Nortel AS 5300 Release 1.0
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NN42040-105
June 2008

Nortel AS 5300
Personal Agent User Guide

Contents

New in this release

This section describes what's new in the *Nortel AS 5300 Personal Agent User Guide* (NN42040-105) for Nortel Application Server (AS) 5300 Release 1.0.

Other changes

This document is new for AS 5300 Release 1.0.

Revision history

June 2008	Standard 01.02. This document is up-issued to support Application Server 5300 Release 1.0. Added information regarding PIN length requirements, page 43.
May 2008	Standard 01.01. This document is issued to support Application Server 5300 Release 1.0.

Getting started

This guide describes the Nortel Personal Agent, a feature-rich online IP telephony solution. Use the Personal Agent to view, manage, and configure your services.

Chapters include:

Audience

This guide is intended for subscribers of the Personal Agent services and features. Nortel recommends that you keep the Personal Agent open while you follow the steps described in this guide.

Screen captures in this guide show Internet Explorer as the default browser. If you use another browser the screen can look different.

Text conventions

This guide uses the following text conventions:

bold text	Indicates the command key or link you need to press or click. Examples: Press **Enter**, Click **Ok**

italic text	Indicates new terms and document titles for reference.

Acronyms

This guide uses the following acronyms:

IP	Internet Protocol
PA	Personal Agent
PNG	portable network graphic
URL	Uniform resource locator (Internet address)

Related publications

Other publications related to the Personal Agent include:

- *Nortel AS 5300 Multimedia PC Client User Guide* (NN42040-107)

How to get help

For service issues, contact your local support or Information Services team.

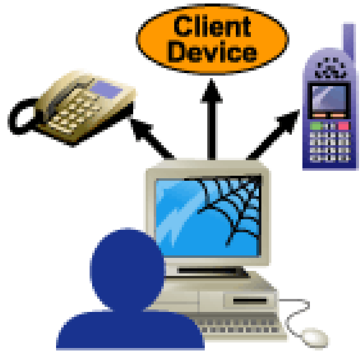
Using your Personal Agent

This chapter describes how to use your Personal Agent.

Topics in this section include:

Understanding your Personal Agent

You use the Personal Agent to effectively manage your service and communication preferences on your system. The Personal Agent ensures that your calls are delivered where and when you want, as shown in the following picture.



Personal Agent services and features

The Personal Agent solves the problem of having a different contact number for your office phone, home phone, mobile phone, and other communications devices. With the Personal Agent, you can direct incoming calls to ring all of these devices at the same time or in a sequence.

With the Personal Agent features, you can:

- define how incoming calls are treated
- view and customize your personal information and services (including viewing the presence of another user in your network)
- manage, track, and maintain key contact information
- establish a call between you and another contact

Before you begin

You need the following items before you use the Personal Agent:

- URL to access the Personal Agent
- username and password (provided by your system administrator)

- PC that has the required minimum hardware and software. See “Minimum hardware and software requirements” on page 13
- Internet access and a connection that meets the minimum transmission-speed requirements. See “Minimum hardware and software requirements” on page 13

Minimum hardware and software requirements

Before you begin using the Personal Agent, your PC must have the following hardware and software:

- 200 MHz Pentium class or equivalent processor
- This system does not require additional RAM. The minimum memory requirements of your browser must be met. For more information, see your browser documentation.
- This system does not require additional hard drive space. Local caching of Web pages is performed by your Web browser. For more information about the minimum disk space requirements, see your browser documentation.
- Mouse (optional)
- 640x480 pixels @8 bpp (256 colors) VGA graphics card
- Windows 2000, Windows XP, or Windows NT 4.x with Service Pack 5 (SP5)
- 28.8 kbyte/s modem
- Internet Explorer 6.0 or Firefox 2.0
- cookies and javascript enabled

Recommended hardware and software requirements

- 300MHz (or faster) Pentium class or equivalent processor
- This system does not require additional RAM. The minimum memory requirements of your browser must be met. For more information, see your browser documentation.
- This system does not require additional hard drive space. Local caching of Web pages is performed by your Web browser. For more information about the minimum disk space requirements, see your browser documentation.
- Mouse (required)
- 800x600 pixels or higher @16 bpp (65,536 colors) VGA video graphics card

- Windows 2000, Windows XP, or Windows NT 4.x with Service Pack 5 (SP5)
- 56 kbyte/s modem or other high-speed connection (for example, cable modem, DSL modem, and 10baseT ethernet.)
- Internet Explorer 6.0 or Firefox 2.0 (or later)
- cookies and javascript enabled

Useful terms to know

The Personal Agent uses some terms that may be new to you. Read through the explanations to familiarize yourself with the following terms:

- "Service package" on page 14
- "Address" on page 15
- "Global address book" on page 15
- "Personal address book" on page 15
- "Friends" on page 15
- "Presence" on page 16

Service package

Your service provider or system administrator assigns a service package with predefined features and options for you. These features are available to you if they are listed in your service package. For example, your service package defines

- the maximum number of entries in your list of Friends
- the maximum number of callers permitted in an audio conference
- if voice mail enabled.

Address

When an address is required in a procedure, enter either a Session Initiation Protocol (SIP) address or a telephone number. A SIP address is a unique identifier of users on the IP network. The SIP address has the same format as an e-mail address, for example, jdoe@lab1.org, but it is not an e-mail address. The network can identify where you are and route your calls by tracking your SIP address when you sign in to any Multimedia PC Client, Nortel IP Phone.

To make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in your personal address book.

Global address book

Your global address book lists all the registered users on your network. With the Personal Agent, you can search for a user name, user ID, first name, last name, or phone number. You initiate a call by clicking an entry in your global address book. Your service provider or system administrator maintains this list. This is an optional feature and can be turned off by your system administrator.

Personal address book

You can use your personal address book to manage addresses. You can save your addresses for quick access, as well as organize addresses into groups. Your personal address book is synchronized across all your network access devices. If you make a change in your personal address book on the Personal Agent, the change automatically appears on your other network access devices (for example, your Multimedia PC Client and your IP Phone).

Friends

In your personal address book, you can designate entries as Friends. When you mark an address book entry as a Friend, you can see the online presence status for that entry in the Multimedia PC Client, or IP Phone.

➡	**Note:** The ability to designate entries as Friends is a feature of the Presence service and depends on your service package. The ability to designate entries as Friends is available only when the Presence service is included in your service package.

Presence

The following terms describe the presence feature:

- Presence: a service on the Multimedia PC Client, or IP Phone that indicates the online status of you and other users on your network.
- Automatic presence: a service on the Multimedia PC Client, or IP Phone that you configure to make the system automatically alert others when you are away from your PC or on the telephone.

➡	**Note:** The ability to configure automatic presence notifications on the Personal Agent depends on your service package. This feature must be enabled in your service package before you can use automatic presence.

- Presence Indicators: You can determine the status of anyone registered in the system by querying the global address book in the Personal Agent. This feature is helpful when sending instant messages or after unanswered calls.

The following table describes the different Presence states:

Presence Indicator	**Status**	**Description**
	Active available	The user is active on their computer. The system displays this indicator automatically.
	Active on the phone	The user is on a call. The system displays this indicator automatically.
	Connected	The user is registered on the network.
	Connected inactive	The user has not used their computer for a period of time. The user can configure the idle timer, using Preferences, Services, Presence, Auto presence.
	Connected <user defined>	These are the connected default states (Away, Out to lunch, and Be right back) and any user-defined connected states that identify that the user is registered, but not available.
	Unavailable	The user is registered in the network but is busy, or the user is not registered on the network.
	Unknown	No Presence information is available.

Accessing the Personal Agent for the first time

To access the Personal Agent for the first time:

1 Start your Web browser.

2 Enter the Personal Agent URL in your Web browser.

The Personal Agent URL is provided by your service provider. For example, http://<PA_IP>/pa.

Also, if you enter the http address of Personal Agent, the browser is redirected automatically to an https address.

3. Press **Enter**.

   The Personal Agent Login page appears.

Personal Agent log on

You must log on to the Personal Agent before you can perform any of the functions available.

Tip: Remember that your session can timeout due to inactivity. Your system administrator defines the maximum number of minutes a session can be idle before you are forced to re-authenticate.

