

BroadWorks Hosted Thin Receptionist

User Guide

Release 21.0 Document Version 2

Table of Contents

1	Sumn	nary of ChangesError! Bookmark not defined.					
1.1	Cha	anges for Release 21.0, Document Version 2 Error! Bookmark not defined.					
1.2	Cha	anges for Release 21.0, Document Version 1 Error! Bookmark not defined.					
1.3	Cha	anges for Release 20.0, Document Version 4 Error! Bookmark not defined.					
1.4	Cha	anges for Release 20.0, Document Version 3 Error! Bookmark not defined.					
1.5	Cha	anges for Release 20.0, Document Version 2 Error! Bookmark not defined.					
1.6	Cha	anges for Release 20.0, Document Version 1 Error! Bookmark not defined.					
1.7	Cha	anges for Release 19.0, Document Version 1 Error! Bookmark not defined.					
1.8	Cha	anges for Release 18.0, Document Version 2 Error! Bookmark not defined.					
1.9	Cha	anges for Release 18.0, Document Version 1 Error! Bookmark not defined.					
1.10) Cha	anges for Release 17.sp2, Document Version 6 Error! Bookmark not defined.					
1.11	Cha	anges for Release 17.sp2, Document Version 5 Error! Bookmark not defined.					
1.12	2 Cha	anges for Release 17.sp2, Document Version 4 Error! Bookmark not defined.					
1.13	Cha	anges for Release 17.sp2, Document Version 3 Error! Bookmark not defined.					
1.14	Cha	anges for Release 17.sp2, Document Version 2 Error! Bookmark not defined.					
1.15		anges for Release 17.sp2, Document Version 1 Error! Bookmark not defined.					
2	About	t This Document1					
2.1	Aud	lience1					
2.2	Hov	v This Guide Is Organized1					
2.3	Add	litional Resources2					
3	Introd	luction to Receptionist3					
3.1	Rec	eptionist Editions					
3.2	Rec	eptionist Enterprise4					
	3.2.1	User Interface4					
	3.2.2	Contact Directories5					
	3.2.3	Call Management Functions6					
3.3	Rec	eptionist Small Business7					
	3.3.1	User Interface7					
	3.3.2	Contact Directories8					
	3.3.3	Call Management Functionality8					
3.4	4 Receptionist Office 10						
	3.4.1	User Interface 10					
	3.4.2	Contact Directories 11					
	3.4.3 Call Management Functionality 11						
4	Get Started 13						
4.1	Lau	nch Receptionist from Web Portal13					
4.2	Sigr	n in from Web Browser					
4.3	3 Sign-in Restrictions						

4	4.4	Get	Help	. 16				
4	4.5	5						
4	4.6							
4	4.7	Change Your IM&P Presence State 17						
4	4.8	Cha	nge Your Password	. 18				
ļ	5	Explo	e Workspace	. 19				
ļ	5.1	Logo	Pane	. 20				
		5.1.1	Global Message Area	. 20				
		5.1.2	Settings, Help, and Sign Out Links	. 20				
		5.1.3	Signed-in User Information	. 20				
ļ	5.2	Call	Console	. 22				
		5.2.1	Header					
		5.2.2	Dialer	. 22				
		5.2.3	Current Calls					
		5.2.4	Conference Call Panel					
		5.2.5	Call States and Actions					
ļ	5.3		acts Pane					
		5.3.1	Directory Management Bar					
		5.3.2	Directories List					
		5.3.3	Search Tab					
		5.3.4	Favorites Tab					
		5.3.5	Group/Enterprise Tab					
		5.3.6	Group/Enterprise Common Tab					
		5.3.7	Monitored Contacts Tab (Enterprise Edition)					
		5.3.8	Personal Tab					
		5.3.9	Speed Dial Tab					
			Queues Tab (Enterprise Edition)					
			Custom Directories Tabs (Enterprise Edition)					
			Instant Message Tab					
			Outlook Tab (Enterprise Edition) Search Results Tabs					
	5.4		ued Calls Pane (Enterprise Edition)					
	5.4 5.5		rols					
	0.0	551	Call Action Buttons					
	6	0.0.1	je Calls					
	-	-						
	6.1 6.2	-	and Drop Call onto Contact					
(0.2	6.2.1	View Current Calls					
		6.2.1 6.2.2	View Incoming Call Details					
		6.2.2 6.2.3	Save vCard					
		6.2.3	Open URL					
	6.3		and Change Security Classification of Calls					
,	0.0	6.3.1	Change Security Classification					
		0.0.1	Change County Classification	- 72				

6.4	Ans	wer Calls	43
	6.4.1	Answer Call	43
	6.4.2	Pick Up Call	43
6.5	6 Holo	I and Resume Calls	44
	6.5.1	Put Call on Hold	44
	6.5.2	Resume Held Call	44
6.6	6 Mak	e and End Calls	44
	6.6.1	Dial Ad Hoc Number	44
	6.6.2	Redial Number	
	6.6.3	Dial Contact	
	6.6.4	Speed Dial	
	6.6.5	Dial from History	
6.7		Call	
6.8		nsfer Calls	
	6.8.1	Blind Transfer Call	
	6.8.2	Conduct Supervised Transfer	
	6.8.3	Transfer with Consultation	
	6.8.4	Transfer to Voice Mail	
~ ~	6.8.5	Transfer to Queue (Enterprise Edition)	
6.9		and Camp Calls	
	6.9.1	Conduct Busy Camp On (Enterprise and Small Business Editions)	
6.4	6.9.2	Conduct Group Call Park (Enterprise Edition)	
0.1		Start Three-Way Conference	
		Add Participant to Conference	
		Hold Conference	
		Resume Held Conference	
		Put Conference Participant on Hold	
		Resume Conference Participant	
		Leave Conference	
		Remove Conference Participant	
		End Conference	
	6.10.1		
6.1		ord Calls	
••••		Start Call Recording	
		Pause and Resume Call Recording	
		Stop Call Recording	
7		age Contacts (Enterprise Edition)	
7.1		d E-mail to Contact	
8		or IM&P Contacts and Chat with Contacts	
-			
8.1		itor IM&P Contacts Subscribe to Contact	
	8.1.1		
	8.1.2	Add Contact to Instant Message Directory	วง

Modify Contact Name	57
Unsubscribe from Contact	57
Accept or Reject Subscription Request	57
View Presence State of Contacts	58
at with IM&P Contacts	. 59
Start Instant Messaging Session	59
Place Call from Chat Window	60
Establish Multiuser Chat Session	60
ge Contacts	. 63
ow/Hide Directories	64
w Directory Content	64
arch Contacts	65
Perform Quick Search	65
Perform Regular Search	. 66
Create Directory from Search Results	. 68
Perform Search on Search Results	69
ler Directory Entries	69
ke Notes about Contact (Enterprise Edition)	70
nage Personal Contacts	71
Add Personal Contact	71
Delete Personal Contact	72
nage Speed Dial Entries	. 72
Add Speed Dial Entry	73
Modify Speed Dial Entry	73
tor Contacts	. 75
tic Monitoring	75
namic Monitoring (Enterprise Edition)	. 76
quest Dynamic Monitoring (Enterprise Edition)	. 76
nitored Contact's Calendar (Enterprise and Small Business Editions)	. 78
nitored Contact's Personal Assistant State	. 78
ntact States	. 79
ge Call History	81
w Call History	81
ete Call History	82
•	
ect Call Centers to Manage	. 83
-	
	Modify Contact Name Unsubscribe from Contact Accept or Reject Subscription Request

12.6 Transfer Call Between Queues	85
12.7 Change Position of Call in Queue	85
12.8 Transfer Call to Top of Queue (Premium Call Center)	86
12.9 Promote Call in Queue (Premium Call Center)	86
12.10 Group Calls	86
12.11 Order Queued Calls	87
13 Configure Receptionist	88
13.1 Settings – General	88
13.1.1 Account	89
13.1.2 Language	89
13.1.3 Screen Pop	89
13.1.4 Date Format	91
13.1.5 Time Format	91
13.1.6 Workspace	91
13.1.7 Drag and Drop	92
13.2 Settings – Application	92
13.2.1 Queue Membership	92
13.2.2 Operator Policies	93
13.3 Settings – Services	93
13.4 Settings – Plug-ins	94
13.4.1 Notification	94
13.4.2 Microsoft Outlook	94
13.4.3 LDAP v3	95
13.4.4 Program Shortcuts	96
13.4.5 Activity Archive	96
13.5 Settings – Messaging	98
13.5.1 Messaging	98
13.5.2 Instant Messaging and Presence	
13.6 Settings – About	
14 Appendix A: Glossary and Definitions	100
14.1 Monitored User States	100
14.2 Call States	100
14.3 Unified Instant Messaging and Presence States	101
15 Appendix B: Keyboard Shortcuts	102
Index	104

Table of Figures

	Receptionist Enterprise Main Interface							
	Receptionist Small Business Main Interface							
Figure 3	Receptionist Office Main Interface	10						
	ure 4 BroadWorks Web Portal Logo Pane – Launch Receptionist							
	igure 5 Receptionist Sign-in Page							
	igure 6 Receptionist Sign-in Page – Advanced Options							
Figure 7 S	igure 7 Sign-in Dialog Box with Error Message16							
	Receptionist Main Interface (Top of Page) with Error Message							
	Main Interface (Top of Page) – Help Link							
Figure 10	Question Dialog Box	16						
	Logo Pane – IM&P Presence State Control							
	Set IM Status Dialog Box							
	IM&P Status Message							
Figure 14	Account – Change Password	18						
	Receptionist Enterprise Main Interface							
Figure 16	Receptionist Logo Pane	20						
Figure 17	Signed-in User Information	20						
	Call Console							
Figure 19	Call Console – Dialer	22						
Figure 20	Call Console – Current Calls	23						
Figure 21	Call Console – Security Classification	23						
Figure 22	Conference Call Panel	24						
	Conference Call Panel – Security Classification							
	Receptionist Enterprise Contacts Pane							
	Group Tab - Contact in Focus with Action Buttons							
	Directories Management Bar							
	Contacts Pane – Search Tab							
-	Contacts Pane – Favorites Tab							
-	Contacts Pane – Group Tab							
-	Contacts Pane – Group Common Tab							
	Contacts Pane – Monitored Contacts Tab							
-								
•	Contacts Pane – Personal Tab							
-	Contacts Pane – Speed Dial Tab							
	Contacts Pane – Queues Tab							
	Contacts Pane – Custom (Directory) Tab							
	Contacts Pane – Instant Message Tab							
•	Contacts Pane – Outlook Tab							
0	Contacts Pane – Search Results Tab	-						
	Queued Calls Pane							
	Queued Calls Pane – Call Center Panel (Expanded)							
	Group Directory – Contact in Focus with Action Buttons							
	Call Console							
	Drag Call and Drop Call on Contact							
	Call Notification Pop-up Window for Non-ACD Call							
	Call Notification Pop-up Window - Call from Call Center							
	Call Notification Pop-up Window with Diversion Information							
	Security Classification of Calls							
	Security Classification Levels							
	Dialer							
	Dialer – Select Recently Dialed Number							
Figure 51	Dialer – Redial Number	45						

Figure 52 Group Directory – Contact in Focus with Split Call Button	15
Figure 53 Split Call Button – List of Contact's Alternate Numbers	
Figure 54 Call History Dialog Box	
Figure 55 Call Console – Conference Call Panel	
Figure 56 Start Conference	
Figure 57 Call in Call Console with Record Button	
Figure 58 Call Being Recoded	
Figure 59 Contact (IM) Subscribe Dialog Box	
Figure 60 Contact (IM) Re-Subscribe Dialog Box	
Figure 61 Edit Instant Message Contacts Dialog Box – Add Contact	
Figure 62 Edit Instant Message Contacts Dialog Box – Modify Contact	57
Figure 63 Contact (IM) Unsubscribe Dialog Box	57
Figure 64 Contact (IM) Request Dialog Box	
Figure 65 Instant Message Tab – Unified Presence State of Contacts	58
Figure 66 IM&P Contact with Chat button	
Figure 67 Chat Window	
Figure 68 Add Participants to Chat	
Figure 69 Multiuser Chat	
Figure 70 Chat Window	
Figure 71 Contacts Pane	
Figure 72 Contacts Pane – Expanded Directories List	
Figure 73 Group Directory – Contact Details	
Figure 74 Contacts Pane – Perform Quick Search	
Figure 75 Contacts Pane – Perform Regular Search	
Figure 76 Contacts Pane – Search Results	
Figure 77 Perform Search Using Search Tab.	67
Figure 78 Contacts Pane – Search Results in Search Tab	
Figure 79 Sort Directory	
Figure 80 Notes for Cheryl Baldwin Dialog Box	
Figure 81 Group Directory – Contact Notes	
Figure 82 Personal Tab	
Figure 83 Edit Personal Contacts Dialog Box – Add Entry Figure 84 Edit Personal Contacts Dialog Box – Delete Entry	
Figure 85 Speed Dial Tab	
Figure 86 Edit Speed Dials Dialog Box – Add Entry	
Figure 87 Edit Speed Dials Dialog Box – Add Entry	
Figure 88 Edit Speed Dials Dialog Box – Delete Entry	
Figure 89 Favorites Directory with Monitored Contacts	
Figure 90 Group Directory with Monitored Contacts	
Figure 91 Group Directory – Request Contact Monitoring	
Figure 92 Group Directory – Monitored Contact	
Figure 93 Contacts Pane – Monitored User's Calendar Details	
Figure 94 Call History Dialog Box	
Figure 95 Queued Calls Pane	
Figure 96 Queued Calls – Options – Edit Queue Favorite Dialog	
Figure 97 Edit Queue Favorites Dialog Box	
Figure 98 Ad Hoc Queue Transfer	
Figure 99 Reorder Queued Call	
Figure 100 Transfer Call to Top of Queue	
Figure 101 Queued Calls – Options – Group	
Figure 102 Queued Calls – Options – Sort.	
Figure 103 Settings – General	
Figure 104 Account – Change Password	
Figure 105 Settings – Application	

Figure 106	Settings – Services	93
•	Settings – Plug-ins (Top of Page)	
	Settings – Messaging	
Figure 109	Settings – About Page	99

1 About This Document

This guide provides step-by-step procedures and reference information for BroadWorks Hosted Thin Receptionist Release 21.0.

