ALTIGEN
COMMUNICATIONS

AltiAgent™

for AltiWare ACC Release 5.2
and AltiWare ACM Release 5.2

Manual

2/2008 4503-0001-5.2

WARNING!

Toll fraud is committed when individuals unlawfully gain access to customer telecommunication systems. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. AltiGen Communications, Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although AltiGen Communications, Inc. has designed security features into its products, it is your sole responsibility to use the security features and to establish security practices within your company, including training, security awareness, and call auditing.

NOTICE

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This documentation may be used only in accordance with the terms of the AltiGen Communications, Inc., License Agreement.

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TRADEMARKS

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Part Number 4503-0001-5.2

Contents

Warranty

What The Warranty Covers

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

How Long the Warranty Is Effective

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

Whom the Warranty Protects

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

What the Warranty Does Not Cover

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

How to Obtain Service

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

Authorized AltiGen Dealers must follow the steps below for service:

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

   All materials being returned to AltiGen must have an associated RMA number. RMA numbers are issued by AltiGen Customer Service and can be obtained by calling 1-888-ALTIGEN (258-4436) or faxing an RMA form to 510-252-9738, attention to Customer Service. AltiGen reserves the right to refuse return of any material that does not have an RMA number. The RMA number should be clearly marked on the outside of the box in which the material is being returned. For example:

   Attn.: RMA # 123
   AltiGen Communications, Inc.
   4555 Cushing Pkwy.
   Fremont, CA 94538

   Upon authorization of return, AltiGen will decide whether the malfunctioning product will be repaired or replaced.

2. To obtain warranty service, you will be required to provide:

   a) the date and proof of purchase

   b) serial number of the product

   c) your name and company name

   d) your shipping address

   e) a description of the problem.

3. For additional information contact your AltiGen Dealer or AltiGen Communications, Inc.

Effect of State Law

This warranty gives you specific legal rights, and you may also have other rights which vary from state to state. Some states do not allow limitations on implied warranties and/or do not allow the exclusion of incidental or consequential damages, so the above limitations and exclusions may not apply to you.

Sales Outside the U.S.A.

For AltiGen Communications products sold outside of the U.S.A., contact your AltiGen Communications dealer for warranty information and services.

About AltiAgent

AltiAgent is a Windows desktop application designed to improve the performance of workgroup and call center agents in an AltiWare AltiContact Center (ACC) or AltiContact Manager (ACM) environment.

AltiAgent allows workgroup agents to manage workgroup calls from their computers. It allows direct access to call handling and other functions, including the following:

- Viewing caller data (for example, IP address, account number, credit card number, name, and so on) sent with an incoming call.
- Pushing or sending a URL or web page to a web-based call.
- Viewing and printing workgroup call data.

With AltiAgent, you can monitor workgroup-related statistics, workgroup call pickup, and member login/logout. In addition, AltiAgent integrates with Microsoft Outlook and Outlook Express, ACT!, and GoldMine® for caller screen pops and dialing out from these applications.

Call information can be stored to an internal or external CDR database for future review and analysis.

New in Release 5.2

Displays a Global Extension's BLF state, extension status, and activity.

New in Previous Release, 5.1

- MeetMe Conference scheduling, monitoring, and control.
- Dial Pad and Flash key.
- Ability to manage Activity greetings.
- Ability to transfer or conference by clicking on an entry on the **Speed Dial** tab or **Monitor** tab.
- User receives indication when calls are in workgroup queue.
- User has the ability to monitor the workgroup voice mail box.

- A workgroup voice mail indicator alerts the agent.
- The AltiAgent Queue Monitor includes a DNIS field.
- When the user clicks **Delete All** on the **Call History** tab, confirmation is required.
- A red light blinks when **Not Ready** is displayed.
- IPTalk user can specify a different ring device when away from the desk (for example, the PC speakers instead of the headset system) so that the ring can be heard.

Microsoft Outlook and Outlook Express Support

AltiAgent 5.2 supports Microsoft Outlook 2003 and 2007, and Outlook Express 5.0, allowing you to obtain phone numbers to dial from a Microsoft Outlook Contact list. AltiAgent also lets you see the incoming calls that have a matching record in the Contact list.

You must set up the Outlook Contacts list prior to using this feature.

A Country Code field can be configured (in the Configuration window, **General Info** tab) by the local user to help convert standard international phone numbers in Outlook to correct digit strings for AltiWare.

ACT!/GoldMine® Support

AltiAgent 5.2 supports ACT! 2005, 2006, and 2007 and GoldMine® 6.0, 6.5, and 6.7 contact management software, allowing you to obtain phone numbers to dial from the ACT! or GoldMine® contact database list. AltiAgent also lets you see the matching record from the contact database list of the incoming calls.

Licensing

AltiAgent requires an AltiAgent session license to be installed at the AltiWare ACC/ACM system. A concurrent login session is governed by the AltiAgent session license.

A system administrator can verify the licenses in AltiWare Admin by selecting **About AltiWare** or **About ACC/ACM Admin** on the **Help** menu, then clicking the **License Information** button, which opens a window that displays licenses and session information.

The IPTalk feature requires the purchase, registration and activation of the **IPTalk License**.

Installation

The client system must meet the following minimum requirements.

- IBM/PC AT compatible system
- 1GHz CPU or above
- Windows XP Professional or Windows Vista Business Edition
- 250 MB available hard drive disk space
- 256 MB RAM
- SVGA monitor (800 x 600) with 256 color display, or better
- Keyboard and mouse
- AltiWare ACC/ACM 5.2 running on a server accessible to this client.

Pre-Installation Checklist

Before installing AltiAgent, make sure the following is done:

- AltiWare ACC 5.2 or AltiWare ACM 5.2 has been installed on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing AltiAgent has local administrator rights on the client PC.
- The AltiAgent License Key has been installed and activated on the system server.

Installing AltiAgent on a Client System

When the above items are done, follow these steps on the client machine:

1. Exit all Windows applications.
2. Insert the AltiWare 5.2 Clients CD into the CD ROM drive..

3. Open the AltiAgent folder, and run the **Setup** program in that folder, following the step-by-step installation instructions as they appear on the screen.

Alternatively, if your system administrator has loaded AltiAgent on a shared network server, you can copy the files in the AltiAgent folder to your desktop PC, and run the AltiAgent **Setup** program.

Uninstalling AltiAgent

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs > AltiAgent 5.2** to uninstall AltiAgent.
2. Click **Remove**, and respond to any additional prompts.

Automatic Upgrade

Each time you start up AltiAgent, a comparison is made with the version of AltiWare ACC/ACM that is running on the server. If updates were made on the server, and your version of AltiAgent is out-of-date, you are prompted for upgrade permission. If you automatically upgrade, the AltiAgent startup is terminated and a software upgrade session is started. Restart AltiAgent to run the newer version.

Note: For remote AltiAgent users outside the firewall, TCP port 10050 is required to be open to allow automatic upgrade. Also, automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, so it may take some time to perform the automatic update.

Downgrade Procedure

1. Go to **Control Panel** > **Add/Remove Programs** and remove the AltiAgent 5.2 program and ALL OTHER 5.2 client applications (including AltiView, AltiSupervisor, AltiConsole and CDR Search 5.2).
2. Reboot your system.
3. Go to `<local drive>:`**`Program Files\AltiGen\Shared Files`** and remove **AlpInterface.dll**.

Note: The **AlpInterface** might be located under `\WinNT\System32\`, `\Windows\System32\` or some other location. Use the **Search for Files and Folders** feature to locate and remove all **AlpInterface.dll** files from the system.

4. Install the AltiAgent 5.0A or 5.1 software, as appropriate.

Getting Started

Start AltiAgent from the Microsoft Windows **Start** menu, by choosing **Start** > **All Programs** > **AltiClient** > **AltiAgent**

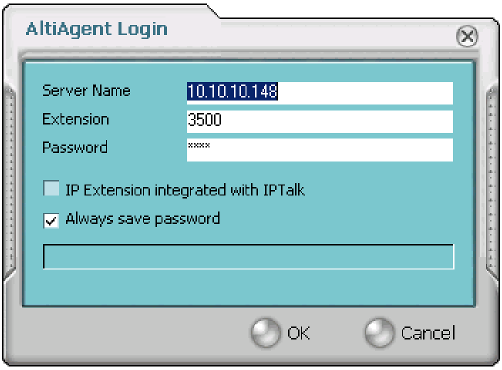
Note: For users running Windows XP SP2, a firewall protection Security Alert may pop up when opening the login window. If this happens, click **Yes** to allow AltiAgent to run.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local internet service provider. If you're using a low-speed connection, the login may take some time, since a large amount of data is transferred to your desktop.

Logging In

1. If this is your first login to this AltiWare ACC/ACM system, enter the system server's IP address or the name of the system server you will be using. To obtain the server name or IP address, ask your IT administrator.

   (Subsequently, when you log in, you'll see the IP address in the **Server Name** field.)



2. Enter your **Extension** number and **Password** assigned to your phone.

If you want to store your login password and have it entered automatically the next time you log in to AltiAgent, check the **Always save password** check box.

Note: Up to eight unsuccessful login attempts are allowed, after which login will be disabled for from 1 to 24 hours (depending on the duration set by your system administrator).

3. If your extension is an IP extension and you will be using a headset, check the **IP Extension Integrated with IPTalk** option.

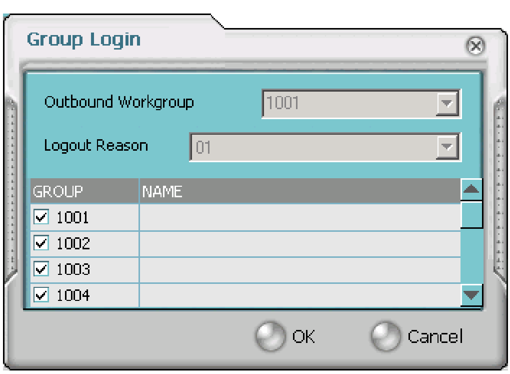
   (Even if you do not have an IP *phone*, as long as your extension is set up as an IP extension by your system administrator, you can select the **IP Extension Integrated with IPTalk** check box.)

   See "Logging In Remotely" on page 12 for more information on using IP extensions remotely.

4. Click **OK**.

Workgroup Login

After you complete your initial login, a Group Login dialog box appears.



Select the workgroup or workgroups you want to log in to, then click **OK**. You can log in to eight workgroups simultaneously.

Note: If you are set up to change your **Outbound Workgroup,** you can select another extension from the drop-down list.

Logging Out or Changing Workgroups

After you've logged in, you can log out or change the workgroups you're logged in to as follows:

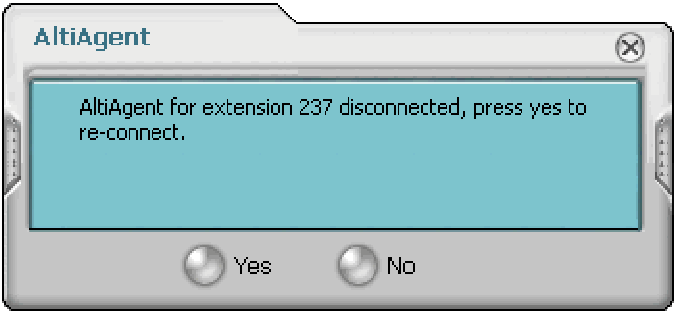
1. Click the **Login/Logout** button in the main window to open the Group Login window.
2. To log out or change workgroups, deselect the check box(es) next to the workgroup(s) you're logging out from.
3. If **Logout Reason Codes** are required in your system, select one in the drop-down list.
4. If you want to log in to other workgroups, select their check boxes.
5. Click **OK**.

Version Mismatch Dialog Box

If your version of AltiAgent doesn't match the version of AltiWare on the system server, you are prompted for upgrade permission when you try to log in. If you allow upgrade at this time, the AltiAgent startup is terminated and a software upgrade session is started. Restart AltiAgent to run the newer version. (See "Automatic Upgrade" on page 6 for more details.)

Reconnecting to AltiAgent

When a connection with the phone server is broken, a message box pops up asking if you want to connect again. Clicking **Yes** will restore the connection without you having to go through the log-in process again.



Logging In Remotely

You can use AltiAgent from a remote location if

- AltiAgent is installed on your remote computer
- Your extension is configured as an IP or mobile extension by your system administrator
- You have an AltiGen-certified IP phone or are using IPTalk

Consult your system administrator or authorized AltiGen dealer for details on obtaining this equipment.

All the call handling functions are the same as when you log in locally. You can pick up voice mail, forward local business office phone calls to another site such as a home desktop PC, and even receive phone calls as you would at the office.

To log in from a remote location

1. If you connect to the Internet through a modem connection, establish a connection to your internet service provider (ISP).
2. Log in using your **Extension** and **Password** as usual.
3. If you will be using a headset plugged into your PC, select the **IP Extension Integrated with IPTalk** check box.
4. Click **OK.**

IP Extensions Using IP Talk

To use IPTalk, you need an AltiGen-certified USB headset system (your phone system administrator or AltiGen dealer can recommend headsets).