Logging on to the Personal Agent takes three steps:

1. "Acknowledging the pre-login banner" on page 18
2. "Logging on to the Personal Agent" on page 19
3. "Acknowledging the post-login banner" on page 20

Acknowledging the pre-login banner

When you attempt to access the Personal Agent login screen, a pre-login banner appears if configured by your system administrator. You must acknowledge the terms of the pre-login banner before you see the log on screen by selecting the check box and clicking **Continue**.

When timing or logging out of the Personal Agent, you see the pre-login banner instead of the login screen.

Note: You cannot access Personal Agent functionality unless you acknowledge the pre-login banner. The pre-login banner is presented only if the system administrator configures it.

Note: When you access the Personal Agent through the Multimedia PC Client or Provisioning Client, you do not see the pre-login or post-login banners.

Logging on to the Personal Agent

Warning: Your system administrator can implement a lockout duration for when the maximum number of failed log on attempts is reached. For more information, contact your system administrator.

To log on to the Personal Agent, perform the following steps.

1. Enter your user name (for example: you@yourcompany.com) and password in the Personal Agent Login page.
2. Click **Login**.

   After you log on, the Personal Agent Quick Start page appears.

Tip: On the Welcome to Personal Agent logon screen, click the **Remember my username** check box if you would like the system to remember your username.

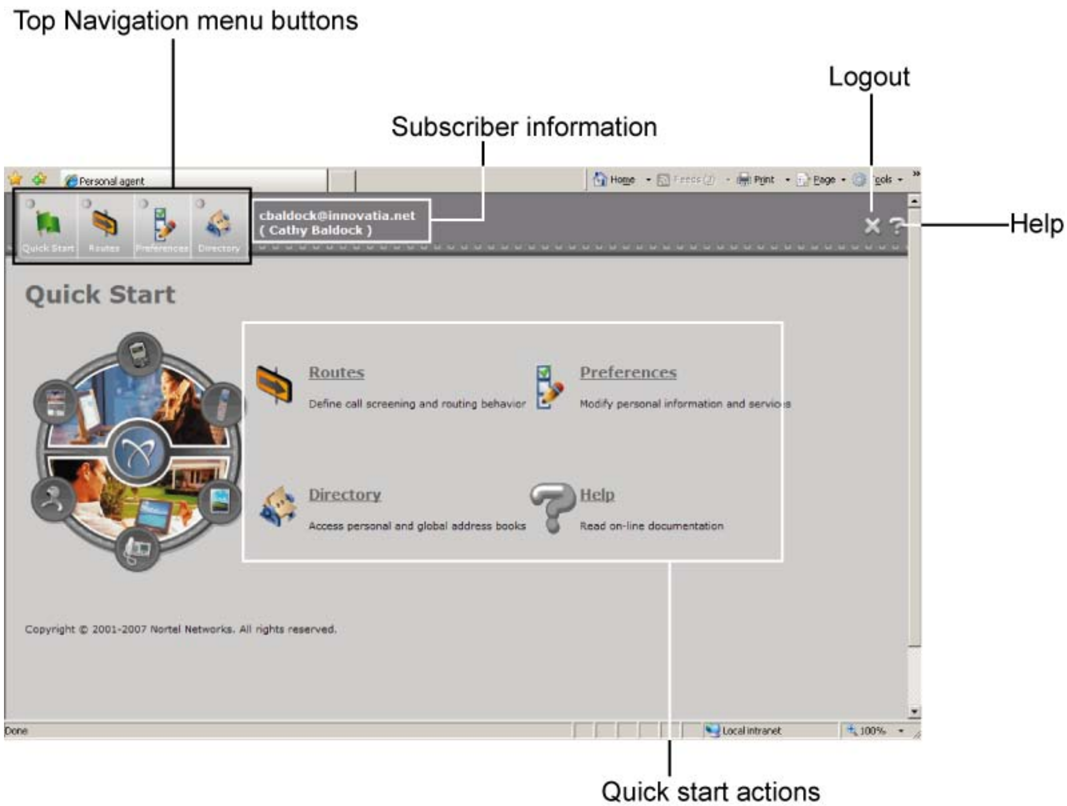
Acknowledging the post-login banner

After successfully logging on to the Personal Agent, a post-login banner appears, if configured by your system administrator. Otherwise, the quick start page displays. You cannot access any Personal Agent functions until you acknowledge the post-login banner by selecting the check box and clicking on the **Continue** button. If you click on the **logout** button, the Personal Agent is logged off.

Note: When you access the Personal Agent through the Multimedia PC Client or Provisioning Client, you do not see the pre-login or post-login banners.

Navigating the Personal Agent interface

The Personal Agent Quick Start page is where you access the services and features of the Personal Agent.

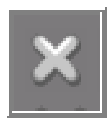


Navigating the Personal Agent Quick Start page

The icons and links on the Quick Start page and the top navigation menu buttons provide the interface to the Personal Agent and features described in the following table.

Service/Feature	Description
	Access the Quick Start page, from which you access the Personal Agent services and features
	Define how you want to manage your incoming calls by specifying the routing and screening of your calls (The Routes icon only appears if you have the Advanced service package)
	Manage your account and personal information
	Create, view, and manage your personal address book; View your global address book

Service/Feature	Description
	View your inbox and outbox list of calls (The Call logs icon only appears if you have the Advanced service package)
	Establish a call between you and another person

Exiting the Personal Agent 

To exit the Personal Agent, click the logout icon on the top right of any page you are currently working on.

Using the online Help 

There are several ways that you can access Personal Agent help:

- online help—Click the Help icon, on the top right of any page, to view a task-based help system. The online help provides:
  - help pages that contain forward and backward navigation icons
  - procedures that help you use the Personal Agent
  - hypertext links to all topics
  - a table of contents with hypertext links
  - an Index with hypertext links
- rollover help—help text that has a description and possible values that appears when your pointer moves over a form field or an icon

Customizing your Personal Agent

This chapter includes the following sections:

Configuring your personal preferences

To configure or modify your preferences, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

2 From the navigation pane, select **Personal**.

   The following options appear:

   - Contact info
   - Password
   - Picture
   - Reasons
   - My Times

Tip: The information you enter in the Contact info and My Times pages is used when you configure routes for your incoming calls. For more information on configuring routes, see "Using your Personal Agent Routes Wizard" on page 67.

Tip: Click the plus **(+)** and minus **(-)** symbols to expand or collapse a menu item on the Preferences page.

Modifying your contact information

To modify your contact information, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

The Preferences page appears.

2 In the navigation pane, select **Personal** > **Contact Info.**

From the Contact Info page, you can view your first name, last name, and alias as entered by your service provider or system administrator. You can enter or modify your e-mail address, business, home, cell, pager, and fax phone numbers. You can also modify your time zone and locale.

Field	**Description**
First name	Your first name as it appears to other users (viewable field only).
Last name	Your last name as it appears to other users (viewable field only).
Aliases	An alias (if provisioned) that associates a Public Switched Telephone Network (PSTN) phone number to your username (viewable field only).
email	E-mail address (for example tsmith@acme.com).
Business phone	Your business phone number.
Home phone	Your home phone number.
Cell phone	Your cell phone number.
Pager	Your pager number.
Fax	Your fax number.
Timezone	Your time zone, in which your predefined My Times Call Screening times are enforced.
Locale	Your language and region, for display in different languages, if supported. You must log out and log on again for the changes to take effect.

3 Complete the required fields on the page.

4 Click **Save**.

Note: Some fields cannot be configured. For more information about these fields, contact your system administrator.

Changing your password

When you change your password, your password changes for all client devices (Multimedia PC Client, Personal Agent, and Nortel IP Phone). The length and complexity of your password is determined by your system administrator.

Your password criteria can contain:

- minimum password length
- minimum number of digits
- minimum number of uppercase characters from A through Z
- minimum number of lowercase characters from a through z
- minimum number of special characters

Your password cannot contain spaces.

To change your password, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

2 From the navigation pane, select **Personal** > **Password**.

3 Complete the required fields, using the following table.

Field	**Description**
New Password	Your new password (See your system administrator for password criteria).
Confirm Password	Confirmation of your new password.
Old Password	The old password that you entered when your registered with the Personal Agent.

Tip: For security purposes, Nortel recommends that you change your password periodically.

4 Click **Save**.

Note: For information about changing your Chairperson PIN, see "Viewing and modifying your Meet Me conferencing details" on page 45.