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

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users. This guide covers all three editions of Receptionist.

1.1 Audience

This document is intended for end users of Hosted Thin Receptionist Enterprise, Small Business, and Office.

1.2 How This Guide Is Organized

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

Section	Overview			
Error! Reference source not found.	This section provides an overview of Receptionist and its three editions: Enterprise, Small Business, and Office.			
Get 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.			
Message Contacts (Enterprise Edition)	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 (Enterprise Edition)	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.			

1.3 Additional Resources

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

- BroadWorks Hosted Thin Receptionist Configuration and Administration Guide
- BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2)
- BroadWorks Getting Started Web Interface Administration Guide
- BroadWorks CommPilot Call Manager and Attendant Console User Guide
- BroadWorks Application Server User Web Interface Administration Guide

2 Introduction to Receptionist

BroadWorks 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. BroadWorks Receptionist realizes the promise of IP telephony by enhancing business processes and delivering rich services in a user-friendly way.

BroadWorks 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

In Release 21.0, BroadWorks Receptionist is offered in two architectural variants:

- Hosted Thick Receptionist Introduced in Release 16.0, Hosted Thick Receptionist is a Software as a Service (SaaS) application hosted on BroadWorks and launched from the BroadWorks web portal.
- Hosted Thin Receptionist Introduced in Release 17.sp2, Hosted Thin Receptionist is a SaaS Rich Internet Application (RIA) hosted on BroadWorks and allows you to manage calls from a web browser.

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

This document describes the BroadWorks Hosted Thin Receptionist client.

2.1 Receptionist Editions

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users.

The following sections provide an overview of the Receptionist Enterprise, Small Business, and Office interface and functionality and refer you to other sections of the document for more information.

NOTE: Features available in a specific version are identified and tagged with the edition's name.

2.2 Receptionist Enterprise

The Receptionist Enterprise edition is a BroadWorks 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.

2.2.1 User Interface

Figure 1 shows the main interface of Receptionist Enterprise.

	st						<u>Set</u>	<u>tings Help Full Sci</u> C	<u>een</u> <u>Sign Out</u> heryl Baldwin
CALL CONSOLE	₽	CON.	TACTS						
🔚 Enter Number	Transfer Redial	Q :	SEARCH 🛛 🌋 FA	AVORITES X	group x 🧏	GROUP COM	x 🕻 PERSON	AL 🗴 🧮 SPEED (MAL x
Mario Bueno (1001)	Active 01:53		Beg	ins with All	~ Q		Quick Sear	ch	ר
□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	HOLD END	Status	Last Name 🏛	First Name +	Number	Extension	Mobile	Department +	Notes
		0	Baldwin	Cheryl	+12025551009	1009			Notes
		\bigcirc	basicAA	Auto Attendant					Notes
 CONFERENCE CALL 	×	\circ	Bueno	Mario	+12025551001	1001	2021112223		Notes
No items to show								CALL	TXR
No items to show		\bigcirc	Dumas	Marie	+12025551005	1005			Notes
		\bigcirc	hotline	Call Center	+12025551000	1000			Notes
		0	Jones	Shirley	+12025551002	1002			Notes
		0	Maldini	Paolo	+12025551003	1003			Notes
QUEUED CALLS	Ϋ́ι	0	Smith	Stan	+12025551004	1004			Notes
 Hotline 2025551000 	0/10 (0/20) 🗙	0	standardAA	Auto Attendant					Notes
		0	Voice Portal	Voice Messaging	+12025551008	1008			Notes
		0	Wyoming	Madoline	+12025551006	1008			Notes

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 BroadWorks 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 4 Explore Workspace.

2.2.2 Contact Directories

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

Disectory	Contonto	Commente
Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently statically 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 BroadWorks group or enterprise directory. You can access this same directory 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 and it cannot exceed 100.
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on BroadWorks.	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 BroadWorks 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 to which you are subscribed.	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 <i>Search</i> tab.	The directory needs to be configured by your system administrator. Otherwise, it is not visible.
Custom: <custom contact<br="">directory name></custom>	This consists of all contacts in your custom contact directories configured by your administrator on the web portal. Each custom directory is displayed in a separate tab.	You may not have any contact directories or you may have several.
Outlook	This consists of all your Outlook contacts.	

For information on managing your contact directories, see section 8 Manage Contacts; for information on using your contacts to make and manage calls, see section 5 Manage Calls; for information on monitoring contacts, see section 9 Monitor Contacts.

2.2.3 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 (Enterprise Edition)
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Group Call Park	Conduct Group Call Park (Enterprise Edition)
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 5 Manage Calls.

2.3 Receptionist Small Business

The Receptionist Small Business edition is a lower-priced version of the client, targeted at front-office personnel in small and mid-sized organizations that do not require multiple directories, call queuing, or other advanced features. It supports a full set of call control functions and monitoring of up to 30 lines in the directory.

2.3.1 User Interface

Figure 2 shows the main interface of Receptionist Small Business.

	ist						<u>Settings</u> <u>I</u>	lelp <u>Full Screen</u> <u>Sign Out</u> Mario Bueno
CALL CONSOLE		CONTAC	тѕ					
Enter Number	Transfer Redial	Q SEAR	CH 🛛 🔏 FAV	orites x 🕹 GRC	DUP 🗴 🔽 GROU	IP COM X	🖕 PERSONAL 🗴	
Cheryl Baldwin (1009)	Active 18:59		Begins	with All	 ✓ Q. 		Quick Search	× 🛛
	HOLD END		ast Name 🕈	First Name ‡	Number ‡	Extension	[‡] Mobile [‡]	Department 🕈
		-	aldwin	Cheryl	+12025551009	1009		
		-	umas mith	Marie Stan	+12025551005	1005		
 CONFERENCE CALL 	×							
No items to show								

Figure 2 Receptionist Small Business Main Interface

The interface contains the following 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.
- Contacts pane This pane contains your contact directories and allows you to use contacts to manage calls. You also use the *Contacts* pane to monitor 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 to view and return your past calls.
- Chat windows You use a chat window to chat with an IM&P contact.

For more information, see section 4 Explore Workspace.

2.3.2 Contact Directories

This following table lists the contact directories available in Receptionist Small Business. The *Comments* column specifies additional settings required to access a 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 30 static users company-wide.
Group/Enterprise	This consists of all contacts in your BroadWorks group or enterprise directory. You can access this same directory 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.	
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Personal	This consists of all contacts in your personal directory on the BroadWorks 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 your IM&P contacts, that is, the IM&P users to which you subscribed.	You need to have the Integrated IM&P or Third- Party IM&P service assigned.

For information on managing your contact directories, see section 8 Manage Contacts; for information on using your contacts to make and manage calls, see section 5 Manage Calls; for information about monitoring contacts, see section 9 Monitor Contacts.

2.3.3 Call Management Functionality

This section lists call management functions of Receptionist Small Business and provides you with pointers to sections of this document where they are described.

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

Function	Quick Reference
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
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

2.4 Receptionist Office

The Receptionist Office edition is targeted at a small office environment with a limited number of employees. It supports the standard set of Call Control features and the monitoring of up to eight lines in the directory.

2.4.1 User Interface

Figure 3 shows the main interface of Receptionist Office.

	st						<u>Settings</u> <u>Hel</u>	l <u>p Full Screen</u> <u>Sign Out</u> Mario Bueno
CALL CONSOLE	₽	CONTA	CTS					
Enter Number	Transfer Redial	Q SEA	ARCH 🛃 FAVOR	rites 🗴 🚵 grou	P 🗴 🤽 GROUP	сом х 🕻	A PERSONAL X	
▶ Cheryl Baldwin (1009)	Active 18:59		Begins w		~ Q		Quick Search	× 🛛
	HOLD END	Status ÷	Last Name 🕈	First Name ‡	Number \$	Extension	Mobile ‡	Department ‡
			Baldwin Dumas	Cheryl Marie	+12025551009 +12025551005	1009		
		ŏ	Smith	Stan	+12025551004	1004		
CONFERENCE CALL No items to show	×							

Figure 3 Receptionist Office Main Interface

The interface contains the following 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.
- Contacts pane This pane contains your contact directories and allows you to use contacts to manage calls. It also allows you to 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 an IM&P contact.

For more information, see section 4 Explore Workspace.

2.4.2 Contact Directories

This following table lists the contact directories available in Receptionist Office. The *Comments* column specifies any additional settings required to have access to a 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 eight static users group-wide.
Group/Enterprise	This consists of all contacts in your group.	
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Personal	This consists of all contacts in your personal directory on the BroadWorks 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 your IM&P contacts, that is, the IM&P users to which you subscribed.	You need to have the Integrated IM&P or Third-Party IM&P service assigned.

For information on managing your contact directories, see section 8 Manage Contacts; for information on using your contacts to make and manage calls, see section 5 Manage Calls; for information about monitoring contacts, see section 9 Monitor Contacts.

2.4.3 Call Management Functionality

The Receptionist Office 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
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call

Function	Quick Reference
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

3 Get Started

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

NOTE 1: The minimum required screen resolution for Receptionist is 1024 x 768 pixels.

NOTE 2: Receptionist does not support signing in as different users from the same machine at the same time.

NOTE 3: 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.

3.1 Launch Receptionist from Web Portal

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

BR&ADSOFT	Launch Help - Home
Innovation calling.	Launch Call Center Agent reen [Logout]
	Call Center Agent reen [Logout]

Figure 4 BroadWorks Web Portal Logo Pane – Launch Receptionist

Receptionist starts and you are automatically signed in.

3.2 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 BroadWorks. The Receptionist *Sign-in* page appears.



Figure 5 Receptionist Sign-in Page

2) Enter your BroadWorks 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.

User ID	paolomaldini@virtsanity.mtl.broadsoft.cc
Password	*****
	Stay signed in
	Sign In
	Hide options Bookmark this page
Append Domain :	
Language :	English (US)

Figure 6 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.

3.3 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."

User ID	msellers@devcluster.synapse.com
assword	
	Stay signed in
	Sign In
	Sign In Show options Bookmark this page

Figure 7 Sign-in Dialog Box with Error Message



Figure 8 Receptionist Main Interface (Top of Page) with Error Message

3.4 Get Help

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



Figure 9 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.

3.5 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.

Question			Baldwin	Cherul	x
?	Do you want to save you	ur worksp	ace?		
	Yes		No		

Figure 10 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 12.1.6 *Workspace*.

3.6 Set Up Your Environment (Enterprise Edition)

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

- Select call centers to manage see section 11.1 Select Call Centers to Manage.
- Join queues and set your post sign-in ACD state see section 12.2 Settings Application.

For information about other Receptionist configuration options, see section 12 Configure *Receptionist.*

3.7 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. For more information, see section 13.3 Unified Instant Messaging and Presence States.

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 7 *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.

Settir	ngs H	lelp Ful	l Screen	Sign Out
Presence:	💗 Av	ailable 🔻	📝 Mai	rio Bueno
	,	Available		
		Busy		Y
	🧠 .	Away		
		Offline		×
				— ×

Figure 11 Logo Pane – IM&P Presence State Control

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

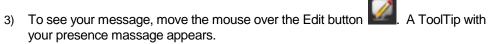
To set an IM&P status message:

1) Click the **Edit** button **Event** next to the *Presence* box. The *Set IM Status* dialog box appears.

Set IM Status			GIGIOIIO
IM Status :	l am available till 5:00 PM	Ι.	\times
	C	ж	

Figure 12 Set IM Status Dialog Box

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



<u>Settings Help Fu</u>	<u>Il Screen</u> Sign Out
Presence: Presence	🌽 Mario Bueno
	l am available till 5:00 PM.

Figure 13 IM&P Status Message

3.8 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 BroadWorks.

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.

Change Password			
Old Password :			
New Password :			
Confirm Password :			
Change Password	Reset	Cancel	

Figure 14 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.

4 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.

	st						<u>Set</u>	<u>tings Help Full Scr</u> C	<u>reen</u> <u>Sign Out</u> heryl Baldwin
CALL CONSOLE		CONT	TACTS						
🔚 Enter Number	Transfer Redial	Q. 5	SEARCH 🛛 🌋 FA	avorites x 👗	GROUP X	GROUP COM	. x 🗳 PERSON	IAL 🗴 🔛 SPEED D	DIAL X 📼
Mario Bueno (1001)	Active 01:53		Beg	ins with All	~ Q		Quick Sear	ch	× 🛛
	HOLD END	Status	Last Name ‡	First Name ‡	Number	Extension	Mobile	Department *	Notes
		\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes
		\bigcirc	basicAA	Auto Attendant					Notes
 CONFERENCE CALL 	×	0	Bueno	Mario	+12025551001	1001	2021112223		Notes
No items to show								CALL	TXR
No tems to show		\bigcirc	Dumas	Marie	+12025551005	1005			Notes
		\bigcirc	hotline	Call Center	+12025551000	1000			Notes
		0	Jones	Shirley	+12025551002	1002			Notes
		0	Maldini	Paolo	+12025551003	1003			Notes
QUEUED CALLS	Yi	0	Smith	Stan	+12025551004	1004			Notes
 Hotline 2025551000 	0/10 (0/20) 🗙	0	standardAA	Auto Attendant					Notes
		0	Voice Portal	Voice Messaging	+12025551008	1008			Notes
		0	Wyoming	Madoline	+12025551008	1008			Notes

Figure 15 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 *12.1.6 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.

