to the main interface.

This section describes the *Settings* pages that you use to configure Receptionist:

- Settings – General

- Settings – Application

- Settings – Services

- Settings – Plug-ins

- Settings – Messaging

- Settings – About

📝 | **Note**:  Depending on your system configuration, some settings may not be available.

## SETTINGS – GENERAL

You use the General tab to configure miscellaneous settings that improve the usability of Receptionist.



**Figure 93  Setting – General**

The following subsections describe the settings that can be configured on this page.

## ACCOUNT

You use this area to change your Clearspan password.

Receptionist shares login credentials with Clearspan.  So when you change your password here, remember to use this new password when accessing your web portal.

**Note**:  The password you enter must meet password requirements set on Clearspan.

To change your password:

1.  Click the **Change Password** link.  The section expands, allowing you to change your password.

**Figure 94  Account – Change Password**

2.  Enter your current and new password and click **Change Password**.

    Note that the Reset button does not reset your password.  It only clears the input boxes.

## LANGUAGE

The *Language* settings allow you to select the language of the user interface.

*   The drop-down list identifies the languages available in your edition of Receptionist. To change the language, select a new language from the list.

*   *Synchronize language to my profile* – When this option is checked, Receptionist synchronizes the language with your Clearspan profile and ignores the language selection on this page.

## SCREEN POP

You use the *Screen Pop* settings to configure the URL that may be launched on incoming calls.

*   *Enter URL* – This text box allows you to enter the URL address of the web page that Receptionist opens using the default browser when you click the Web Pop URL button in the *Call Notification* pop-up window.

*   *Auto pop for Incoming Calls* – When this option is checked, Receptionist launches the Web Pop URL without your being required to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database.  For example:

```
http://www.mysite.com/webapp.php?remoteNumber=__REMOTE_PHONE__&sp=__S
ERVICE_PROVIDER__
```

This URL passes the incoming calling number and the service provider ID to the web application at www.mysite.com.  The web application formats the data for the applicable database and launches the web page on your PC.

There are a number of optional parameters that the client can pass to the browser.  The following list summarizes these parameters:

- __USER__:  The user's Clearspan ID (Note that in this case, the "user" is the Clearspan subscriber.)

- __FIRST__:  The first name of the user

- __LAST__:  The last name of the user

- __EMAIL__:  The e-mail address of the user

- __GROUP__:  The name of the Clearspan group to which the user belongs

- __SERVICE_PROVIDER__:  The name of the Clearspan service provider to which the user belongs

- __PHONE__:  The phone number of the user

- __REMOTE_PHONE__:  The phone number of the remote party

- __REMOTE_NAME__:  The name of the remote party (when available)

- __CALL_TYPE__:  "Incoming" or "Outgoing"

- __DNIS_NAME__:  The name of the DNIS on which the call was received

- __DNIS_PHONE__:  The phone number of the DNIS on which the call was received

## DATE FORMAT

This setting allows you to select the format to use for displaying the date in the calendar details for a contact.  The possible options are:

- MM/DD/YYYY

- DD/MM/YYYY

## TIME FORMAT

This setting allows you to select the format to use for displaying the time in chat windows and in the calendar details for a contact.  The possible options are:

- AM/PM

- 24 hours

## WORKSPACE

Receptionist allows you to customize elements of your workspace, such as the size and placement of the main window on the desktop.  The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed
- The size of the panes (Call Console, Contacts, and Queued Calls)

> **Notes**:  This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.
>
> When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Buttons:

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore Workspace* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Receptionist asks you whether you want to save your current workspace.  To save your workspace automatically when signing out without being asked, check the *Always save workspace on signout* box.

To customize your workspace:

1. Arrange the windows the way you like.
2. Click the **Save Workspace** button to save the current configuration.  To restore the system default, click **Restore Workspace**.
3. At any time to return to the last saved configuration, click the **Load Workspace** button.

# SETTINGS – APPLICATION

You use the Application tab to configure your availability to take calls as well as the policies used to process calls.



**Figure 95  Settings – Application**

The settings can be configured on this page and are described in the following subsections.

## QUEUE MEMBERSHIP

These settings allow you to select which queues you want to join.

To join queues:

1.  To join a specific queue, select the check box on the line for the queue.

2.  To join all queues, select the check box in the column header.

> **Note**:  If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue.  To change your join status in a queue if you are not allowed to do it yourself, contact your administrator.

For queues on this page, you can select columns to appear and you can sort and group queues by any column.

## OPERATOR POLICIES

The *Operator Policies* setting allows you to select your post sign-in state in your queues.

*Sign-In State* – This drop-down list allows you to select your availability to receive calls from queues upon signing in to Receptionist.

# SETTINGS – SERVICES

You use the Services tab to configure various services assigned to you by your administrator on Clearspan, which are applicable to Receptionist.  These settings are only available if you have been assigned such services.  For more information, see your administrator.