Selecting a picture

You can add a picture to use as your picture caller ID in the Multimedia PC Client. If you are replacing an existing picture ID, your new picture overwrites the previous picture.

To add or modify a picture, perform the following steps.

1 In the navigation pane, select **Preferences** > **Personal** > **Picture**.

From the Picture page that appears, you can add, view, or update your caller ID picture. The first time you access this page, you notice a shadow figure. The shadow indicates that you do not have a picture in the database.

2 In the **My New Picture** field, enter the path and file name of the picture to use for your picture caller ID service.

OR

Click **Browse** and select the picture file.

Preview your picture.

Tip: The system resizes pictures greater than 160 x 120 pixels. Use only .png or .jpg files. Your system administrator defines the maximum picture size.

3 Click **Save** to save the picture as your picture caller ID.

4 Click **Reset** to reset your picture from the preview picture to your current picture.

The picture file you specify is sent to your service provider’s user database and appears on the Multimedia PC Client, and on the Picture page each time you use the Personal Agent. The picture also appears in the address book in card view mode.

5 Click **Delete** to delete a picture.

Note: A picture caller ID appears when the contact is added to the address book of the person being called.

Specify reasons

Use the Reasons page to specify a reason or list of reasons to appear on your IP Phone.

Specifying a new reason

To specify a new reason or a list of reasons for rejecting an incoming call, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

2 In the navigation pane, select **Personal** > **Reasons**.

3 In the **New Reason** box, enter the text of the reason. For example, Busy right now or Try again later.

Tip: The reasons appear in the order that you enter them.

4 Click **Add**.

5 To add another reason, in the **New Reason** box, enter the text of the reason.

6 Click **Add**.

7 To save the reason, click **Save**.

8 Click **Reset** to clear your input and reset your reason list to the last saved settings.

9 Click **Remove** to remove the selected reason.

OR

Click **Remove All** to remove all reasons.

Tip: The reasons appear on your IP Phone in the same order they appear in the Current Reasons window. Contact your system administrator if this option is not available.

Reordering the list of reasons

To change the order in which the reasons appear on your IP Phone, perform the following steps.

1 Navigate to **Preferences** > **Personal** > **Reasons.** In the **Current Reasons** box, select a reason from the list.

2 Click **Up** or **Down** to change the order of the reasons list.

Tip: The reasons appear on your IP Phone in the same order they appear in the Current Reasons window.

3 To remove a reason from the list, select the entry in the **Current Reasons** list.

4 Click **Remove** to remove the selected reason.

OR

Click **Remove All** to remove all reasons.

5 Click **Save** to save your changes.

Configure My Times

Use the My Times page to Add, Modify, Copy, Rename, or Delete day and time ranges when configuring conditions to screen and route your incoming calls.

Note: The Advanced Screening parameter must be enabled in your Service Package.

Adding a new day and time range

To add a new day and time range, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Personal** > **My Times**.
3. Click **Add**.
4. In the **Select Days** column, click the required days. In the **FROM Time** and **TO Time** fields, select the required time.
5. Click **Add Time**. The selected day and time range appears in the **Day/Time Details** section.
6. In the **Enter a Name for this Day/Time Range** box, enter a name for the day and time range.
7. Click **Save** to save your new day and time range.

   OR

   Click **Cancel** to return to the My Times page without creating a new range.

Tip: To remove day and time ranges for a specific day, click the day in the **Select Days** column and click the **Clear Day** button. To remove the day and time ranges for all days, click the **Clear All** button.

Note: You can add more than one day and time combination to apply to the day and time range.

Modifying a day and time range

To modify an existing day and time range, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Personal** > **My Times**.
3. In the My Times section, click an option. For example, My Office Hours.
4. Click **Modify**.
5. Enter your changes to the days and time ranges on the My Times page.
6. Click **Add Time.** The modified day and time range appears in the **Day/Time Details** section.
7. Click **Save** to save your day and time changes.

   OR

   Click **Cancel** to return to the My Times page without saving your changes.

Copying a day and time range

To copy a day and time range:

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Personal** > **My Times**.
3. In the My Times section, click the option you want to copy. For example, My Office Hours.
4. Click **Copy**.
5. Enter a new name for the day and time range you want to copy. The copied day and time range appears in the **Day/Time Details** section.
6. Click **Save** to save your changes.

   OR

   Click **Cancel** to return to the My Times page without saving your changes.

Renaming a day and time range

To rename a day and time range, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Personal > My Times**.
3. In the My Times section, click the option you want to rename. For example, My Office Hours.
4. Click **Rename**.
5. Enter a new name for the day and time range you want to rename. The renamed day and time range appears in the **Day/Time Details** section.
6. Click **Save** to save your changes.

   OR

   Click **Cancel** to return to the My Times page without saving your changes.

Deleting a day and time range

To delete a day and time range, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Personal** > **My Times.**
3. In the My Times section, click the option you want to delete. For example, My Office Hours.
4. Click **Delete**.
5. Click **OK** to confirm that you want to delete the selected My Times option.

   OR

   Click **Cancel** to return to the My Times page without saving your changes.

Modifying your Nortel IP Phone settings

This section applies to the IP Client Manager (IPCM) connected to your IP Phone.

You can configure or modify your IP Phone preferences by clicking the **Preferences** icon on the Quick Start page or from the navigation pane. The following options appear when you click on **IP phone** from the navigation pane:

- Subjects
- Personalized presence
- Logout

Creating a subject list for your IP Phone calls

On your IP Phone, you can create a list of subjects to add to an outgoing call. The subject appears on the IP Phone (as well as other registered SIP clients) of the person you are calling and tells them why you are calling.

To create a new subject, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **IP phone** > **Subjects**.
3. Enter the text of the subject in the **New Subject** box
4. Click **Add**. The subject appears in your **Current Subjects** box.
5. To add another subject, enter the text of the subject in the **New Subject** box.
6. Click **Add**.
7. To remove a subject, select the entry, and click **Remove**.
8. To remove all subjects in the list you created, select all the entries, and click **Remove All**.
9. Click **Save** to save your new subjects.

   OR

   Click **Reset** to clear all recent input and reset your subject list to the last saved settings.

Changing the order of the subject list

To specify the order in which the subjects appear on your IP Phone, perform the following steps.

1 In the **Current Subjects** area, click a subject.
2 Click **Up** or **Down** to change the order of the subject list.
3 Click **Save** to save your changes.

Personalizing your presence

To customize a presence status note for display on the IP Phone, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2 In the navigation pane, select **IP phone** > **Personalized presence**.
3 In the **New Note** box, enter a note.
4 Click **Add**.
5 To add another note, enter the text of the note in the **New Note** box.
6 Click **Add**. The new note appears in the **Current notes** box.
7 To reorder the presence note for display on the IP Phone, select the note from the **Current notes** box and click **Up** or **Down**.
8 Click **Save** to save the note.
9 Click **Reset** to clear your input and reset your note list to the last saved settings.
10 To remove a note, select the note from the **Current notes** box and click **Remove**.

OR

click **Remove All** to remove all notes.

Logging off from your active phones

If you work in a number of locations and often log on to several IP Phones, you can use the **IP phone** option to check your logon status and logoff your active phone.

To log off your active phones, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **IP phone** > **Logout**.
3. Log off from the IP Phone, based on the Device Label, MAC address, or Users.

Tip: The **IP phone** option lists a separate entry for each phone you are logged on to.

4. Click the **Log Me Out** link from the IP Phone.
5. Click **OK** to log off.

Viewing and modifying your available services

To view or modify the list of services that you are currently subscribed to, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Services.**

The following options appear:

- Service package—a list of services assigned to you by your service provider or system administrator
- Presence

- Unified Communications
- Meet Me Conferencing—provides your conferencing bridge information
- Call park

Tip: You may see other menu items depending on your Service Package. See the documentation for those services.

Viewing your service package information

You can view the service package assigned to you by your system administrator.

Note: You cannot change any of the service package parameters that you view on the Service Package page. Contact your system administrator to request any changes to your service package.

To view the services enabled in your service package, perform the following steps.

1. Click the **Preferences** icon on the Quick Start page or from the top navigation menu.
2. In the navigation pane, select **Services** > **Service package**.
3. View the list of services assigned to you.

Note: The following table provides a list of Service Packages. Some of the services and parameters listed may not be available to you as your system administrator may not have configured all the Service Package options or the service package option is available in a future release.

