OpenWorX BUSINESS ATTENDANT SYSTEM

USER GUIDE

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Chapter 1   Introduction

The *Business Attendant System User Guide* provides the information you need to work with the Business Attendant System Client application.

Chapter Topics

What is the Business Attendant System?

The Business Attendant System is an OpenWorX application that brings the basic functionality of the business attendant console to the desktop of a Windows-based workstation. The Business Attendant System uses the NEC Open Applications Interface (OAI) to communicate with the NEAX 2400 or NEAX 2000. When connected to the NEC PBX, OAI shows call processing information on the attendant screen and allows the attendants to issue call processing requests with their keyboard or mouse. The Business Attendant System extends the attendant's capabilities with database-driven console features and loops that provide powerful call handling and directory assistance services.

The Business Attendant System consists of the following components:

• The **Business Attendant System—Client** application allows the attendants to process calls with a graphical user interface. The Business Attendant System—Client is referred to in this document as the Business Attendant Client.

• The **Business Attendant System—Administrator** application is used by administrators to configure the Business Attendant System components. The Business Attendant System—Administrator application is referred to in this document as the Business Attendant Administrator.

• The **Business Attendant System—Server** provides connectivity between the Business Attendant System and the PBX. The Business Attendant System—Server is referred to in this document as the Business Attendant Server.

Refer to the *Business Attendant System Administration Guide* for information about the Business Attendant Administrator application and refer to the *Business Attendant System Installation Guide* for information about the installing the Business Attendant System software.

How This Guide is Organized

Chapter 1 - Introduction

This chapter outlines how to use the manual, including the actual manual organization, chapter layout, keyboard conventions, function keys, and basic terminology for the Business Attendant System.

Chapter 2 - Getting Started

This chapter gives a detailed overview of the Business Attendant System and its functions and features, including the hardware and software requirements, screen format, and menu descriptions.

Chapter 3 - Processing Calls

This chapter describes how to perform call processing procedures in the Business Attendant Client application.

Chapter 4 - Configuring the User Options

This chapter shows you how to customize the Business Attendant Client to meet your preferences and change your password.

Chapter 5 - Working With the Directory

This chapter describes how to use the Business Attendant Client directories, including how to add, modify, and delete individual directory entries.

Chapter 6 - Using the Wave File Recording Features

This chapter shows you how to work with recorded greetings and recorded calls in the Business Attendant Client.

Appendix A - Error Messages

This appendix describes the error messages that can be encountered when using the Business Attendant System Client application, including the potential causes of the error, and suggested solutions to resolve the error.

Using This Guide

This guide is designed to make the attendant station easy to understand and simple to use. There are examples of the screens you will see in the Business Attendant Client, with step-by-step instructions for the procedures you need to perform.

Note: *The screens and procedures shown in this guide represent the typical installation of the Business Attendant System. Remember that the Business Attendant System can be customized for each site, so the screens shown in this guide may not always reflect what displays on your attendant station.*

Document Conventions

This guide uses the following conventions:

Table 1-1 Document Conventions

When you see	It means	Example
Boldfaced	Field names	Enter the ID in the **Name** field. Click **Save**.
	Button names	Select the names from the
	Drop-down list names	**Employees** drop-down list.
		Enter **login admin** at the
	Commands, keywords, or other user input	command prompt.
Capitalized	Menu names	From the File menu, choose **Save**.
	Window names	From the Directory window, select **Edit > Modify**.
	Dialog box names	Click **OK** to save and close the Account Properties dialog box.
Menu > Submenu (boldfaced font)	Menu paths	Select **Edit > Modify**.
CTRL+S CTRL+Shift+S	Shortcut keys	Press **CTRL+S** to save your changes.
F2	Function keys	Press **F1** to access the online help.
Click	Click the left mouse button	Click **OK** to save your changes.
Right-click	Click the right mouse button	Right-click and select **Delete** from the shortcut menu.

Procedures

Step-by-step instructions are numbered. Simply follow the numbered steps to perform the desired function.

Sometimes in step-by-step instructions, you will have more than one option to complete the task. These options are presented in bulleted lists, as shown in the following example:

1. Do one of the following to add a field to the Employee directory.

   - Select the desired field from the **Employee** field and click **Add**.

   - Double-click the desired field from the **Employee** field.

   - To select all of the available fields, click **Add all**.

Keyboard Conventions

The general keys used throughout Business Attendant System are:

Table 1-2 General Key Conventions

Key	Action
Arrow keys	Scrolls among options within a menu or field.
Backspace	Erases the character to the left of the cursor.
Enter	Accepts a selection or field entry. Also will transfer to an entered number or selected entry in the directory.
ESC	Exits the current screen or action and moves to the previous screen or action.
Function keys	Provide direct access to the different tasks that an attendant can perform. Refer to "Summary of Shortcut and Function Keys" on page 5 for a brief description of the function keys and their assigned functions.
Tab	Moves forward through fields and options.
Shift+Tab	Moves backward through fields and options.
CTRL+Tab	Moves forward through tabs.
CTRL+Shift+Tab	Moves backward through tabs.
Space Bar	Answers an incoming call or answers a held call when there are no more queued calls.

Summary of Shortcut and Function Keys

Use the following keys in the Line Status window:

Table 1-3 Business Attendant System Shortcut and Function Keys

To Choose	Shortcut Key	Function Key
Answer	ALT+A	None
Announce Call	ALT+L	CTRL+F7
Dial	ALT+D	None
Hold	ALT+H	F5
Unhold	ALT+U	F3
Blind Transfer	ALT+B	F6
Screened Transfer	ALT+S	F7
Transfer to Voice Mail	ALT+X	CTRL+F6
Conference	ALT+F	F9
Toggle Source/Destination	ALT+S	F10
Cancel	ALT+N	F2
Release	ALT+R	F12
Busy Camp	ALT+P	F11
Override	ALT+V	CTRL+F4
Park	ALT+K	F8
Join with Parked Call	ALT+J	CTRL+ALT+F8
Retrieve Parked Call	ALT+E	CTRL+F8
Save Recording	None	CTRL+F9
Open the Directory window	CTRL+R	None
Open the Speed Dials window	CTRL+P	None

Business Attendant System Terminology

Abandoned Parked Caller
A parked caller who chooses not to wait for the paged caller to respond and hangs up.

ANI Number
Automatic Number Identification. Generally, the ANI Number lists the telephone number from which the call is placed and the name associated with that number, if available.

Announce Call
Allows the attendant to place the caller on hold while the attendant announces the transfer to the destination party without the destination party answering the phone.

Blind Transfer
Allows the attendant to transfer a connected caller directly to the destination party, and releases the attendant from the call. Also known as a Direct Transfer.

Busy Camp
Allows the caller to wait for connection to a called party whose line is busy. Depending on the version of the PBX, the waiting caller is automatically connected when the busy party releases from their call or presses the Answer button on the D^{term} after hearing the call waiting tone.

Conference
Connects two callers and an attendant into one phone conversation.

Destination
The extension where a call terminates or the party being called.

DID Number
Direct Inward Dialing number. Allows inward-directed calls to a PBX to reach a specific PBX extension without human intervention. When an incoming call arrives on a Direct Inward Dial Number that is assigned in the PBX as a virtual number, this virtual number is forwarded to the main monitored number used for the operator, usually "0". This feature is often used in a multi-tenant environment where the operator answers calls for multiple businesses.

Do-not-disturb
Blocks an extension's incoming calls so that callers will either hear a reorder tone or will be routed according to the extension's call forwarding pattern when they dial that extension.

Forward
Allows the attendant to direct incoming calls from an extension to a different location. Available Forwarding settings are forward all incoming calls, forward incoming calls only when the extension is busy, or forward incoming calls only when there is no answer at that extension.

Health Check
Allows the Business Attendant Server to make sure that the connection between the Business Attendant Server and a Business Attendant Client workstation is still active by monitoring the amount of time between heartbeats from the Server to the clients.

Hold Time
A timer setting that specifies the amount of time the Business Attendant System allows a caller to remain on hold before reminding the attendant that the caller is still on hold.

Link Destination Address
The IP address of the PBX running OAI.

Link Port
The port the Business Attendant Server uses to communicate with the PBX.

Link Source Address
Specifies the Ethernet card to use if more than one is installed.

Monitored Numbers
Used by the Business Attendant System to queue and route calls. The different types of monitored numbers and their purposes are:

- **Hold Monitored Number**
  Number used within the system only for holding calls.

- **Incoming Monitored Number**
  Number used to dial the Business Attendant System attendant internally.

- **Priority Monitored Number**
  Number given to VIPs and emergency listings that routes these calls to the Priority queue.

- **Vacant Monitored Number**
  Number used to route external calls that were placed to nonexistent stations to the specified queue.

Orbit Numbers
Comprise the pool of meet-me paging numbers used for joining paged people with their parked parties.

Override
Allows the attendant to interrupt an ongoing call to conference with both parties in that call, or talk with one party while the other party is on hold.

Park Recall
A timer setting that specifies the amount of time the Business Attendant System allows a caller to remain parked waiting to be joined to another party before sending the call to the Park T.O. queue.

Parked Caller
A caller who has been put on hold in a global area while waiting for a paged party to respond by either dialing the announced meet-me paging orbit number or by calling any attendant, who will manually join the call.

Prime Line
Corresponds with the physical phone used by an attendant to process calls.

Retrieved Parked Caller
A Retrieved Parked Caller is a parked caller who is connected to an attendant.

Screened Transfer
Allows the attendant to place the caller on consultation hold, then call the destination party, announce the transfer, and release from the call. Also known as an Announced Transfer.