NOTE 1: To work in full screen mode, you can also click F11 when the main window is in focus.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.

NOTE 3: 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.

You can also resize the *Call Console* and the *Contacts* panes by moving the bar between the two to the left or to the right. Receptionist remembers the position of the bar at sign out, and the bar is at the same position the next time you sign in.

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 4.5 Controls. The action buttons are described in section 4.5.1 Call Action Buttons.

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

- Logo Pane
- Call Console
- Contacts Pane
- Queued Calls Pane (Enterprise Edition)
- Controls

The Settings pages, accessed via the Settings link and used to configure Receptionist, are described in section 12 Configure Receptionist.

The Call History dialog box is described in section 10 Manage Call History.

The Chat windows are described in section 7 Monitor IM&P Contacts and Chat with Contacts.

4.1 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.

Receptionist Unable to create program shortcut, plugin failed to initialize.

Figure 16 Receptionist Logo Pane

4.1.1 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 appears for several seconds and then disappears.

4.1.2 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.

4.1.3 Signed-in User Information

Information about yourself, such as, 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, as applicable.

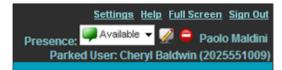


Figure 17 Signed-in User Information

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 (I), Busy (I), Away (I), or Offline (I).
- 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.

 - 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, then 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>).

4.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section 5 *Manage Calls*.

CALL CONSOLE	R.
🔚 Enter Number	Transfer Redial
Marie Dumas (1005)	Active 01:33 HOLD CONF END
CONFERENCE CALL	END ANS LEAVE 🗙
🖧 Cheryl Baldwin (1009)	Active 08:22 HOLD END
🎝 Jean Richard (1007)	Active 04:34
	HOLD

Figure 18 Call Console

The Call Console contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

4.2.1 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 Label This allows you to enable the Call Waiting service.
- Auto Answer button
 This allows you to answer your calls automatically.

4.2.2 Dialer

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

🔚 Enter Number		Redial
----------------	--	--------

Figure 19 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 4.2.5 Call States and Actions and 4.5.1 Call Action Buttons.

4.2.3 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.

CALL CONSOLE	₽.		
🔚 Enter Number	Transfer Redial		
Marie Dumas (1005)	Held 44:04[00:28]		
← Jean Richard (1007)	Outgoing 00:0 CONF TXR END		
CONFERENCE CALL	×		

Figure 20 Call Console – Current Calls

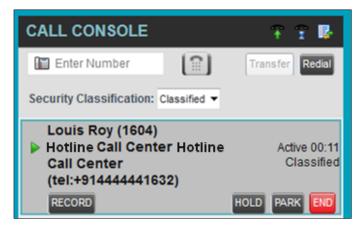


Figure 21 Call Console – Security Classification

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>

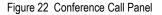
- Diversion CLID This is the name (if available) of the party who diverted (transferred or forwarded) the call before you received the call and the phone number is in parenthesis. If the call was diverted more than once, the last party who diverted the call is listed first; the second to last party is listed second; and so on.
- Call State icon This is a visual representation of the current state of the call. For more information, see section 4.2.5 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 BroadWorks 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 4.2.5 Call States and Actions and 4.5.1 Call Action Buttons.

4.2.4 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.

CONFERENCE CALL	END ANS LEAVE 🗙
🙏 Cheryl Baldwin (1009)	Active 08:22
🙏 Jean Richard (1007)	Active 04:34 HOLD END



CONFERENCE CALL	END ANS LEAVE X Secret
A Jim Brian (1605)	Active 00:39 Secret HOLD END
A 444441602	Active 00:28 Secret

Figure 23 Conference Call Panel – Security Classification

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 4.2.3 Current Calls.

4.2.5 Call States and Actions

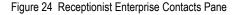
The following table lists the possible call states and actions that can be performed in each state.

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	AI	Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Recalled	-	Terminator	Answer, Conference, End
Parked Call	Parked (<dn>)</dn>		Any	Answer, End

4.3 Contacts Pane

The *Contacts* pane contains your contact directories in a tabbed format and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section 5 *Manage Calls*. For information about organizing and managing your contact directories, see section 8 *Manage Contacts*.

Q	SEARCH	FAVORITES X	👗 GROUP	x 🖄	GROUP COM	x 📢 PERSOI	VAL X
		Begins with All	~	٩	Quick Se	earch	×
Stat	Last Name 🕈	First Name 🕈	Number	Exten	Mobile	Department *	Notes
\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		<u>Notes</u>
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	hotline	Call Center	+12025551000	1000			<u>Notes</u>
\bigcirc	Jones	Shirley	+12025551002	1002			Notes
	Maldini	Paolo	+12025551003	1003			<u>Notes</u>
	Smith	Stan	+12025551004	1004	2021234567		Notes
\bigcirc	standardAA	Auto Attendant					<u>Notes</u>
\bigcirc	Voice Portal	Voice Messagi	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		<u>Notes</u>



The Contacts pane contains the following areas

- Directory Management Bar
- Directories List
- Search Tab
- Favorites Tab
- Group/Enterprise Tab
- Group/Enterprise Common Tab
- Monitored Contacts Tab (Enterprise Edition)
- Personal Tab
- Speed Dial Tab
- Queues Tab (Enterprise Edition)
- Custom Directories Tabs (Enterprise Edition)
- Instant Message Tab
- Outlook Tab (Enterprise Edition)
- Search Results Tabs

The tabs you see depend on your Receptionist edition, system configuration, as well as the services assigned to you. For information, see section 2 Error! Reference source not found. or see your administrator.

You can only see the contents of one directory at a time. The information displayed for a contact, depends on the directory, which is described in the following subsections.

When you click a contact in any contact directory, the contact expands and the action buttons for the operations that you can currently perform on that contact, and in some cases additional information about the contact, appear.

0	Jones	Shirley	+12025551000	1000			Notes Notes
-	Dumas hotline	Marie Call Center	+12025551005	1005			Notes
$\overline{\mathbf{O}}$	Bueno	Mario	+12025551001	1001	2021112223		Notes
0	Baldwin basicAA	Cheryl Auto Attendant	+12025551009	1009 1036			Notes Notes
Stat	Last Name ‡	Begins with All	Number	O. Exten	Quick Se	Department +	× Note

Figure 25 Group Tab - Contact in Focus with Action Buttons

For the list of action buttons available in Receptionist, see section 4.5.1 Call Action Buttons.

4.3.1 Directory Management Bar

The *Directory Management* bar contains controls that allow you to perform search operations, create directories from search results, and edit directories.



Figure 26 Directories Management Bar

For information on managing contact directories, see section 8 Manage Contacts.

4.3.2 Directories List

The drop-down arrow to the right of the directories tabs, when clicked, displays the list of directories available to you, and allows you to select directory tabs to display in the *Contacts* pane. For more information, see section 8.1 Show/Hide Directories.

4.3.3 Search Tab

You use the *Search* tab to look for specific contacts in all your contacts directories and, if available, in the configured *LDAP* directory. For information on performing directory searches, see section *8.3 Search Contacts*.

соит	ACTS					
<u>Q</u> , 5	EARCH	🔏 FAVORITES 🗴 🧯	GROUP X	SROUP COM x 📢		
ad	Begins with		th 🔍 🗙			
Status	Name		Directory			
\bigcirc	Madoline Wyoming		GROUP			
	Dad		SPEED DIAL			

Figure 27 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.

4.3.4 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 9 Monitor Contacts.

CON	TACTS						
🔏 FA	VORITES X	🐍 GROUP	х 🖄 G	ROUP CO	M x 🗳	PERSONAL X	
		Begins with	All	~ a	🗌 Quick	Search	ר
Stat	Last Name	First Name	Number ‡	Exte	Mobile ‡	Departme	Note
	Bueno	Mario	+12025551	1001	2021112223		Notes
	Dumas	Marie	+12025551	1005			Notes
	Maldini	Paolo	+12025551	1003			Notes

Figure 28 Contacts Pane - Favorites Tab

4.3.5 Group/Enterprise Tab

The *Group/Enterprise* tab contains the contacts in your BroadWorks 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.

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.)

If you have the Receptionist Enterprise edition, 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 *9.2 Dynamic Monitoring (Enterprise Edition)*.

Q	SEARCH 🙎	FAVORITES X	🚴 GROUP	х 这	GROUP COM ;	x 🛀 PERSOI	VAL X
		Begins with All	~	a	Quick Se	arch	x 🛙
Stat	Last Name 🕈	First Name 🕈	Number	Exten	Mobile	Department *	Notes
\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
\bigcirc	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	hotline	Call Center	+12025551000	1000			Notes
\bigcirc	Jones	Shirley	+12025551002	1002			Notes
\bigcirc	Maldini	Paolo	+12025551003	1003			Notes
\bigcirc	Smith	Stan	+12025551004	1004	2021234567		Notes
\bigcirc	standardAA	Auto Attendant					Notes
\bigcirc	Voice Portal	Voice Messagi	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+120255510	1008	2405557777		<u>Notes</u>

Figure 29 Contacts Pane – Group Tab

4.3.6 Group/Enterprise Common Tab

The *Group/Enterprise Common* directory contains the contacts in your group's common phone list (if your group is part of a service provider) or your enterprise's common phone list (if your group is part of an enterprise) configured by your administrator on BroadWorks.

The contact's name and phone number (as configured on BroadWorks) are displayed for each contact.

CONTACTS	
🔍 SEARCH 🏾 🌋 FAVORITES 🗴	🚵 GROUP 🗴 🧏 GROUP COM x 📢 PERSONAL x
Begins with All	🖂 🔍 📔 Quick Search 🛛 🗙 🖄
Name [‡]	Number +
Best ItalianTakeout	2024124333
Favorite Taxi	2029999999
Help Desk	202444444
Human Resources	2407845571
Lucky Travel	2021212121
Supervisor On Call	111111111
Weekly Conference Call	3456121212

Figure 30 Contacts Pane – Group Common Tab

4.3.7 Monitored Contacts Tab (Enterprise Edition)

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 *9 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.)

CON	TACTS						
x	PERSONAL	x 📢 QUE	UES x	SPEED	DIAL 🗴 🖉	MONITORED	X 💌
		Begins with	All	~ a	Quick	Search	× 🛛
Stat	Last Name	First Name	Number ‡	Exte	Mobile ‡	Departme	Note
	Jones	Shirley	+12025551	1002			Notes

Figure 31 Contacts Pane – Monitored Contacts Tab

4.3.8 Personal Tab

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

You can edit your personal contacts in Receptionist. For information about managing your personal contacts, see section 8.6 Manage Personal Contacts.

CONTACTS						
🔍 SEARCH 🛛	🕈 Favorites 🙁 🏅	GROUP 🔬 📢	GROUP COM	× 😢	PERSONAL ×	SPEED DI4
	Begins with All		- a	Quic	Search:	× 🛛 🥖
Name 🗢			Number 🔶			
Charles			9999760965			
						CALL
Mark			9999660775			

Figure 32 Contacts Pane – Personal Tab

The information displayed for each contact includes the contact's name and number, as you configured them.

4.3.9 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 8.7 *Manage Speed Dial Entries*.

CONTACTS		
FAVORITES 🗴 👗 GROUP 🗴	SROUP COM 🗴 🌿 PER	SONAL X 🏭 SPEED DIAL X 🚽
Begins with	All 🗸 🗌	Quick Search 🛛 🗎 🗡 🖉 🥖
Code ‡	Phone Number ‡	Description +
2	2023111434	Daycare
3	9051232432	Chris mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad

Figure 33 Contacts Pane - Speed Dial Tab

The information displayed for each contact includes the speed dial code, phone number, and description, as you configured them.

4.3.10 Queues Tab (Enterprise Edition)

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.

CONTACTS						Yi
PERSONAL S	ED DIAL ×	😋 QUEUES 🗙	o ^o CUSTOM: Sales	× 2	MONITORED	CONTACTS 🙁 🛃
	Begins with	Al	<u>a</u>	Quick S	Search:	× 🛛 🖬
Name 🗢	Number	\$	Extension 🔶		Departmen	it ⊜
Finance						
Mobile Operations	+1-66666	61621	1621			
Operations	+1-66666	61600	1600			
Television Operations	+1-66666	61622	1622			

Figure 34 Contacts Pane – Queues Tab

The information displayed for each queue includes the name, phone number, extension, and department (as applicable).

The Group button allows you to group (and ungroup) queues by call center.

4.3.11 Custom Directories Tabs (Enterprise Edition)

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.

Status IM Last Name First Name Number Exten Mobile Department Notes Robert Alexis +91-6666661617 1617 Finance Notes			🔗 CUSTON	ES 8	QUEUES	1.1	SPEED DIAL	PERSONAL 8	UP COM 8	GRC	× (1
Robert Alexis +91-66666661617 1617 Finance Notes	×e	1	rch:	uick Sea	Quic	1	► a	gins with All	Be		
		Notes	oartment 🔶	le Dep	Mobile	Exten	Number	First Name 🜲	Last Name 👙	IM	Status
	2	Notes	ance	Fin		617	+91-66666661617	Alexis	Robert	4	0
Martel Anne +91-6666661612 1612 Notes		Notes				612	+91-66666661612	Anne	Martel		0
O - Morin Antoine +91-666666616 1618 Note:		Notes				1618	+91-66666616	Antoine	Morin	1	0

Figure 35 Contacts Pane – Custom (Directory) Tab

4.3.12 Instant Message Tab

The *Instant Message* tab displays IM&P contacts to which you have are subscribed. The information displayed for each contact includes the contact's name, IM&P ID, and unified IM&P presence state. For information on subscribing to and chatting with IM&P contacts, see section 7 *Monitor IM&P Contacts and Chat with Contacts*.