Service Package option	Description
Presence	• View the online status of other users and allow others to monitor your status by indicating when your PC is inactive or when you are on the phone. • Designate an address book contact as a Friend to see that person's presence. Your system administrator configures the maximum number of Friends you can add to your address book. • Prohibit a contact in your network from viewing your online presence status.
Basic Services	Provides the core functionality that is not provided by the other services. For example, the ability to make a call.
Hot Line	Available in a future release.
Unified Communications	Provides access to multimedia messaging services.
Client Collaboration	Available in a future release.
Calling Picture Display	Display the picture of the caller.
ParlayX Presence	Available in a future release.
QoS	Available in a future release.
Network Call Logs	Available in a future release.
Multi-Level Precedence and Preemption (MLPP)	As an option when placing a call, you can specify the precedence level. A call must be initiated with a precedence level below or equal to the authorized precedence level initially provisioned for you. During call setup, this precedence level assures preferential call completion of higher precedence calls, even if it preempts lower precedence calls.
Voicemail	Receive and retrieve your voice mail and also receive notification of waiting messages. For information about retrieving voice mail, see: • *Nortel AS 5300 Multimedia PC Client User Guide* (NN42040-107)
Meet Me Audio Conferencing	You can chair an audio conference by sending out a dial-in number and personal identification number (PIN) for a conference bridge. Video conferencing available in a future release.

Service Package option	**Description**
Advanced Addressbook	The default number of contacts is 10. Your system administrator configures the maximum number of contacts you can add to your address book.
Music On Hold	You can provide music to callers that you put on hold.
Wireless Client	Available in a future release.
Instant Messaging	Send text messages to other users whether they are active on a client.
Colorful Ringback Tones	Available in a future release.
Device Access Restrictions	Available in a future release.
Multiple Login Restriction	Limit the number of simultaneous logon sessions for a user.
Click to Call	Available in a future release.
Ad- Hoc Audio Conferencing	Join or conference multiple users in an audio call.
Ad Hoc Video Conferencing	Available in a future release.
Advanced Screening	Define routes that affect how your calls and instant messages are received. A route allows you to specify locations that ring simultaneously or sequentially when you receive a call. A route can be defined to affect only specific calls or instant messages, based on the configured conditions. For example, the time of day you receive the call and who is calling.
Call Park	Available in a future release.
Assistant Console	Available in a future release.
Assistant Support	Available in a future release.
Call Waiting Disable	Available in a future release.
Calling Name Display	The name of the caller is displayed on incoming calls.
Calling Line ID Restriction	Calling Line Identification allows you to specify whether or not you want your name and number to appear when you call someone.
Converged Desktop	Available in a future release.
Converged Mobility	Available in a future release.

Service Package option	Description
Direct to Gateway	Available in a future release.
IM chatroom	Available in a future release.
Malicious Call Trace	Available in a future release.
Multiple Call Restriction	Available in a future release.
Net6 Support on 2004	Configure the Nortel IP Phone 2004 to display Web text. It allows the phone to connect to the Net 6 server to display information from the Web. It also allows a user to perform searches of a corporate directory
Packet Cable Multimedia	Available in a future release.
ParlayX Multimedia Messaging	Available in a future release.
ParlayX Third Party Call Control	Available in a future release.
Video	Receive and transmit video calls.
Wireless Gateway	Available in a future release.

Viewing and modifying your Watchers List

To see a list of people who have subscribed to your presence information, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

2 In the navigation pane, select **Services** > **Presence > Watchers**.

The list shows only the active username watching your presence, not all users registered to your presence. The date when an active watcher subscribed to your presence information also appears.

3 To ban an active watcher from seeing your presence information, click the check box beside the watcher's username.

4 Click the **Ban watchers** icon. The Banned watchers list appears with the new banned watcher's username.

Setting up a Banned watchers list

You may want to ban someone from subscribing to your presence information in the future. Use the **Banned watchers** menu option to restrict access by other users who do not currently appear in your watchers list.

To ban someone from viewing your presence information, perform the following steps.

1 In the navigation pane, select **Preferences > Services** > **Presence > Banned Watchers**.

2 Enter the SIP address of the person you want to ban.

3 Click **Save**. The person you added to the ban list can still call you, but they can no longer see your online status.

   The name now appears in a list of banned users.

4 To delete a user from your ban list, click the Delete link next to Banned User. Click **OK** at the confirmation message.

   The party is removed from the ban list.

Modifying your Auto presence service

If you have the Automatic presence service enabled in your service package, you can automatically let other users in your domain know whether you are away from your PC or on the phone.

To modify your Automatic presence options, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

2 In the navigation pane, select **Services** > **Presence > Auto presence**.

3 In the **Report when on the phone,** select **Yes** or **No**.

4 In the **Inactivity Timer (in minutes)** box, enter a time value in the range of 10 to 600 minutes.

5 Select **Report when inactive**, and enter a time value in the range of 10 to 600 minutes into the **Inactivity Timer (in minutes)** field. This value is the number of minutes that must elapse before your status is reported as inactive.

People who subscribed to your presence are alerted to your presence status after the elapsed time.

6 The Inactivity Timer (in minutes) option applies only to the Personal Agent, which includes the Multimedia PC Client. This option does not apply to the Nortel IP Phone.

Viewing and modifying your Unified Communications details

The Unified Communications service provides you with integrated access to your voicemail messages from a preferred client device, such as a PC, Voice over IP (VoIP) phone, wireless phone, or a traditional circuit switched telephone. Use the Personal Agent to view and modify the details of your account.

Click **Preferences > Services > Unified Communications > Overview** to display your mailbox number and the access numbers for the Unified Communications service. The Unified Communications page appears.

Configuring your greeting message

To select which recorded greeting plays when a user leaves you a message, perform the following steps.

1. Select **Preferences** > **Services** > **Unified Communication** > **Greetings** > **Set Active Greetings**. The Unified Communications Greeting page appears.
2. From the list, select the recorded greeting to play when a user leaves you a message:
   - System
   - Temporary
   - Personal
   - Custom (up to three custom greetings)
3. Click **Save** to save your changes after you complete your work.

   OR

   Click **Reset** if you made changes and you do not want to save them.

Modifying your current greeting settings

To modify your greeting settings, perform the following steps.

1. Select **Preferences** > **Services** > **Unified Communications > Greetings** > **Greeting settings**.
2. Click the **Modify** link for each greeting, to specify a different email address to deliver your voicemail message to and to assign transfer destinations.
3. Click **Save** to save your changes after you complete your work.

   OR

   Click **Reset** if you made changes and you do not want to save them.

Changing your PIN

To change your Personal Identification Number (PIN) for accessing your mailbox, perform the following steps.

1. Click **Preferences > Services > Unified Communications > PIN**.
2. Enter a new PIN (from 4 to 10 digits) in the **New PIN** field.
3. Enter the new PIN again in the **Confirm PIN** field.
4. Confirm these changes by entering your Personal Agent password in the **Confirm Personal Agent password** field.
5. Click **Save** to save your changes.

   OR

   Click **Reset** if you made changes and you do not want to save them.

Configuring your email preferences

To change the email delivery options of your voicemail messages:

1. Select **Preferences** > **Services > Unified Communications** > **Greetings > Email preferences.**
2. Modify the email delivery options of your voicemail messages.

3 Click **Save** to save your changes.

OR

Click **Reset** if you made changes and you do not want to save them.

Controlling your automatic login

To control your Unified Communications logon when using other Public Switched Telephone Network (PSTN) telephone (such as a cell phone) that are not hosted by the AS 5300 network, perform the following steps.

1. Select **Preferences > Services > Unified Communications > Greetings > Auto Identification.**
2. Click **Save**, after you select an option to use automatic identification when calling from your client.
3. Provide direct access to your mailbox by using the customizable option to enter up to three different PSTN or Electronic Switched Network (ESN) numbers.
4. Click **Save** to save your changes.

   OR

   Click **Reset** if you made changes and you do not want to save them.

Remember that the customizable option only allows you to enter valid PSTN or ESN digits and not a user name. Only PSTN numbers that are not hosted by the AS 5300 network can be used for automatic identification. For example, automatic identification does not work when subscribers call from a known device, such as the cell phone or home phone. The numbers listed in the Aliases field in Preferences > Personal > Contact Info will not work. You would list a user’s PSTN number as an Alias number for that user, so you would not enter that number as an address to be auto-identified. Instead, you would use auto-identification for the **my client** the user is logged on as.