The services are grouped into two categories:  Active and Inactive.
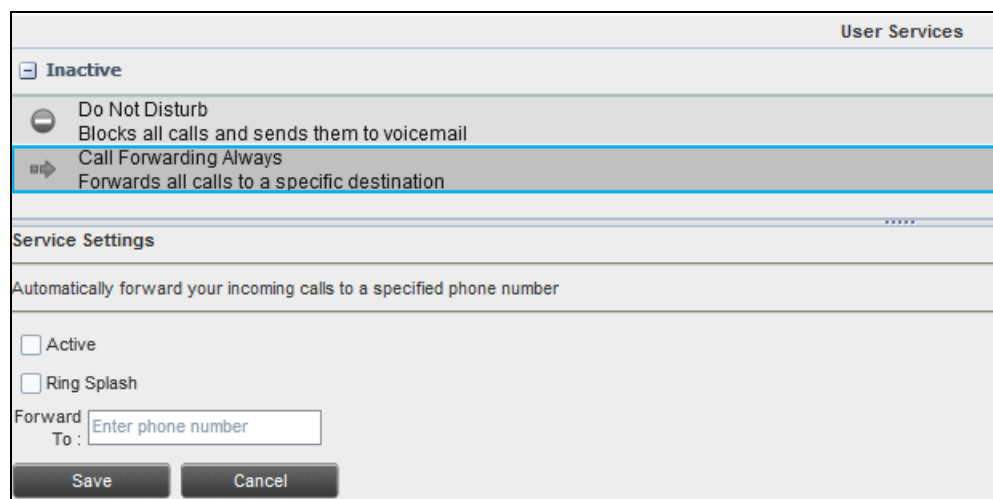


**Figure 96  Settings – Services**

The services that you can configure (if you have been assigned the services) are:

- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.

- Call Forwarding Always – When you activate this service, you need to provide the phone number to forward your calls to.  When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1.  Select the service and check the *is Active* box.  The service is moved from the *Inactive* to *Active* category.

2.  If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to forward the calls to.

3.  To generate a ring splash for incoming calls, check the *RingSplash* option.

4.  To save your changes, click **Save**.

# SETTINGS – PLUG-INS

You use the Plugins tab to configure the plug-in software used by Receptionist to provide functionality such as call notification, LDAP and Outlook directories, program shortcuts, and call logs.



**Figure 97  Settings – Plugins**

## NOTIFICATION

These options control when and how incoming call notification "pop-up toasts" are displayed.  The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window on incoming calls.

  This does not work in Firefox.  In Internet Explorer, there must be only one tab open in the web browser running Receptionist.

- *Show notifications for calls* – When this option is checked, Receptionist displays the *Call Notification* pop-up window on top of other applications' windows when you

receive a call.  When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

This does not work if there are other tabs open in the same web browser window as Receptionist.  In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

## MICROSOFT OUTLOOK

The Microsoft Outlook options control Outlook integration with Receptionist.  They are only visible if Outlook integration is enabled in Receptionist.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts.  If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from Clearspan.

- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.

- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

> **Note**:  The Outlook Integration feature provides the following functionality:  CLID lookup, saving vCards, and accessing and searching Outlook contacts.  When using Microsoft Outlook 2010 or Outlook 2013 (32- or 64-bit edition), Outlook has to be running before Receptionist is launched for these functions to work.

## LDAP V3

LDAP settings allow you integrate an *LDAP* directory with Receptionist.  These options are only visible if LDAP integration is enabled in Receptionist.  If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

To import a certificate:

1.  Click **Start** and then select *Run…*

2.  Type "cmd" and click **OK**.

3.  Type "<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts".

To verify the certificate:

1.  Click **Start** and select *Run…*

2. Type "cmd" and click **OK**.

3. Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

The *LDAP* directory options are as follows:

- *Enable/Disable LDAP Integration* – This determines whether Receptionist provides *LDAP* directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.

- *LDAP Hostname* – This is the network address of the LDAP server.

- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.

- *Search Base* – The text box determines the location in the LDAP server tree that Receptionist looks in when executing a search. The check box, when checked, searches all sub-trees within the search base until the specifications are found.

- *Encrypt Connection* – This option determines whether Receptionist uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.

- *("cn=_ _Search_ _Text")* – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively, in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.

- *Attribute Mapping* – This table controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.

   In each row of the table, enter an LDAP attribute in the *Remote Attribute* column. Enter a corresponding local attribute in the *Local Attribute* column. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".

- *Authentication Required* – When this box is checked, Receptionist must provide a user name and password to the directory server to conduct searches.

- *DN* – This is the user name Receptionist uses when connecting to the LDAP server when *Authentication Required* is checked.