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

When your presence state is set to "Offline", the tab is empty. To change your IM&P presence state, see section 3.7 *Change Your IM&P Presence State*.

SPEED	DIAL 🛛 📢 QUEUES 🕸	🕫 CUSTOM: Sales 🛞 🧕 OUTLOOK 🗵 💭 INSTANT MESSAGE 🗙
	Begins with	All 🔍 🔍 📔 Guick Search: 🛛 🗶 🖉 🆉
IM	Name 😓	IM ID
-	Wyoming Madoline	madoline@tig-eu.bc.im
4	ddSUP19	ddSUP19@tig-eu.bc.im
4	ddSUP20	ddSUP20@tig-eu.bc.im
P	harsh gmail	hvardhanu@gmail.com
W	Mario Bueno	mariobueno@btc.tcp.im
1	newuser	newuser@tig-eu.bc.im

Figure 36 Contacts Pane - Instant Message Tab

4.3.13 Outlook Tab (Enterprise Edition)

The *Outlook* tab contains your Outlook contacts. The information displayed for each contact includes the contact's last and first name, phone number, mobile number, and home phone number. This feature is available to you if you have the Outlook Integration feature enabled and configured. For more information, see section *12.4 Settings – Plugins*.

CONTACTS								
up 🛛 📢 grou	P COM ×	Vé PER	ISONAL 🛛	E SPEED C	NAL 🖂	CIEUES ::	🧿 онтлоок 🗴	1
	Begins	with Al		- a	L.	Guick Search	×	ø
Last Name ®	First Na	me *	Numbe	er o	Mob	ile •	Home Number *	
Sheperd	Addis	on	7894	561230			7894561230 CALL TXR	
Dannay	Charles		9876543	210	98765	43210	9876543210	
Thompson	Madoline		9638527	410	96385	27410	9638527410	

Figure 37 Contacts Pane - Outlook Tab

4.3.14 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

соит	ACTS	
Q, 5	EARCH 🛛 🎦 FAVORITES 🗴 🦂	🖕 group 🗴 🔉 group com x 📢 🚽
ad	Begins wi	th 🔍 🗙
Status	Name	Directory
	Madoline Wyoming	GROUP
	Dad	SPEED DIAL

Figure 38 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.

4.4 Queued Calls Pane (Enterprise Edition)

You use the *Queued Calls* pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section 11 Manage Queued Calls (*Enterprise Edition*).

QUEUED CALLS	Ϋ́i
▲ Hotline 2025551000	2/20(2/100) 🗙
Technical Support 2025551010	1/30(1/100) 🗙

Figure 39 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section 11.1 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.

QUEUED CALLS	Υ <mark>ί</mark>
Premium_CC 5143403030	🚀 0/10 (0/10) 🗙
TestCC 5143403023	🚀 2/10 (2/10) 🗙
🖃 Priority 0 (2)	
▲ cc3007 group3 (5143403007) Priority 0, Position 1 TestCC (5143403023)	01:17 [01:17] RETRIEVE
🔀 cc3001 group3 (5143403001)	00:10 [00:10]

Figure 40 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 \bigcirc 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 (Premium Call Center).
- 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 *4.5.1 Call Action Buttons*.

4.5 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 *4.5.1 Call Action Buttons*.

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

Name	Description
Common Controls	
Options	This allows you to organize items in lists.
Expand/Collapse	This shows or hides the contents of a window, panel, or tab.
Close	This closes an interface element, such as window, pane, tab, or panel.
Edit	This allows you to edit contacts in some directories.
Call Console Controls	

Name	Description
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.
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	This places directory search results in a new tab.
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	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.

Name	Description
X Close	This closes the chat window.

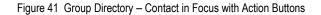
4.5.1 Call Action Buttons

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.

Q	SEARCH	FAVORITES X	👗 GROUP	х 🚨	GROUP COM	x 🌿 PERSON	VAL X
		Begins with All	~	a	Quick Se	earch	×
Stat	Last Name 🕈	First Name ‡	Number	Exten	Mobile	Department +	Note
\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
\bigcirc	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	hotline	Call Center	+12025551000	1000			Notes
\bigcirc	Jones	Shirley	+12025551002	1002			Notes
\bigcirc	Maldini	Paolo	+12025551003	1003			Notes
\bigcirc	Smith	Stan	+12025551004	1004	2021234567		Notes
\bigcirc	standardAA	Auto Attendant					Notes
\bigcirc	Voice Portal	Voice Messagi	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+120255510	1008	2405557777		Note



The following table lists action buttons available in Receptionist.

Button	Description
Dial	This dials the number you entered in the <i>Dialer</i> .
CALL Call	This places a call to the selected contact or to a number from Call History. This button is used when there is only one number available for the contact.
CALL split Call	When there is more than one number available for a contact, the split Call button is displayed for the contact.Clicking the Call button, places a call to the default destination number of the contact.Clicking the drop-down arrow (the right Call button), displays the list of available numbers for the contact. Selecting a number places a call to that number.
Redial	This redials the last dialed number.

Button	Description
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	This transfers a call to an ad hoc number entered in the Dialer.
Transfer	This transfers a call to a selected number or contact. This button is used when there is only one number available for the contact.
split Transfer	When there is more than one number available for a contact, the split Transfer button is displayed for the contact.Clicking the Transfer button, transfers the call to the default destination number of the contact.Clicking the drop-down arrow (the right Transfer button), displays the list of available numbers for the contact. Selecting a number transfers the call to that number.
Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
End	This ends a call.
CONF	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	This parks a call on a contact.
RECORD Record	This records a call.
PAUSE	This pauses call recording.
RESUME	This resumes call recording.
STOP Stop	This stops recording a call.
MON Monitor	This starts monitoring the state of the selected contact, except if the contact is a virtual user. Virtual users cannot be monitored.
CHAT	This opens a chat window allowing you to chat with an IM&P contact.
PROMOTE	This promotes a selected call to the next higher priority bucket.

Button	Description
RETRIEVE	This retrieves a selected call from the queue to the supervisor's device.
REORDER	This changes a selected call's position in the queue.
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.

5 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 42 Call Console

5.1 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. By default, 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.

However, you can enable automatic call transfer on *Drag and Drop* (if available). If automatic transfer is enabled, then the call is transferred to the contact's phone number when you drop the call on the contact. For more information, see section 12.1.7 Drag and Drop.

						<u>s</u>	<u>ettings</u> <u>Help</u> <u>Full Sc</u> (<u>reen</u> <u>Sign Out</u> Cheryl Baldwin
CALL CONSOLE	₽.	CONT	TACTS					
🖿 2025551001 🔇 😭 Trans	fer Redial	👗 GR	OUP x 🧏 GROUP	COM X 🔗 CUST	ЮМ: Hu 🗴 🙆 OL	ITLOOK X	SPEED DIAL X	QUEUE:
Mario Bueno (1001) Acti	ve 02:00:17		Begins	with All	 ✓ Q. 	Quick	Search	× 🖸
		Status	Last Name 🗘	First Name 🕈	Number	Extension	Mobile	Notes
		\bigcirc	Wyoming	Madoline	+12025551008	1008		Notes
CONFERENCE CALL	×	\bigcirc	Voice Portal	Voice Messaging Gr				Notes
CONFERENCE CALL	~	0	Valdez	Gregorio	+12025551006	1006		Notes
No items to show		\bigcirc	Technical Support	Call Center	+12025551010	1010		Notes
		\odot	Smith	Stan	+12025551004	1004		Notes
			Richard	Jean	+12025551007	1007		Notes
		0	Maldini	Paolo	+12025551003	1003		Notes
QUEUED CALLS	Yi	\circ	Jones	Shirley	+12025551002	1002	2405558888 CALL	Notes TXR
		0	Hotline	Call Center	+12025551000	1000		Notes
		\bigcirc	Dumas	Marie	+12025551005	1005		Notes
		-	Bueno	Mario	+12025551001	1001	2405559999	Notes
		•	Baldwin	Cheryl	+12025551009	1009		Notes

Figure 43 Drag Call and Drop Call on Contact

5.2 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.

5.2.1 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

5.2.2 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

si 🔜		×
	Incoming Call: Cheryl Baldwin +12025551009	

Figure 44 Call Notification Pop-up Window for Non-ACD Call

Calls from a call center (Enterprise Edition) – For calls from a call center, the call center name is displayed in addition to the caller's name and phone number.

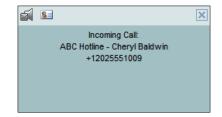


Figure 45 Call Notification Pop-up Window – Call from Call Center

In addition, for diverted calls, that is, calls that were forwarded or transferred before being delivered to you, the diversion information is also displayed.

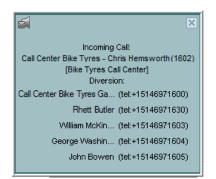


Figure 46 Call Notification Pop-up Window with Diversion Information

NOTE 1: You must have only one tab open in the browser running Receptionist to receive call notifications.

NOTE 2: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

5.2.3 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.

5.2.4 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 12.1 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.

5.3 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".

CALL CONSOLE	🗣 i i
🔚 Enter Number	Redial
Security Classification: Restricted -	
Direct (1)	
Cheryl Baldwin (1009) RECORD	Active 00:29 Unclassified HOLD END

Figure 47 Security Classification of Calls

5.3.1 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.

CALL CONSOLE		🗣 ĭi
🗊 Enter Number		Redial
Security Classification:	Restricted 🔻	
Direct (1)	Restricted	
	Classified	Active 00:38
🕨 Cheryl Baldwin (Unclassified	Unclassified
RECORD		HOLD END

Figure 48 Security Classification Levels

To change your current security classification:

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

5.4 Answer 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.

5.4.1 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 1 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.

5.4.2 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**

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

5.5 Hold and Resume Calls

You can only put an active call on hold.

5.5.1 Put Call on Hold

To put a call on hold:

Move the mouse over the call and click Hold

5.5.2 Resume Held Call

To resume a held call:

Move the mouse over the call and click Answer

NOTE: Double-clicking a call does not take the call off hold.

5.6 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*.

5.6.1 Dial Ad Hoc Number

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



Figure 49 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*.

5.6.2 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.

202		\otimes	
2025551003			
2025551005	N		
2021234567	ЧŠ		
2025551111			

Figure 50 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.

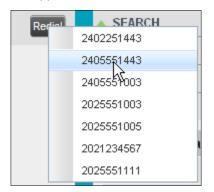


Figure 51 Dialer – Redial Number

5.6.3 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** ^{CALL} for that contact. A Click-To-Dial action is initiated and your phone rings.

CON	TACTS						
Q	SEARCH	🏅 FAVORI	ites x 🟅	GROU	P x 🖄	GROUP COM.	X 💌
		Begins wi	ith All	~ (ス 🗌 Quicl	k Search	ר
Stat	Last Nam	First Nam	Number	Exte	Mobile	Departm	Notes
\bigcirc	Baldwin	Cheryl	+12025551	1009			Notes
0	Bueno	Mario	+1202555	1001	24055599		<u>Notes</u>
						C.	ALL 🔽
0	hotline	Call Center	+12025551	1000			Notes

Figure 52 Group Directory - Contact in Focus with Split Call Button

- 3) Answer the phone. An outbound call is placed.
- 4) Alternatively, to dial the contact's alternate number, if available, click the **right Call CALL** button and select the number from the list.

2405559	9	Notes	
	Phone Numbe		1001)
	Mobile (2405	559999)	

Figure 53 Split Call Button – List of Contact's Alternate Numbers

5.6.4 Speed Dial

To speed dial a contact:

- 1) In the *Contacts* pane, click the **Speed Dial** tab.
- 2) Click the contact to expand it and click **Call**

5.6.5 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 **appears**.

Call History				×
	Show Missed	l Calls	*	
Name		Number	Date/Time	
Marie Duma	is	1005	2013-06-11, 12:42:15 CAL	
Mario Bueno	D	1001	2013-06-10, 12:53:21	
			ок	



- 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**

5.7 End Call

To end a call:

Click End [III] for that call.

NOTE: If the call has not yet been answered, then the calling party continues to ring until there is no answer, another applicable timer expires, or the user hangs up.

The Call History dialog box

5.8 Transfer Calls

There are a number of ways that 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.

5.8.1 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**. 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, click the tab from which you want to select a contact.
- 3) Click the destination contact to expand it, and click **Transfer TKR** for that contact. The call is transferred and removed from the *Call Console*.

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

4) To transfer the call to the contact's alternate number, if available, click the right

Transfer button **under** and select the number form the list.

5.8.2 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**

5.8.3 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.

The calls are connected and removed from the Call Console.

5.8.4 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** for that contact.

Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail** 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

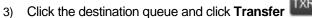
to Voice Mail

5.8.5 Transfer to Queue (Enterprise Edition)

You can transfer a current call to any queue that appears in your *Queues* tab. 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) Click the **Queues** tab.



The call is transferred and removed from the Call Console.

Alternatively, drag the call onto the target queue and click **Transfer** IN for that queue.

5.9 Park and Camp 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, then the call is recalled and it reappears in your Call Console.

5.9.1 Conduct Busy Camp On (Enterprise and Small Business Editions)

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:

- In the Call Console, select the call to camp. 1)
- In your Group/Enterprise or Favorites directory, click a Busy or Ringing contact and 2) 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.

5.9.2 Conduct Group Call Park (Enterprise Edition)

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** The call is parked on an available extension and removed from the Call Console.

PARK

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.

5.10 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.

CONFERENCE CALL	END HOLD LEAVE 💥
🆧 Jean Richard(2025551007)	Remote Held 01:33
🖧 Gregorio Valdez(2025551006)	Remote Held 01:07

Figure 55 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.