Server Port
The port used by all Business Attendant Client workstations to communicate with the Business Attendant Server.

Source
The extension where a call originates or the party placing the call.

Transfer to Voice Mail
Automatically routes the source caller to the destination party's voice mail box.

Chapter 2 Getting Started

Overview

The Business Attendant System brings the functionality of an attendant console to the PC. The Business Attendant Client gives you the ability to handle calls quickly and efficiently with features that include call parking, page retrieval, and internal and external directory assistance.

Chapter Topics

- About the Business Attendant Client Windows
- Line Status Window
- Directory Window
- Speed Dials Window
- Running the Business Attendant Client Application

About the Business Attendant Client Windows

The Business Attendant Client application is composed of the following three windows:

Line Status
Contains all of the call processing functions. This is the main window of the Business Attendant System.

Speed Dials
Contains speed dial buttons which you can set up to dial frequently called numbers.

Directory
Contains the internal and external phone directories.

The Line Status window is described in the following section. For more information about the Directory window, see . For more information about the Speed Dials window, see .

Line Status Window

The Line Status window (Figure 2-1) is the main window of the Business Attendant Client and is used for all of the call processing functions. This window displays the status of each loop as well as the activity that is taking place on those loops. The tabs, buttons, and menus on the Line Status window are described in the following sections.

Menu Bar

Command
and
Queues Tabs

Loop Buttons

Source and
Destination
Areas

Status Line
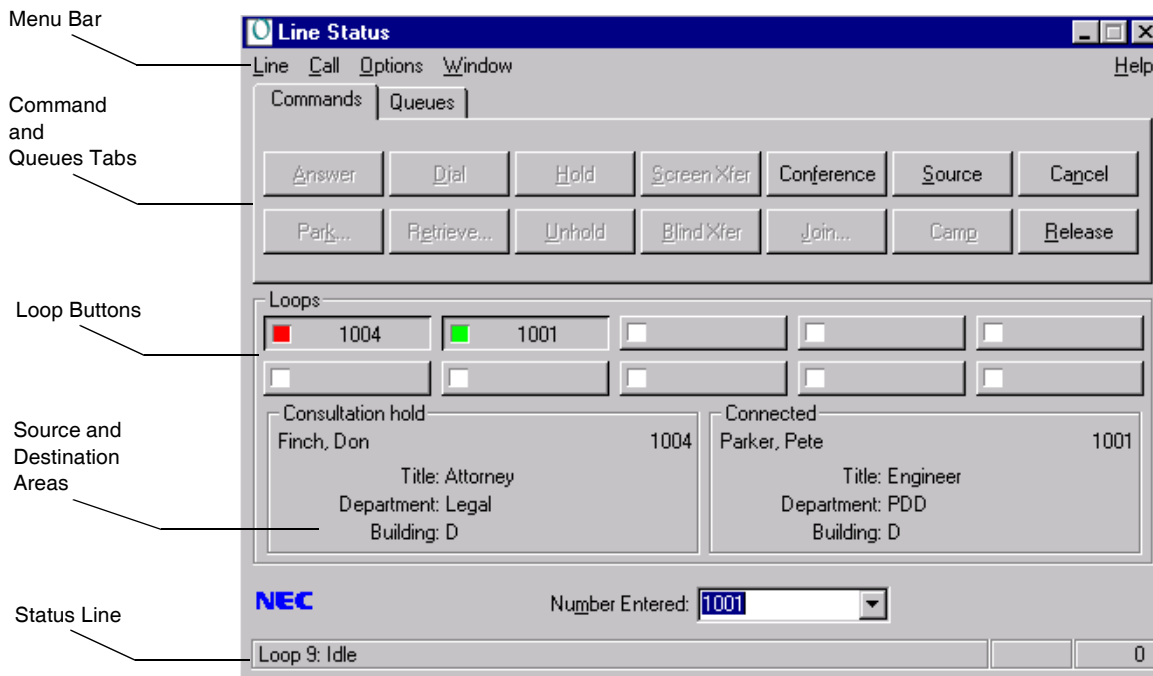
Figure 2-1   Line Status Window

Menus

The Line Status window (Figure 2-1) has five pull-down menus which allow you to configure and use the Business Attendant Client: Line, Call, Options, Window, and Help.

Line Menu

Forward
Directs incoming calls for an extension to a different location. You can forward all calls, forward calls when busy, or forward when no answer.

Set Do-not-disturb
Blocks an extension's incoming calls so that callers will either hear a reorder tone or will be routed according to the extension's call forwarding pattern when they dial that extension.

Exit
Closes the Business Attendant Client application.

Call Menu

Answer
Selects the next call waiting in sequence from the waiting pool (i.e., the first attendant-specific call, a priority call, or the next call in line in the global pool). You can also perform this operation with the **Answer** command button, by pressing **ALT+A**, or by pressing the **space bar**.

Dial
Initiates an outgoing call to the number in the Number Entered field. You can also perform this operation with the **Dial** command button, by pressing **ALT+D**, or by pressing **Enter**.

Hold
Places the current call on hold. This option is only enabled when the loop is in a state in which it can be placed on hold. You can also perform this operation with the **Hold** command button, by pressing **ALT+H**, or by pressing **F5**.

Unhold
Retrieves a call previously placed on hold. You can also perform this operation with the **Unhold** command button, by pressing **ALT+U**, or by pressing **F3**.

Blind Transfer
Initiates a direct transfer to the number in the Number Entered field. The Blind Transfer command connects the caller to the destination party without the attendant announcing the transfer. You can also perform this operation with the **Blind Xfer** command button, by pressing **ALT+B**, or by pressing **F6**.

Screened Transfer
Initiates a screened transfer to the number in the Number Entered field. The Screened Transfer command places the caller on consultation hold in the Source Caller window while the attendant connects to the destination party, announces the call, then releases the call to complete the transfer. You can also perform this operation with the **Screen Xfer** command button, by pressing **ALT+S**, or by pressing **F7**.

Conference
Conferences a screened transfer call. This option is only enabled when the loop is in a state in which it can be conferenced or when a conference can be completed. You can also complete this operation with the **Conference** command button, by pressing **ALT+F**, or by pressing **F9**.

Toggle source and destination
Switches between source and destination callers prior to completing a conference call or transfer. This option is only enabled when the current call is in the process of transferring or conferencing. You can also perform this operation with the **Source/Dest** command button, by pressing **ALT+S**, or by pressing **F10**.

Save Recording
Writes the selected conversation recording to a specified folder for permanent retrieval and allows the operator to add a note associated with the recorded wave file.

Cancel
Stops a transaction. Use this command to disconnect from a two-party call, such as when you place an outbound call and want to disconnect, or answer a call and want to disconnect without transferring. If the destination party does not answer during a screened transfer or you hear a busy tone after a screened transfer to an outside line, use this command during a screened transfer to rejoin with the source caller. You can also perform this operation with the **Cancel** command button, by pressing **ALT+N**, or by pressing **F2**.

Release
Releases the attendant workstation from the current Source and Destination connection to receive new calls. You can also perform this operation with the **Release** command button, by pressing **ALT+R**, or by pressing **F12**.

Busy Camp
Allows the caller to wait for connection to a called party whose line is busy. Depending on the version of the PBX, the waiting caller is automatically connected when the busy party releases from their call or presses the **Answer** button on the D^{term} after hearing the call waiting tone. You can also perform this operation with the **Camp** command button, by pressing **ALT+P**, or by pressing **F11**.

Override
Allows the attendant to interrupt an ongoing call to speak with one party, placing the other party on consultation hold, or join in conference with both parties in that call. You can also perform this operation with the **Override** command button, by pressing **CTRL+F4** or by pressing **ALT+V**.

Park
Places a caller on an announcement trunk or a monitored number hearing music until they can be joined with a paged party. You can also perform this operation with the **Park** command button, by pressing **ALT+K**, or by pressing **F8**.

Join With Parked Call
Joins a parked caller to the current source caller and releases the attendant. You can also perform this operation with the **Join** command button, by pressing **ALT+J**, or by pressing **CTRL+ALT+F8**.

Retrieve Parked Call
Connects the attendant to the parked caller if the destination caller or paged party doesn't respond. You can also perform this operation with the **Retrieve** command button, by pressing **ALT+E**, by pressing **CTRL+F8**.

Announce Call
Allows the attendant to place the caller on hold while the attendant announces the transfer to the destination party without the destination party answering the phone. You can also perform this operation by pressing **ALT+L** or by pressing **CTRL+F7**.

Transfer to Voice Mail
Automatically routes the source caller to the destination party's voice mail box. You can also perform this operation by pressing **ALT+X** or by pressing **CTRL+F6.**

Options Menu

Preferences
Displays the Business Attendant Client Options dialog box where you can change the user preferences. The options configured in this dialog box are saved for each user, so each user can personalize their speed dials and screen layouts without affecting other users.

Save screen layout
Saves the current layout of the Business Attendant Client windows. The next time the application is started for this user, the layout will be restored to the last saved layout. You can also configure the Business Attendant Client to automatically save the screen layout every time you exit.

Change Password
Displays a dialog box that enables you to change the password for the current user.

Recording greeting
Displays the Record Greeting dialog box where you can record greeting messages for incoming internal and external calls and save them as a wave files.

Play back
Displays the Play Back dialog box where you can play back recorded phone conversations and greeting messages.

Window Menu

Directory
Displays the Directory window.

Speed Dials
Displays the Speed Dials window.

Help Menu

Contents
Displays the help file contents page.

About
Displays version information for the Business Attendant Client.