Important: You can run only one instance of AltiAgent with IPTalk per system.

To make and receive calls using IPTalk

1. Connect your headset to your PC.
2. Use the AltiAgent dialing and call accepting functions as usual to make and receive calls.

Troubleshooting IP Connectivity

If problems occur, they may be due to a failure to connect to your ISP or due to firewalls at your office preventing direct access to the AltiWare server.

As a test, you can choose **Run** from the Windows **Start** menu, then enter

```
Ping <IP address> [ENTER]
```

where <IP address> is the AltiWare system you want to connect to. An example of the IP address format is 123.234.231.143

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

Also, check to verify that the necessary ports are open.

Exiting and Minimizing AltiAgent

To exit AltiAgent, click the X in the top right corner of the screen. To minimize AltiAgent, click the **Minimize** symbol . AltiAgent shrinks to a phone icon in the tray in the lower right corner of your screen.

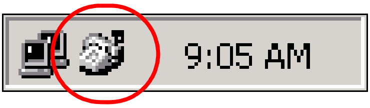
To exit AltiAgent when it is minimized, right-click the phone icon and select **Exit**.

Pop Up AltiAgent when You Get a Call

You can configure AltiAgent to pop up when you have incoming calls. Pop ups work when AltiAgent is minimized but *not* when you have exited. See “Screen Pop, Audio Beep, and Auto Close” on page 59.

Using the Windows Tray Phone Icon

After you log in, the AltiAgent icon (a yellow phone) is displayed in the Windows tray, normally at the bottom right of your screen. When you have new voice mail, the phone icon is replaced with a yellow envelope icon.



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

Resizing the Display

You can resize many AltiAgent windows using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.

Columns can be resized by placing the cursor on a column divider in the header area until the cursor changes to a movable double bar (||). Then move the bar to resize the column.

Error Messages

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

Error Message	Description	Solution
AltiWare connection limit has been exceeded.	No AltiAgent was found OR more than allowed number of AltiAgent users have attempted to log on.	Maintain the number of AltiAgent license keys or add additional session licensing.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to AltiWare.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of AltiWare (if using the DNS name in the server field).
Cannot access voice mail list while mail box in use.	Mail box is in use by the AltiGen Voice Mail System and is temporarily unavailable.	Wait awhile, then try again.
Mail service is unavailable. Please check with your administrator.	Voice mail service is not enabled on AltiWare.	Make sure voice mail service is started.

Error Message	Description	Solution
Please register AlpInterface.dll (regsver32 AlpInterface.dll).	AltiAgent uses this dll to communicate with AltiWare. It should be registered in user system.	Re-register this file. Type in DOS command window, **regsver32 AlpInterface.dll** Change directory to AltiAgent directory, type **regsver32 AlpInterface.dll**
You have entered an invalid password. Please try again.	The password is incorrect.	Enter your extension password.
Cannot use "IP Extension integrated with IP Talk."	You tried to log in with the IP extension option without the IP-Talk License.	Confirm that your extension is set up as an IP extension with dynamic IP address and that an IP-Talk License has been registered.
The version of AltiAgent on your desktop is out of date.	The installed version of AltiAgent does not match the version of AltiWare on the system server.	Upgrade AltiAgent to match the current running version of AltiWare.

Using AltiAgent as a Workgroup Agent

Once you log in to AltiAgent, the main window appears. This window provides tools to manage and monitor calls, and is your window into your workgroup environment.

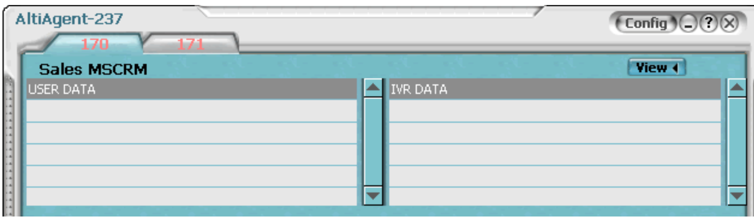
The window displays the following:

The Workgroup Status panel

Displays statistical information about the current workgroup. If you're logged into more than one workgroup, you can click a tab above the panel to view another workgroup.

The statistics are largely self-explanatory, but it may be noted that the *Service Level* represents the percentage of workgroup calls taken out of queue before the *Threshold* time has expired.

Click the **View** button at the right of the Workgroup Status panel to see additional information:



- **User Data** is entered either by you (using the **User Memo** button) or by another workgroup agent who transferred the call to you. Data programmed by your system may also appear here. (User data entered here appears on the **History** tab in the **Note** column when the call is completed.)
- **IVR Data** is collected from caller input in response to auto attendant requests. (Your system may not use this capability.)

Click the **View** button again to return to the workgroup statistics view.

The Status panel

Displays the status of the currently active call, the current time, an **Activity** drop-down list and a **DND** (do not disturb) button.

Call statuses include the following:

- **AA**—the call is being transferred to an Auto Attendant
- **Busy**—callee is busy or not available
- **Call Pending**—the call is placed into a workgroup queue
- **Conference**—the call is in conference
- **Connect**—the call is connected
- **Dial Tone**—a dial tone is present, AltiAgent is ready to dial out
- **Error**—receipt of an error tone
- **Hold**—the call is on hold
- **Hold Pending**—the call is being transferred or conferenced

- **Idle**—the extension is not in use
- **Music on Hold**—an extension user placed the call on hold to take another call
- **Park**—the call is parked
- **Play**—playing voice mail
- **Proceeding**—the outgoing call is in progress
- **Record**—recording an introductory message
- **Ringback**—caller sees this status while the callee’s phone is ringing
- **Ringing**—an outgoing call is ringing another phone
- **Voice mail** —the call is in voice mail

The table below the Status panel

Displays calls or voice mail. When you click the **Calls** tab, the table shows a current list of calls, the name of the caller (if available from extension information or from an external database), the number, workgroup number, DNIS digits if available, call length, and conference status.

When you click the **Voice Mail** tab, the table shows a log of current and past voice messages. Clicking the **WG VM** tab displays a list of workgroup voice mail.

The Activity drop-down list

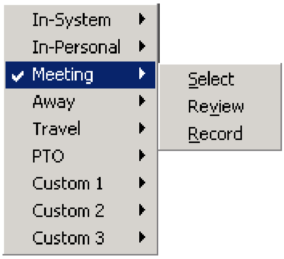
Lets you select your whereabouts, so that others may be informed. Click the Down arrow and choose **Select** beside the appropriate category:

In-System / **In-Personal** / **Meeting** / **Away** / **Travel** / **PTO** (personal time off)

The remaining three activity codes (7, 8, 9) may or may not be customized by your system administrator.

The activity category you select appears on the button.

You can record a greeting for each away-from-desk activity status by selecting **Record** beside that activity, and then using your phone or headset to record a greeting:



You can record and review a greeting for each away-from-desk activity status

To hear the greeting played back, select **Review**. Change your greeting whenever you want to.

The DND button

Is a toggle that turns **Do Not Disturb** on and off. When Do Not Disturb is on, the button label turns red and becomes DND/ON. All incoming calls are forwarded according to your **Enable Busy Call Handling** settings.

Note: If the system administrator has disabled the Do Not Disturb feature for the extension, the **DND** feature will not be available to you. If you select **DND**, an alert pops up informing you that DND is not allowed.

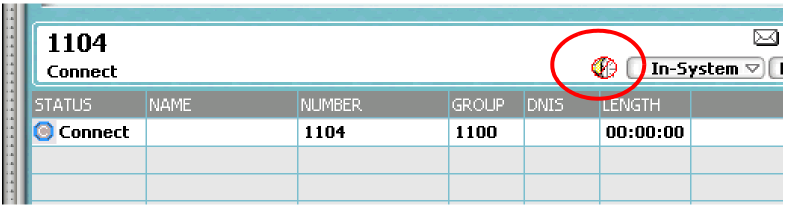
Call Controls

Provide single-click functions to **HOLD**, **REDIAL**, **HANGUP**, **TRANSFER**, **CONFERENCE,** send calls to **AA** (auto attendant) or **VM** (voice mail), and **FLASH**.

Mute and Volume Control buttons are displayed when you have logged in as an IPTalk user.

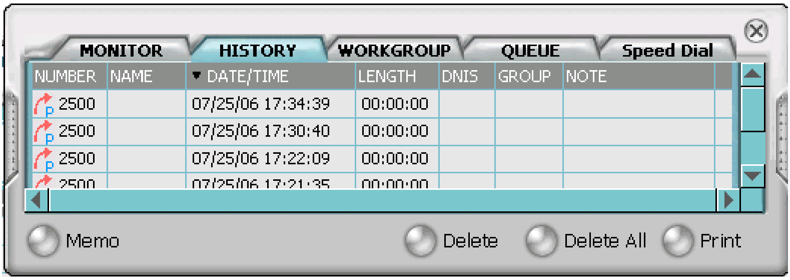
- The **READY**/**NOT READY** buttons tell the system you are ready/not ready to receive workgroup calls.
- The **WEB DATA** button lets you display data associated with the calls, send web pages or URLs to the user, or share web pages.

- The **USER MEMO** button lets you type a brief memo about a call/ caller while you are on the call. Later, click the **Memo** button on the **History** tab to see the note.
- The **LOGIN/LOGOUT** button allows you to log in to different workgroups and/or log out of workgroups.
- When IPTalk is enabled, a headset volume control can be opened by clicking the **Volume Control** button.
- When IPTalk is enabled, a **Mute** button is available. The button is a toggle. When the conversation is muted, a "mute" symbol appears in the main window.



Monitor, History, Workgroup, Queue, and Speed Dial Tabs

Clicking the EXPAND button gives you five more tabs to work with: **Monitor**, **History**, **Workgroup**, **Queue**, and **Speed Dial**. See the appropriate sections for information on working with these tabs.



Handling Calls

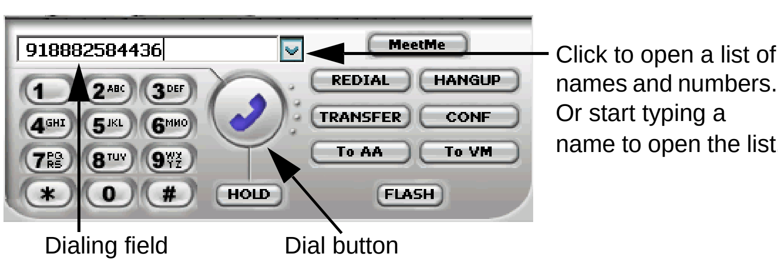
The AltiAgent call handling functions include:

- Dialing out, page 22
- Placing calls on hold, page 25
- Using call waiting, page 25
- Transferring calls, page 25

Dialing

To dial a number, click in the dialing field, enter a number or name, and then click the **Dial** button or press **Enter** on your computer keyboard.

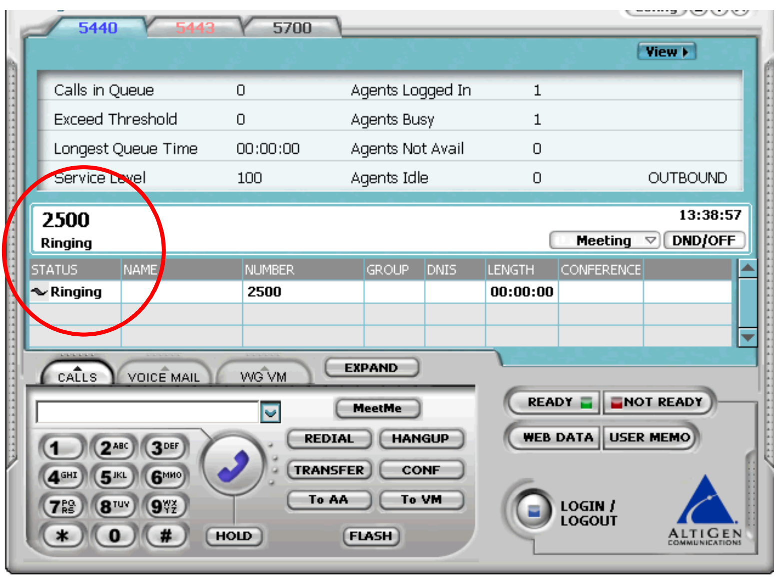
- **By number**—You can enter a phone number in the dialing field by clicking the digits on the dialing pad in AltiAgent or by using the standard numeric keys or the numeric keypad on your computer.
- **By name**—For names recorded in the system, you can enter a name by using the keyboard on your computer to type the name. Then select the name from the drop-down list that opens. The phone number for that name appears in the dialing field.
- **By selecting from a list**—You can open the drop-down list by clicking the Down arrow and then scroll down the list to find the name or number you want and then select it.



The drop-down list beside the dialing field displays extensions or the names associated with extensions as well as names and numbers imported from MS Outlook, Outlook Express, GoldMine®, or ACT!.

The list can display up to 2,000 entries. If you are working with more than 2,000 entries, you can find the entry by name search even if the entry is not one of the 2,000 that are displayed.