- *Password* – This is the password that corresponds to the authentication *DN*.

## PROGRAM SHORTCUTS

You use the *Program Shortcuts* settings to create Receptionist shortcuts on your desktop for convenient access to Receptionist.

The program shortcuts plug-in allows for the creation of a desktop shortcut on a Windows platform, which when clicked, launches Receptionist in your default web browser.

- *Add Shortcut* – This button, when clicked, creates a Receptionist shortcut on your desktop.

- *Remove Shortcut* – This button, when clicked, removes the previously created Receptionist shortcut.  If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

## ACTIVITY ARCHIVE

This Call Event Log plug-in software provides the ability to store call event statistics locally on your computer.

- Enable/Disable Call Event Log Integration – This double-action button allows you to enable or disable log archival on your computer.

- Rotate Log – This parameter allows you to specify the frequency with which the log is rotated.  You select the frequency from the drop-down list.

- Open Log Location – This link, when clicked, goes to the location on your computer where the log is stored.

# SETTINGS – MESSAGING

The Messaging tab allows you to configure various messaging options for Receptionist. Currently, e-mail messaging and instant messaging are supported.



**Figure 98  Settings – Messaging**

## MESSAGING

These options allow you to specify the mail client to use for sending e-mail messages.

From the drop-down list, select the mail client to use for e-mails.

If you selected the *custom SMTP server* option, you need to configure the following:

- *Display Name* – This is the name that is displayed in the *From* field.

- *Reply-to Address* – This is the address where reply messages can be sent.

- *Default Subject* – This is the subject that appears when you generate an e-mail message in Receptionist.

- *SMTP Host* – This is the IP address of the SMTP host.

- *SMTP Port* – This is the port of the SMTP host.

- *Mail Template* – This is the mail template to use.

- *Outgoing SMTP Server Requires Authentication* – When this option is set, authentication is required to send e-mails.

- *Username* – This is the name you must enter to authenticate yourself.

- *Password* – This is the password part of your authentication credentials.

## INSTANT MESSAGING AND PRESENCE

Check the *Open incoming instant messages in minimized windows* check box if you want the chat windows that appear when you receive an instant message to be displayed in minimized format.

# SETTINGS – ABOUT

Use the About tab to view the information about Receptionist.
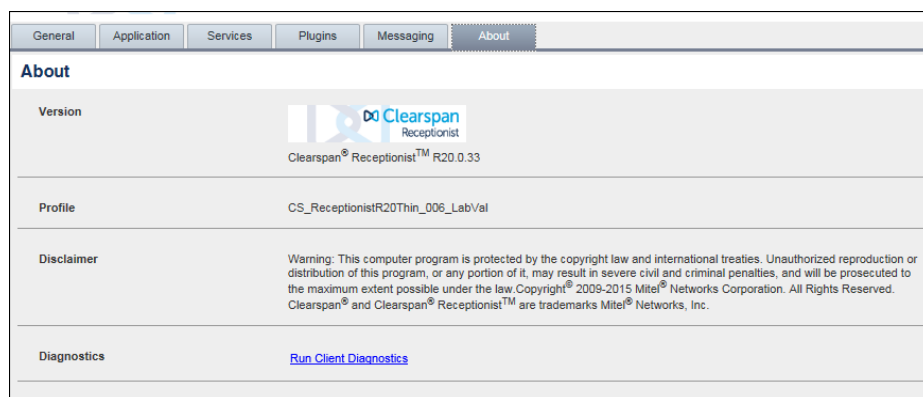


**Figure 99  Settings – About Page**

The following information is provided on this page:

- Version – This is the software version of the Clearspan Receptionist client.

- Profile – This is the Receptionist client profile used.

- Disclaimer – This is the Receptionist copyright Information.

# APPENDIX A:  GLOSSARY AND DEFINITIONS

## MONITORED USER STATES

The following table lists the possible states for monitored users.

| ICON | STATE IN RECEPTIONIST | DND | CFA | PRIVACY | EXCHANGE CALENDAR STATE | CALL STATE |
|---|---|---|---|---|---|---|
| 🔒 | Private | N/A | N/A | On | N/A | N/A |
| 🔴 | On a Call | N/A | N/A | Off | N/A | Active call |
| 🟠 | Ringing | N/A | N/A | Off | N/A | Ringing call, no active calls |
| 🟡 | Away | N/A | N/A | Off | Out of Office | No active calls |
| 🔴 | In a Meeting | N/A | N/A | Off | Busy | No active calls |
| ➡ | Call Forwarding Always | N/A | On | Off | Free or Tentative | No active calls |
| ⛔ | Do Not Disturb | On | Off | Off | Free or Tentative | No active calls |
| 🟢 | Available | Off | Off | Off | Free or Tentative | No active calls |