Configuring recording time for incoming voicemail messages

To configure the maximum recording time for incoming voicemail messages, perform the following steps.

1 Select **Preferences** > **Services** > **Unified Communications** > **Greetings** > **Message Storage**.

2 Click **Save** to save your changes.

OR

Click **Reset** if you made changes and you do not want to save them.

Viewing and modifying your Meet Me conferencing details

The Meet Me audio conferencing service enables you to have a personal conference bridge, available 24 hours a day. Personal Identification Numbers (PIN) control access to bridge resources. When participants dial into the bridge, they receive a greeting and a request to enter an Access Code. The Access Code uniquely identifies your personal bridge. Only you, as the chairperson (the person who owns the bridge), can open the bridge and allow all participants to join.

To view the details of your bridge, perform the following steps.

1 Click the **Preferences** icon on the Quick Start page or from the top navigation menu.

1 In the navigation pane, select **Services** > **Meet Me Conferencing**. The Meet Me page appears.

2 View the specific details of your conference information:

- Dial-In Number
- Access Code
- Collaboration URL (static).

  Remember to contact your service provider or system administrator to request any changes to the conference phone numbers, conference access code, or static conference URL.

- PIN—To change the Chairperson PIN, click **PIN**. In the **Meet Me: Change PIN** window, click **New Chair PIN** and enter the new PIN (from 4 to 10 digits), reenter the PIN in the **Confirm PIN** box, and in the **Confirm Personal Agent password** box, enter your Personal Agent password. Click **Save**.

- A check box to indicate whether or not the conference will end when you disconnect from the call.
- A check box to indicate whether or not to receive instant messages (such as attendance roster and collaboration material access) during the conference
- A check box to allow interactive participants to use audio emoticons. Your system administrator provides the media source files for the audio emoticons.
- Email address to receive conference recordings.
- Option buttons to select audio entry/exit tone indicators to announce the arrival and departure of conference participants.

3 Click **Save**.

OR

Click **Reset** if you do not want to save the changes.

Configuring Calling Line Identification

Use the Calling Line Identification feature to specify if you want your name and number displayed when you call someone. This service must be enabled in your service package.

To change your Calling Line ID Restriction setting, perform the following steps.

1 On the Quick Start page, click **Preferences**.

OR

In the navigation pane, select **Preferences** > **Services** > **Calling Line ID Restriction**.

2 If you want your name and number displayed when you call someone, select **No** from the **Calling Name/Number Privacy** list.

3 If you do not want your name and number displayed when you call someone, select **Yes** from the **Calling Name/Number Privacy** list.

Note: If you enable this service, your calling ID appears as either unknown or anonymous.

4 Click **Save** to save your changes.

OR

Click **Reset** if you made changes and you do not want to save them.

Using your directories

The Directory icon appears on the Personal Agent Quick Start page or on the top navigation menu. Using the Directory icon you can:

- create and maintain a personal address book of your personal contacts and groups of contacts
- access a global address book of all users in your domain
- call a contact from your personal or global address book
- access details about a contact including their presence status

Topics in this chapter include:

Understanding Personal Agent address books

The following address books are available in the Personal Agent:

- personal address book—contains contact information you enter
- global address book—contains contact information for all users in your domain. Your system administration maintains the global address book.

Tip: Information in your personal and global address book can be used as a condition when you define a route to handle your incoming calls. For more information about call routing, see “Using your Personal Agent Routes Wizard” on page 67.

Note: The system administrator must enable the global address book before you can use it.

Using your personal address book

Your personal address book contains a dynamic list of contacts that contain a user’s nickname, first name, and last name. You can choose to place your contact in a group or in your list of Friends.

Tip: When you add a contact or make a change to a contact using the Personal Agent, your personal address book automatically updates and synchronizes with the Multimedia PC Client and IP Phones.

To access the personal address book, click the Directory icon on the Personal Agent Quick Start page or on the top navigation menu.

Your personal address book has two options for viewing your contacts:

- List view—a traditional table view
- Card view—a business card view (including a picture of the contact, if available)

Both the List view and Card view have the following icons for accessing your personal address book.

Click this icon	To
	Add a new contact to your personal address book
	Remove selected contacts from your personal address book
	Create, rename, and delete contact groups in your personal address book

Viewing your contacts in List view

To view your personal address book contacts in List view on the Personal Agent Quick Start page, click the Directory icon.

Sorting your contacts

To sort your contacts, perform the following steps.

1 Click a column name to sort by that column.

For example, click the **First Name** column to sort your contacts by first name.

2 Click the column name again to sort in reverse.

Searching for a contact

The following table describes the criteria you can use to search for a contact.

Field	Search criteria
Nickname	An alternate name assigned to a subscriber. For example, you can assign the nickname manager to the person you work for.
Name	• First name and last name of the contact. For example, searching for the contact with the Name of Smith returns contacts with the first name Smith and contacts with the last name Smith. • Both first and last name of the contact. For example, the string John Smith returns contacts with the first name John and the last name Smith.The search string Smith, John, also returns the same contacts. • Name matching continuation. For example, entering a **y** returns all contacts starting with the letter **Y**.
Last name	Last name of the contact.
First name	First name of the contact.
Phone number	Telephone number of the contact.
SIP address	The SIP address of the contact on the IP network. It has the same format as an e-mail address, for example, jdoe@lab1.org, but it is not an e-mail address.
Friends	Nickname, first name, or last name of the contact.
Group	Name of the group that the contact is a member of. For example, searching for Work returns all contacts that are members of that group.

To search for a contact, perform the following steps.

1. From the **SEARCH** list, select **Personal address book**.
2. From the **FOR** list, select a criteria to search for. For example, First name

3 Enter a search string in the text box and click **Search.**

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n returns all contacts named John, Jon, and Jen. Use quotation marks (") before and after a search string to specify an exact match. For a complete list of the search criteria, see “Address Book Search Criteria” on page 81.

Viewing details about a contact

To view details about a contact, perform the following steps.

1 Click on the Nickname link. A new window appears listing details about the contact, including an icon that indicates their presence status on the network.

2 Click the **Back** button to return to the contact list.

Calling a contact in your personal address book

To call a contact in your personal address book from List view, perform the following steps.

1 In the Call column, click the Call link to make a call.

2 The Click to Call page appears. For more information on using Click to Call, see AUTHOR NOTE: add link.

Viewing your contacts in Card view

To view your personal address book contacts in Card view, perform the following steps.

1 Click the **Directory** icon on the Personal Agent Quick Start page or on the top navigation menu.

2 Click the **Card View** tab.

Tip: A shadow figure in the Picture column means that there is no picture ID available for the contact.

Viewing details about a contact

To view details about a contact, perform the following steps.

1 Click on the link beside the contact's name. A new window appears listing details about the contact, including an icon that indicates their presence status on the network.

2 Click the **Back** button to return to the contact list.

Managing your contacts in your personal address book

Your personal address book helps you manage, track, and access information about all of your contacts.

Adding a contact to your personal address book

Note: The maximum number of contacts that you can add to your personal address book depends on your Service Package.

To add a contact in your personal address book, perform the following steps.

1 Click the **New** button on the Directory page.

2 Complete the fields with your contact's personal information.

Required fields are indicated with an asterisk (*).

3 Select the **Friend** check box to make this contact a Friend.

4 Select a group from the **Group** list to place this contact in a group.

The default group is **No Group**.

5 Click **Save** to save this contact to your personal address book and close the window.

OR

Click **Cancel** to return to your personal address book without saving your changes.

Editing a contact

If a contact's information changes, you can modify your personal address book.

Note: If you configure the Call Forward service from user A to user B, and then change any of the address details of user B in the address book (using the Personal Agent), you must reenable the Call Forward service in the service package. The Call Forward service is not associated with the address book.

Editing a contact—List view

To edit details about a contact in List view in your personal address book, perform the following steps.

1 From List view, click the Nickname link for the contact that you want to edit. A new window appears listing details about the contact.

2 Click **Edit**.

3 Enter or revise the contact information, including Friend or Group selections.

4 Click **Save**.

OR

Click **Copy**.

OR

Click **Cancel** to return to the previous screen without saving your changes.

OR

Click **Back** to return to your personal address book.

Editing a contact—Card view

To edit details about a contact in Card view in your personal address book, perform the following steps.