The main window displays the status of the call:



When Your Number Is Questionable

If your system's IP trunk access code is 7, when you dial "7101234567," the number could have two meanings:

- "7" is the IP trunk access code, "101" is the IP dialing entry, and "234567" is the target number.
- "710" is the area code, and "1234567" is the number.

In this case, an AltiAgent message box asks you: **Is "710" an area code?**

- If you click **Yes**, AltiAgent inserts the trunk access code ("9") and long distance number ("1") automatically.
- If you click **No**, AltiAgent dials this number out directly, and "7" is treated as an IP trunk access code.

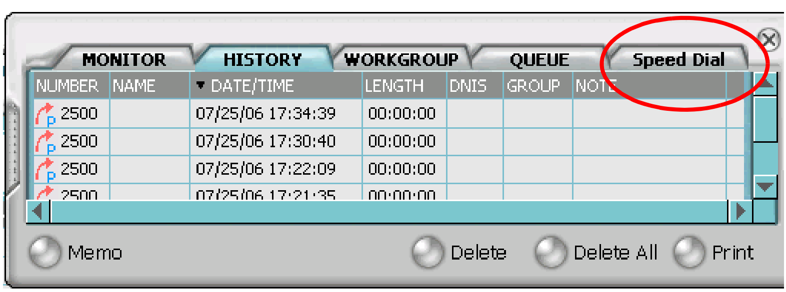
If the number you dialed is shorter than 10 digits (3-digit area code + 7-digit number), AltiAgent sees the "7" as an IP trunk number, and dials this number out directly.

Each time you answer the question **Is "710" an area code?** the result is recorded in a text file, `AreaPrefix.txt`, so that AltiAgent will not have to ask you again about that number. If you want to remove the number, open the file, delete the number, then restart AltiAgent. The typical address for the file is: c:\program files\AltiGen\AltiAgent\AreaPrefix.txt.

Dialing Speed Dial Numbers

To dial Speed Dial numbers, click the 

button, and then click the Speed Dial tab:



This tab lists *Station* Speed Dial numbers that you have configured in AltiAgent, and it lists *System* Speed Dial numbers, if any, that have been set up for your extension by the system administrator. You can see in the **Type** column which numbers are station numbers and which are system numbers.

To call a speed dial number, double-click the row of the number you want to call, or single-click the row in the **Type** column.

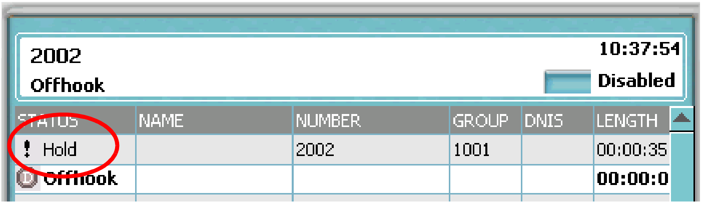
See “To add or edit station speed dial numbers” on page 61 for details on setting up speed dial numbers.

Redialing

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

Placing Calls on Hold

During a phone call, click the **Hold** button in the AltiAgent main window. The state of the call is changed from *connected* to a *hold* state and you will hear the dial tone.



In the row displaying the call, the **Status** column shows the call on hold. Click the **Hold** state cell to release the hold and reconnect the call.

Note: When a call is put on hold automatically by the system (to queue), the system will ring the user after two minutes, if the call is still on hold.

Note: When you place a call on hold, workgroup calls may still ring your extension. To prevent this, click the **Not Ready** button. See “Setting Status to Ready or Not Ready” on page 46.

Using Call Waiting

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

1. Click the **Calls** tab on the AltiAgent main window to view the directory of current calls.
2. Find and click the row displaying the incoming call.

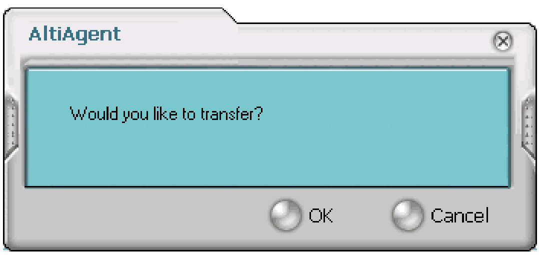
   This places the current call on hold and connects the incoming call.
3. When you are finished, click the **Hold** status cell for the call on hold to reconnect.

Transferring Calls

AltiAgent supports both supervised transfer, in which you confirm the transfer, and blind transfer.

1. While connected to a call, click the **Transfer** button.
2. Specify the extension or phone number to transfer the call to, then click **Dial**. To specify the number, either enter the number on the dial pad or click the appropriate number on the **Speed Dial** or **Monitor** tab.
3. While AltiAgent dials the new number, you're asked to confirm your decision by clicking the **OK** button in a confirmation dialog box.

   You can click **OK** before the party answers to do a blind transfer, or you can wait for the person to answer and then confirm or cancel the transfer.



   At any time before or after the person you're transferring to answers the phone, you can cancel the transfer by clicking the **Cancel** button or by closing the dialog box.

   If the transfer is canceled, AltiAgent reconnects the call to your extension. The call is also reconnected if the third party doesn't answer.

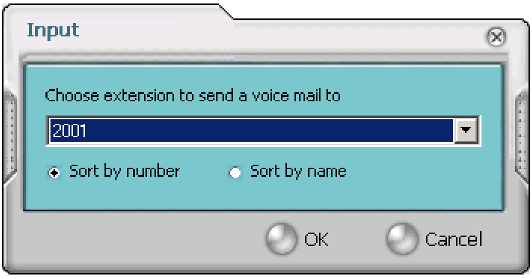
How to display User data on the IP phone

When a call is being transferred using AltiAgent, the person transferring the call can type a brief note in AltiAgent, which will then be displayed on the LCD of the person receiving the call, as well as on that person's AltiAgent screen. To do this, after answering a call and before transferring it, do the following:

1. In AltiAgent, click the **User Memo** button in the lower right of the AltiAgent screen. The Memo dialog box opens.
2. In the **Memo** field, enter `DISP=` and follow that with your text (for example, `DISP=new customer`) in the **Memo** field. DISP (for "display") is case-sensitive and supports only inbound trunk calls.

Transferring to Voice Mail

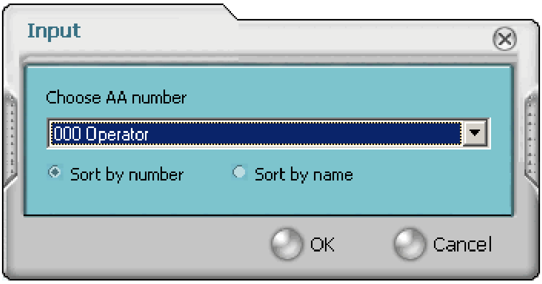
While connected to a call, click **To VM** on the main window. In the box that pops up, choose the extension number you want to send the call to, then click **OK**. (You can sort extensions by number or by name.)



Note: You can forward a call to voice mail without answering it by clicking the **To VM** button and selecting an extension while the call is ringing.

Transferring to Auto Attendant

To transfer a call to an auto attendant, while connected to a call click **To AA** on the main window. Use the drop-down list to select the operator or an auto attendant to transfer to. (You can sort the list by number or by name.)



Note: You can forward a call to an auto attendant without answering it by clicking the **To AA** button and selecting an auto attendant while the call is ringing.

Forwarding Calls Using Do Not Disturb

If allowed, click the **DND** button to forward all incoming calls according to your **Enable Busy Call Handling** settings. See "Busy Call Handling and No Answer Handling" on page 67.

Centrex Transfer

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

To perform a Centrex transfer:

1. While connected to an outside caller from a Centrex trunk, type "**F***" in the number field in AltiAgent, and then press the **Enter** key on the keyboard.
2. After you hear a dial tone, type the second party's outside number in the number field, and then press the **Enter** key on the keyboard again.
3. Now either click the **HangUp** button or wait to announce the caller and then click the **HangUp** button.

Conference Calls

There are two types of conference calls in AltiAgent:

- **Station conferencing**. In this type of conferencing, when you're on a call, you can dial a third party and then conference that party in to the call. Any internal user is able to add parties to this type of conference call.
- **MeetMe conference**. If your company has this feature available, you can schedule a meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time. (See "MeetMe Conference" on page 31.)

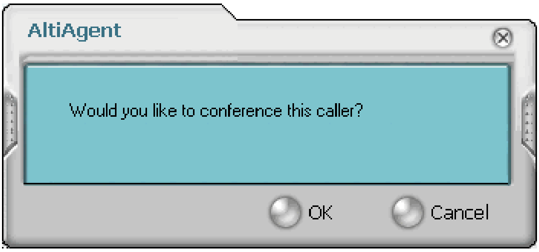
Station Conferencing

Note: In order to conference *incoming* calls, **Single Call Waiting**, **Multiple Call Waiting** or **Live Call Waiting** must be checked in the AltiAgent Configuration window, **Call Handling** tab.

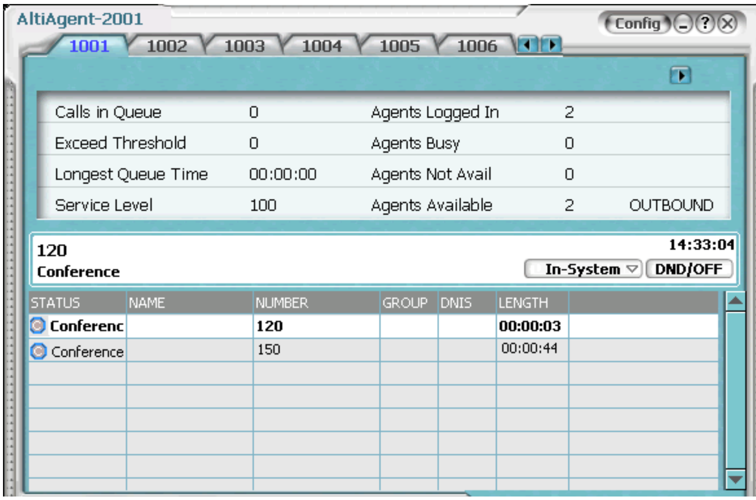
While connected to the first party:

1. Click the **Conference** button.
2. In the dialing field, enter the extension or phone number you want to conference with, then click **Dial**.

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



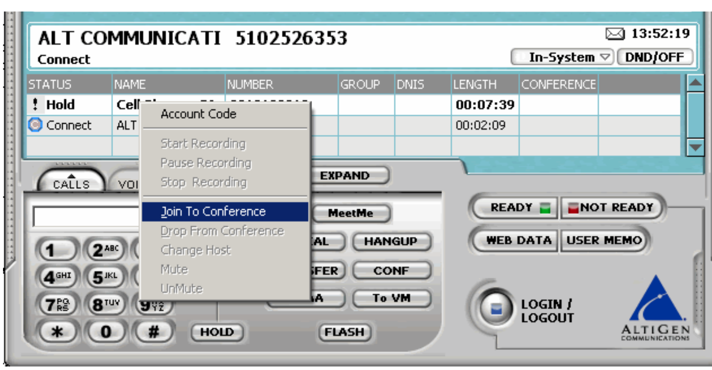
3. After the third party answers, you can announce the conference by clicking **OK** in the dialog box. If the third party does not answer, click the **Cancel** button.
4. Click the **Conference** button again to initiate the three-way conference. Both calls will be displayed as *Conference* status.



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

When lines are holding, you can add parties to a conference call:

1. Right-click on the hold call you want to add to the conference.



2. Select **Join To Conference**.
3. In the confirmation dialog box, click **OK** to conference the caller.
4. Click the **Conference** button again to initiate the three-way conference. Both calls will be displayed as *Conference* status.

To add another party, click the **Conference** button and repeat steps 2-4. The maximum number of station-conferenced parties is 6.

Canceling Conference Calls

You can cancel the conference using any of the following methods:

- Click the **Cancel** button in the conference confirmation dialog box.
- Close the conference confirmation dialog box.
- Press your phone's **FLASH** button.
- Right-click the appropriate call and select **Drop From Conference**.

Normally, after canceling you will be reconnected automatically to the initial call. If you are not automatically reconnected and want to reconnect to the first call, click the call's *Hold Pending* status cell.

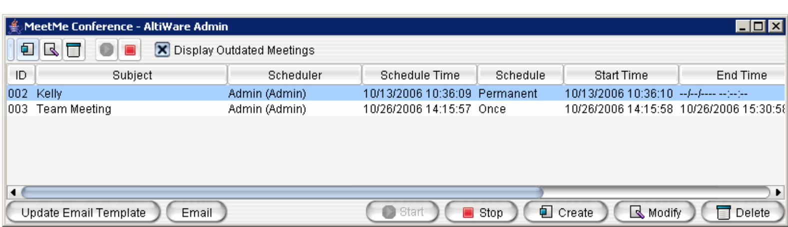
Note: The conference holder is the user who initiates the conference call. If the conference holder hangs up, no one in the conference call is allowed to drop the call from conference. Only the conference holder can drop a call from conference.