Commands Tab   The Commands tab contains the Command buttons, the Loop buttons, the Source and Destination areas, and the Number Entered field. (See "Command Buttons" on page 14 and "Loops" on page 14 for more information.)

Command Buttons

Figure 2-2   Command Buttons

Command buttons (Figure 2-2) are shortcuts to menu functions that help you process phone calls. You can access these buttons by clicking the button, or by holding down the **Alt** key while pressing the character underlined on the button. (For example, to access the **Answer** button, press the **Alt** key while pressing the letter **A** on the keyboard.) If a command is not valid for that particular call state, the command button will be unavailable. (See "Menus" on page 10 for more information.)

Attendants can select which command buttons are displayed on the Line Status window for that specified attendant login name. (See "Selecting the Displayed Command Buttons" on page 60 for more information.)

Loops

Call Status Indicator

Figure 2-3   Loop Buttons

Loops represent calls being handled by an attendant. A loop shows the presence of an incoming call that has been answered or an outgoing call that has been placed by an attendant. When an incoming call is answered, the Business Attendant System automatically places it on the next available loop in sequential order with a green light.

The Loop buttons (Figure 2-3) allow you to work with and display information about the ten loops available for call processing. When selected, the Loop Number, Caller Number, and Call Status for that loop appear in the Status Line. Moving the mouse pointer over a loop shows the party connected or held along with the amount of time that the caller has been on that loop in the Status Line. (See "Status Line" on page 18 for more information.)

The Loop Number identifies the selected loop, ranging from 1 to 10. The Caller Number is the extension number or Route/Trunk number from which the currently connected caller originates. For incoming calls from external sources and for outgoing calls to external sources, the route and trunk number displays.

The Call Status Indicator shows the status of the caller. Green indicates an active call, while red indicates a call that is on hold. Blinking red signifies a party that has been held beyond the configured amount of time. (Refer to the *Business Attendant Administration Guide* for more information.)

To select a loop, click the desired loop button or use the following keyboard sequence.

Table 2-1 Loop Button Shortcut Keys

To Select	Press
Loop 1	SHIFT+F1
Loop 2	SHIFT+F2
Loop 3	SHIFT+F3
Loop 4	SHIFT+F4
Loop 5	SHIFT+F5
Loop 6	SHIFT+F6
Loop 7	SHIFT+F7
Loop 8	SHIFT+F8
Loop 9	SHIFT+F9
Loop 10	SHIFT+F10

Queues Tab

The Queues tab contains the Queue buttons, the Loop buttons, the Source and Destination areas, and the Number Entered field. (See "Queues" on page 16 for more information.)

Queues
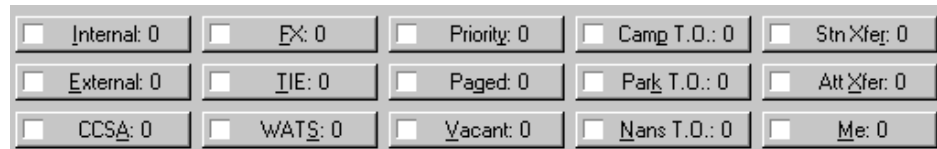
Figure 2-4   Queue Buttons

The Queue buttons (Figure 2-4) show the current incoming calls according to their origination, such as Internal and CCSA. Each incoming call label is followed by the number of calls of this type waiting for the attendants. This number increases by one with every incoming call of its type and decreases by one every time an attendant answers one of this type or a caller abandons before the call is answered.

You can configure the Business Attendant Client workstation to sound a beep when an incoming call is placed in the queue. (See "Configuring the User Options" on page 51 for more information.)

Calls are placed in the queue in first-come, first-served order, but different queues are assigned different priorities, such as Priority or Me. To answer the next call, press the space bar. To answer a particular type of call, select the Queue Button or press the shortcut key for the desired queue. Table 2-2, "Queue Types and Shortcut Keys," on page 16 describes each incoming call type and the shortcut key for each queue. Each call type is routed to the global attendant pool unless otherwise noted.

Table 2-2 Queue Types and Shortcut Keys

Type	Description	Shortcut Key
Internal	Incoming from an internal source	ALT+I
External	Incoming from a central office switch	ALT+E
CCSA	Incoming call from the Common Control Switching Arrangement network	ALT+A
FX	Incoming call via a foreign exchange trunk	ALT+F
TIE	Incoming call from a remote station	ALT+T
WATS	Incoming call from across a Wide Area Telecommunications Service	ALT+S
Priority	Incoming call to a monitored number designated with a higher priority, given to select individuals	ALT+Y
Paged	Incoming call to the Parked Orbit number in response to a page; a call is routed to this queue when the parked call has abandoned and is no longer waiting	ALT+G

Table 2-2 Queue Types and Shortcut Keys

Type	Description	Shortcut Key
Vacant	A call has terminated at an unassigned station number or vacant level	ALT+V
Park T.O.	Caller has been parked beyond the configured amount of time. (Refer to the *Business Attendant System Administration Guide* for more information about this timer setting.)	ALT+K
Nans T.O.	Direct transferred call to an internal extension was not answered within the configured amount of time. (Refer to the *Business Attendant System Administration Guide* for more information about this timer setting.)	ALT+N
Stn Xfer	Station-to-Attendant transfer; the station issuing the transfer can be voice mail or an integrated voice response unit (IVR) as well as an employee station, etc.	ALT+R
Att Xfer	Attendant-to-Attendant transfer, routed only to the specific target attendant	ALT+X
Me	Internal or external call routed to the attendant's personal number that moves with them if they log on to a different Business Attendant Client workstation	ALT+M

Source and Destination Areas
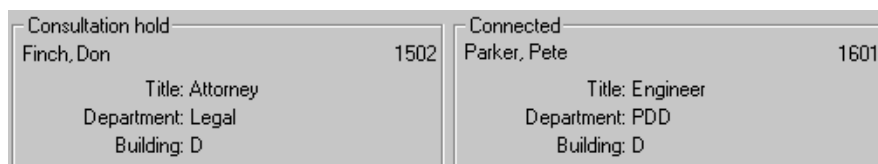
Figure 2-5   Source and Destination Area

The Source and Destination areas (Figure 2-5) on the Line Status window are used to show who is connected to the active loop. The left window shows the status of the source caller, the person who called in or was called first. The right window shows the status of the destination caller (i.e., the extension or phone number being called during transfers or conferences). You can display up to three lines of information about the source and destination in these areas of the Line Status window. For information on how to change the source information that is displayed, see "Displaying the Call Source/Destination Information" on page 61.

Number Entered Field

Number Entered: [▼]

Figure 2-6   Number Entered Field

The Number Entered field (Figure 2-6) is where you enter extension numbers or phone numbers for processing calls. If you enter a non-numeric character (except # or *) in this field, the Directory window displays, and the directory is searched for matching characters. The directory can be configured to search based on various sort criteria. (See "Changing the Default Sort Order" on page 69 for more information.)

Status Line

Loop 1: Hold Ann 1504   0:28   0

Current Call
Status   Timer   Number of
                                                                              Queued Calls or
                                                                              Off-line Status
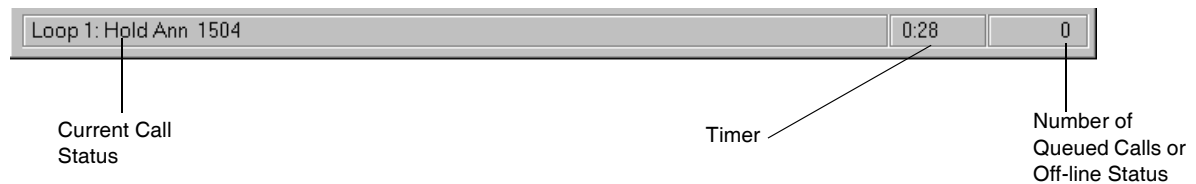
Figure 2-7   Status Line

The Status Line (Figure 2-7) displays information about a loop. Moving the mouse pointer over a Loop button displays the status of that loop in the Status Line, including the caller information and a timer showing how long (in minutes and seconds) the loop has been in its current state. For example, if you move the mouse pointer over the Loop button of a loop that is on hold, the Status Line indicates who is on hold and the timer indicates how long this person has been on hold. Additionally, the number of calls waiting in the queue appears on the right side of the Status Line when the Business Attendant Server is on-line. When the Business Attendant Server is down, the number of queued calls changes to Off-line.