5.10.1 Start Three-Way Conference

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

To start a conference:

- If necessary, place calls to participants using any of the methods described in section 1) 5.6 Make and End Calls.
- In the Call Console, select one of the two calls. 2)



Figure 56 Start Conference



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

5.10.2 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 5.6 *Make and End Calls*.
- In the *Call Console*, move the mouse over the call to add and click **Conference** CONF. The caller is added to the conference.

5.10.3 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.

5.10.4 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.

5.10.5 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**

5.10.6 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**

5.10.7 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.

5.10.8 Remove Conference Participant

To end a selected call in the conference:

- 1) Expand the Conference Call panel.
- Move the mouse over the call and click End



5.10.9 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.

5.10.10 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.

5.11 Record Calls

To record calls, you have to have the Call Recording service assigned and configured. You can record calls manually or have the system automatically record your calls. Depending on your Call Recording mode, Receptionist may allow you to manually start, pause, resume, or stop recording a call.

For information on configuring your services, see the *BroadWorks Application Server User Web Interface Administration Guide*.

CALL CONSOLE	
Enter Number	Transfer Redial
Direct (1)	
🎽 Cheryl Baldwin (1009)	Active 00:36
RECORD	HOLD END

Figure 57 Call in Call Console with Record Button

When a call is being recorded, the recording state, (which can be either *Recording* or *Paused*) appears on the line for the call.

Cheryl Baldwin (1009)	Active(Recording)00:29
PAUSE STOP	HOLD TRACE END

Figure 58 Call Being Recoded

5.11.1 Start Call Recording

To manually record calls, you have to have your Call Recording service mode set to the On Demand or On Demand with User Initiated Start.

To record a call, select the call in the Call Console and click Record

In the *On Demand* mode, the call is recorded from the beginning, and you have to request the recording before the end of the call to keep the recording. In the *On Demand with User Initiated Start* mode, the recording starts from the moment when you click the **Record** button.

5.11.2 Pause and Resume Call Recording

To pause and resume a recording, you have to have your Call Recording service mode set to *On Demand, On Demand with User Initiated Start*, or *Always with Pause/Resume*.

To pause a recording, select a call that is being recorded in the Call Console and click

Pause PAUSE

The recording pauses until you resume it or the call ends.

To resume a paused recording, select a call whose recording has been paused in the *Call Console* and click **Resume RESUME**.

When you pause and resume a recording, only one call recording is generated for the call.

5.11.3 Stop Call Recording

You can only stop recording a call if your Call Recording service mode is set to the *On Demand with User Initiated Start.*

To stop recording a call, select the call that is being recorded (or whose recording has been paused) in the *Call Console* and click **Stop**.

If you click Start after a call recording has been stopped, a separate recording is created.

6 Message Contacts (Enterprise Edition)

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 *12.5 Settings – Messaging*.

6.1 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 **EMAL** for the contact. This shows a new e-mail window for the configured Messaging service.
- 3) Type your message and click **Send**.

7 Monitor IM&P Contacts and Chat with Contacts

When you have an IM&P service assigned on BroadWorks, 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 7.1.6 *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 3.7 *Change Your IM&P Presence State*.

7.1 Monitor IM&P Contacts

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

The following directories display the IM&P state of contacts: *Instant Message, Enterprise/Group, Favorites, Custom,* and *Search* (for contacts from directories that display in the IM&P state).

NOTE: The Instant Message tab 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

7.1.1 Subscribe to Contact

To send a subscription request to a contact:

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

Contact (I	M) Subscribe	>
•	Subscribe to harsh.upreti@tig-eu.bc.im?	
	Yes No	

Figure 59 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.

Contact (I	M) Re-Subscribe			x
0	Subscription to hars Resend	sh.upreti@tig-eu.bc Remove	im is pending.	

Figure 60 Contact (IM) Re-Subscribe Dialog Box

7.1.2 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 tab, 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.

linroti Upreh Iame	IM ID
Harsh Upreti	harshupreti@tig-eu.bc.im
Joe Harper	joeharper@tig-eu.bc.com
Gregorio Valdez	gregoriovaldez@tig-aws.com
Marie Dumas	mariedumas@tig-aws.com
Mario Bueno	mariobueno@tig-aws.com
Sally Field	

Figure 61 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* tab.

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

7.1.3 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* tab, 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.

it Instant Message Contacts	le de la constance de la consta
Modify your Instant Message C	Contacts
Name	IM ID
Harsh Upreti	harshupreti@tig-eu.bc.im
Joe Harper	joeharper@tig-eu.bc.com
Gregorio Valdez	gregoriovaldez@tig-aws.com
Marie Dumas	mariedumas@tig-aws.com
Mario Bueno	mariobueno@tig-aws.com
Sally Fields	sallyfields@tig-eu.bc.im
USTOM: My Contacts	Add

Figure 62 Edit Instant Message Contacts Dialog Box - Modify Contact

7.1.4 Unsubscribe from Contact

To stop monitoring a contact:

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



Figure 63 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.

7.1.5 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.

Contact (IM) Request	×
•	Accept contact (IM) request from harsh.upreti@tig- eu.bc.im?	
	Yes No	

Figure 64 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.

7.1.6 View Presence State of Contacts

You can view the presence state of IM&P contacts in the *Instant Message, Enterprise/Group, Favorites, Custom,* and *Search* tabs. 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, BroadTouch Business Communicator Desktop, or BroadTouch Business 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*.

CONT				
SPEED	DIAL 🙁 📢 QUEUES	🙁 🔗 CUSTOM	Sales 🗴 🧿 OUTLOOK 🗴 🛄 N	STANT MESSAGE 🗙
[Begins	with All	Q. Quick Search	ר/
IM	Name 🚔		IM ID	
4	Wyoming Mad	oline	madoline@tig-eu.bc.i	m CHAT
9	ddSUP19		ddSUP19@tig-eu.bc.im	
4	ddSUP20		ddSUP20@tig-eu.bc.im	
4	harsh gmail		hvardhanu@gmail.com	
	Mario Bueno		mariobueno@btc.tcp.im	

Figure 65 Instant Message Tab - Unified Presence State of Contacts

The following table lists the possible unified presence states of contacts in Receptionist:

IM&P State	Icon	Description
Subscribed Sta	tes	
Available	I	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	9	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 S	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	7	The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the <i>Instant Message</i> tab. Clicking this icon sends a subscription request to the contact.

7.2 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 oneon-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 Multiuser Chat Session
- Manage Instant Messaging Sessions

7.2.1 Start Instant Messaging Session

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

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.

CON	TACTS						
🔏 FA	VORITES X	🕹 GROU	Рх 🚨	GROUP	сом х 🔇	🛓 PERSONA	LX
		Begins wi	th All	~ (오. 🗌 Quicl	k Search	× Ø
Stat	Last Nam	First Nam	Number ‡	Exte	Mobile ‡	Departm	Note
	Bueno	Mario	+12025551	1001	2021112223		<u>Notes</u>
	Dumas	Marie	+12025551	1005			Notes
\bigcirc	Maldini	Paolo	+1202555	1003			Notes
						CALL	CHAT

Figure 66 IM&P Contact with Chat button

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

🚚 Paolo Maldini	(+ ⊵ – ×
	~
	\sim

Figure 67 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.

7.2.2 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 **I** 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*.

7.2.3 Establish Multiuser Chat Session

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

To add users to a chat:

1) Click the **Add User to Chat** button ⁴ in the *Chat* window. A drop-down list of available contacts appears.

Figure 68 Add Participants to 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.

(2) Jean Rich 🥻 💠 🗹 .	- ×
Jean Richard Paolo Maldini	
	×
Paolo Maldini is now offline (5:45 PM) Paolo Maldini is now available (5:46 PM) Jean Richard has joined the conference (5:48 PM) Paolo Maldini has joined the conference (5:48 PM)	

Figure 69 Multiuser Chat

3) To leave the multiuser chat, close the *Chat* window.

7.2.4 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.

💭 Mario Bueno *	(+ C-	ΣS
Mario Bueno (5:29 F	PM): Hi Paolo	
		_
	1	6
	~	

Figure 70 Chat Window

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 **I** at the top right-hand side of the window.

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

To place the window back within the Receptionist main interface:

Click the **Pop-in** button **I** 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.

8 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.

Q.	SEARCH			x 🖄			
		Begins with All	~	Q,	Quick Se	earch	× 🛛
Stat	Last Name 🕈	First Name 🕈	Number	Exten	Mobile	Department *	Notes
\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
0	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	hotline	Call Center	+12025551000	1000			Notes
\bigcirc	Jones	Shirley	+12025551002	1002			Notes
0	Maldini	Paolo	+12025551003	1003			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
\bigcirc	standardAA	Auto Attendant					Notes
\bigcirc	Voice Portal	Voice Messagi	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 71 Contacts Pane

For the list of contact directories available in your version of Receptionist, see section **Error! Reference source not found. Error! Reference source not found.**

For information on monitoring contacts, see section 9 Monitor Contacts; for information on managing IM&P contacts, see section 7.1 Monitor IM&P Contacts; for information on call-related functions, see section 5 Manage Calls.

This section describes the directories management functions provided by Receptionist.

- Show/Hide Directories
- View Directory Content
- Search Contacts
- Order Directory Entries
- Make Notes about Contact (Enterprise Edition)
- Manage Personal Contacts
- Manage Speed Dial Entries

8.1 **Show/Hide Directories**

Receptionist allows you to specify which directory tabs should be visible in the Contacts pane.

	Be	egins with First Na	ame 🗸	a	🛛 🗌 Quic		FAVORITES	
Status	Last Name 🌻	First Name ‡	Number	Extension	Mobile	ž	GROUP GROUP COMMON	
\bigcirc	Baldwin	Cheryl	+12025551009	1009		Ĵ	PERSONAL	
\bigcirc	basicAA	Auto Attendant	+12025551036	1036		Ĵ	SPEED DIAL	
\bigcirc	Bueno	Mario	+12025551001	1001	2021112223	Ĵ	QUEUES	
	Dumas	Marie	+12025551005	1005		Ĵ	MONITORED CONT	ACTE
\bigcirc	Hotline	Call Center	+12025551000	1000		Ĵ	GROUP:ma	ACIS
	Jones	Shirley	+12025551002	1002		•	GROUP.ma	NULES
\bigcirc	Maldini	Paolo	+12025551003	1003				Notes
\bigcirc	Smith	Stan	+12025551004	1004	2021234567	,		Notes
\bigcirc	standardAA	Auto Attendant						Notes
\bigcirc	Technical Support	Call Center						Notes
\bigcirc	Voice Portal	Voice Messagin	+12025551021	1021				Notes
0	Wyoming	Madoline	+12025551008	1008	2405557777	,		Notes

Figure 72 Contacts Pane - Expanded Directories List

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 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.

8.2 **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 4.5.1 Call Action Buttons. For more information about the contact's calendar, see section 9.4 Monitored Contact's Calendar (Enterprise and Small Business Editions).

Q	SEARCH &	FAVORITES X	😕 GROUP	х 🚴	GROUP COM ;	x 🗳 PERSON		
~				^	010001 00000			
🗌 Begins with 📶 🚽 🔍 🕴 🗌 Quick Search 🛛 🗙 🖾								
Stat	Last Name 🕈	First Name 🗘	Number	Exten	Mobile	Department *	Notes	
\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes	
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes	
\bigcirc	Bueno	Mario	+12025551001	1001	2021112223		Notes	
	Dumas	Marie	+12025551005	1005			Notes	
\bigcirc	hotline	Call Center	+12025551000	1000			Notes	
\bigcirc	Jones	Shirley	+12025551002	1002			Notes	
\bigcirc	Maldini	Paolo	+12025551003	1003			Notes	
\bigcirc	Smith	Stan	+12025551004	1004	2021234567		Notes	
\bigcirc	standardAA	Auto Attendant					Notes	
\bigcirc	Voice Portal	Voice Messagi	+12025551021	1021			Notes	
0	Wyoming	Madoline	+120255510	1008	2405557777		Notes	

Figure 73 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.

8.3 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

8.3.1 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.

🔍 SEARCH 🛛 🔏 FAVORITES 🗴 者 GROUP 🗴 🥸 GROUP COM 🗴 📢 PERSONAL X 🔛 SPEED DIAL 🗴							
	Begir	s with All	<u>~</u> Q		Quick Searc	h	×(
A B		FGH				126	9
N O	P Q R	S 🚺 🛛	V W X) 🕐 🕻	3 6	6 7 6	
Status ‡	Last Name 🕈 👘	First Name 🕈	Number ‡	Extensi	Mobile [‡]	Department *	Notes 4
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	Jones	Shirley	+12025551002	1002			Notes
	Maldini	Paolo	+12025551003	1003			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 74 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.

8.3.2 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.

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

🔍 SEARCH 🛛 🛃 FAVORITES 🗙 🚵 GROUP X 🔕 GROUP COM X 📢 PERSONAL X 🧮 SPEED DIAL ;							D DIAL)		
	Begin	is with	All	~	٩		Quick Searc	h	×[
Status ‡	Last Name 🗘	First	All First Name			Extensi	Mobile ‡	Department +	Notes +
	Bueno	Mario	Last Name		01	1001	2021112223		Notes
	Dumas	Marie	Number		05	1005			Notes
	Jones	Shirley	Extension Mobile		02	1002			Notes
	Maldini	Paolo	Department		03	1003			Notes
\bigcirc	Smith	Stan	Notes		04	1004	2021234567		Notes
	Wyoming	Madoli	ne	+12025551	800	1008	2405557777		Notes

Figure 75 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.

- 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

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 BroadWorks directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

CONTACTS							
🔍 SEARCH 🛛 🖉 FAVORITES 🗴 者 GROUP 🗴 🖄 GROUP COM 🗴 🕼 PERSONAL 🗴 🗮 SPEED DIAL 🐙							
ma	🗸 Begin	s with First Name	~ Q		🗌 Quick Searc	h	× 🛛
Status ‡	Last Name 🕈	First Name ‡	Number ‡	Extensi	Mobile [‡]	Department *	Notes ‡
\bigcirc	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 76 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 \bowtie

To search in all directories:

1) Click the **Search** tab.