MeetMe Conference

If your company has this feature available, you can schedule a phone meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time.

To schedule a phone meeting, click the 

button. The MeetMe Conference window opens:



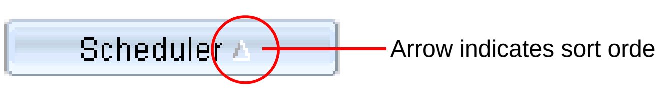
Using this window, you can:

- Create a one-time or recurring meeting and set its parameters
- Open Microsoft Outlook to send an e-mail invitation to participate in the meeting
- Start and stop a meeting

- Modify or delete a meeting
- See meeting ID, subject, scheduler, time, frequency, start time, end time, the last time the meeting started, its status, and the resource being used.
- Display or hide outdated meetings
- Modify column display

Working in the MeetMe Conference Window

- Click a button to perform a function (for example, create a meeting). The buttons at the bottom of the window are labeled with their function; the buttons at the top of the window perform the same functions. In addition, at the top of the window, you can choose to display outdated meetings by checking the **Display Outdated Meetings** check box. Deselect the check box to hide outdated meetings.
- Select an existing meeting to perform a function on it (for example, to start or stop the meeting). You can select one meeting at a time.
- Functions can also be performed on an existing meeting by right-clicking the meeting and selecting from the context menu.
- Click a column head to sort by that column. An arrow is displayed that indicates the sort order, ascending or descending. Click again to reverse the sort order.



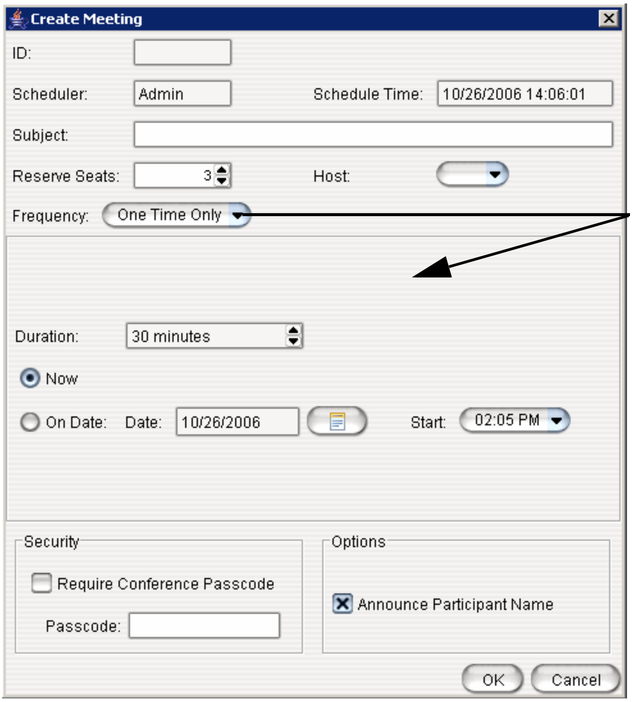
- Use the scroll bar at the bottom of the window to display additional columns, if necessary.
- Change column size by clicking and dragging a column border.
- Change column order in the current window by dragging a column head to where you want it.
- You can open more than one MeetMe Conference window and work with different meetings and displays in each one.
- You can double-click a meeting to open the Modify Meeting dialog box.

Using the Calendar Button

The Create Meeting and Modify Meeting dialog boxes use Calendar buttons for date selection. To select a date, click the **Calendar** button. When the calendar is open, use the Up/Down arrows to select the year, *or* you can type in a year and then press **Enter**. Click the **Calendar** button again to close the calendar.

Creating a Meeting

To create a meeting, click one of the **Create** buttons. The Create Meeting dialog box opens.



The options in the middle panel change, depending on the schedule you select

The following parameters apply to all meetings:

Parameter	Description
ID	The conference ID is created by the system.

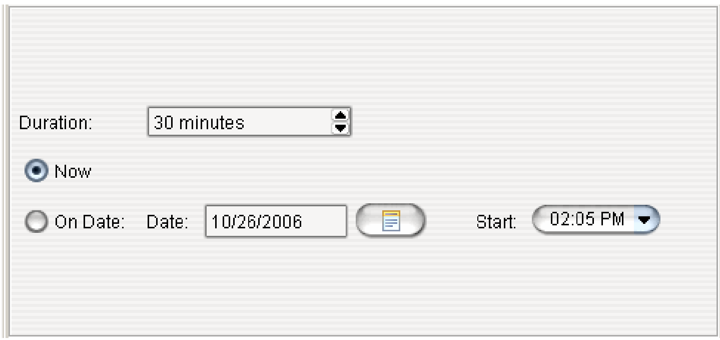
Parameter	Description
Scheduler	The name of the person scheduling the meeting.
Schedule Time	The time the Create Meeting dialog box was opened to create this meeting.
Subject	Identifies the subject or type of meeting. What you enter here should be easily identifiable in the meeting list.
Reserved Seats	Use the Up/Down arrows or type in a number, up to 30, to indicate the number of expected participants.
Host	Select the extension number of the host of this meeting. The host can start and stop the meeting and can mute and drop meeting members.
Schedule	Select the frequency of this meeting from the drop-down list. A “weekly” or “monthly” meeting can actually be specified as every 2nd week/month or every 3rd week/month, and so on.
Middle panel: Options in the middle panel vary according to the frequency of the meeting. See the sections below this table.	
Require Conference Passcode	If you check this, no one can participate who does not enter the conference passcode that you supply.
Passcode	If you are requiring a passcode, enter it here.
Announce Participant Name	If you want participant names announced when they enter the meeting, check this check box.

Fill in the fields of the Create Meeting dialog box, and click **OK**. See the following sections for directions on filling in the fields in the middle panel of this dialog box.

Note: If other scheduled meetings have already reserved resources for the time period, and sufficient resources are not available for the meeting you are attempting to schedule, a message pops up telling you that there is a resource conflict.

One Time Only Meeting

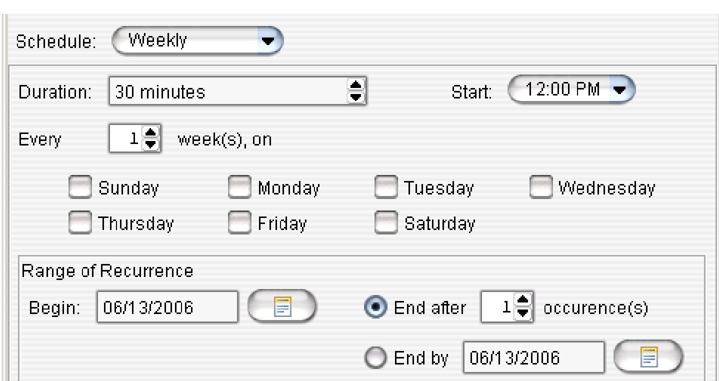
If you select **One Time Only** from the **Schedule** drop-down list, these are your options in the middle panel:



1. Specify the duration of the meeting, using the Up/Down arrows.
2. If the meeting is to begin as soon as it is scheduled, select **Now**.
3. If the meeting is to begin at another time, select **On Date**, and enter a date and start time. To select a date, click the **Calendar** button. To select a start time, click the Down arrow and use the slide bar.

Weekly Meeting

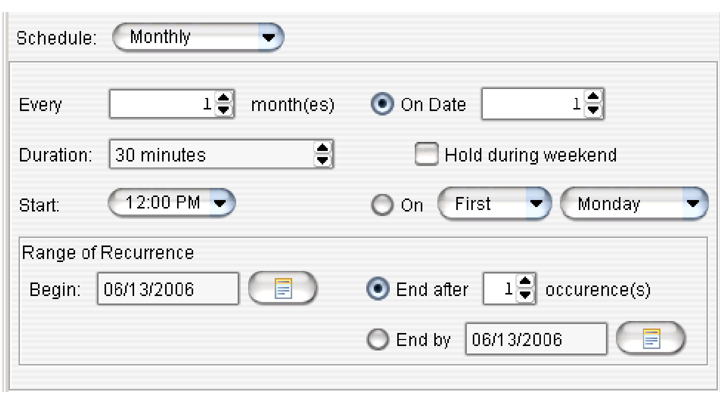
If you select **Weekly** from the **Schedule** drop-down list, these are your options in the middle panel:



1. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
2. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.
3. In the **Every** field, specify how often this meeting is to occur: every week, every other week, every three weeks, and so on.
4. Check the day of the week on which this meeting will occur.
5. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
6. Select **End after x occurrences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date at which the meetings will cease.

Monthly Meeting

If you select **Monthly** from the **Schedule** drop-down list, these are your options in the middle panel:



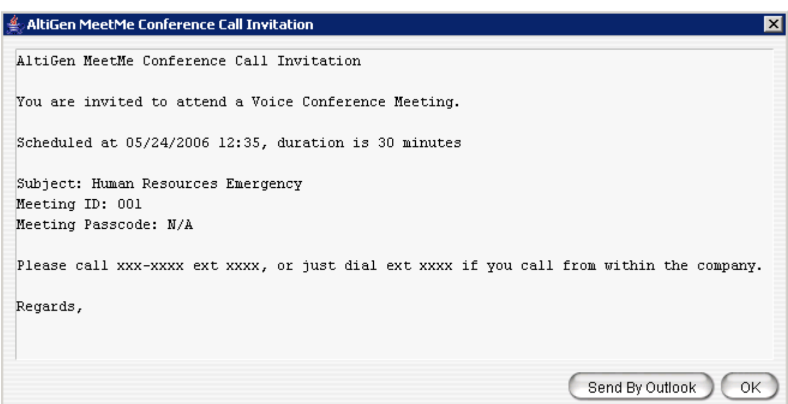
1. In the **Every** field, specify how often this meeting is to occur: every month, every other month, every three months, and so on.
2. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
3. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.

4. Select either **On Date** to specify a day of the month by *number* (for example, the 10th day of the month) or select **On** to specify a day of the month by *name* (for example, the first Monday of the month).
5. If you use **On Date**, the specified date (for example, the 10th day of the month) may sometimes fall on a weekend day. Check the box **Hold during weekend**, if the meeting will be held even on a weekend day.
6. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
7. Select **End after x occurrences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date by which the meetings will cease.

E-mailing a Meeting Invitation

In the MeetMe Conference window, click the 

button to see an automatically generated meeting invitation. It will look something like this:



In the Invitation window, you can then click the 

button to open Microsoft Outlook. The meeting invitation is pasted into a new message in Outlook, and the Outlook **Subject** field is filled in with “Conference Call Invitation”. Choose the people to whom you want to send the invitation, make any edits you may want to make, and click **Send**.

Starting and Stopping a Meeting

The meeting host and the AltiWare Administrator ("altiadmin") can start and stop a meeting.

To start a meeting if you are the host, select the meeting in the MeetMe Conference window and choose **Start**. Once the meeting is "started," the host can log into it (see "Joining a MeetMe Conference" on page 39).

To stop a meeting before its scheduled duration is over, select the meeting and choose **Stop**. Manually stopping a meeting frees up resources. Otherwise, the resources will not be freed until the scheduled meeting duration is over.

What the MeetMe Conference Host Can Do

If you are the host of a MeetMe conference, in addition to starting and stopping a meeting, you can:

- Mute other participants
- Drop participants from the conference
- Make someone else the host

To do any of these, right-click the person's name in the AltiAgent window, and choose from the menu:

Continuing a Meeting Beyond Its Duration Time

When the scheduled meeting time is up, the meeting may continue if no other scheduled meeting needs the resources. If another meeting is scheduled and the resources are needed for that meeting, the current meeting is terminated.

Joining a MeetMe Conference

Users calling from an extension can join a meeting by dialing the MeetMe Conference extension number. Users calling through a trunk must first dial the company number, then the MeetMe extension number.

Users are prompted to dial the meeting ID number. If the meeting has not yet been started, the user hears an appropriate message and can try again later.

If a passcode is required, the user is prompted to enter the passcode.

Recording Calls

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

Note: The voice recording feature is only available on Triton Analog extensions and IP extensions.

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

Recording on Demand

When the system administrator has set your extension to record on demand (either to a central location or to your voice mail), you can use AltiAgent to initiate the recording.

To record a call:

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

2. Select **Start Recording**. The recording will be indicated by a small, red cassette tape icon in the top right AltiAgent window. If your system administrator has set the **Insert Recording Tone** option for your extension, both parties will hear a beep when the recording begins.

3. To pause recording, right-click on the conversation and select **Pause Recording**.

4. To end recording, right-click on the conversation and select **Stop Recording**.

   Note: Do not enter an account code while recording; doing so will disconnect the call.

To listen to the recording

If the system is set to save the recording as your voice mail, you can hear the recording through the AltiGen Voice Mail System.

If the recording is being saved to a centralized location, contact the system administrator for the location.

Using Account Codes

If your system is set up to use account codes, you can associate calls to specific codes for billing or tracking purposes.