1. From Card view, select the contact that you want to edit.
2. Click **Edit** in the **Edit** column.
3. Enter or revise the contact information, including Friend or Group selections.
4. Click **Save**.

   OR

   Click **Copy**.

   OR

   Click **Cancel** to return to the previous screen without saving your changes.

   OR

   Click **Back** to return to your personal address book.

Deleting a contact

To select a contact or several contacts to delete, perform the following steps.

1. In the **Select** column, select each contact you want to delete.
2. Click **Delete**.
3. Click **OK** to confirm the deletion.

   The contact or contacts are deleted from your personal address book. These changes are automatically synchronized with the Multimedia PC Client and the IP Phones.

Adding a new group

You can organize your contact entries into groups. For example, you can create a group called Work for your office contacts, another called Personal for your personal contacts.

To add a new group, perform the following steps.

1 On the personal address book page, click the **Groups** button. The groups page appears.

2 In the **Enter new group name** box, type the name of the new group.

3 Click **Add**.

4 Repeat **Step 2** and **Step 3** to add more groups.

5 To rename a group, select the group in the Groups window and click **Rename.**

6 To delete a group, select the group in the Groups window and click **Delete**.

7 Click **Back** to return to your personal address book.

Designating a contact as a Friend

Note: To designate a contact as a Friend in your personal address book, Presence must be enabled in your service package. Your service package determines the maximum number of contacts that you can designate as Friends. By designating a contact as a Friend, you can view their activity by clicking the Friends Online button in the Multimedia Web Client. For more information, see *Nortel AS 5300 Multimedia PC Client User Guide* (NN42040-107).

You can use the Personal Agent to create, view, and update your Friends contacts. Your Friends are contacts that you work with or correspond with regularly. When you designate contacts as Friends, you can view their online status.

To designate a contact as a Friend, perform the following steps.

1 Select the **Friend** check box in the contact details page when you enter contact information in your personal address book (Card view or List view).

2 Click **Save**.

The contact you designated as a Friend now appears in your personal address book (List view) with the Friends icon appearing in the Friends column for the selected contact.

In Card view, the contact you designated as a Friend appears with the Friend icon next to the contact name.

3 To remove a contact as a Friend, clear the Friend check box in the contact details page (List view or Card view) and click **Save.**

Tip: You can also use the Multimedia PC Client or IP Phone to see whether a Friend is online.

Using the global address book

Your global address book lists all the users in your domain. Your service provider or system administrator creates and maintains this list. It must be enabled by your system administrator before you can see it.

Your global address book has the following two viewing options for your contacts:

- List view—a traditional table view
- Card view—business card view (including a picture of the contact, if available)

Accessing the global address book

To access the global address book, click the Directory icon on the Personal Agent Quick Start page or on the top navigation menu.

Note: By default, the active book is always your personal address book in List view format.

Searching for users in the global address book

The following table describes the criteria you can use to search for users in the global address book.

Field	Search criteria
Username	User name of the user (assigned by your service provider or system administrator). For example, eburns.
Name	• First name and last name of the user. For example, searching for a user with the Name of Smith returns users with the first name Smith and contacts with the last name Smith. • Both first and last name. For example, the string John Smith returns users with the first name John and the last name Smith.The search string Smith, John, also returns the same users. • Name matching continuation. For example entering a **y** returns all users starting with the letter **Y**.
Last name	Last name.
First name	First name.
Phone number	Telephone number.

To display users from the global address book, perform the following steps.

1 Select **Global address book** from the **SEARCH** list.

2 Select a search field from the **FOR** list.

3 Enter a search string in the text box. For a complete list of the search criteria you can specify to search for a contact, see "Global Address Book search criteria" on page 84.

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n returns all contacts named John, Jon, and Jen.

Use quotation marks (") before and after a search string to specify an exact match.

4 Click **Search**. A new window appears.

5 Click **Return to my address book**, to return to your personal address book.

Working with the global address book—List view

Use the global address book to access a single, common network-wide address book, in a list format.

Sorting users

To sort users in the global address book, perform the following steps.

1 Click a column name to sort by that column.

(For example, **Last name, First name**, **Office**, or **Home**)

2 Click the column name again to sort in reverse.

Viewing details about a user

To view details about a user in the global address book, perform the following steps.

1 In the **Last name**, **First name**, **Office**, or **Home** column, click a highlighted user.

A page appears listing details about the user, including an icon that indicates their presence status on the network.

2 Click **Close** to return to the global address book page

3 Click **Add** to add this user to your personal address book.

Initiating a call to a global address book user

To initiate a call to a user in the global address book, perform the following steps.

1 Click the **Call** link in the **Call** column to call the user in your global address book.

2 Click the **Call** button to place a call to the user.

Working with the global address book—Card view

The following table describes the criteria you can use to search for a user in your global address book.

Field	Search criteria
Username	User name of the user (provided by your service provider or system administrator). For example, eburns.
Name	• First name and last name of the user. For example, searching for the user with the Name of Smith returns users with the first name Smith and users with the last name Smith. • Both first and last name of the user. For example, the string John Smith returns users with the first name John and the last name Smith.The search string Smith, John, also returns the same users. • Name matching continuation. For example, entering a **y** returns all users starting with the letter **Y**.
Last name	Last name of the user.
First name	First name of the user.
Phone number	Telephone number of the user.

To access the global address book in Card view, perform the following steps.

1. Select **Global address book** from the **SEARCH** list.
2. Select a field to search on in the **FOR** list.
3. Enter your search criteria.

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n returns all contacts named John, Jon, and Jen.

Use quotation marks (") before and after a search string to specify an exact match.

4. Click **Search**.
5. To see the results of your search in Card view, click the **Card View** tab. The global address book displays the user or users in your global address book that

match the specified search criteria and includes a thumbnail picture of the user (if available).

Adding global address users to your personal address book

You can add users from the Global address book to your personal address book.

To select a user to add to your personal address book, perform the following steps.

1. Search for a user or users in the Global address book (Card view or List view).
2. Select the users you want to add by selecting the check box in the Select column.
3. Click the **Add** button to add the selected entries to your personal address book.

   The message **Adding address book entries** appears.
4. Select the **Add users as friends** check box if you want to designate the users as Friends.
5. Select a group from the **Add users to group** list to place the users in a group.

> **Note:** You receive an error message if you attempt to add users from your global address book that have the same **Last name** or **First name** as the **Nickname** field defined in your personal address book.

6. Click **OK** to save your changes.

   OR

   Click **Cancel** to return to the Global address book without saving your changes.

Using your call logs

Use the Personal Agent to view a list of the incoming and outgoing calls made by any device that you are logged on to.

Topics in this chapter include:

Viewing call logs

Your Inbox shows information about the caller’s name, the time and duration of the call, and caller address. The icons in the Type column of your inbox indicate whether you answered the call or not.

	indicates that the call was answered
	indicates that the call was not answered

Your Outbox shows information about the calls you have placed including the contact names, the time and duration of the calls, and their SIP addresses

To view your call logs, perform the following steps.

1 Click on the **Call logs** icon in the top navigation bar.

2 Click on the **Inbox** tab to view the calls you have received.

3 Click on the **Outbox** tab to view the names of people you called.

Note: Network-based call logs capture all missed calls whether the caller leaves a message or not.

Calling contacts in the call log

To call a contact from the call logs in your inbox or outbox, perform the following steps.

1 Click the **Call logs** icon in the top navigation bar.

2 Select the **Inbox** tab or the **Outbox** tab.

3 In the Call column, click the **Call** link beside the contact name you want to call. The Click to Call window appears.

4 In the Ring me at section, select a device from the **Device** list that you want to initiate the call from.

5 In the Ring me at section, enter a new number or registered SIP address in the **Phone # or Address** field if you do not want to use a preconfigured telephone number or registered SIP address to call the personal address book contact.

6 In the Make Call To section, enter a new number or registered SIP address in the **Phone # or Address** field if you do not want to use a preconfigured telephone number or registered SIP address to receive calls from the contact in your personal address book.

7 Click **Call**.

The system rings you. After you answer, the system makes a second call to the contact in your personal address book.

Saving contacts from the call log information

To save a contact from a call log to your personal address book, perform the following steps.

1 From your call log **Inbox** or **Outbox**, select the check box beside the name of the contact you want to save.

2 Click the **Add to directory** button.

The new contact appears in the Directory list.