CONTACTS	
🔍 SEARCH 🛛 🌋 FAVORITES 🗴 🕹 GROUP 🗴	🚳 group com x 📢 personal x 📢 queues x 두
Begins with Q.	×
Status Name	Directory

Figure 77 Perform Search Using Search Tab

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

	ARCH 🛛 🌋 FAVORITES 🗴 🚵 GROUP 🗴	SROUP COM X 🔮 PERSONAL X 🧮 SPEED DIAL X				
ma	Begins with	×				
Status	Name	Directory				
	Mario Bueno	GROUP GROUP GROUP				
	Marie Dumas					
	Paolo Maldini					
	Madoline Wyoming	GROUP				
	Mary-Ann	PERSONAL				

Figure 78 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.

8.3.3 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 a search results tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform operations directly from the search results.

8.3.4 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.

8.4 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 \Rightarrow 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 13.1 *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. For information on the different states, see section 13.3 Unified Instant Messaging and Presence States.

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.

Q	SEARCH	FAVORITES X	👗 GROUP	х 🚨	GROUP COM	x 🛀 PERSOI	NAL X
		Begins with All	~	0.	Quick Se	earch	×
Stat	Last Name 🗘	First Name 🕈	Number	Exten	Mobile	Department +	Note
\bigcirc	Baldwin	Cheryl	+12025551009	1009			Notes
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
0	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	hotline	Call Center	+12025551000	1000			Notes
\bigcirc	Jones	Shirley	+12025551002	1002			Notes
•	Maldini	Paolo	+12025551003	1003			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
\bigcirc	standardAA	Auto Attendant					Notes
\bigcirc	Voice Portal	Voice Messagi	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 79 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.

8.5 Make Notes about Contact (Enterprise Edition)

Receptionist Enterprise 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.

Notes for Cheryl Baldwin	×
On vacation from October 10 to 15.	 Image: A set of the set of the
Cancel	ок

Figure 80 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**.

CONT	CONTACTS							
Q. 9	🔍 SEARCH 🛛 🌋 FAVORITES 🗴 🕹 GROUP X 🔕 GROUP COM X 📢 PERSONAL X 🧮 SPEED DIAL X							
	Beg	ins with All	~ Q		Quick Searc	h	×	
Status	Last Name 🕈	First Name +	Number	Extension	Mobile	Department *	Notes	
\bigcirc	Baldwin	Cheryl	+12025551009	1009			<u>On vac</u>	
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes	
\bigcirc	Bueno	Mario	+12025551001	1001	2021112223		Notes	

Figure 81 Group Directory – Contact Notes

8.6 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.

Q SEARCH	CONTACTS	
Name * Number * Antoine - mobile 9354495495 dr. Frank 4539506334	🔍 SEARCH 🛛 🌋 FAVORITES 🗴 👗 GRO	DUP 🗴 🛛 🥸 GROUP COM 🗴 🕻 🌿 PERSONAL 🚽
Antoine - mobile 9354495495 dr. Frank 4539506334	Begins with All	🛛 🔍 📄 Quick Search 🛛 🗎 🗡 🖉 🥖
dr. Frank 4539506334	Name 🕈	Number \$
	Antoine - mobile	9354495495
Jim 2025467897	dr. Frank	4539506334
	Jim	2025467897
Mary-Ann 3031314156	Mary-Ann	3031314156

Figure 82 Personal Tab

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.

8.6.1 Add Personal Contact

To add a personal contact:

- 1) In the Personal tab, click Edit . 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.

Antoine - mobile	0054405405
	9354495495
dr. Frank	4539506334
Jim	2025467897
Mary-Ann	3031314156
Grandpa	3031739411

Figure 83 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.

8.6.2 Delete Personal Contact

To delete a speed dial entry:

- 1) In the Personal tab, click Edit *Letter*. The Edit Personal Contacts dialog box appears.
- 2) Select the entry to delete and click Delete.

Edit P <mark>erso</mark> nal Contacts		453950633 X
Modify your personal contacts		
Name	Number	
Antoine - mobile	9354495495	
dr. Frank	4539506334	
Grandpa	3031739411	
Jim	2025467897	
Mary-Ann	3031314156	
	+ Add	M Dalete
	- Add	

Figure 84 Edit Personal Contacts Dialog Box - Delete Entry

8.7 Manage Speed Dial Entries

This directory is available in all editions of Receptionist. It 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* tab.

CONTACTS		
FAVORITES X 🕹 GROUP X	SROUP COM 🗴 🌿 PEF	SONAL X 🧱 SPEED DIAL X 🗾
Begins with	h All 🔽 🔍 🗌	Quick Search 🛛 🛛 🖊
Code ‡	Phone Number 🕈	Description ‡
2	2023111434	Daycare
3	9051232432	Chris mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad

Figure 85 Speed Dial Tab

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

8.7.1 Add Speed Dial Entry

To add a speed dial entry:

- 1) In the Speed Dial tab, 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.

Code	Phone Number	Description
2	2023111434	Daycare
3	9051232432	Chris mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad
7	✓ 5406595557	My dentist

Figure 86 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 Description 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.

8.7.2 Modify Speed Dial Entry

To modify a speed dial entry:

- 1) In the *Speed Dial* tab, click the **Edit** button. The *Edit Speed Dial*s dialog box appears.
- 2) Double-click the entry to modify. The entry becomes modifiable.

Edit Speed Dials	9051232432	Chris mobile 🗙
Modify your speed	I dial lists:	
Code	Phone Number	Description
2	2023111434	Daycare
3	9051232432	Chris - mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad
		🕂 Add 🔀 Delete

Figure 87 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.

8.7.3 Delete Speed Dial Entry

To delete a speed dial entry:

- 1) In the Speed Dial tab, click **Edit** . The *Edit Speed Dials* dialog box appears.
- 2) Select the entry to delete and click **Delete**.

Code	Phone Number	Description
2	2023111434	Daycare
3	9051232432	Chris - mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad
7	5406595557	My dentist

Figure 88 Edit Speed Dials Dialog Box - Delete Entry

9 Monitor Contacts

Receptionist allows you to monitor the call state of selected contacts. All editions of Receptionist allow 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.

The following table summarizes the monitoring capabilities of the different editions of Receptionist:

Edition	Description
Enterprise	This is the static monitoring of up to 200 contacts and the dynamic monitoring of a configurable number of contacts enterprise-wide. The maximum number of contacts you can dynamically monitor is configured by your administrator and it cannot exceed 100.
Small Business	This is the static monitoring of up to 30 contacts enterprise-wide.
Office	This is the static monitoring of up to 8 contacts group-wide.

You use the *Favorites* tab to view the phone state of statically monitored contacts and the *Group/Enterprise* tab 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 (Enterprise Edition)
- Request Dynamic Monitoring
- Monitored Contact's Calendar (Enterprise and Small Business Editions)
- Contact States

9.1 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.

🕈 FAVORITES 🗴 👔 🕹 GROUP 🗴 🛛 🥸 GROUP COM 🗴 🛛 🌿 PERSONAL 🗴 🖉 🧱 SPEED DIAL							
Begins with First Name 🗸 Q. Quick Search 🛛 🗙							
Statu	Last Name 🕈	First Name 🕈	Number ‡	Exten	Mobile [‡]	Department *	Notes
0	Bueno	Mario	+12025551001	1001	2021112223		Notes
0	Dumas	Marie	+12025551005	1005			<u>Notes</u>
\bigcirc	Jones	Shirley	+12025551002	1002			<u>Notes</u>
•	Maldini	Paolo	+12025551003	1003			Notes
0	Smith	Stan	+12025551004	1004	2021234567		<u>Notes</u>
	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 89 Favorites Directory with Monitored Contacts

9.2 Dynamic Monitoring (Enterprise Edition)

Dynamic Monitoring allows you to view the call state of selected contacts in your *Group/Enterprise, Search, Custom* and *Monitored Contacts* directories. 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.

You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit, the first contact that was selected for monitoring, is unselected, and is no longer monitored. The state of a contact that is not monitored is shown as *Unknown*.

сои	TACTS						
Q	SEARCH	FAVORITES :	x 🚵 grou	P x 【	S GROUP COM	x 📢	PERSONAL
	Begins with All Quick Search						
Stat	Last Name 🕈	First Name ‡	Number	Exten	Mobile	Departme	ent [‡] Notes
\bigcirc	Baldwin	Cheryl	+12025551009	1009			On va
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
0	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	Graves	Lena	+12025551022	1022			Notes
\bigcirc	Hotline	Call Center	+12025551000	1000			Notes
0	Jones	Shirley	+12025551002	1002			Notes
•	Maldini	Paolo	+12025551003	1003			Notes
\bigcirc	Rodriguez	Melody	+12025551030	1030			Notes
\bigcirc	Smith	Stan	+12025551004	1004	2021234567		Notes
0	Sparks	Bryan	+12025551014	1014			Notes
\bigcirc	standardAA	Auto Attendant					Notes
\bigcirc	Technical Sup	Call Center					Notes
\bigcirc	Voice Portal	Voice Messag	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 90 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.

9.3 Request Dynamic Monitoring (Enterprise Edition)

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, Search, or Custom* directory, click the **Status** icon of the contact to monitor.

The contact is also added to the *Monitored Contacts* directory and the contact's state is displayed in the *Group/Enterprise*, *Search*, *Custom*, and *Monitored Contacts* directories.

NOTE: You cannot monitor the state of virtual users. Only regular users can be monitored.

CON	TACTS						
Q,	SEARCH	FAVORITES :	x 👗 GROU	Рх	S GROUP COM	x 🌿 PER	SONAL
		Begins with Al	1	- Q.	Quick S	earch	×(
Stat	Last Name 🕈	First Name ‡	Number	Exten	Mobile	Department *	Notes
\bigcirc	Baldwin	Cheryl	+12025551009	1009			<u>On va.</u>
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
0	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	Graves	Lena	+12025551022	1022			Notes
\bigcirc	Hotline	Call Center	+12025551000	1000			Notes
0	Jones	Shirley	+12025551002	1002			<u>Notes</u>
•	Maldini	Paolo	+12025551003	1003			Notes
R	Rodriguez	Melody	+12025551030	1030			<u>Notes</u>
8	Smith	Stan	+12025551004	1004	2021234567		Notes
0	Sparks	Bryan	+12025551014	1014			<u>Notes</u>
\bigcirc	standardAA	Auto Attendant					Notes
0	Technical Sup	Call Center					<u>Notes</u>
\bigcirc	Voice Portal	Voice Messag	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 91 Group Directory – Request Contact Monitoring

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

CON	CONTACTS						
Q,	SEARCH	🕈 FAVORITES :	x 👗 GROU	P x 🚦	S GROUP COM	x 📢	PERSONAL 👻
	□ Begins with All v Q □ Quick Search × 🛙						
Stat	Last Name 🗘	First Name ‡	Number	Exten	Mobile	Departm	ent * Notes
\bigcirc	Baldwin	Cheryl	+12025551009	1009			<u>On va</u>
\bigcirc	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
\bigcirc	Graves	Lena	+12025551022	1022			Notes
\bigcirc	Hotline	Call Center	+12025551000	1000			Notes
0	Jones	Shirley	+12025551002	1002			Notes
0	Maldini	Paolo	+12025551003	1003			Notes
\bigcirc	Rodriguez	Melody	+12025551030	1030			Notes
\bigcirc	Smith	Stan	+12025551004	1004	2021234567		Notes
\bigcirc	Sparks	Bryan	+12025551014	1014			Notes
\bigcirc	standardAA	Auto Attendant					Notes
\bigcirc	Technical Sup	Call Center					Notes
\bigcirc	Voice Portal	Voice Messag	+12025551021	1021			Notes
\bigcirc	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 92 Group Directory – Monitored Contact

9.4 Monitored Contact's Calendar (Enterprise and Small Business Editions)

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.

CONTACTS		
🔍 SEARCH	🕈 FAVORITES 🕹 ENTERPRISE 🦉	ENTERPRISE 🥸 GROUP COM 📢 PEF
1811	Begins with 🔍 🗙	
Status IM	Name	Directory
Number : +91450 Mobile : 145987 <u>Notes</u> Calendar :	William ROBINSON 1611811 Extension : 1811 332 Department : Engineering 05/07/2013	ENTERPRISE CALL TOR EMAL CHAT
•	AM 5AM 19AM 11AM 12PM 1PM 2PM	S PM 4 PM 5 PM GROUP COMMON
	Martha Hall	SPEED DIAL

Figure 93 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.

9.5 Monitored Contact's Personal Assistant State

When a monitored contact has the Personal Assistant service, the Personal Assistant presence state of the contact is integrated with the contact's line state and other services' state.

A user can set their Personal Assistant to one of the following states, and can optionally provide a date and time when they are planning to be back:

- None
- Business Trip
- Gone for the Day
- Lunch
- Meeting
- Out of the Office
- Temporarily Out
- Training
- Unavailable
- Vacation

For information on how the Personal Assistant presence of a contact is integrated with Receptionist, see section 9.6 Contact States.

9.6 Contact States

The state of a monitored 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, Personal Assistant, and Privacy.

lcon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar	Personal Assistant	Call State
0	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
0	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
\bigcirc	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
0	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
0	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
•	In a Meeting	N/A	N/A		Free or Tentative	Meeting or Training	No active calls
+	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
•	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	None	No active calls

The following table lists the possible contact states:

NOTE: When a contact enables Privacy, this terminates monitoring of the contact's state for the current login session. To be able to monitor their state again, you must sign out and then sign in after the contact has disabled Privacy.