Directory Window

The Directory window (Figure 2-8) contains the internal and external phone directories. Double-click an entry in the directory, press **Enter**, or drag it to the Line Status window to place a call or dial a transfer destination. You can also use the Directory window to define the speed dial buttons on the Speed Dials window. (See "Adding or Modifying a Speed Dial Number" on page 53 for more information.)
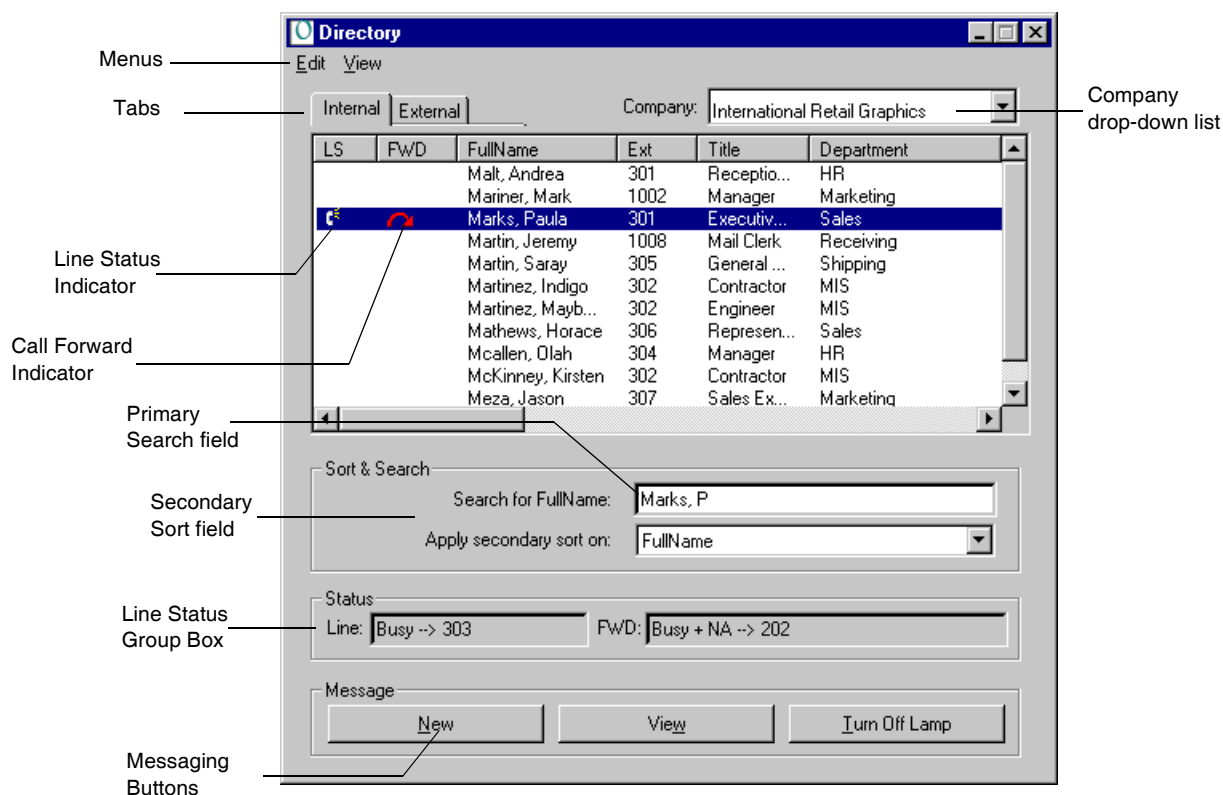
Figure 2-8   Directory window

Menus

The Directory window contains two menus, Edit and View. These drop-down menus give you access to directory configuration options that allow you to administer or view the directory entries.

Internal/External Tabs

Clicking on these tabs will allow you to view the external directory or the internal directory, depending on which directory is displayed.

Line Status Indicator

If the Line Status Indicator field is configured to display in the directory, a telephone or a question mark can be displayed to indicate the status of that station when a directory entry is highlighted. The telephone icon indicates that the caller is on the line. The question mark icon indicates that the station is off-hook and not connected to another party. No icon present indicates that the extension is idle. The Line field in the Line Status group box also shows the line status. (See "Configuring the Fields Displayed in the Directory Window" on page 64 for more information.)

Call Forward Indicator

If the Call Forward Indicator field is configured to display in the directory, this icon indicates that this line is forwarded when a directory entry is highlighted. A red arrow indicates that calls to that line will be forwarded. A white arrow indicates that calls to that line may or may not be forwarded, depending on the call forwarding patterns in effect. No icon present indicates that calls directed to that extension will not be forwarded. The **FWD** field in the Line Status group box also shows the line's forward status. (See "Configuring the Fields Displayed in the Directory Window" on page 64 for more information.)

Search Fields

Use these fields to find an individual's number in the phone directory according to the search criteria you enter. Enter letters or digits in the **Primary search** field (depending on the selected sort option) and the first matching entry in the directory will be selected. If needed, enter letters or digits in the **Secondary sort** field to sort on an alternate field when the primary search field has identical entries.

Line Status Group Box

These fields show detailed information about the line settings for the selected line, such as the call forwarding patterns and the current status of that line.

> **Note:** *If the Line Status Group box shows, Busy → Private, the VIP check box on the Contact tab of the Add or Modify Employee dialog box has been selected for that person. (See "Working With the Directory" on page 67 for more information.)*

New Message Button

This button displays the New Message dialog box, where you can edit and send a new message to the employee currently selected in the employee directory.

View Message Button

This button displays the View Messages dialog box, where you can view all of the messages for the employee currently selected in the employee directory.

Turn Off Lamp Button

This button displays the Turn Off Message Lamp dialog box, where you can turn off the message indicator lamp of the specified telephone.

Speed Dials Window

The Speed Dials window (Figure 2-9) contains the speed dial buttons you can use to quickly dial another party. To associate a number with a speed dial button, drag an entry from the Directory window onto a speed dial button on the Speed Dials window. You can also define a speed dial button from General tab on the Business Attendant Client Options dialog box (Figure 4-1) or by right-clicking on a speed dial button and choosing **Properties** from the shortcut menu. (See "Configuring the Speed Dial Keys" on page 53 for more information.)

Menu
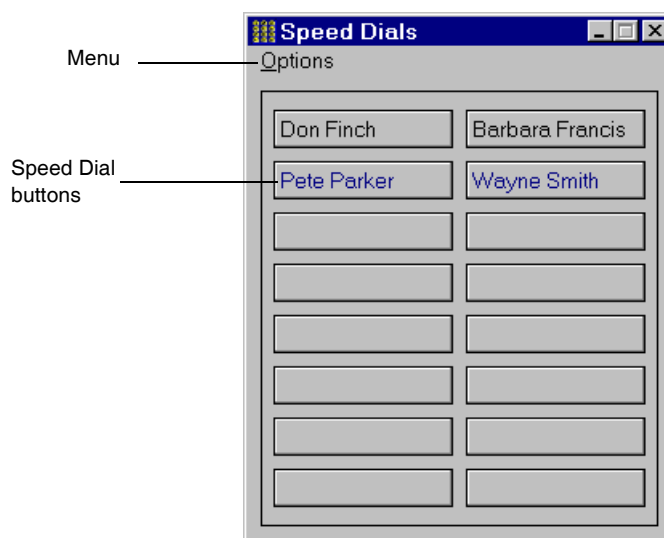
Speed Dial buttons

Figure 2-9   Speed Dials window

Options Menu

The Speed Dials window contains the Options menu. From the Options menu, you can change the number of speed dial buttons displayed and clear all the speed dial buttons.

Speed Dial Buttons

Clicking on these buttons dials the configured number. Right-clicking on a speed dial button opens a shortcut menu, where you can configure the properties of that speed dial, as well as dial, forward, or set do-not-disturb for the extension associated with that speed dial.

About Monitoring Speed Dials

The Speed Dials window can be configured to monitor the status of the internal speed dial numbers, if the OpenWorX administrator enabled this option in the Business Attendant Administrator. Speed dial number monitoring allows attendants to check the status of an internal extension at a glance. If a number is monitored, the speed dial button associated with that number will flash when that number is dialed and turn red when connected. Speed dial monitoring is configured in the Client Setup options in the Business Attendant Administrator application. (Refer to the *Business Attendant Administration Guide* for more information.)

Running the Business Attendant Client Application

Each time you work with the Business Attendant Client, log in with your user ID and password. When you have finished using the Business Attendant Client, you must exit (or quit) the application completely.

Logging In To the Application:

1. From the workstation desktop, click the **Start** button, then select **Programs > NEC OpenWorX > Business Attendant Client** or select the Program Folder specified during the BAS Client installation. The Business Attendant Client Login dialog box displays (Figure 2-10).
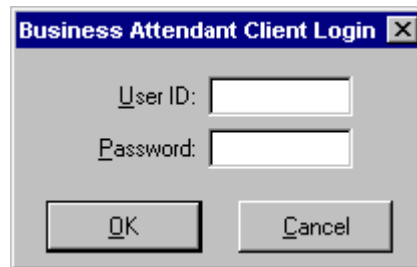
Figure 2-10   Login dialog box

2. Enter your User ID in the **User ID** field.

   Note: *An account for this User ID must have been set up by your BAS Administrator. (Refer to the Business Attendant System Administration Guide for more information about maintaining user accounts.)*

3. Enter your password in the **Password** field.

4. Click **OK** or press **Enter**. The Line Status window displays (Figure 2-1). If the Business Attendant Server is up, the number of calls waiting in the queues displays in the Status Line. If the Business Attendant Server is down, Off-line displays in the Status Line.

Exiting the Application:

• Select **Line > Exit** from the Line Status window. The Business Attendant Client application closes and the Windows desktop displays.

Connecting to the Business Attendant Server

The Business Attendant Client must be connected to the Business Attendant Server to process calls. To make sure that it is communicating properly with the Business Attendant Server, the Business Attendant Client periodically performs a "health check" to make sure that the Business Attendant Server is operational. You can configure how often the Business Attendant Client checks the Business Attendant Server in the Health Check Server Interval. (See "Setting the Health Check Server Interval" on page 58 for more information.)