Clearing call log information

To remove one or more entries in a call log, perform the following steps.

1 Select the check box beside the name of the contact you want to delete.

2 Click the **Delete entry** button.

3 Click **OK** to confirm the deletion.

The Call logs page refreshes and the entry no longer appears.

Tip: The **Select all** button under the call log selects every entry in the call log. The **Clear all** button clears all check marks beside entries in the call log.

Using your Personal Agent Routes Wizard

The Personal Agent Route wizard solves the problem of having different contact numbers for different communication devices. For example, office phone, home phone, or mobile. Use the Route wizard to build routes for all or specific incoming calls, or to block anonymous callers.

Note: Advanced screening must be enabled in your service package to use the Personal Agent routing capabilities. If you do not have routing capability, you have a default route configured that rings your telephone. If you subscribe to the voice mail service, unanswered calls route to your voicemail.

Topics in this chapter include:

Tip: Some features, such as Call forward, can be configured at the IP Phones and may override the routes that you configure with the Personal Agent.

Understanding Routing

Use routes to perform actions on your incoming calls and instant messages (IM) based on a set of conditions or exceptions. For example, you can create a route named Lunch that specifies a condition that calls received between 12:00 p.m. and 1:00 p.m. Monday through Friday are routed to your mobile phone first and then sent to your voice mail.

Tip: Routes apply to incoming calls in the order they are listed in the List of Routes window. Click Move up or Move down to change the order of how your incoming calls are treated.

Understanding the Personal Agent Route wizard

You use the Personal Agent Route wizard to create routes. The wizard presents step-by-step procedure that makes the task of creating rules and conditions for your incoming calls easier.

Use the Route wizard to:

- define routes to handle your incoming calls and instant messages
- specify how specific calls should be presented to you and on what devices in a simultaneous or sequential fashion
- specify personalized time blocks to further define your routes so that you are always reachable
- send an instant message when processing a ring list

Note: Your routes are bypassed when you place an emergency services call. Calls returned by emergency services personnel bypass your route list and ring at the location where the call originated.

Understanding the Route wizard steps

The following table describes the steps to follow when you create a route using the Personal Agent Route wizard.

Step	Specifies
Step 1: Initiate action	Main action or actions that initiates the processing of the route. There are two options to select from: **When a call is received** or **When an Instant Message** is received. Select the desired option by selecting the appropriate check box.
Step 2: Conditions	Call filtering conditions that are applied before the Actions in Step 3 can take place.
Step 3: Actions	The actions performed when a call is received. Actions are defined according to the services enabled in your service package.
Step 4: Exceptions	Exceptions to the filtering conditions defined in Step 2.
Step 5: Finish	Name of the route, and whether the route should be active and saved.

Navigating the Route wizard

The following describes the buttons in the Route wizard:

- **Next**—go to the next step.
- **Back**— return to the previous page to make changes.
- **Cancel**—cancel the creation or modification of the route.
- **Finish**—complete a step.
- **Save**—save the route.

Using the Personal Agent Route wizard

To start the Personal Agent Route wizard, perform the following.

1 Click the **Route** button on the Personal Agent Quick Start page or on the top navigation menu.

The first time you use the Route Wizard, the List of routes page appears. It shows a Default route selected that appears dimmed.

2 Click **New** to create a new route and launch the Route Wizard.

Step 1: Initiate action

In Step 1 of the Route Wizard, specify the main actions that initiate the processing of the route. Select "When a call is received" or "When an instant message is received". Click **Next** to go to "Step 2: Conditions" on page 70.

Step 2: Conditions

In Step 2 of the Route Wizard, select how you would like to filter calls received.

Click this link	To specify
From THESE PEOPLE in my Personal Address Book	Contacts from your personal address book that you want to include in the condition.
From THESE PEOPLE in my Global Address List	A user (or users) from the global address book that you want to include in the condition.
From THESE GROUPS in my Directory	The lists of contacts that you have organized into meaningful groups in your personal address book (for example, Friends, Family, Work, Projects) that you want to include in the condition.
From THESE TELEPHONE NUMBER(S)	The SIP Address or phone number of the person (or persons) calling you.
From anonymous	When a call is received from an unknown caller.
Received in SPECIFIC DAY/ TIME RANGE(S)	The days and hours of the day and week when you want the condition to apply. For more information about using the My Times feature to configure Day/ Time ranges, see "Configure My Times" on page 31.

Note: The global address book must be enabled by the system administrator before it can be used.

Specifying contacts from your personal address book

To specify a contact from your personal address book as a condition, perform the following steps.

1. Click the **From THESE PEOPLE** link. A new window appears.
2. In the **Search for** field, enter a search criteria to select a contact (or contacts) from your personal address book.
3. Click **Search**.
4. In the **Select** column, select a contact (or contacts).

   OR

   Click **Select all** to select all contacts to include in the condition.
5. Click **OK** to accept the selected contacts.

   OR

   Click **Cancel** to quit this window.
6. To edit the condition, click the link in the Route details window.
7. Continue to specify conditions.

   OR

   Click **Next** to go to the next step.

Specifying users from the global address book

To specify a users from the global address book as a condition, perform the following steps.

1. Click the **THESE PEOPLE** link.
2. In the **Search for** field, enter a search criteria to select users from the global address book.
3. Click **Search**.
4. Select a user (or group of users) from the **Select** column.

   Click **Select all** to select all users from the global address book.
5. Click **OK** to accept the selected users.

OR

Click **Cancel** to quit this window.

The Step 2. Conditions window appears with the global address conditions you specified listed in the Route details window.

6 To edit the condition, click the link in the Route details window.

7 Continue to specify conditions.

OR

Click **Next** to go to the next step.

Specifying groups

To specify a group as a condition, perform the following steps.

1 Click the **THESE GROUPS** link. A new windows appears.

2 Select the group (or groups) of people that you have organized into groups (such as Family, or Friends) as defined in your personal address book.

3 Click **Select all** to select all groups.

4 Click **OK** to accept the selected groups.

OR

Click **Cancel** to quit this window.

5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions.

OR

Click **Next** to go to the next step.

Specifying telephone numbers

To specify a phone number, a list of phone numbers, or a SIP Address of an incoming call as a condition, perform the following steps.

1 Click the **THESE TELEPHONE NUMBER(S)** link. A new window appears.

2 Enter a phone number (or a list of phone numbers) or a SIP address.

Add one number or SIP address on each line.

Click **OK** to accept the selected phone numbers or SIP addresses.

3. Click **Cancel** to quit this window.
4. To edit the condition, click the link in the Route details window.
5. Continue to specify conditions.

   OR

   Click **Next** to go to the next step.

Specifying a condition for an anonymous incoming call

You can configure conditions to handle incoming calls from an anonymous caller, perform the following steps.

- reject the incoming call without specifying a reason
- reject the call and specify a reason for the rejection
- send the call to voice mail (if enabled in your service package)
- send the call to a particular phone number

For more information about configuring the actions for an incoming anonymous call, see "Specifying an ordered list" on page 76, and "Specifying a rejection message" on page 78.

To specify an anonymous caller condition, perform the following steps.

1. In the Step 2: Conditions window, select the **Received in "Unavailable Busy"** option.
2. Continue to specify conditions.

   OR

   Click **Next** to go to the next step.

Specifying a condition for Unavailable Busy

You can configure conditions to handle incoming calls when your presence state is configured to Unavailable Busy:

- reject the incoming call without specifying a reason
- reject the call and specify a reason for the rejection
- send the call to voice mail (if enabled in your service package)
- send the call to a particular phone number

Tip: Presence Based Routing in your service package controls this parameter.

For more information about configuring the actions for an incoming calls while you are Unavailable Busy, see “Specifying an ordered list” on page 76 and “Specifying a rejection message” on page 78.

To specify an incoming call condition while Unavailable Busy, perform the following steps.

1. In Step 2: Conditions window, select the **From anonymous** check box.
2. Continue to specify conditions.

   OR

   Click **Next** to go to the next step.

Specifying day and time ranges

To specify the days and times ranges for the condition to apply, perform the following steps.

1. Click the **SPECIFIC DAY/TIME RANGE(S)** link. The My Times window appears.

Tip: For complete information about configuring My Times day and time ranges, see “Configure My Times” on page 31.

2. Select a previously defined day and time range (for example, My Office Hours).

View the graphic display of highlighted My Times.