When you place the mouse over the Status icon of a monitored contact, a ToolTip appears providing additional information, as applicable. The ToolTip displays the information about the state that has the highest precedence. For example, if a monitored contact enables Privacy, the ToolTip displays "Private" independent of whether the contact is on a call, in a meeting, or away. See the following table for information about ToolTip messages displayed for a contact in the different states.

ToolTip Message	State in Receptionist	Additional Conditions
Private	Private	
On a Call	On a Call	
Ringing	Ringing	

ToolTip Message	State in Receptionist	Additional Conditions
Away	Away	Contact's calendar shows Out of Office
<contacts's an="" first="" last="" name=""> is on a business trip/gone for the day/at lunch/out of the office/temporarily out/on vacation/unavailable [until <date time="">]</date></contacts's>	Away	Contact's calendar shows Free or Tentative and their Personal Assistant is set to any state except None, Meeting, or Training
In a Meeting	In a Meeting	Contact's calendar shows Busy
<contacts's an="" first="" last="" name=""> is in a meeting/training [until <date time="">]</date></contacts's>	In a Meeting	Contact's calendar shows Free or Tentative and their Personal Assistant is set to Meeting or Training
Call Forwarding Always	Call Forwarding Always	
Do Not Disturb	Do Not Disturb	
Available	Available	

10 Manage Call History

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

10.1 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:



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

C <mark>all H</mark> istory		~ ~ ~
Show	Received Calls	~
Name Cheryl Baldwin	Missed Calls Received Calls Placed Calls	Time 2010-10-31, 12:34:13
Paulo Maldini	1003	2013-10-31, 12:33:08
Elias Rivera	9076958821	2013-10-31, 12:30:44
Brian Russell	5604072323	2013-10-31, 12:27:54
Pam Aguilar	3201234570	2013-10-31, 12:26:41
Cheryl Baldwin	1009	2013-10-31, 12:22:40
Cheryl Baldwin	1009	2013-10-31, 12:21:33
Cheryl Baldwin	1009	2013-10-31, 11:36:12
Cheryl Baldwin	1009	2013-10-31, 11:35:15
		ок

Figure 94 Call History Dialog Box

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

10.2 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 **I**. The *Call History* dialog box appears.
- 2) To delete all call logs, click **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.

11 Manage Queued Calls (Enterprise Edition)

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 have the Receptionist – Enterprise license assigned and either you are assigned to a call center (as a supervisor or agent) or you have the BroadWorks Supervisor license assigned.

QUEUED CALLS	ĭi
Premium_CC 5143403030	🎻 0/10 (0/10) 🗙
TestCC 5143403023	🚀 2/10 (2/10) 🗙
Priority 0 (2)	
▲ cc3007 group3 (5143403007) Priority 0, Position 1 TestCC (5143403023)	01:17 [01:17] RETRIEVE
🚆 cc3001 group3 (5143403001)	00:10 [00:10]

Figure 95 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

11.1 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.

QUEUED CALLS	View	۲	۲ <mark>і</mark>
 Hotline 2025551000 	Group	۲	×
Priority 0 (2)	 Sort	-	
🛣 .Major Accounts (202555103	Edit Queue Favorite Dialog		33]

Figure 96 Queued Calls - Options - Edit Queue Favorite Dialog

The Edit Queue Favorites dialog box appears.

dit Queue Favo	orites	FAES R	ITES	RITESRI	TES	
Coloct a list of	favorite call centers to be mor	itered				
	Tavonite call centers to be mor	nioreu.				
Monitor	Queue Name	Total Calls	Priority 0	Priority 1	Priority 2	Priority 3
	Hotline	10	2	4	2	2
Image: A start and a start	Technical Support	10				
2/2 Queue se	elected (Maximum 5)					
						🔚 Save

Figure 97 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.

11.2 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.

11.3 View Queued Calls

To view calls in a queue:

Click the **Expand** button **I** for that queue.

11.4 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** for that call.

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

11.5 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**



Figure 98 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

11.6 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 tab.
- 3) Click the target queue and click **Transfer** TXR for that queue.

The call is transferred and removed from the original queue.

11.7 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

I MM Super (1000001900)	05:28:39 [05:28:39]
Priority 0, Position 4 CC_PRE_Manu (1000001910)	REORDER RETRIEVE
	Send to Front
	2
	3
	Send to Back

Figure 99 Reorder 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.

11.8 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.

REORDER and select Send to Front from the list that appears. Click Reorder 2)

🚡 Cowboys Tickets Sales (2403641010)	00:14 [00:14]
Priority 0, Position 3 Cowboys Ticket Sales (2403641001)	REORDER RETRIEVE
composition carea (2400041001)	Send to Front
	2

Figure 100 Transfer Call to Top of Queue

11.9 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

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

11.10 Group Calls

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

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

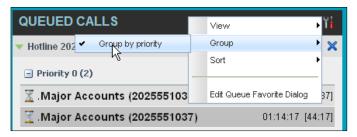


Figure 101 Queued Calls - Options - Group

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

11.11 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



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

QUEUED	QUEUED CALLS			View	Þ	ĭi
▼ Hotline 20	255	51000		Group	١	×
		Longest wait		Sort	۲	
Priority	~	Longest wait in priority			-1	_
🛣 . Major	Ac	counts (202555103		Edit Queue Favorite Dialog	2	4]
🔟 .Major	Ac	counts (202555103)	7)	01:16:04 [4]	6:0	4]

Figure 102 Queued Calls - Options - Sort

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

12 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.

12.1 Settings – General

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

General	Application	Services	Plug-ins	Messaging	About			
General								
Accour	nt		Change Passy	vord				
Langua	age		English (US)	ize language with	n service profile			
Screen	Рор		Enter URL	incoming calls				
Date Fo	ormat		⊙ MM/DD/Y	YYY ODDMM	YYYY			
Time F	ormat		⊙ AM/PM (24 Hour				
Works	pace		Save Works	pace Load W ave workspace o		tore Workspace		
Drag a	nd Drop		Transfer	he call automatic	ally when it's drop	pped on a contact		

Figure 103 Settings - General

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

12.1.1 Account

You use this area to change your BroadWorks password.

Receptionist shares login credentials with BroadWorks. 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 BroadWorks.

To change your password:

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

Change Password			-
Old Password :			
New Password :			
Confirm Password :			
Change Password	Reset	Cancel	

Figure 104 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.

12.1.2 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 BroadWorks profile and ignores the language selection on this page.

12.1.3 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 <u>www.mysite.com</u>. 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 BroadWorks ID (Note that in this case, the "user" is the BroadWorks 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 BroadWorks group to which the user belongs
- __SERVICE_PROVIDER__: The name of the BroadWorks 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
- __CLIENT_SESSION_INFO__: The client session identifier (when available)
- ___EXT_TRACKING_ID__: The external tracking ID for the call
- REDIRECTED_NAME_1__, __REDIRECTED_NAME_2__, and so on: The name of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- ___REDIRECTED_PHONE_1__, __REDIRECTED_PHONE_2__, and so on: The phone number of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- ____REDIRECTED_USERID_1__, ___REDIRECTED_USERID_2__, and so on: The user ID of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent

NOTE: The maximum number of redirections that can be displayed on a *Web Pop URL* page is configured by your administrator.

12.1.4 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

12.1.5 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

12.1.6 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)

NOTE 1: This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

NOTE 2: 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.
- Click the Save Workspace button to save the current configuration. To restore the system default, click Restore Workspace.
- At any time to return to the last saved configuration, click the Load Workspace button.

12.1.7 Drag and Drop

You use the *Drag and Drop* area to specify whether a call should be automatically transferred when dropped on a contact.

Transfer the call automatically when it's dropped on a contact – This setting allows you to enable or disable automatic call transfer when you drag and drop. When this box is checked, the call is automatically transferred to the contact's phone number when the call is dropped on the contact.

12.2 Settings – Application

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

General	Application	Services	Plugins	Messaging	About			
Applicatio	on							
Queue	Membershi	ips	Queue		Number		Wrap-Up Policy	
			🗹 Hotlin	ne	20255510	000		
			🗹 Techi	nical Suppor	t 20255510	010		
Operate	Operator Policies Post Sign-In ACD State : Available							
Manage your Ap	oplication prefere	nces						2 categories

Figure 105 Settings – Application

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

12.2.1 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.

12.2.2 Operator Policies

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

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

12.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on BroadWorks, 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.

General	Application	Services	Plugins	Messaging	About			
Services	Services							
📁 📁 Defa	ult				User Service	es		
		🖃 Inactive						
			ll calls and sen	ds them to voic	email			
			varding Always					
	I'	Forwards all calls to a destination						
	5	Service Settings						
	A	Automatically forward your incoming calls to a specified phone number						
	-	Active						
	1	Forward Enter phone number						
	(Save Cancel						
Manage your se	Manage vour service settings 2 Ser							

Figure 106 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 which your calls are forwarded. 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 *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 which your calls are forwarded.
- 3) To generate a ring splash for incoming calls, check the *Ring Splash* option.
- 4) To save your changes, click **Save**.

12.4 Settings - Plug-ins

You use the Plug-ins 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.

General	Application Services	Plug-ins Mess	aging About			
Plug-ins						
Notifica	ation	 Focus window for Show notifications 	incoming calls for calls when auto answ	er is off 🐱		
Micros	oft [®] Outlook [®]		tion om : Default Contact Folde ntacts as preferred CLID loc			
LDAP	/3	Disable LDAP Integrat	389 Recursive			E
		(cn=*SEARCH_1 Attribute Mapping	Remote Attribute	Local Attribute	Dialable	
			telephoneNumber	telephoneNumber		
			mobile	mobile		
			homePhone	homePhone		
			mail	mail		
			officePhone	officePhone		
		Authentication	Add	Delete		
		DN		_		
		Password		_		
						-
Manage your 3r	d Party integration process					5 Plug-ins

Figure 107 Settings – Plug-ins (Top of Page)

12.4.1 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.

12.4.2 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 BroadWorks.
- 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 2013 (32- or 64-bit edition), Outlook has to be running before Receptionist is launched for these functions to work.

12.4.3 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**.
- 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, do the following:

- 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".
- For dialable attributes such as "phoneNumber" or "mobile", check the *Dialable* box to be able to dial the number from Receptionist by simply clicking the contact.
- 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.

12.4.4 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.

12.4.5 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.

The log is saved at the desired interval as a comma-separated value (CSV) file in the following path:

<Drive>:\Documents and Settings\<Windows_Username>\Application
Data\BroadSoft\BW Receptionist\profiles\<BW UserID>\statistics

where:

- Drive is the drive letter where your profile is stored (typically C)
- Windows_Username is your Windows user name
- BW_User_ID is your BroadWorks user ID

The following events are captured based on activity that occurs on the Receptionist client:

Statistic	Description	Allowed Values	Example Value
BroadWorks User ID	BroadWorks user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound queued calls only	String, null	ABCSales
Availability	Operator's joined state	Joined, Not Joined, null	Joined
ACD State	Operator's <i>ACD</i> state. Typically, operators should always be Available. This value cannot be changed in Receptionist.	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	null
Call ID	ID of the call	String, null	192.168.1.5:1
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2) 0 = BroadWorks Originator 1 = Originator 2 = Terminator	0
Remote Name	External caller name	String or null	null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe
Last Redirected Number	Last redirected number	String or null	null
Time	Date stamp of record	Long date/time format	2008-04-03 12:08:17.859

NOTE: Each row in the archive file records a *single* event change and as such, columns such as *Availability*, *ACD State*, and *Call State* may contain null values since an alternate column value caused the event change. For example, *Incoming* is stored in *Call State* while *Availability* (and other columns) store null.

12.5 Settings – Messaging

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

Messaging						
Messaging	e custom SMTP server v for emails					
	Display Name :					
	Reply-to Address: Default Subject :					
	SMTP Host :					
	SMTP Port :					
	Mail Type : text/plain					
	Mail Template :					
	×					
	Outgoing SMTP Server Requires Authentication					
	Username :					
	Password :					
Instant Messaging & Open incoming instant messages in minimized windows Presence						

Figure 108 Settings - Messaging

12.5.1 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 also need to configure the following options:

- 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.

12.5.2 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.

12.6 Settings – About

Use the About tab to view the information about Receptionist.

(())	Receptionist	<u>« Back To Application</u> <u>Help</u> <u>Full Screen</u> <u>Sign Out</u> Mario Bueno
General	Application Services	Plug-ins Messaging About
About		
Version		BroadWorks [®] Receptionist TM R21.0.9 Build: 2
Profile		System
Disclaimer		Warning: This computer program is protected by the copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.Copyright [®] 2014 BroadSoft [®] , All Rights Reserved. BroadWorks [®] and BroadWorks [®] Receptionist TM are trademarks BroadSoft [®] Inc.

Figure 109 Settings – About Page

The following information is provided on this page:

- Version This is the software version of the BroadWorks Receptionist client.
- Profile This is the Receptionist client profile used.
- Disclaimer This is the Receptionist copyright Information.

13 Appendix A: Glossary and Definitions

13.1 Monitored User States

The following table lists the possible states for monitored users.

lcon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar	Personal Assistant	Call State
	Private	N/A	N/A	On	N/A	N/A	N/A
0	On a Call	N/A	N/A	Off	N/A	N/A	Active call
0	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
\bigcirc	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
0	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
0	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
•	In a Meeting	N/A	N/A		Free or Tentative	Meeting or Training	No active calls
+	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
•	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
\bigcirc	Available	Off	Off	Off	Free or Tentative	None	No active calls

NOTE: When a user enables Privacy, this terminates your monitoring of the user's state for the current session. To be able to monitor their state again, you must sign out and then sign in after the user has disabled Privacy.