If the Server Goes Down While You Are Logging In

If the Business Attendant Client cannot connect to the Business Attendant Server when you are first logging in, the Server Information message displays (Figure 2-11).
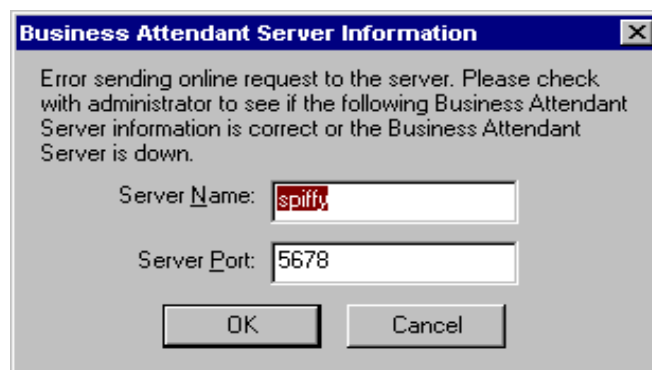
Figure 2-11   Server Information message (Unsuccessful Connection)

If you receive this message, do the following:

1. Click **OK** to attempt to connect to the Business Attendant Server.

2. If you are not able to reconnect to the server after repeated tries, contact the Administrator for the Business Attendant System at your site. Click **Cancel** to bypass the Server Information message. The Line Status window displays for processing employee information and directory services, but call processing cannot occur until connection to the Business Attendant Server can be established.

If the Server Goes Down While You Are Working

If the Business Attendant Client loses communication with the Business Attendant Server, the Server Down Error message displays (Figure 2-12).

Figure 2-12   Server Down Error message

If you receive this message, do the following:

1. Click **OK** to close the error message window.

2. Contact the Administrator for the Business Attendant System at your site.

3. Continue to answer calls ringing on your phone manually, using the Business Attendant Directory to look up numbers and then use the transfer key on the telephone to transfer callers to their destination.

4. When the Business Attendant Server comes back up and successfully connects with the Business Attendant Client, the following message appears.
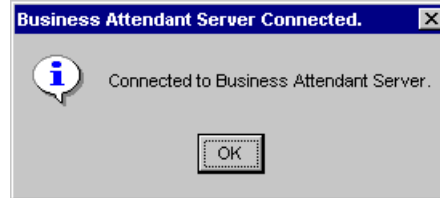
Figure 2-13   Server Connected message

5. Click **OK**. The Line Status window displays. Continue processing calls as usual.

Chapter 3   Processing Calls

Overview

This chapter outlines the procedures the attendant uses to process calls, including answering a call, placing a call on hold, and transferring a call.

You can use your mouse or your keyboard in the Business Attendant Client, so in most cases there will be more than one way to perform a function. For more information about navigating through the windows, see "Keyboard Conventions" on page 4 or "About the Business Attendant Client Windows" on page 9.

Chapter Topics

- About Call Processing
- Making Calls
- Answering Calls
- Holding Calls
- Transferring Calls
- Working With Messages
- Canceling Transactions
- Releasing Calls
- Making Conference Calls
- Switching Between Source and Destination Callers
- Camping On To a Busy Line
- Overriding Calls
- Parking Calls
- Forwarding Calls
- Setting Do-not-disturb

About Call Processing

To begin processing calls, log in to the Business Attendant Client. (See "Running the Business Attendant Client Application" on page 22 for more information.) After logging in, the Line Status window displays (Figure 3-1).
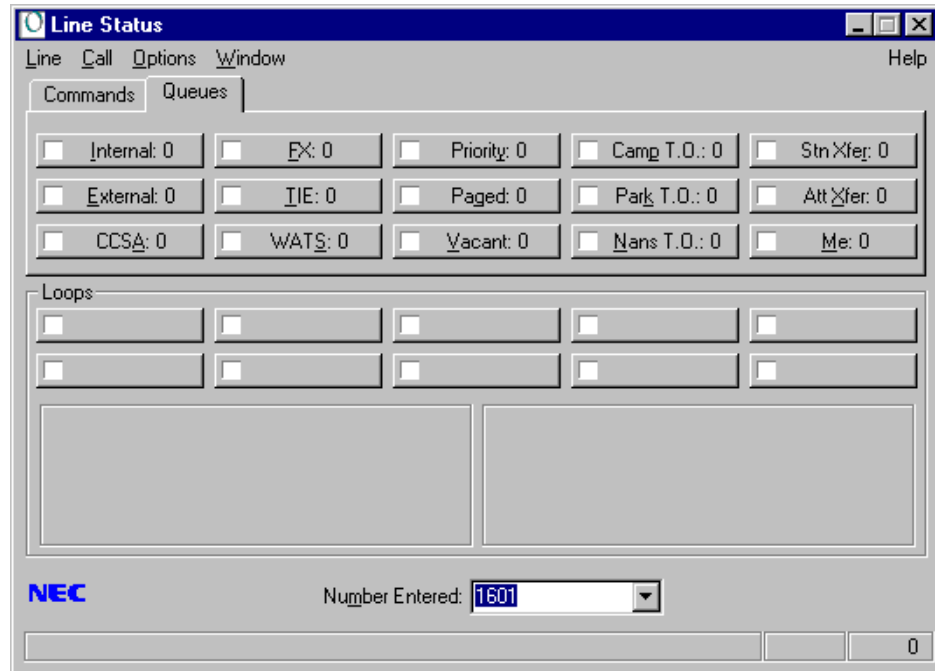
Figure 3-1   Line Status window

From the Line Status window, you can perform all call processing functions. Additionally, you can perform selected functions from the Directory and Speed Dials windows.

Processing Calls Using the Directory

You can use the Directory window (Figure 5-1 on page 67) to perform several call processing functions, such as dialing or transferring calls. You can open the directory when the station is in "Idle" status or while the attendant is connected to a caller. (See "Working With the Directory" on page 67 for more information.)

Use one of the following methods to open the Directory window.

- Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

  Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

- Select **Window > Directory** from the Line Status window.

- Press **CTRL+R**.

Processing Calls Using the Speed Dials

You can use the Speed Dials window (Figure 2-9 on page 21) to perform several call processing functions, such as dialing or forwarding calls. (See "Speed Dials Window" on page 21 for more information.)

Use one of the following methods to open the Speed Dials window.

- Select **Window > Speed Dials** from the Line Status window.
- Press **CTRL+P**.

Making Calls

The Dial command allows you to place a call through the Business Attendant System, if there is an available loop. The loop button displays the extension used for internal calls, or the route and trunk used for external calls.

Note: *If you attempt to place a call when no loop is available, a message box appears notifying you that the call will not be placed. Before the call can be placed, unhold and process an existing call to clear a loop.*

To Make a Call from the Line Status Window

Use the following steps to make a call from the Line Status window.

1. Enter the phone number of the person that you are trying to call in the **Number Entered** field on the Line Status window.

2. Do one of the following:
   - Select the **Dial** command button.
   - Select **Call > Dial** from the Line Status window.
   - Press **ALT+D**.
   - Press **Enter**.

   The Business Attendant System selects the first available loop and dials the number.

To Make a Call Using the Speed Dials

Use the following steps to make a call using speed dialing.

1. If the Speed Dials window (Figure 2-9 on page 21) is not displayed, do one of the following:
   - Select **Window > Speed Dials** from the Line Status window.
   - Press **CTRL+P**.

2. Do one of the following:
   - Click the desired **speed dial** button
   - Right-click the desired speed dial button and select **Dial** from the shortcut menu.

   The Business Attendant System selects the first available loop and dials the number.

To Make a Call Using the Directory

Use the following steps to make a call from the Directory window.

1. If the Directory window (Figure 2-8 on page 19) is not displayed, open the Directory window by doing one of the following:

   • Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

      Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

   • Select **Window > Directory** from the Line Status window.

   • Press **CTRL+R**.

   The Directory window displays.

2. Do one of the following:

   • Double-click on the directory entry you want to call.

   • Click and drag the directory entry you want to call from the Directory window to the Line Status window.

   • Enter the name of the person you are trying to call in the **Search for FullName** field. Select the desired party from the matching entries displayed in the Directory window and press **Enter**.

      Note: *If the Search for field does not specify FullName, select **FullName** for the Default sort field under the **Options>Preferences>Employee DB** tab from the Line Status Window.*

   • Right-click on the directory entry you want to call and select the number you want to dial from the shortcut menu. The numbers available to call in this list include those User-defined fields that have been marked by the administrator as "Dialable". (Refer to the *OpenWorX Business Attendant System Administration Guide* for more information.)

   The Business Attendant System selects the first available loop and dials the number.

Answering Calls

The Answer command connects you to an incoming call and places it on the next available loop.

Note: *If there are no available loops, the Business Attendant System stops answering calls until a loop becomes available.*

When an incoming call arrives in a queue, the queue button for that type of call is lit and the number on the display increases by one, as shown in Figure 3-2.

Call Indicator ——— [red square] Internal: 1 ——— Number of Calls Waiting in Queue

Queue Name
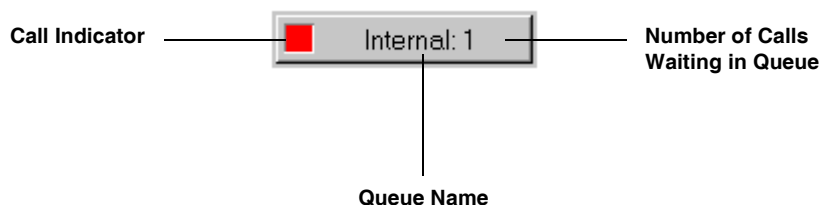
Figure 3-2   Queue Button

There are other ways the Business Attendant System can notify you of an incoming call in addition to the indicators on the queue buttons. You can configure the Business Attendant System to sound a beep, maximize the Line Status window, bring the application to the front, or flash the Line Status window when a new call is received. (See "Configuring Incoming Call Notification" on page 59 for more information.)

Use one of the following actions to answer an incoming call.

• Click the desired **Queue** button.

• Click the **Answer** command button.

• Select **Call > Answer** from the Line Status window.

• Press the **SPACE** bar.

• Press **ALT+A** from the Commands tab.

   The Business Attendant System connects you to the first caller waiting in that queue and places the call in the first available loop.