3 Use the buttons to create new My Times day and time ranges or manage existing My Times ranges.

4 Click **Save** to accept selected My Times.

OR

Click **Cancel** to quit this window.

5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions.

OR

Click **Next** to go to the next step.

Step 3: Actions

In Step 3: Actions of the Route Wizard, specify what action or actions to perform on your incoming calls. For example, you can configure the following mutually exclusive actions:

- specify numbers to ring simultaneously or sequentially in ordered lists
- send a rejection message (Public Switched Telephone Network [PSTN] callers will receive a busy tone)
- send the request to email (PSTN callers will receive a busy tone)
- display a call window
- send the call to voice mail

Note: Actions are defined according to the service, like Advanced screening, enabled in your service package.

Specifying ordered lists

Use the Personal Agent to configure how and where you want your incoming calls to ring by using ordered lists. An ordered list is a group of SIP addresses or phone numbers associated with your user name (the name you register under) in your organization's or service provider's user database. An ordered list enables your incoming calls to follow you if you are not at your desk or primary device location.

Using ordered lists, you can specify the sequence of phone numbers to ring first, second, and so on. You can specify how many times the phone in each list should ring. Finally, you can specify whether or not the incoming call should go to voice mail (if you are subscribed to and provisioned for voice mail).

Tip: Your service package restricts the maximum number of ordered lists and phone numbers in each list.

Your calls route differently based on the identity of the caller. Based on your ordered lists, incoming calls can be forwarded or routed to any number of devices or clients. You can send a Web page in response to an incoming call, as well as send a response in the form of an instant message.

Specifying an ordered list

To specify an ordered list for your incoming calls, perform the following steps.

1 In the Step 3: Actions window, select Ring my devices in the following ordered list.

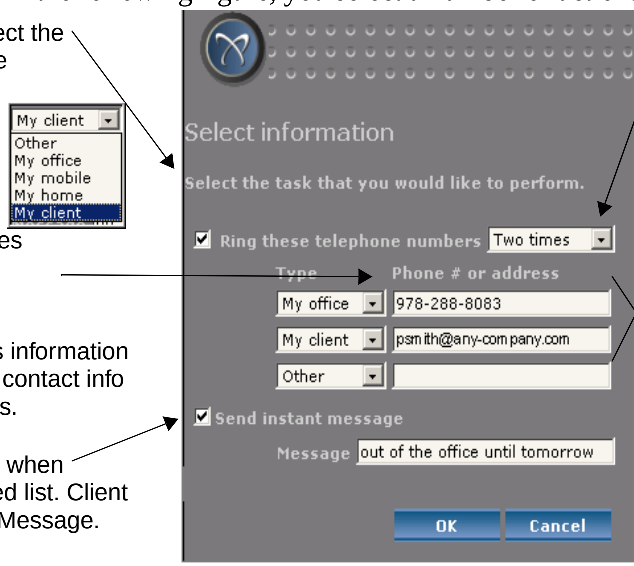
Note: Your service package controls the options available in this window.

Note: The number of ordered lists grows depending on the Advanced Screening service parameters in your service package. If you have Voice mail enabled in your service package, the option for "If no answer then send to voicemail" appears when creating an ordered list.

Note: If you do not have Voice mail enabled, the Personal Agent Route Wizard does not provide the ability to create a route that terminates a call to voice mail. However, if Voicemail is enabled, and you do not have Advanced Screening in your service package, then you only see the default route.

2 Select the first option in the list. In the Ring THESE NUMBERS first in my list, click the link to specify a list of numbers that are called when the incoming call reaches a ring list.

In the following figure, you select a number of actions for an incoming call.



3 Select the actions for the incoming call.

4 Click **OK** to return to the Actions page.

5 Continue specifying ordered lists. To edit the ordered list, click the links in the Route details window.

6 When you are finished specifying conditions, click **Finish** to name your route and save your route details.

7 If you wish to specify exceptions, click **Next**.

Specifying a rejection message

To specify a reject message, perform the following steps.

1. In the Step 3: Actions window, select the **Rejection** option.
2. Click the **MESSAGE** link to compose a message to display when an incoming call from an anonymous caller activates the route. The Select rejection message window appears.
3. To compose a rejection message, click **New**. A dialog box opens.
4. Type the text for your message in the dialog box and click **OK**. The rejection message appears in the Select rejection message window.
5. Select the rejection message to activate it.
6. Click **OK** to return to the Route wizard. Your reject reason appears in the Route details window.
7. To edit the message, click the **Rejection** link in the Route details window.
8. Continue to specify conditions.

   OR

   Click **Next** to go to the next step.

Specifying an e-mail request

To specify an email request when you receive an incoming call, select the option to request an email (PSTN callers will receive a busy tone).

With this option, the system requests that callers send e-mail to the e-mail address of the user that they called. The phone does not ring.

Step 4: Exceptions

In Step 4: Exceptions of the route wizard, specify exceptions to the conditions that you specified in Step 2: Conditions. The method for specifying exceptions is consistent with the method for specifying conditions. For more information about specifying conditions, see "Step 2: Conditions" on page 70.

The following links are available as exceptions:

- From THESE PEOPLE in my Personal Address Book
- From THESE PEOPLE in my Global Address Book
- From THESE GROUPS in my directory
- From THESE TELEPHONE NUMBER(S)
- From anonymous
- Received in “Unavailable Busy”

Tip: The Received in **SPECIFIC DAY/TIME RANGE(S)** link is not available as an exception.

If you have Presence based Routing enabled in your service package, you see the Received from "Unavailable Busy" parameter.

1. To edit the condition, click the link in the Route details window.
2. To go to the next step, click **Next**.

Step 5: Finish

Before you complete the final step in configuring your route, Nortel recommends that you view all the route details to ensure that you are satisfied with the conditions, actions, and exceptions.

If the route is complete, name the route and configure the route to active.

1. Specify a unique name for the route in the text box provided.
2. Click the **Make this route active** check box.
3. Click **Save** to save the route information and activate the route.

   Incoming calls are now processed according to your active route or routes.

Address Book Search Criteria

Topics in this chapter include:

- "Personal address book search criteria" on page 82
- "Global Address Book search criteria" on page 84

Note: The phone number field is case-sensitive in both the personal and global address books. All other fields are not case-sensitive.

Personal address book search criteria

The following table provides a detailed description of the Personal Address Book search criteria.

Field	Example search criteria	Results
Nickname	*nick	Returns entries that end with nick and start with anything (appends *).
	nick	Same as *nick.
	nick	Finds entries that starts with nick (appends *).
	nick*	Same as nick.
Name	name	Returns anything that starts with first name and starts with last name (appends * to both).
	name*	Same as name.
	*name	Returns entries that have first name or last name that contains name (appends * at end).
	name	Same as *name.
	firstname lastname	Returns anything starting with last name and starting with first name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*, *firstname	Returns entries starting with last name and containing first name in the first name (appends * to the firstname).
	lastname*, *firstname*	Same as "lastname*, *firstname".

Field	Example search criteria	Results
	*lastname, firstname	Returns entries containing last name and starting with first name (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name (	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.
SIP Address	*sipAddress	Returns entries containing sipAddress.
	sipAddress*	Same as *sipAddress.
	sipAddress*	Returns entries starting with sipAddress.
	sipAddress	Same as sipAddress*.
Friends	Rules similar to the last name and first name search apply to this search criteria, but the search is carried out with the condition that the entry being searched for is a Friend.	
Group	*groupName	Returns entries belonging to group containing groupName in the name of the group (appends *).
	groupName	Same as *groupName.
	groupName	Finds entries belonging to the group starting with groupName (appends *).
	groupName*	Same as groupName.
no criteria	—	Returns all the entries in the address book.

Global Address Book search criteria

The following table provides a detailed description of the Global Address Book search criteria.

Field	Example search criteria	Results
Username	user@domain*	Returns entries that have a user name that starts with user@domain.
	user@domain	Same as user@domain*.
	user*	Returns entries which have username starting with user.
	user	Returns entries that have user in the username.
Name	name	Returns anything with first name or last name starting with name (appends * at end).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.
	"name"	Returns all users that have the last name or first name that match the search criteria within the quotation marks.

Field	Example search criteria	Results
Name	firstname lastname	Returns anything starting with first name and starting with last name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	Same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.

Index

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Multimedia Communication Portfolio

Nortel AS 5300

Personal Agent User Guide

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