13.2 Call States

Call states are the available states for your current calls. They are as follows:

Call State	Display Name	lcon	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	4	The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.

Call State	Display Name	lcon	Description
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	AI	The call is in a conference and on hold.

13.3 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	lcon	Description
Subscribed Sta	tes	
Available	I	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	9	The contact is connected but away from one or more devices and not busy on any device.
Offline	4	The contact if offline on all devices. If you are offline, you do not receive any presence updates or instant messages. In addition, your Instant Message directory is empty and the presence state of your contacts in other directories is set to "Offline".
Unsubscribed S	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	7	The contact has an IM&P service but you are not subscribed to monitor their state and the contact is not listed in the <i>Instant Message</i> directory. Clicking this icon sends a subscription request to the contact.

14 Appendix B: Keyboard Shortcuts

Кеу	Equivalent Mouse Action	Description
ESC	Click the Close button X 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 <i>Dialer</i> text box.	This places the cursor in the <i>Dialer</i> 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 <i>Enter Number</i> text, but does not place the cursor in the input box.
?	Click the Search text box.	This places the cursor in the <i>Search</i> 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 <i>Call Console</i> or <i>Queued Calls</i> pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the <i>Call Console</i> or <i>Queued Calls</i> pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the <i>Call Console</i> or <i>Queued Calls</i> pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the <i>Call Console</i> or <i>Queued Calls</i> pane.
19	Select a call in the <i>Call Console</i> .	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 <i>Call Console</i> .	This answers the selected incoming call or if no ca 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></period>	Click End on a selected call in the <i>Call Console</i> .	This ends the selected call.
ENTER	Click Dial .	If the cursor in placed in the <i>Dialer</i> text box, the entered digits are dialed.
ENTER	Click Search.	If the cursor is placed in the <i>Search</i> text box, a search is performed.
+	Click Transfer in the <i>Dialer</i> .	This transfers the selected call to the ad hoc number entered in the <i>Dialer</i> .
SHIFT+19	Select a ringing call and click Answer .	Pressing SHIFT+1 selects and answers the first ringing call, pressing SHIFT+2 selects and answer the second ringing call, and so on.
SHIFT+19	Select an active call and click Hold .	Pressing SHIFT+1 selects and then places the first active call on hold. Pressing SHIFT+2 selects and then answers the second active call, and so on.
SHIFT+19	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.

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

Кеу	Equivalent Mouse Action	Description
S or s	Click on Settings link.	This opens the <i>Settings</i> 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+I	Click the Sign Out link.	This signs the user out of the application.

Index

About Receptionist, 103 Accepting IM&P subscription requests, 61 Action buttons, 40 Ad hoc numbers Dialing, 48 Transferring queued calls to, 89 Addina Conference participants, 55 IM&P contacts, 60 Personal contacts, 75 Speed dial numbers, 77 Users to chat sessions. 64 Additional resources, 6 Allowed actions, in call states, 29 Answering calls, 47 Application settings, configuring, 96 Auto answering calls, 47 Barging in on calls, 56 Blind transferring calls, 51 Busy Camp On, 53 Buttons, for actions on calls, 40 Call centers. See Queues Call Console, 26, 27 Conference Call panel, 28 Current calls, 27 Dialer, 26 Header, 26 Call event log, configuring, 100 Call Forwarding Always, configuring, 97 Call history Deleting, 86 Dialing from, 50 Managing, 85 Viewing, 85 Call management functionality Enterprise edition, 10 Office edition. 15 Small Business edition, 12 Call states, 29, 104 Calls Answering, 47 Barging in on, 56 Camping on busy contacts, 53 Current, 44 Dialing Ad hoc numbers, 48 Contacts, 49 From history, 50 Dragging and dropping, 43 Ending, 50 History Deleting, 86 Managing, 85 Viewing, 85 Holding and resuming, 48

Incoming, 44 Managing, 43 Moving to top of queue, 90 Opening URL for, 45 Parking, 53 Picking up for another user, 47 Queued. See Queued calls Recording, 56 Redialing numbers, 48 Reordering in gueue, 89 Saving vCard for, 45 Security classification, 45 Speed dialing, 50 Transferring, 51 Blind, 51 To queue, 52 To voice mail, 52 With consultation, 51 With supervision, 51 Camping calls, 53 Changing IM&P presence state, 21 Password, 22, 93 Security classification of calls, 46 Chatting Managing sessions, 66 Starting multiuser sessions, 64 Starting one-on-one sessions, 63 Common directory, group/enterprise, 33 Conference Call panel, 28 Conferences Ending, 56 Holding, 55 Leaving, 55 Managing, 54 Participants Adding, 55 Ending, 55 Holding, 55 Resuming, 55 Resuming, 55 Three-Way, starting, 54 Configuring Application settings, 96 Call event log, 100 Call Forwarding Always, 97 Call notification settings, 98 Date format, 95 Do Not Disturb, 97 Drag and drop operation, 96 E-mail messaging, 102 General settings, 92 IM&P messaging, 103 Language, 93 LDAP v3 settings, 99 Messaging, 102 Operator policies, 97 Outlook settings, 98

Plug-ins, 98 Program shortcuts, 100 Queue membership, 96 Receptionist client, 92 Screen Pop URL, 93 Time format, 95 Workspace settings, 95 Consultative transfer of calls, 51 Contact directories. See also Directories Enterprise edition, 9 Office edition, 15 Small Business edition, 12 Contacts Common group/enterprise, 33 Custom, 35 Dialing, 49 Directories, 30 Enterprise, 32 Exchange calendar, viewing, 82 Favorites, 32 Group, 32 IM&P, 35 Accepting subscription requests, 61 Adding, 60 Chatting with, 63 Editing, 61 Monitoring presence, 62 Subscribing to, 59 Unsubscribing from, 61 Making notes about, 74 Managing, 67 Monitoring, 79 Dynamically, 33, 80 Statically, 32, 79 Outlook, 36 Pane. 30 Personal, 34 Phone states of, 83 Searching, 36, 69 Sending e-mails to, 58 Speed dials, 34 Viewing information about, 68 Contacts pane, 67 Controls, 38 Current calls, Call Console, 27 Custom directories, 35 Date format, configuring, 95 Definitions Call states, 104 IM&P states, 105 Monitored user states, 104 Deleting Calls from history, 86 Personal contacts, 76 Speed dial numbers, 78 Dialer, Call Console, 26 Dialing Ad hoc numbers, 48 Contacts. 49 From chat window, 64

From history, 50 Directories Custom, 35 Enterprise edition, 9 Favorites, 32 Group/Enterprise, 32 Group/Enterprise Common, 33 Instant Message, 35 Listina, 31 Management bar, 31 Monitored Contacts, 33 Office edition, 15 Ordering, 73 Outlook, 36 Personal, 34 Queues, 35 Searching, 36, 69 Showing or hiding, 68 Small Business edition, 12 Speed Dial, 34 Do Not Disturb, configuring, 97 Dragging and dropping calls Configuring, 96 Procedure, 43 Dynamic monitoring, 80 Editing IM&P contacts. 61 Speed dial list, 77 E-mail Configuring options for, 102 Sending to contacts, 58 Ending Calls. 50 Conference participants, 55 Conferences, 56 Enterprise Common directory tab, 33 Directory tab, 32 Edition, 8 Call management functionality, 10 Directories, 9 User interface, 8 Exchange calendar of contacts, 82 Exploring workspace, 23 Favorites directory tab, 32 General settings, configuring, 92 Getting Help, 20 Started, 17 Global Message Area, 24 Group Common directory tab, 33 Directory tab, 32 Group Call Park, 53 Grouping, queued calls, 90 Header, Call Console, 26 Help Getting, 20 Link, 24

History of calls, 85 Deleting, 86 Dialing from, 50 Viewing, 85 Holding Calls, 48 Conference participants, 55 Conferences, 55 IM&P, 59 Changing your presence state, 21 Configuring options for, 103 Contacts Accepting subscription requests, 61 Addina, 60 Chatting with, 63 Editing, 61 Subscribing to, 59 Unsubscribing from, 61 Starting chat sessions, 63 States, 105 Viewing presence state of contacts, 62 Initial setup, 21 Instant Message directory tab, 35 Instant messaging and presence. See IM&P Keyboard shortcuts, 106 Language, configuring, 93 Launching Receptionist From web browser, 18 From web portal, 17 LDAP v3, configuring, 99 Leaving conference, 55 Listing directories, 31 Logo pane, 24 Global Message Area, 24 Settings, Help, and Sign Out links, 24 Signed-in user information, 24 Making notes about contacts, 74 Managing Call history, 85 Calls, 43 Chat sessions, 66 Conferences, 54 Contacts. 67 Personal contacts, 75 Queued calls, 87 Speed dial numbers, 76 Messaging Chatting, 63 Configuring, 102 Sending e-mails, 58 Modifying Number of calls to display, 88 Security classification of calls, 46 Speed dial numbers, 77 Monitoring contacts, 79 Dynamically, 33, 80 IM&P, 59 Phone states, 83 Statically, 32, 79

Multiuser chat, starting, 64 Notes, making about contacts, 74 Office edition, 14 Call management functionality, 15 Directories, 15 User interface, 14 Operator policies, configuring, 97 Ordering Contact directories, 73 Queued calls, 91 Outlook Configuring settings, 98 Directory tab, 36 Pane Call Console, 26 Contacts, 30 Logo, 24 Queued Calls, 37 Parking calls, 53 Participants, conference Adding, 55 Ending, 55 Holding, 55 Taking off hold, 55 Password, changing, 22, 93 Pausing call recording, 57 Personal contacts Adding, 75 Deleting, 76 Managing, 75 Viewing, 34 Phone states of monitored contacts, 83 Picking up calls, 47 Plug-ins settings, configuring, 98 Presence state of IM&P contacts Listing, 62, 105 Monitoring, 59 Viewing, 62 Program shortcuts, configuring, 100 Promoting calls in queue, 90 Queued calls Grouping, 90 Managing, 87 Maximum allowed to display, 88 Pane, 37, 87 Promoting, 90 Reordering, 89, 90 Retrieving, 88 Sorting, 91 Transferring Between aueues. 89 To ad hoc number, 89 Viewing, 88 Queues. See also Queued calls Directory tab, 35 Selecting to manage, 87 Transferring calls to. 52 Your membership in, configuring, 96 Receptionist

Configuring, 92 Editions. 7 Enterprise, 8 Introduction, 7 Office, 14 Small Business, 11 Starting, 17 Recording calls, 56 Pausing, 57 Resuming, 57 Starting, 57 Stopping, 57 Redialing numbers, 48 Reordering calls in gueue, 89 Requesting contact monitoring, 80 Resources, 6 Resuming Call recording, 57 Conference participants, 55 Held Calls, 48 Conferences, 55 Retrieving calls from queue, 88 Screen Pop URL, configuring, 93 Search Operations on contacts, 69, 70, 73 Results, 32, 36, 72 Security classification of calls, 45 Selecting queues to manage, 87 Sending e-mails to contacts, 58 Services, configuring, 97 Settings About, 103 Application, 96 Operator policies, 97 Queue membership, 96 General, 92 Account, 93 Date format, 95 Drag and drop operation, 96 Language, 93 Screen Pop URL, 93 Time format, 95 Workspace, 95 Link, 24 Messaging, 102 E-mail, 102 IM&P, 103 Plug-ins, 98 Call event log. 100 LDAP v3. 99 Notification, 98 Outlook, 98 Program shortcuts, 100 Services, 97 Call Forwarding Always, 97 Do Not Disturb, 97 Setup, initial, 21 Shortcuts, keyboard, 106

Showing or hiding directories, 68 Signed-in user information, 24 Signing in From web browser, 18 Restrictions, 20 Signing out, 20, 24 Small Business edition, 11 Call management functionality, 12 Directories, 12 User interface, 11 Sorting queued calls, 91 Speed Dial directory, 34 Adding entries, 77 Calling from, 50 Deleting entries, 78 Editing entries, 77 Managing, 76 Starting Call recording, 57 Chat sessions, 63 Multiuser chats, 64 Three-Way conferences, 54 States Call, 104 IM&P, 105 Phone, of monitored user, 83, 104 Static monitoring, 79 Stopping call recording, 57 Subscribing to IM&P contacts, 59 Subscription requests, accepting from IM&P contacts, 61 Supervised transfer of calls, 51 Three-Way conferences, starting, 54 Time format, configuring, 95 Transferring calls, 51 Between queues, 89 Blind, 51 From queue to ad hoc number, 89 To queue, 52 To top of queue, 90 To voice mail. 52 With consultation, 51 With supervision, 51 Unholding calls, 48 Unsubscribing from IM&P contacts, 61 URL, opening for a call, 45 User interface Action buttons, 40 Call Console, 26, 27 Conference Call panel, 28 Contacts pane, 30 Controls, 38 Custom directories tabs, 35 Dialer, 26 Directories Management bar, 31 Enterprise edition, 8 Favorites tab, 32 Global Message Area, 24 Group/Enterprise Common tab, 33

- Group/Enterprise tab, 32 Information about signed-in user, 24 Instant Message tab, 35 Logo pane, 24 Monitored Contacts tab, 33 Office edition, 14 Outlook tab, 36 Personal tab, 34 Queued Calls pane, 37 Queues tab, 35 Search results tabs, 36 Search tab, 32 Small Business edition, 11 Speed Dial tab, 34 Users, managed phone states, 104 vCards, saving, 45 Viewing Calls
- Current, 44 History, 85 Queued, 88 Contacts Calendar, 82 IM&P, presence state of, 59, 62 Information, 68 Monitored, phone state of, 79 Security classification of calls, 45 vCards, 45 Voice mail, transferring calls to, 52 Web browser, launching Receptionist from, 18 Web portal, launching Receptionist from, 17 Workspace Configuring settings, 95 Exploring, 23