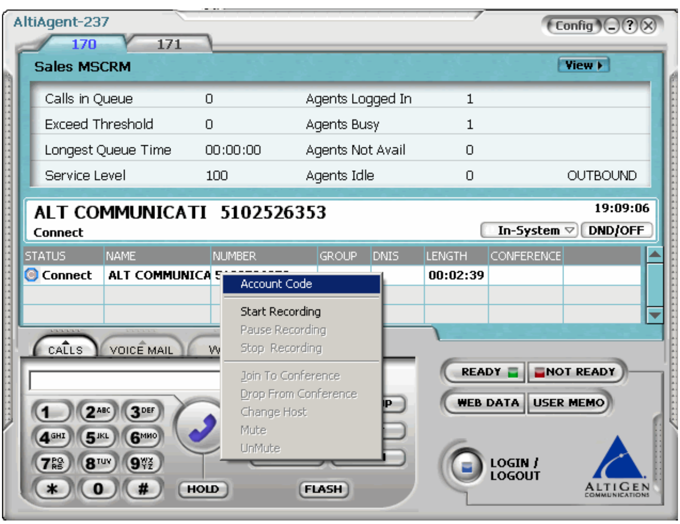
Required account codes—If your extension has been configured for required account codes, the system will prompt you to select an account code from a pop-up window for all outbound calls.

Bypassing required account codes— If your extension has been configured to bypass account code validation, you can enter a different account code in the box at the bottom of the pop-up window or enter # to bypass the account code altogether.

Optional account codes

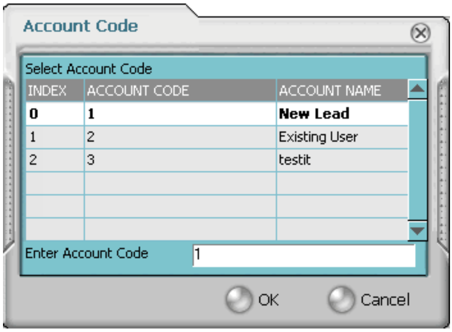
To associate a call in progress with an account code:

1. Right-click the number in the Calls List.



2. Choose **Account Code**.
3. In the Account Code dialog box, select an account code.

   Note: Do not enter an account code while recording; doing so will disconnect the call.



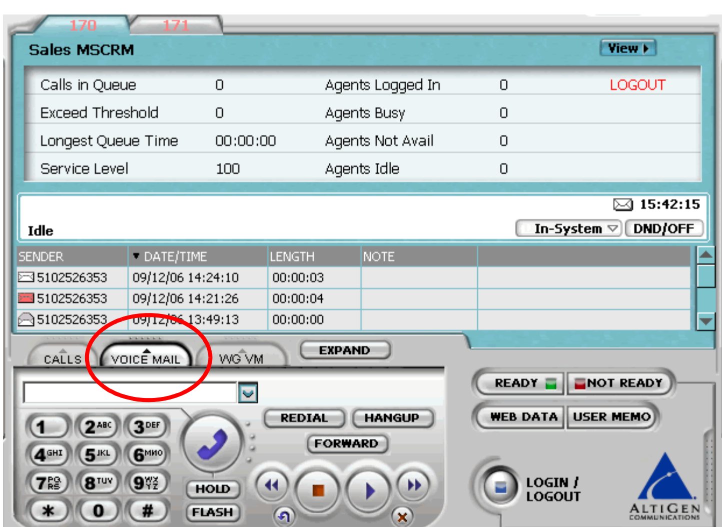
Note: If your extension is configured to bypass account code validation, you can enter an account code in the box at the bottom of the pop-up window.

4. Click **OK.**

To change the account code for a call in progress, repeat the steps above, entering the new account code to assign the call to.

Using Voice Mail

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



- New voice mail messages are indicated by a white, closed envelope icon in the status panel of AltiAgent.
- If the new message is urgent, a red envelope icon is displayed.
- Heard voice mail messages are indicated by a white, open envelope icon.
- If the message is saved, a blue, open envelope icon is displayed.
- A paperclip symbol on the envelope indicates an attachment—a voice mail message forwarded from another extension.

Click on the column headings to sort the data. Right-click on a message row to perform any of the actions (listening to, saving, returning messages) described in this section.

Listening to Your Voice Mail

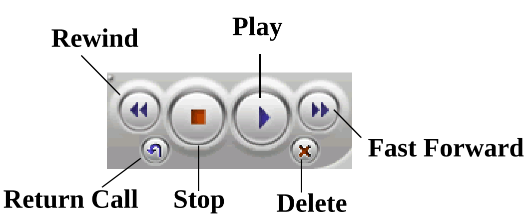
In the Voice Mail list, select the message and use the voice mail controls (shown below) to play, rewind, or fast forward. You can also use these commands on the right-click pop-up menu.

You have several listening options, which you can configure as described in “General Information” on page 58. You can listen using the sound card on your PC or your phone. You can play the message while it’s downloading or wait until it’s completely downloaded to play it.

When you listen to a new message, the envelope icon changes from closed to open, indicating that the message has been heard. As the message is played, the status window displays *Play*.

Use the tape player type buttons to perform the following functions:

.



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

Saving Remotely or Locally

To save a message as a .wav file that you can play back later, right-click the message. A dialog box opens, letting you choose how you want to save the file.

- **Save in remote** saves the message on a remote server in a location designated by the system administrator.
- **Save in local** lets you name the .wav file and choose a directory on your local computer in which to store it. You can then play the .wav file on a media player.

Deleting a Message

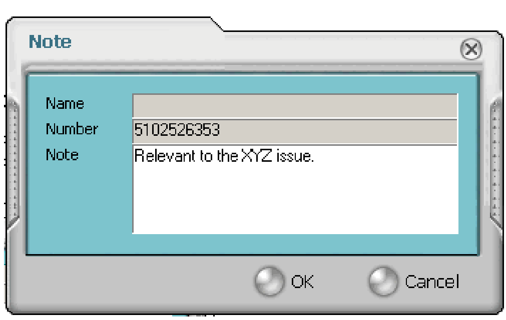
To delete a message, select it and click the **Delete** button, or use the right-click pop-up menu, and select **Delete**.

Returning the Call

To return the call, select it and click the **Return Call** button, or use the right-click pop-up menu, and select **Return Call**.

Attaching a Note

To add a note to accompany a voice mail, either type it right into the **Note** column, or right-click the voice mail, and select **Note**.

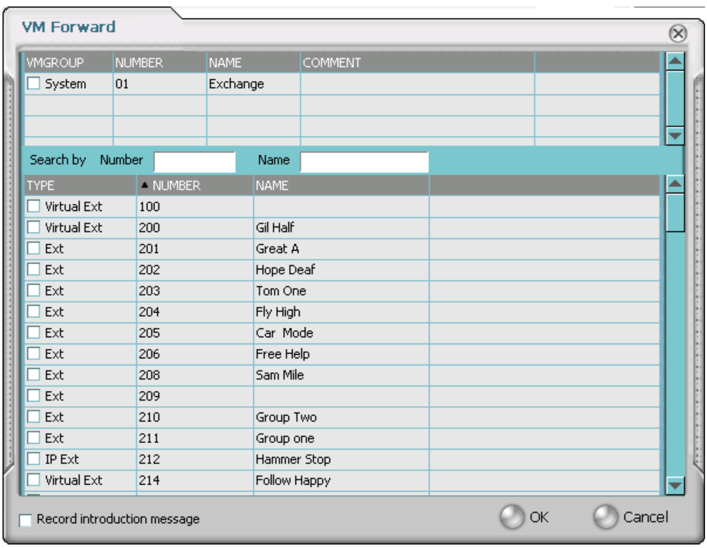


Type the note in the area provided and click **OK**. The entry will be displayed in the **Note** field of the voice mail.

Forwarding Voice Mail

To forward a voice mail to an extension or a VM Group

1. Right-click the voice mail in the Voice Mail view of the AltiAgent main window, and select **Forward**. The VM Forward dialog box opens:



2. Select the check box next to the extension, workgroup, or voice mail group to which you want to forward the message.

   If you need to search for a person by extension or group name, or extension or group number, type the first letters of the number/name into the **Search by Number** or **Name** box. The matching extension/ group number or name displays in the list as you type.

   Notes:

   - Click on the column headings to sort the data.
   - If the extension name is configured for an extension, it is used to match the search string. If the extension name is not configured, then the extension number is used to match the search string for this extension.

3. Optionally, you can leave an introductory message. Select the **Record Introductory Message** check box and follow the steps below.

4. Click **OK** to complete the forwarding.

To record an introductory message:

1. If you selected the **Record Introductory Message** check box, then when you click OK to complete the forward, pick up the phone hand set and you'll hear a prompt to record the message.
2. Record the message and press the pound key (**#**). A confirmation appears on screen.
3. Click **OK** to confirm and complete the action.

Working with Voice Mail Groups (Distribution Lists)

You can set up voice mail (VM) groups (distribution lists) to forward messages to multiple recipients at the same time. You can set up to 100 personal voice mail groups, each with 64 members. Group members can be any extension or another voice mail group.

There are two types of voice mail groups you can use:

- **System-based groups** are set up by the system administrator. You can use but not edit these lists in AltiAgent.
- **Personal groups** are set up and modified in your AltiGen Voice Mail System.

Setting Status to Ready or Not Ready

Click the **Not Ready** button to tell the system not to send workgroup calls to your extension.

Click the **Ready** button to tell the system you are ready to receive workgroup calls.

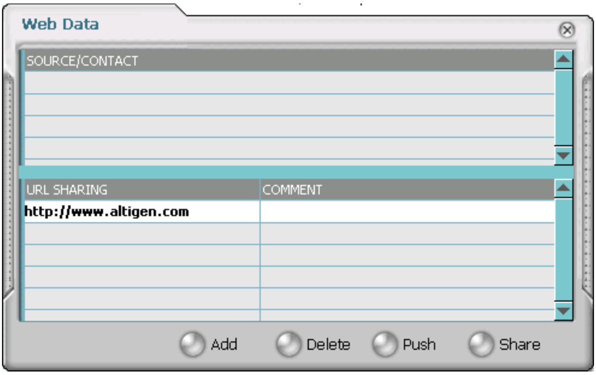
The **Log** button allows you to log into or out of one or more workgroups.

Viewing, Sharing, or Pushing Data

Pushing a web page or URL is sending the page or URL as a link that the other person views in their web browser.

Sharing the URL is pushing the link to the other user and simultaneously opening the page in your own browser in such a way that when you act on the page, the other user sees the results in their own browser. Sharing allows you to guide the web-based caller through a site.

To work with web data when connected with a web-based caller, click the **Web Data** button in the main window to open the Web Data dialog box.



Viewing Caller Data

The Source/Contact panel displays data collected in various ways:

- From an Auto Attendant/IVR if the caller has input data there in either a PTSN or web call situation.
- From Supplemental Caller Data, including user data tagged to the call, and data included by using the AltiAgent **User Memo** button, DDR, ActiveX I/F, or Agent ActiveX I/F.
- From caller data collected from the web page form.
- From web URL paths—a URL history.
- From or input by the caller, such as IP address, name, account numbers, and so on, including data from your external database such as Outlook, if available.

Using AltiAgent

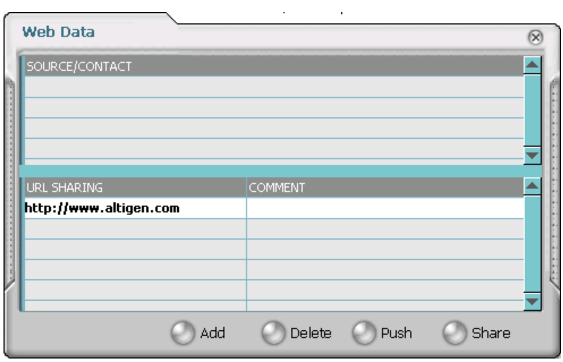
Sharing or Sending a URL or Page

The URL Sharing panel in the Web Data dialog box displays the addresses of pages or sites you've added to the list. Pushing a web site or a web page is a two step process: first you add it to your share list to make it available, then you send it.

1. In the Web Data dialog box, click **Add.** The Add URL dialog box opens.

2. Type in the URL or web page specification and click **OK**.

   The URL now appears in your URL Sharing list.

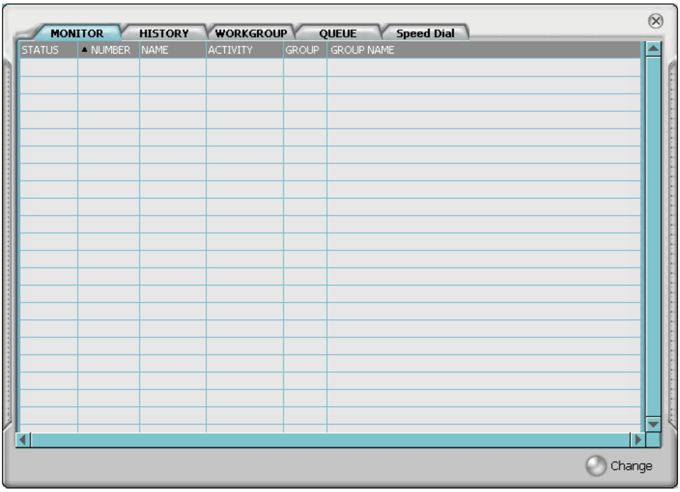


3. To share or push the URL, select the URL you want to share by clicking it, then click **Push** to send it or **Share** to share it.
4. When you're done, click **Release** to disconnect the web call.