Holding Calls

The Hold command allows you to temporarily leave a connected call without releasing it, freeing you to handle calls on other loops.

Note: *If there are no available loops, the Business Attendant System stops answering calls until a loop becomes available.*

Placing a Call On Hold

Use one of the following actions to place a caller on hold.

- Click the **Hold** command button.
- Select **Call > Hold** from the Line Status window.
- Press **ALT+H**.
- Press **F5**.
  The Business Attendant System places the caller on hold with music and the Call Status indicator on that loop button turns red.

Retrieving a Held Call

The Unhold command reconnects you to a call you previously placed on hold.

Use one of the following actions to retrieve a caller on hold.

- Click the **Loop** button of the held caller.
- Select the **Unhold** command button.
- Select **Call > Unhold** from the Line Status window.
- Press **ALT+U**.
- Press **F3**.
- If there are no calls waiting in the queue, press the **SPACE** bar to connect you to the held call that has been waiting longest.
  The Business Attendant System connects you to the caller and the Call Status Indicator on that loop button turns green.

Canceling Transactions

The Cancel command stops a call transaction in progress. Use this command to rejoin the source caller if the destination party does not answer or is busy when you attempt a screened transfer, or to hang up after placing a call or answering a call.

To Cancel a Call

Use one of the following actions to cancel or end the current call.

- Click the **Cancel** command button.
- Select **Call > Cancel** from the Line Status window.
- Press **ALT+N**.
- Press **F2**.
  The current call ends. If canceling a screened transfer, you are connected to the source caller for further processing.

Transferring Calls

The Business Attendant System gives you three ways to transfer calls:

Blind Transfer
Transfers the caller directly to the destination party and releases the attendant from the call. This is also known as a Direct Transfer.

Screened Transfer
Places the caller on hold while the attendant calls the destination party and announces the transfer. After announcing the transfer, the attendant releases the call. This is also known as an Announced Transfer or Assisted Transfer.

Transfer to Voice Mail
Transfers the caller directly to the destination party's voice mail box and releases the attendant from the call.

Announce Call
Allows the attendant to place the caller on hold while the attendant announces the transfer to the destination party without the destination party answering the phone.

Making a Blind Transfer

If you are already connected to a call, use any of the following methods to perform a blind transfer.

Note: *If the destination party is external, the Business Attendant System forces the attendant to perform a screened transfer and listen for a busy signal or a ring-back tone, then manually release from the call.*

To Make a Blind Transfer from the Line Status Window

Use the following steps to make a blind transfer from the Line Status window.

1. Enter the phone number of the person to whom you are transferring the call in the **Number Entered** field on the Line Status window.

2. Do one of the following:
   - Select the **Blind Xfer** command button.
   - Select **Call > Blind transfer** from the Line Status window.
   - Press **ALT+B**.
   - Press **F6**.

   The Business Attendant System places the current call on hold, dials the party to whom the call is being transferred, and releases you from the call.

To Make a Blind Transfer Using the Speed Dials

Use the following steps to make a blind transfer using speed dialing.

1. If the Speed Dials window (Figure 2-9 on page 21) is not displayed, do one of the following:

   • Select **Window > Speed Dials** from the Line Status window.

   • Press **CTRL+P**.

2. Do one of the following:

   • If the administrator has set the default transfer type to Blind Transfer, click the **speed dial** button that corresponds to the person to which the call is being transferred.

   • Right-click the **speed dial** button that corresponds to the person to which the call is being transferred, and select **Blind Transfer** from the shortcut menu.

   The Business Attendant System places the current call on hold, dials the party to whom the call is being transferred, and releases you from the call.

To Make a Blind Transfer Using the Directory

Use the following steps to make a blind transfer from the Directory window.

1. If the Directory window (Figure 2-8 on page 19) is not displayed, open the Directory window by doing one of the following:

   • Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

     Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

   • Select **Window > Directory** from the Line Status window.

   • Press **CTRL+R**.

   The Directory window displays.

2. Do one of the following:

   • If the administrator has set the default transfer type to Blind Transfer, double-click the entry of the person to whom you are transferring the call.

   • If the administrator has set the default transfer type to Blind Transfer, click on the entry of the person to whom you are transferring the call from the Directory window and drag it to the **Destination** section or the **Number Entered** field of the Line Status window.

   • From the Directory window, right-click on the entry of the person to whom you are transferring the call, then select **Blind Transfer** from the shortcut menu.

   The Business Attendant System places the current call on hold, dials the party to whom the call is being transferred, and releases you from the call.

Making a Screened Transfer

If you are already connected to a call, use any of the following methods to perform a screened transfer.

Note: *In any of the methods described below, you can toggle your connection between the source and destination parties by clicking on the* **Source/Dest** *command button.* *(See "Switching Between Source and Destination Callers" on page 37 for more information.)*

To Make a Screened Transfer from the Line Status Window

Use the following steps to make a screened transfer from the Line Status window.

1. Enter the phone number of the person to whom you are transferring the call in the **Number Entered** field on the Line Status window.

2. Do one of the following:

   • Select the **Screen Xfer** command button on the Line Status window.

   • Select **Call > Screened transfer** from the Line Status window.

   • Press **ALT+S**.

   • Press **F7**.

   • If the Directory window is open, right-click on the destination party in the Directory window and select **Screen Transfer** from the shortcut menu.

   • If the Speed Dials are open, right-click the **speed dial** button that corresponds to the person to which the call is being transferred.and select **Screen Transfer** from the shortcut menu.

   The Business Attendant System places the current call on hold and dials the party to whom the call is being transferred.

3. When the destination party answers that call, announce the transfer and release the call. (See "Releasing Calls" on page 36 for more information.) The two calls are connected, the loop button clears, and you are released from the call.

4. If the destination party doesn't answer or is busy, cancel the transfer to rejoin the source party. (See "Canceling Transactions" on page 30 for more information.)

Transferring a Call to Voice Mail

The Business Attendant System allows you to automatically transfer a caller directly to a destination party's voice mail box from the Directory window, releasing you from the call. When the Transfer to Voice Mail action is selected, the Business Attendant System places the source caller on hold and uses a script to dial the Voice Mail Pilot number and connect the caller to the destination party's voice mail box, releasing the attendant from the call. The Voice Mail Transfer script is configured in the Business Attendant Administrator application. (Refer to the *Business Attendant Administration Guide* for more information.)

To Transfer a Call to Voice Mail

If you are already connected to a call, use one of the following steps to transfer a call to a specific voice mail box.

• Right-click on the destination party in the Directory window and select **Transfer to Voice Mail** from the shortcut menu.

• Right-click the **speed dial** button that corresponds to the person to which the call is being transferred.and select **Transfer to Voice Mail** from the shortcut menu.

The Business Attendant System places the current call on hold, dials the desired voice mail box, and releases you from the call.

Making Conference Calls

The Conference command allows you to initiate a conference call with two other parties.

A conference call connects an attendant with two parties in one phone conversation. You can initiate a conference from a screened transfer call. This option is only available when the current loop is in a state where it can be conferenced or when a conference can be completed.

Note: *In any of the methods described below, you can toggle your connection between the source and destination parties by clicking on the Source/Destination command button. (See "Switching Between Source and Destination Callers" on page 37 for more information.)*

To Place a Conference Call

Use the following steps to place a conference call from the Line Status window.

1. Enter the phone number of the party you want to be conferenced in to the current call in the **Number Entered** field on the Line Status window.

2. Do one of the following:
   - Perform a screened transfer by doing one of the following:
     - Select the **Screen Xfer** command button.
     - Select **Call > Screened transfer** from the Line Status window.
     - Press **ALT+S**.
     - Press **F7**.
   - Announce the call by doing the following:
     - Press **ALT+L**.
     - Press **F7**.

   The Business Attendant System places the current call on hold and dials the first party to be joined into the conference call.

3. Once you are connected to the destination number, do one of the following:
   - Click the **Conference** command button on the Line Status window.
   - Select **Call > Conference** from the Line Status window.
   - Press **ALT+F**.
   - Press **F9**.

   You are connected to both the source and destination callers in a conference call.

4. When you have finished with the conference call, release the call by doing one of the following:
   - Click the **Loop** button of the destination caller.
   - Click the **Release** command button.
   - Select **Call > Release** from the Line Status window.
   - Press **ALT+R** to release the current call.
   - Press **F12** to release the current call.

   The two callers are connected, the loop buttons clear, and you are released from the call.

Releasing Calls

The Release command connects a transferred caller to his or her destination, releases the attendant workstation from the call, and clears the loop to receive new calls. This command is also used to exit a conference call, leaving the other two parties talking.

To Release a Call Use one of the following actions to release the current call from the Line Status window.

- Click the **Loop** button of the destination caller.
- Click the **Release** command button.
- Select **Call > Release** from the Line Status window.
- Press **ALT+R** to release the current call.
- Press **F12** to release the current call.

  The caller is connected to its destination, the attendant workstation is released from the call, and the loop button display clears, indicating that the loop is idle.

Camping On To a Busy Line

The Camp command allows the caller to wait for connection to a destination party whose line is busy, while leaving the attendant free to answer the next call. The busy party hears a zip tone, alerting them to the presence of the waiting caller. The busy party can then press the Answer key on their D^{term} to place their current call on consultation hold and answer the new call.

Note: *The destination party must be an internal station on the local PBX. You cannot camp on to a party across the CCIS network on a remote PBX.*

To Camp On a Busy Line Use one of the following actions to camp the current caller on to a busy line after attempting to call a busy line from the Line Status window.

- Click the **Camp** command button.
- Select **Call > Busy camp** from the Line Status window.
- Press **ALT+P**.
- Press **F11**.