## CALL STATES

Call states are the states that your current calls can be in.  They are as follows:

| CALL STATE | DISPLAY NAME | ICON | DESCRIPTION |
|---|---|---|---|
| *Ringing In (Local)* | Incoming Local | ➡ | This represents a Click-To-Dial call ringing on your phone. |
| *Ringing In (Remote)* | Incoming | ➡ | The call is coming in and ringing on your phone. |
| *Ringing In (Recalled Call)* | Call Recalled | ➡ | The call was parked or camped and is being recalled because its timer has expired. |
| *Ringing Out* | Outgoing | ⬅ | The call is outgoing, ringing out.  This is equivalent to a phone ringing on the called party's phone. |
| *Active* | Active | ▶ | The call is an active call. |
| *On Hold* | Held | ⏸ | The call is on hold. |
| *On Hold (Remote Held)* | Remote Held | ⏸ | The call is held by the remote party. |

| Active (In Conference) | Active | | The call is in a conference and active. |
|---|---|---|---|
| Held (In Conference) | Held | | The call is in a conference and on hold. |

# UNIFIED INSTANT MESSAGING AND PRESENCE STATES

IM&P states indicate you or your contacts' availability to communicate using an IM&P client.  The possible states are as follows:

| IM&P STATE | ICON | DESCRIPTION |
|---|---|---|
| **Subscribed states** | | |
| Available | | The contact is online, available on one or more devices, and not busy on any device. |
| Busy | | The contact is online, but currently busy on one or more devices.  Do not disturb. |
| Away | | The contact is connected but away from the computer. |
| Offline | | The contact if offline on all devices. |
| | | If you are offline, you do not receive any presence updates or instant messages.  Also, your Instant Message directory; is empty and the presence state of your contacts in other directories is set to "Offline". |
| **Unsubscribed states** | | |
| Pending Subscription | | You sent a subscription request to the contact, but it has not yet been accepted.  Clicking the icon resends the request. |
| Not subscribed | | The contact has an IM&P service but you are not subscribed to monitor their state and the contact is not listed in the *Instant Message* directory.  Clicking this icon sends a subscription request to the contact. |

# APPENDIX B:  KEYBOARD SHORTCUTS

When using keyboard shortcuts, make sure that the main interface window is in focus.

| KEY | EQUIVALENT MOUSE ACTION | DESCRIPTION |
|---|---|---|
| ESC | Click the **Close** button ☒ in a dialog box. | This closes the open dialog box. |
| ESC | Cancel the changes. | This exits the currently selected editable item, such as a text box. |
| / | Click the *Dialer* text box. | This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). |
| | | **NOTE**:  In Internet Explorer 8, the "/" shortcut key does not always work.  Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box. |
| ? | Click the *Search* text box. | This places the cursor in the *Search* text box; it retains the currently selected item (if applicable). |
| ARROW DOWN | Click the scroll bar or the next item in a list. | This selects the next item in the *Call Console* or *Queued Calls* pane. |
| ARROW UP | Click the scroll bar or the previous item in a list. | This selects the previous item in the *Call Console* or *Queued Calls* pane. |
| PAGE DOWN | Scroll down one page. | This goes to the next page in the *Call Console* or *Queued Calls* pane. |
| PAGE UP | Scroll up one page. | This goes to the previous page in the *Call Console* or *Queued Calls* pane. |
| 1….9 | Select a call in the *Call Console*. | Pressing "1" selects the first call, pressing "2" selects the second call, and so on. |
| SPACEBAR | Click **Answer** on the selected incoming call in the *Call Console*. | This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest.  Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold. |
| <PERIOD> | Click **End** on a selected call in the *Call Console*. | This ends the selected call. |
| ENTER | Click **Dial**. | If the cursor in placed in the *Dialer* text box, the entered digits are dialed. |
| ENTER | Click **Search**. | If the cursor is placed in the *Search* text box, a search is performed. |
| + | Click **Transfer** in the *Dialer*. | This transfers the selected call to the ad hoc number entered in the *Dialer*. |
| SHIFT+1..9 | Select a ringing call and click **Answer**. | Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on. |
| SHIFT+1..9 | Select an active call and | Pressing **SHIFT+1** selects and places the first |

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| | click **Hold**. | active call on hold, pressing **SHIFT+2** selects and answers the second active call, and so on. |
|---|---|---|
| SHIFT+1..9 | Select a held call and click **Retrieve**. | Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on. |
| S or s | Click on **Settings** link. | This opens the *Settings* page if main window is in focus. |
| B or b | Click on **Back to Application** link. | This goes back to the main page from the *Settings* page. |
| R or r | Click the **Call History** button. | This opens the *Call History* dialog box. |
| H or h | Click the **Help** link. | This opens this guide in a PDF format. |
| SHIFT+L or SHIFT+l | Click the **Sign Out** link. | This signs the user out of the application. |

# INDEX