Monitoring

If your system administrator has configured your extension for monitoring, you can monitor the activity on the other extensions in your workgroup, view call history, view workgroup statistics, and view calls in queue.

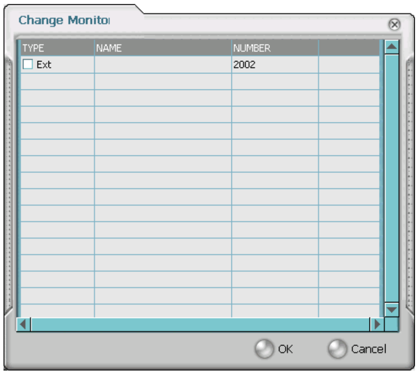
If you’re a manager, for example, you might monitor to determine whether you need more resources in a busy environment. Or you might use monitoring capability to cover calls for a co-worker, since you can click the ringing phone icon in the monitor list and take the co-worker’s call.



Choosing Workgroups to Monitor

To choose workgroups to monitor:

1. Click the **Expand** button in the AltiAgent main window, then click the **Monitor** tab.
2. Click the **Change** button on the **Monitor** tab to open the Change Monitor dialog box.



Extensions to which your system administrator has given you monitoring rights are listed here, in addition to any workgroups to which you belong.

3. Select the check boxes next to the individual extensions (**Type** "Ext.") or workgroups (**Type** "WG Ext.") you want to monitor, and click **OK.**

   The extensions in the selected workgroups will be listed on the **Monitor** tab, in addition to any individual extensions you selected.

Note: If you selected individual extensions to monitor, you will be able to pick up *personal* calls to these extensions, but not workgroup calls.

In addition, if you selected a workgroup extension, the Monitor list shows *all* the extensions in the workgroup, even for agents who are currently logged out.

Reading the Monitor List

In the monitor list, each extension is listed along with its **Status, Number**, **Name, Activity**, and **Group** (if applicable).

The status can be one of the following:

- **Idle**—the extension is not in use; you can click the **Status** field to ring that extension
- **Connected**—the extension is in use
- **Ringing**—the phone on the extension is ringing; you can click the **Status** field to pick up the call at your own extension
- **Conference**—the extension is on a conference call

- **Voice Mail**—the extension is in voice mail
- **Auto Attendant**—the extension is connected to an auto attendant
- **Holding**—the extension is on hold
- **Hold Pending**—the extension is awaiting hold

Calling or Picking Up Calls

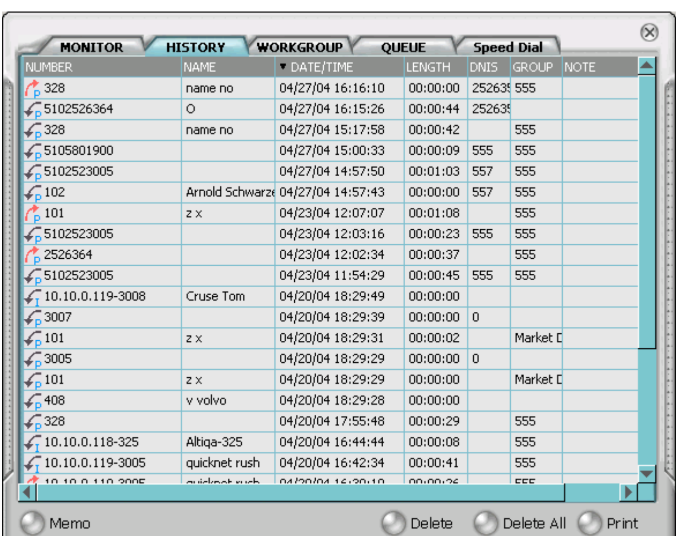
If a monitored extension is *Idle*, you can click its **Status** field to ring the extension.

If a monitored extension is *Ringing*, you can click its **Status** field to pick up the call.

Note: If a call is coming in to a workgroup to which you are not currently logged in, you cannot pick up the call.

Viewing the Call History

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



Note: Click on the column headings on the **History** tab to sort the data.

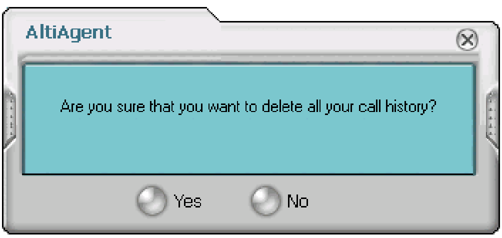
The list on the **History** tab displays the following fields:

- **Number**—the extension or phone number. *Upward arrow* icons indicate outgoing calls; *downward arrows* indicate incoming calls. Clicking a number in the **Number** column puts that number in the dialing field and closes the **History** window.
- **Name**—Caller ID information, if available, or *Unknown*.
- **Date/Time**—the call's date and time.

  The history data is sorted by last disconnected and not in the order the call was received. It is therefore possible to have a record with an earlier timestamp followed by a record with a later timestamp.

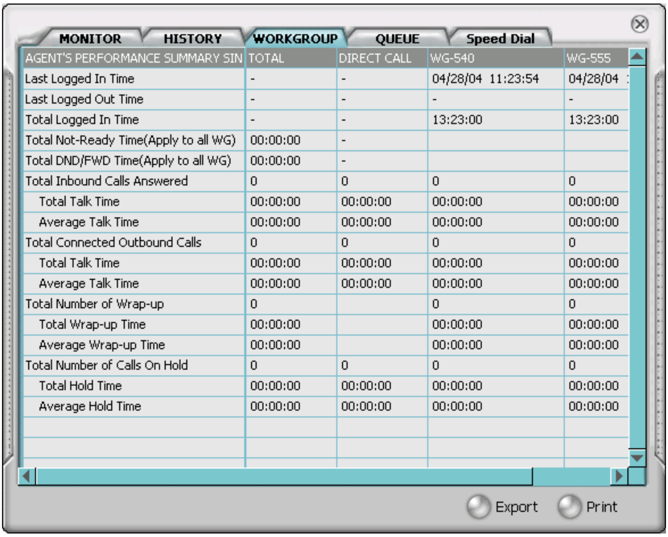
  Also, the timestamp for call data is based on the client system, while the timestamp for voice mail messages is from AltiWare. Thus, the times displayed here may not match those in the voice mail view in the main window.
- **Length**—the length of time of each call.
- **DNIS**—DNIS digits collected, if available
- **Group**—Group number or name
- **Note**—a note attached to the call. A note can be entered during a call (or while it is ringing) by clicking the **User Memo** button in the main AltiAgent window, typing the note, and clicking **OK**. To enter a note later, click the **Memo** button in the lower left of the **History** tab, type your note, and click **OK**.

Use the **Delete** button to delete a single call history entry. Use the **Delete All** button to delete the entire call history list. AltiAgent will ask you to confirm the deletion; click **Yes** to delete or **No** to cancel.



Viewing Workgroup Statistics

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



AGENT'S PERFORMANCE SUMMARY SIN	TOTAL	DIRECT CALL	WG-540	WG-555
Last Logged In Time	-	-	04/28/04 11:23:54	04/28/04
Last Logged Out Time	-	-	-	-
Total Logged In Time	-	-	13:23:00	13:23:00
Total Not-Ready Time(Apply to all WG)	00:00:00	-		
Total DND/FWD Time(Apply to all WG)	00:00:00	-		
Total Inbound Calls Answered	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Total Connected Outbound Calls	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Total Number of Wrap-up	0		0	0
Total Wrap-up Time	00:00:00		00:00:00	00:00:00
Average Wrap-up Time	00:00:00		00:00:00	00:00:00
Total Number of Calls On Hold	0	0	0	0
Total Hold Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Hold Time	00:00:00	00:00:00	00:00:00	00:00:00

Most of the data is self-explanatory, but you might note the following:

- The *Service Level* represents the percentage of workgroup calls that have been taken out of queue before the *Threshold* time has expired.

If you have been removed from a workgroup by the system administrator, all your statistics related to that workgroup will also be removed from the Workgroup tab.

- The *Login Time* is the time you logged into the workgroup.

Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed in “Viewing Group Statistics” in the *AltiSupervisor Manual*.

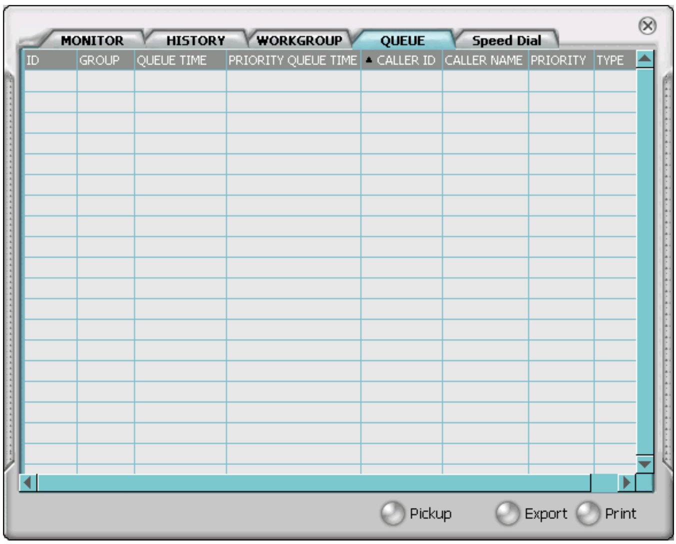
These statistics are cleared if the system is reset.

Click the **Export** button to export the statistics as a .csv (comma-separated values) file.

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

Viewing Queues

Click the **Queue** tab to view the calls in queue for the monitored workgroups. The call data includes the Caller ID and caller name, if available, as well as the amount of time the call has been in the workgroup queue and its priority queue time.



Most of the data is self-explanatory, but you might note the following:

- *Queue Time* represents the total time a call has been waiting in queue.
- *Priority Queue Time* represents the amount of time that a call has been waiting at a specific priority level. Priority queue time will be reset to 0 when the call's priority is promoted to a higher level.

Pick Up Calls from Queue

To pick up a call from a workgroup queue, click on the queued call and click the **Pickup** button. If the agent is connected to a caller, the current call will be put on hold and the queued call is connected.

Note: This feature must first be enabled by the system administrator.

Using ActiveX Control with Third Party Applications

The AltiAgent ActiveX Control Object is an ActiveX Object. It works with AltiAgent by getting call-related information from AltiAgent, which acts as a server. Based on the call information, AltiAgent will implement corresponding actions, such as popping up corresponding customer information and logging Caller ID into a database. For more information on using ActiveX with AltiAgent, refer to the “AltiAgent ActiveX Programmer’s Guide” available from AltiGen’s web site (www.altigen.com, under **Support** > **Manuals** > **5.2 Manuals**).

CHAPTER 5

Configuring Your Station Settings

You can configure the following settings and options by clicking the 

button in the upper right of the AltiAgent main window:

- **General Info**—password, default trunk access, and other settings.
- **One Number Access (ONA)**—forwarding of specific incoming calls. This is available only when the system administrator has configured your extension to allow ONA.
- **Call Handling**—forwarding, busy call, and no-answer call handling.
- **Message Notify**—how and when to notify yourself about incoming voice messages.
- **Station Speed**—your personal speed dial numbers.
- **System Speed**—personal comments for system speed dial numbers that have been entered in the system by the system administrator (you cannot edit the numbers or names).

Note: Some options may not be available to you.

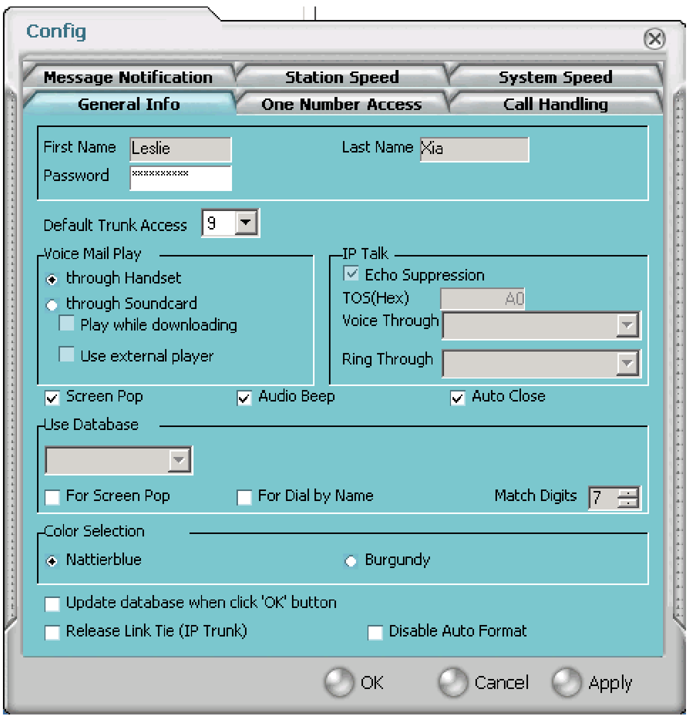
Apply Button and OK Button

In the Config window, click **Apply** or **OK** to save your changes:

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

General Information

The **General Info** tab lets you edit your password, the default trunk access code, voice mail settings, audio and video behavior, IPTalk settings, and external database access options.