  You are released from the call and the loop button clears while the current caller waits for the destination party to become available. The caller will hear music or a ring-back tone, depending on the PBX firmware level at your site.

  - If the caller hears music after being camped, they will be connected to the destination party when they become available.
  - If the caller hears a ring-back tone after being camped, the destination party can press the Answer key on their telephone to toggle between their existing call and the new caller. In this case, no recall will occur if the busy party does not answer the new call.

Switching Between Source and Destination Callers

The Source/Destination commands allow you to switch between the source and destination parties prior to completing a conference call or transfer. This option is only available when you are in the process of transferring, overriding, or conferencing the current call.

To Switch Between Source and Destination Callers

Use one of the following actions to switch between the source and destination parties from the Line Status window.

Note: *The Source/Dest command button changes as you toggle between the source and destination.*

- Click the **Source/Dest** command button to switch between the source and destination.
- Select **Call > Toggle source & destination** from the Line Status window.
- Press **ALT+S** to switch between the source and destination.
- Press **F10** to switch between the source and destination.
  The current party is put on hold, and the Business Attendant System connects you to the desired party. The loops for the source and destination change to reflect their change in status.

Overriding Calls

The Override command allows you to break in to an ongoing call to speak with one party or conference with both parties in that call.

Note 1:   *One of the parties being overridden must be an internal station on the local PBX, not an external number or across the CCIS network on a remote PBX.*

Note 2:   *You can determine if a line is busy by dialing it from the **Number Entered** field in the Line Status window or using the directory.*

To Override a Call

Use the following steps to break in to a call from the Line Status window.

1. After attempting to call a busy extension, do one of the following:
   - Click the **Override** command button.
   - Select **Call > Override** from the Line Status window.
   - Press **ALT+V**.
   - Press **CTRL+F4**.

   A message appears asking "Are you sure you want to break into this person's current call?"

2. Click **Yes**. You are connected to the destination party. While you are on the line with the destination party, the other party on the call is placed on hold.

3. Do one of the following:
   - Speak with the destination party.
   - **Toggle** to speak with the caller that is on hold.
   - Join with both parties in a conference call. (See "Making Conference Calls" on page 34 for more information.)

4. When you are done, click the **Release** command button. The callers are left in a two-way call, the attendant workstation is released from the call, and the loop button display clears.

Parking Calls

One of the more powerful features of the Business Attendant System is the ability to park calls. Call parking allows the attendant to place the call in a pool to wait for the destination caller, freeing the attendant to answer more calls. The destination party is then paged to notify them that they have a call, and they can retrieve the waiting call from any telephone by dialing the attendant or dialing a meet-me-paging orbit number to join the call automatically.

There are three main commands relating to call parking in the Business Attendant System:

Park
Places a caller on an announcement trunk or a monitored number hearing music to wait for a paged party.

Join With Parked Call
Joins a parked caller to the current source caller.

Retrieve Parked Call
Connects the attendant to the parked caller if the destination caller or paged party doesn't respond.

Refer to the following sections for more information about these commands.

Parking a Call

The Park command places a caller on an announcement trunk or a monitored number to wait for a party who has been paged to answer their call.

To connect to the parked caller, the destination party can dial a "meet-me page" number to join the waiting call automatically or use the attendant to join the waiting call. The "meet-me page" numbers are configured in the Business Attendant Administrator application. Refer to the *Business Attendant System Administration Guide* for more information.

About Orbit Numbers

Orbit numbers specify the numbers that are announced in paging as the meet-me page numbers. When a call is parked to wait for a party, the Business Attendant System assigns an orbit number to that call.

The orbit number assigned to the parked call displays in the bottom left corner of the Line Status window. The attendant announces this number to the paged party as the "meet-me page" number. The paged party then can dial this number to retrieve their call without attendant help.

If no orbit numbers are available, then the paged party must call the attendant, who then joins the paged party to the waiting caller.

To Park a Call

Use the following steps to park a caller from the Line Status window.

1. Do one of the following:
   - Click the **Park** command button.
   - Select **Call > Park** from the Line Status window.
   - Press **ALT+K**.
   - Press **F8**.

   The Park dialog box displays (Figure 3-3).

Figure 3-3   Park dialog box

2. If the caller's information was not filled in automatically, enter the caller's name in the **Name** field in the Party being parked group box. If available, enter the caller's number in the **Call Back #** field.

   Note: *The **Call Back #** field is optional, but the **Name** field is required.*

3. Enter the paged party's name in the **Name** field in the Party holding for group box.

4. Click **OK**. The caller is parked to wait for the paged destination party with the assigned "meet-me page" number displayed in the lower left corner of the Line Status window. If no "meet-me page" number displays in the Line Status window, no orbit numbers are available and the attendant must instruct the paged party to call the operator. The attendant workstation is then released from the call and the loop button display clears.

Joining a Caller   The Join command allows you to retrieve a parked caller and connect them to the
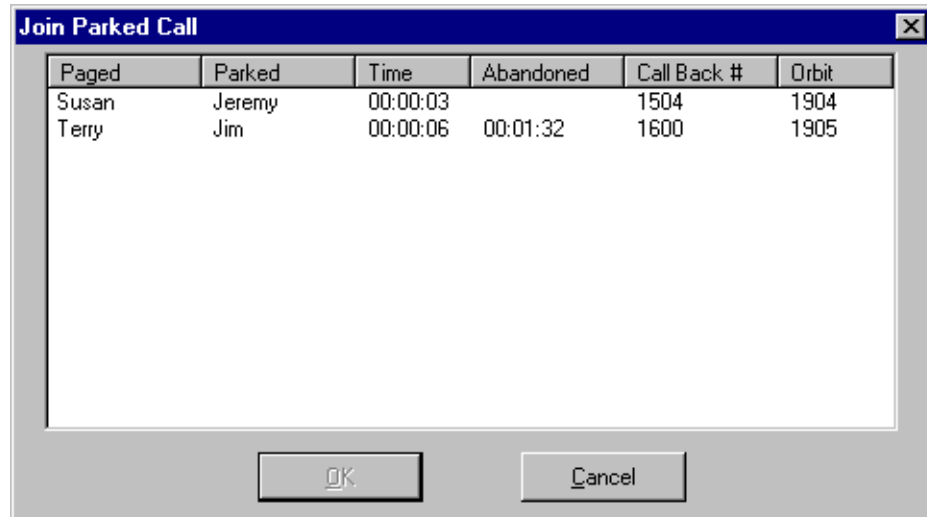**with a Parked Call**   paged party.

Figure 3-4   Join Parked Call window

To Join a Parked Call

Use the following steps to join the paged party to the parked caller from the Line
Status window.

1. After answering the call from the paged destination party, do one of the
    following:

    •   Click the **Join** command button.

    •   Select **Call > Join with parked call** from the Line Status window.

    •   Press **ALT+J**.

    •   Press **CTRL+ALT+F8**.

    The Join Parked Call window displays (Figure 3-4).
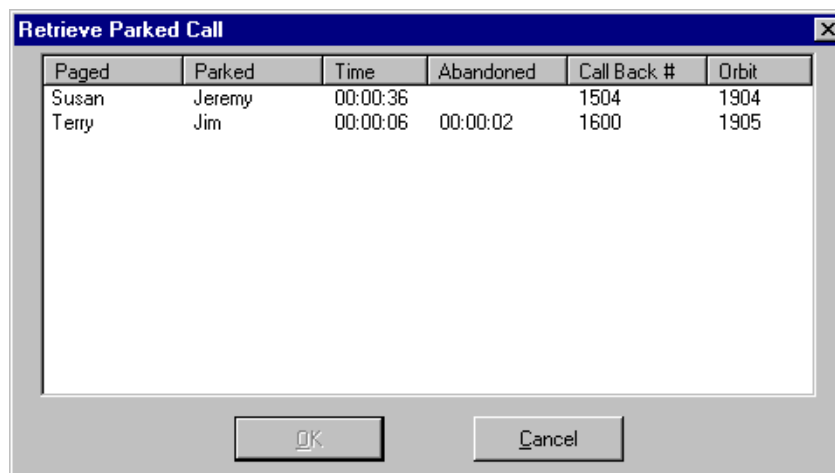
2. Do one of the following:

    •   Select the desired parked caller and click **OK**.

    •   Double-click on the desired parked caller.

    The Business Attendant System connects the destination party to the parked
    caller, releases the attendant workstation, clears the loop button, and removes
    the parked record from the database.

Retrieving a Parked Call

If the destination party does not respond to their page, you can retrieve the parked caller to take a message or send them to another party.

Note: *You can access any caller parked in the system, not just those you parked.*

Figure 3-5   Retrieve Parked Call window

The Retrieve Parked Call window (Figure 3-5) lists all parked callers. Each parked call record includes information entered by the attendant who parked the call, including the name of the parked caller, the name of the paged party, the orbit number that the paged destination party can dial to connect automatically to the parked caller, and the total time the caller has been parked at the time the window displays. If the parked caller abandoned by hanging up or disconnecting, the total time since the caller abandoned displays under the Abandoned column and the entry displays in red.

To Retrieve a Parked Call

Use the following steps to connect to the parked caller from the Line Status window.

1. Do one of the following:

    *   Click the **Retrieve** command button.

    *   Select **Call > Retrieve parked call** from the Line Status window.

    *   Press **ALT+E**.

    *   Press **CTRL+F8**.

    The Retrieve Parked Call window displays (Figure 3-5).

2. Do one of the following:

    *   Select the desired parked caller and click **OK**.

    *   Double-click on the desired parked caller.