Default Trunk Access

The trunk access codes are defined by the system administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.

Voice Mail Play Options

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

IPTalk

If you are using IPTalk, **Echo Suppression** is checked by default.

TOS (Hex)—The ToS byte indicates the type of service. For IPTalk, you need high priority service, and the default of “00” set here indicates high priority service. However, if your company router supports DSCP EF, then set this field to “A0”. The ToS value is AltiGateway-based. For guidance, see your system administrator.

From the **Voice Through** drop-down list, choose the sound card that will carry the incoming and outgoing voice. It could be a sound card in your PC, or it could be a USB-based sound card in your headset system.

From the **Ring Through** drop-down list, choose the device that will carry the incoming ring. When you’re away from your desk, you may prefer the ring to come through your PC speakers, rather than your headset system.

Screen Pop, Audio Beep, and Auto Close

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

Select the **Audio Beep** check box if you want your PC to beep you when you have a call.

Note: The **Screen Pop** and **Audio Beep** selections on this screen differ from the Alert option you can select in the Advanced dialog box, which alerts you when a call goes into your workgroup’s queue. See “Advanced Options for Web-based and Workgroup Calls” on page 61 for details.

Select the **Auto Close** check box to have AltiAgent close the pop-up window after you have finished with the call.

Accessing Databases

AltiAgent can access phone numbers from your Microsoft Outlook, Outlook Express, ACT!, or GoldMine® database. During installation, the install program reads which applications you have installed on your PC.

In the drop down list under **Use Database**, select the database you want to use.

Note: If you select Outlook, AltiWare will load all the subfolders and data in your main Contacts folder, which will take a few moments. Once the data is loaded, you can close the Configuration window, reopen it, and click the **Select Folder** button that now appears to choose which Contacts subfolders you want to use.

You also have these additional options:

- Select the **For Screen Pop** check box to have a database contact window pop up when you receive a call from someone for whom you have a record in the database contact directory.
- Select the **For Dial-by-Name** check box to enable access to the names in the database directory when you dial. With this option checked, the names and their associated numbers in your Outlook, ACT!, or GoldMine® directory are added to the contact list in the dial pad window.

  Note: If the contact entry has an extension number as part of the dialing number, the extension number is displayed but will not be included in the digits dialed by AltiWare.
- **Match Digits**—Select the number of digits to match for caller ID. Matching starts from right and moves left. This option is for calls that go through IP and for international calls that have a digit prepended, like 0. For example, if you choose 7 (the default) in the **Match Digits** field, and the number is 10.10.10.6- 915102529712, AltiAgent would match the last 7 digits, or 2529712, to identify the caller for you.
- Check the **Update database when click OK** check box at the bottom of the tab to refresh the data AltiAgent accesses from the database.
- **Country Code**—If you selected Outlook or Outlook Express, the **Country Code** field is displayed. Enter the country code of the local AltiAgent user; US country code is “1”.

Color Selection

Select either **Nattierblue** (default) or **Burgundy** as the color of the AltiAgent window.

Miscellaneous

Release Link Tie (IP Trunk)—When checked, clicking the **Transfer** button will automatically send send "FLASH *" to release a tie trunk if the incoming call is through an IP trunk. (Option is disabled by default.)

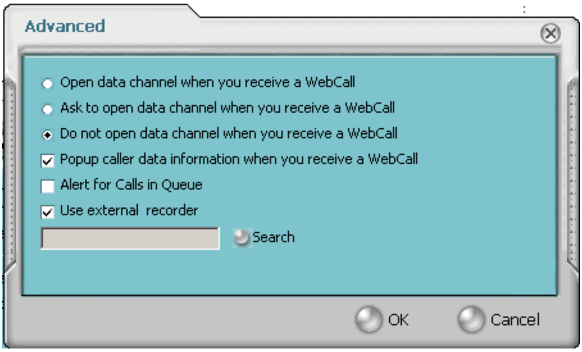
Important: Before checking this check box, see your phone system administrator. If your company is using multiple systems and the tie trunk feature, the administrator **needs to have used AltiEnterprise Manager to synchronize the systems**. Otherwise this feature *will not work*.

Note: The call to be transferred *must* originate from an AltiServ system running 5.0 or later.

Disable Auto Format—If the AltiWare server's country code is US/ Canada, AltiAgent automatically adds the long distance/international dialing prefix (corresponding to the server's country code) when returning a call from voice mail or when making a call from Call History. If this is not right for your situation, check **Disable Auto Format**.

Advanced Options for Web-based and Workgroup Calls

This option is available if you are logged in as a workgroup agent but not as a desktop user. Click the **Advanced** button to select advanced options.



- The first three radio buttons provide choices for when to open a text chat session during web-based calls—that is, whether to open IPTalk in coordination with the calls. You can choose always, never, or to be asked each time you receive a web call.
- Select the **Pop up caller data information when you receive a WebCall** check box to have the Caller Data window pop up automatically when you connect to a web-based call. See "Viewing Caller Data" on page 47.
- Select **Alert for calls in queue** to have AltiAgent alert you via a screen pop and audio beep when a new call enters the workgroup queue.
- If the AltiWare server's country code is *not* USA/Canada, AltiAgent displays the check box **Insert long distance/international dialing prefix**. When checked, AltiAgent will add the long distance/ international dialing prefix (corresponding to the server's country code) when returning a call from voice mail, or when making a call from call history. If the AltiWare server's country code is USA/ Canada, this check box is not displayed.
- Select **Use external recorder** to use any client voice recording system you have installed. Use the **Search** button to browse to the .exe file.

One Number Access (ONA)

If you are expecting calls that you want to receive regardless of where you are, you can have the system forward those calls to you. You must specify the Caller IDs for the calls you want forwarded, and the numbers where you can be reached.

If the system is unable to connect the call (can't identify a Caller ID or can't reach you at *any* of the numbers you specify), the call is sent to your voice mail.

When you answer an ONA call, you may be required to enter your extension password, depending on the configuration for your extension set by your system administrator.

Before You Set Up ONA

- ONA must be enabled for your extension by your system administrator.

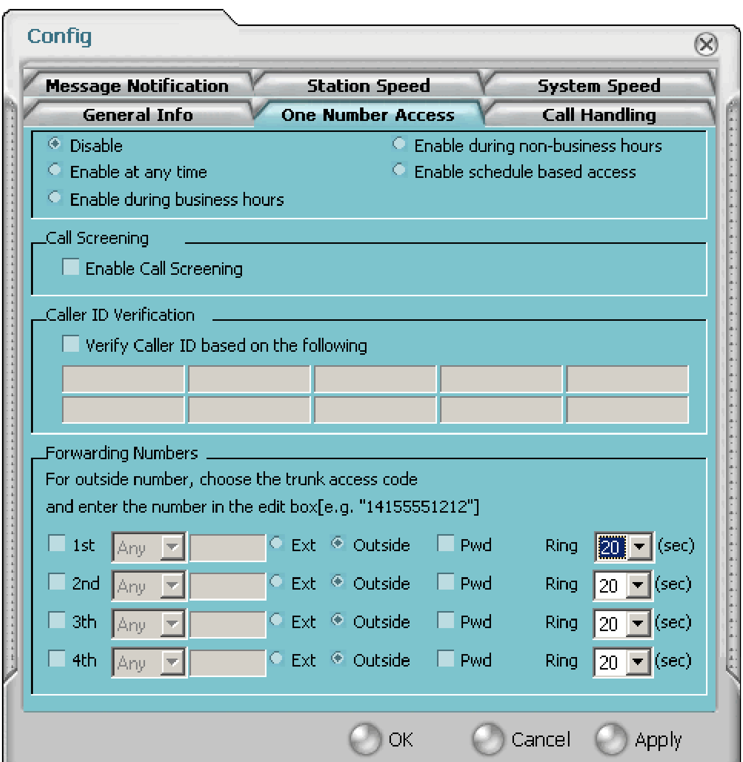
- The settings on your AltiAgent **Call Handling** tab must not conflict with ONA. Specifically:
  - — **Enable Do Not Disturb** must not be checked. If it is, when your line is busy, all calls will go into voice mail and not to the ONA forwarding numbers you specify.
  - — **Enable Forward to** must not be checked. If it is, all calls will be forwarded according to this setting.

  See “Call Handling” on page 65 for details on these settings.

Setting Up One Number Access

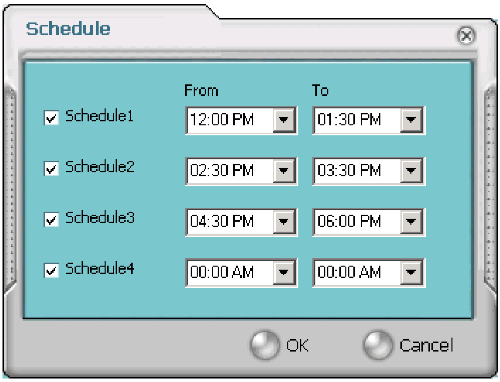
To set up one number access,

1. Click the **One Number Access** tab in the Config window.



2. Select the times you want to be available to ONA callers.

If you choose **Enable schedule based access,** you can set up to four different schedules in the dialog box that pops up.



3. Check the **Enable Call Screening** check box if you want the system to prompt the ONA caller to record a caller name to continue ONA.

4. If you want, check the **Verify Caller ID based on the following** check box and then specify the incoming phone numbers for ONA. If ONA finds one of these numbers on an incoming call, it will forward the call to you.

   You can enter up to 10 phone numbers in the **Caller ID Verification** fields. For local numbers, use 7 digits (5555555). For long distance numbers, use 10 digits—area code + local number.

   Note: If you enter no numbers in the Caller ID Verification fields and ONA is enabled, ONA is made available to every caller.

Using a Password

You can use a Caller ID Verification field to enter a password number such as “5555” so that a caller who knows this password can use ONA to find you, regardless of where they are calling from. Tell the caller to dial **1** during your personal greeting and then enter the password.

5. Enter the **Forwarding Numbers** to be used by the system to find you when ONA is active. You can set up to four different numbers—extensions or outside numbers. For outside numbers, use the drop-down list to select the trunk access code you want to use. Specify whether the number is an extension or outside number and if a password is required.

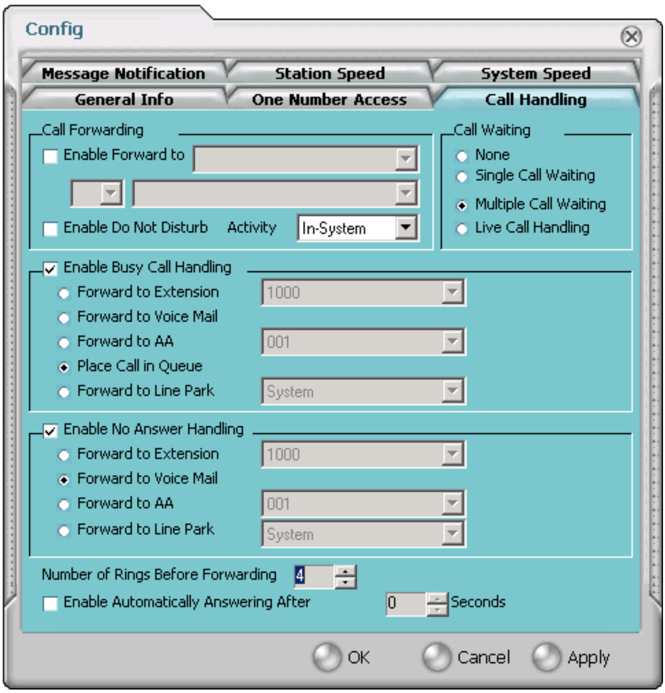
When ONA is active, the system dials the forwarding number(s) in the order from Forwarding Number 1 through Forwarding Number 4. Note that this number order does *not* correspond to the Schedule order—for example, Forwarding Number 2 is *not* used first during Schedule Number 2.

Note: If your system administrator has *not* configured your extension to require you to enter your extension password when answering an ONA call, then a call forwarded via ONA that is picked up by a voice mail box, fax machine, or answering machine will connect, and will not try any subsequent Forwarding Numbers. Therefore, if you want ONA to use such an option as a last resort, it should be Forwarding Number 4.

You can set the **ONA ring duration** from 5 to 45 seconds using the **Ring** drop-down lists. Default value is 20 seconds. The system will ring the ONA target within the specified time limit. If the ring time exceeds 30 seconds, the system will play a phrase every 15 seconds (playing time is included in ring time).

Call Handling

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



Forwarding All Calls

If you want to forward calls to an external number, select a trunk access code in the drop-down list, then begin with the outside trunk or route access digit and any long distance prefix digits such as **1** and area code.

Note: Forwarding calls to a pager is possible but *not recommended* since callers will only hear what is heard when calling a pager and might not know to enter a return phone number unless instructed.

Do Not Disturb

If you check **Enable Do Not Disturb**, all incoming calls are forwarded according to your **Enable Busy Call Handling** settings, described below. If you check **Enable Do Not Disturb**, use the **Activity** drop-down list to select the activity that applies to you:

1 - In-System, 2 - In-Personal, 3 - Meeting, 4 - Away From Desk,
5 - Business Travel, 6 - Personal Time Off

The remaining three activity codes (7, 8, 9) may or may not be customized by the system administrator.

Note: Checking **Enable Do Not Disturb** here has the same effect as clicking the **DND** button in the AltiAgent main window. Also, if "System" or "Personal" is the activity you select, it will not be displayed on the AltiGen IP phone LCD; all other activities are displayed.

Busy Call Handling and No Answer Handling

You can use these options to specify how you want to handle incoming calls when you're already on the phone or when you can't answer the phone, for example, when you've checked **Enable Do Not Disturb**.

If you want to use the auto attendant/IVR and you don't know the number of the phrase or menu you want to use, check with your system administrator.

Place call in queue is available only if your system administrator has enabled queuing for you or your workgroup.

Number of Rings Before Forwarding

The **Number of Rings Before Forwarding** setting pertains to almost all the options on this tab. It is the number of times the phone rings before the system forwards the call to an extension, voice mail, or the auto attendant.

To have AltiAgent automatically pick up the call, check the **Enable Automatic Answering after x Seconds** check box and use the arrow keys to choose the number of seconds.

Note: The default setting is 0 seconds. If the duration is set to 0, all incoming calls will go to connect state right away. Neither caller nor callee will hear a ring tone.

Call Waiting Options

Call waiting options are available only if the **Enable Busy Call Handling** check box has been checked, but this option is *available only for personal calls*.

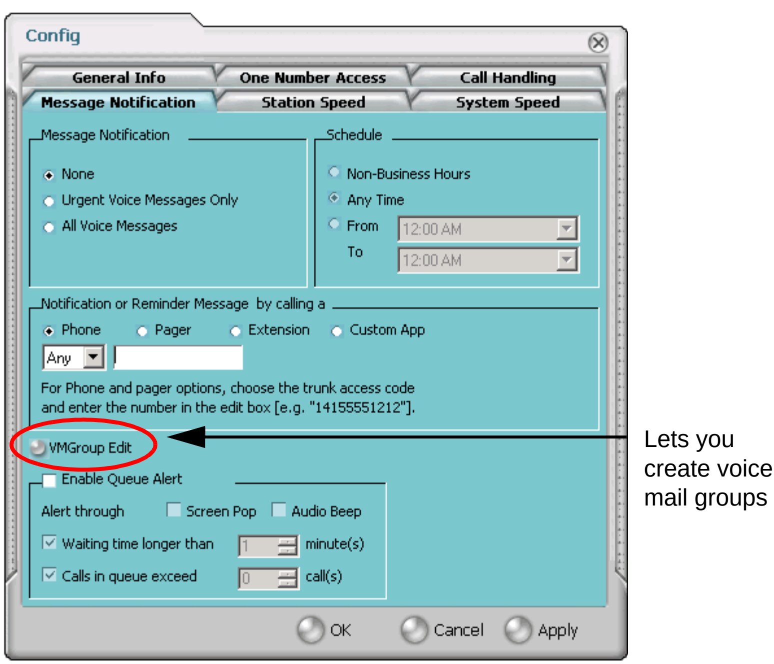
- **Single Call Waiting**—sets up single call waiting. This feature gives an alert tone (audio beep) to indicate that a call is waiting. **Single Call Waiting** must be selected in order to conference incoming calls.

- **Multiple Call Waiting**—enables a "personal queue" of multiple calls waiting. You must also select the **Place Caller In Queue** option under **Enable Busy Call Handling** to enable this option. This allows you to transfer or park the current call before picking up the next call in queue.
- **Live Call Handling**—when enabled, allows a caller to hear a ringback tone when the called party is in voice mail, paging, transfer, or conference status.

Message Notification

Message Notification lets you set up how you'd like to be alerted to new messages when you're away from your desk. You can also set up Message Notification through the AltiGen Voice Mail System.

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



Use this tab to set the notification options:

- **The types of messages** to which you want to be alerted: none, urgent voice messages only, or all voice messages.
- **Schedule**—during what hours you want to be alerted.
- **How and where to notify you**—select an option in the **Message Notification or Reminder Message by calling** section. If you want to use an outside number, use the drop-down list to select the trunk access you want to use.
- **Queue condition**—if you want to be notified when the queue time is longer than the number of seconds you specify and/or the calls in the queue exceed the number you specify. You can be notified with the appropriate information in a screen pop, an audio beep, or both. If you don't click **OK** in the screen pop, the information it contains will be updated when the threshold is crossed again. This setting applies to all workgroups an agent belongs to. Check the **Enable Queue Alert** check box and specify your settings.

Voice Mail Groups (Distribution Lists)

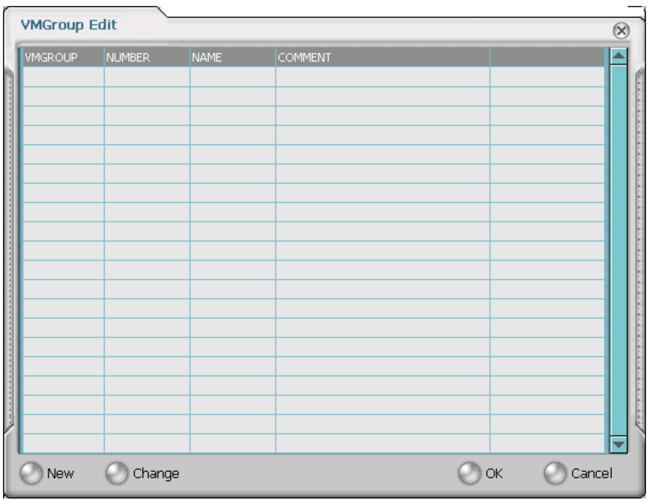
You can set up voice mail (VM) groups (*distribution lists*) to forward messages to multiple recipients at the same time. You can set up to 100 personal voice mail groups, each with up to 64 members. Group members can be any extension or another voice mail group.

There are two types of voice mail groups you can use:

- **System-based groups** are set up in the AltiWare Administrator. You can use but not edit these lists in AltiAgent.
- **Personal groups** are set up and modified in AltiAgent or in your AltiGen voice mail system.

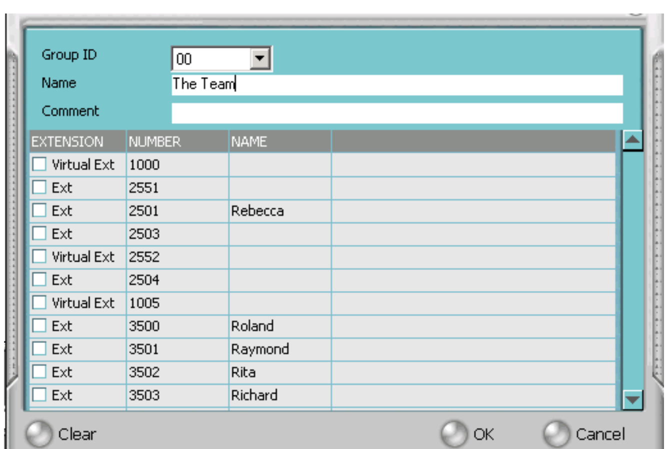
Working on Voice Mail Group Lists

To work on your personal voice mail groups, on the Message Notification tab, click the **VM Group Edit** button. The **VM Group Edit** dialog box opens.



To create a voice mail group

1. **C**lick the **New** button in the**VM Group Edit** dialog box. The **Create Group** dialog box opens..



2. Use the scroll bar to select a **Group ID**.
3. Enter the VM Group **Name** and any **Comments**. These are optional but will help you identify the group.
4. Select the member extensions by selecting the check box next to each extension.
5. When finished, click **OK**. To deselect all extensions, click the **Clear** button, or click **Cancel** to exit without saving your edits.

To change a voice mail group

1. Click the **VM Group Edit** button. The VM Group Edit dialog box opens.
2. Select the group you want to change, and click the **Change** button.
3. Make any changes you need to make for the group name, comments, or members. To add or remove a member, select or deselect the check box next to the extension.
4. Click **OK**.

To delete a voice mail group

1. Click the **VM Group Edit** button. The **VM Group Edit** dialog box that opens.
2. Select the group you want to delete, and click the **Change** button.
3. Click the **Clear** button to deselect all extensions.
4. Click **OK** to save and exit.

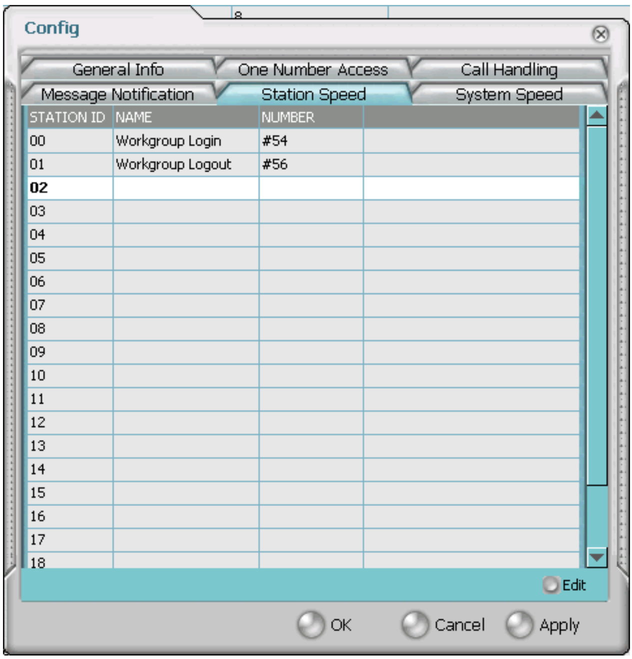
When you empty a group of members, the group is deleted.

Station Speed Dialing Setup

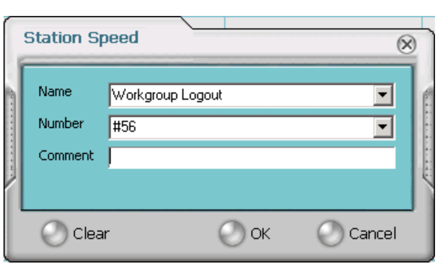
The **Station Speed** tab lets you set up to 20 station speed dial numbers. When you add an outside number, all *relevant* prefix digits such as trunk or route access number, the long distance prefix **1** and area codes must precede the phone number. Station speed dial numbers are also set up by using the **#25** feature code on your phone set.

To add or edit station speed dial numbers

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



2. Click a **Station ID** to select it.
3. Click the **Edit** button. Or double-click the Station ID. The **Station Speed** dialog box appears.



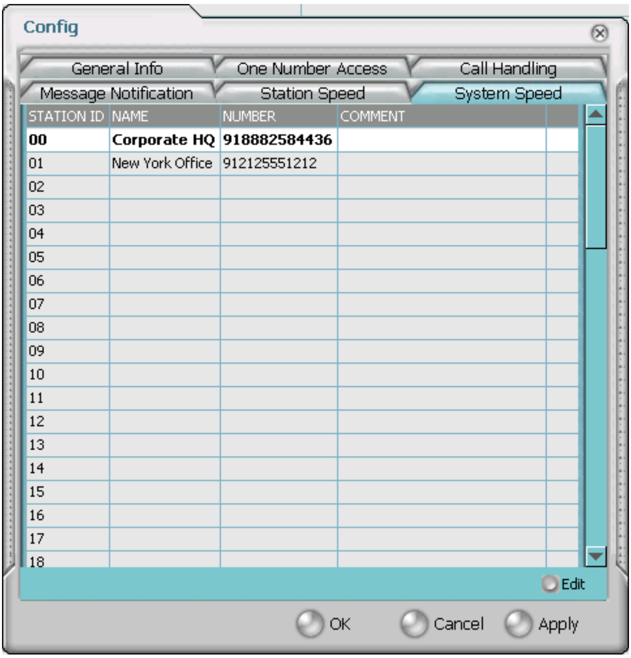
4. Add or edit the **Number, Name** and **Comment** fields.
5. Click **OK**.

To delete station speed dial numbers

1. On the **Station Speed** tab, click the **Station ID**, and then click **Edit**, or double-click the **Station ID**. The Station Speed dialog box opens.
2. Click **Clear**, and then click **OK**.

System Speed Dial Numbers

Click the **System Speed** tab in the Config window to view speed dial numbers set up by the system administrator. In AltiAgent, you cannot edit system speed dial numbers or names, but you can edit the **Comment** column. To do so, select the entry, click the **Edit** button, make your change, and click **OK**.



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