    The Business Attendant System connects you to the parked caller and places the call in the first available loop.

Parked Call Timeout

If a call is parked beyond the amount of time configured in the Business Attendant Administrator application, the Business Attendant System sends it back to any available attendant in the Park T.O. queue, which is presented to all attendants. However, even though the call has been sent back to the attendant, the parked caller can still be joined to the paged caller if:

- The paged party calls the "meet-me page" number before an attendant answers the call in the Park T.O. queue, the paged party and the parked party will automatically be joined and the call will be removed from the Park T.O. queue and from the parked database.

- The attendant answers a call from the Park T.O. queue and is still on the line with the parked caller when the paged party calls the "meet-me page" number, the attendant will be notified that the paged caller is present and given the opportunity to join the calls.

- The attendant answers a call from the Park T.O. queue and places the parked caller on hold, the paged party and the parked party will automatically be joined if the paged party calls the "meet-me page" number.

Forwarding Calls

The Forward command redirects incoming calls for an extension to another location, such as an extension or voice mail. You can forward all calls to that extension, forward calls only when the extension is busy, or forward calls only when no one answers.

To Forward a Call

Use the following steps to forward a call.

> **Tip:** You can use the following shortcuts to go directly to Figure 3-7, "Change Forwarding dialog box—Setting Forwarding Extension" on page 43.
>
> - From the Speed Dials window, right-click on the desired speed dial button and select **Forward** from the shortcut menu.
> - From the Directory window, right-click on the desired directory entry and select **Forward** from the shortcut menu.

1. From the Line Status window, select **Line > Forward**. The Change Forwarding dialog box displays (Figure 3-6).
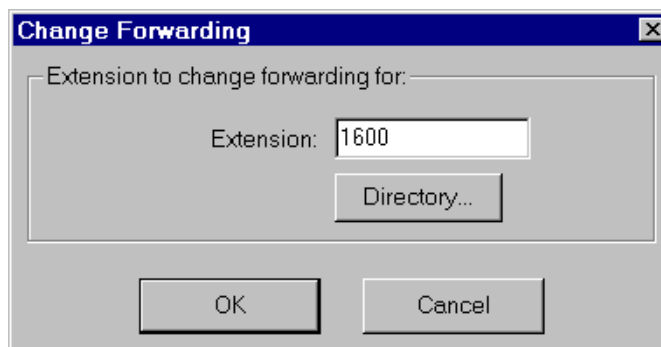

Figure 3-6   Change Forwarding dialog box—Setting Forwarded Extension

2. Do one of the following:

   - Enter the phone number you want forwarded in the **Extension** field.

   - Click the **Directory** button to display the Directory window, then click and drag the appropriate entry from the Directory window (Figure 2-8 on page 19) to the Change Forwarding dialog box.

   Click **OK**. The Setting Forwarding Extension dialog box displays (Figure 3-7), with the current forwarding patterns displayed.
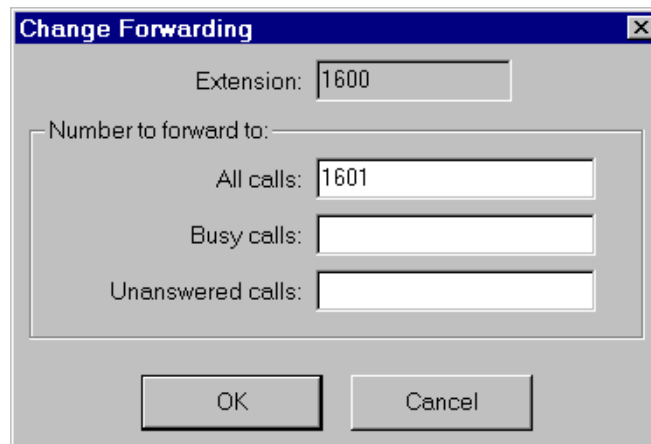
   Figure 3-7   Change Forwarding dialog box—Setting Forwarding Extension

3. Enter the phone number that will receive the forwarded calls in one of the following fields in the Number to forward to group box:

   - All Calls
     Forwards all calls to the specified extension.

   - Busy Calls
     Forwards calls to the specified extension only when the designated extension is busy.

   - Unanswered Calls
     Forwards calls to the specified extension only when the designated extension does not answer.

4. Click **OK**. The designated calls are forwarded to the new extension.

To Cancel Call Forwarding

1. Select **Line > Forward** from the Line Status window. The Change Forwarding dialog box displays (Figure 3-6).

2. Enter the **Extension** that needs Call Forwarding canceled.

3. Clear the phone numbers in the desired fields in the Number to forward to group box.

4. Click **OK**. Call forwarding is canceled. The calls are canceled for that type of forwarding.

Setting Do-not-disturb

The Do-not-disturb command blocks an extension's incoming calls. When Do-not-disturb is active, callers will either hear a reorder (fast busy) tone when they dial that extension or follow the extension's call forwarding patterns for all calls or unanswered calls.

To Set Do-not-disturb

Use the following steps to set Do-not-disturb for an extension.

> **Tip:** You can use the following shortcuts to go directly to Figure 3-9, "Change Do-not-disturb dialog box—Select Phone Operation" on page 45.
>
> - From the Speed Dials window, right-click on the desired speed dial button and select **Forward** from the shortcut menu.
> - From the Directory window, right-click on the desired directory entry and select **Forward** from the shortcut menu.

1. From the Line Status window, select **Line > Set do-not-disturb**.The Change Do-not-disturb dialog box displays (Figure 3-8), where you will specify the extension for which to set Do-not.disturb.

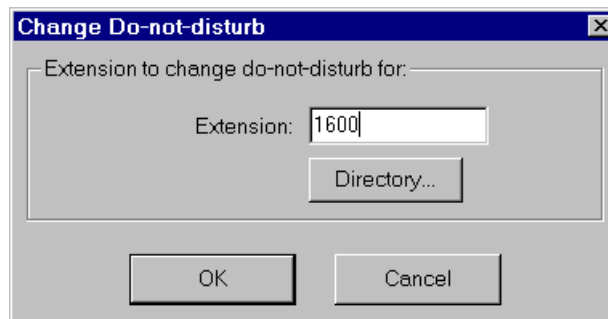**Figure 3-8   Change Do-not-disturb dialog box—Setting Do-not-Disturb Extension**

2. Do one of the following:
   - Enter the phone number you want to set for Do-not-disturb in the **Extension** field.
   - Click the **Directory** button to display the Directory window. Click and drag the appropriate entry from the Directory window (Figure 2-8 on page 19) to the Change Do-Not-Disturb dialog box.

3. Click **OK**. The Change Do-not-disturb dialog box displays (Figure 3-9), showing the current Do-not-disturb setting for that extension.

Figure 3-9   Change Do-not-disturb dialog box—Select Phone Operation

4. Select **Don't allow incoming calls**.

5. Click **OK**. Do-not-disturb is set and all incoming calls are blocked from this extension.

**Canceling
Do-not-disturb**

Use the following steps to cancel Do-not-disturb for an extension.

> **Tip:**   You can use the following shortcuts to go directly to Figure 3-9, "Change Do-not-disturb dialog box—Select Phone Operation" on page 45.
>
> • From the Speed Dials window, right-click on the desired speed dial button and select **Forward** from the shortcut menu.
>
> • From the Directory window, right-click on the desired directory entry and select **Forward** from the shortcut menu.

1. From the Line Status window, select **Line > Set do-not-disturb**.The Change Do-not-disturb dialog box displays (Figure 3-8 on page 44).

2. Do one of the following:
   • Enter the phone number you want to set for Do-not-disturb in the **Extension** field.
   • Click the **Directory** button to display the Directory. Click and drag the appropriate entry from the Directory window to Change Do-Not-Disturb dialog box.

3. Click **OK**. The Change Do-not-disturb dialog box displays (Figure 3-9), showing the current Do-not-disturb setting for that extension.
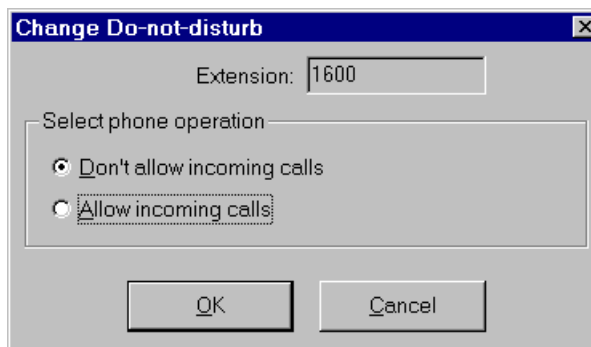
4. Select **Allow incoming calls**.

5. Click **OK**. Do-not-disturb is canceled and the extension can now receive incoming calls.

Working With Messages

The Business Attendant System allows you to take messages for employees and send them either by e-mail or by turning on the employee's message waiting lamp. When the employee calls back after seeing the message waiting lamp, the attendant can view and read the messages for the employee. The message waiting lamp is automatically turned off when there are no unread messages. (See "Directory Window" on page 19 for more information.)

Note: *The adjunct OpenWorX Message Reader application allows employees to read their messages directly from their D^{term} telephones without calling the attendant. Consult your NEC distributor for additional information.*

Creating a Message

Use the following steps to edit and send a new message.

1. If the Directory window (Figure 2-8 on page 19) is not displayed, open the Directory window by doing one of the following:

   • Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

      Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

   • Select **Window > Directory** from the Line Status window.

   • Press **CTRL+R**.

   The Directory window displays.

2. Do one of the following from the Internal directory:

   • Select the desired directory entry and click the **New Message** button.

   • Right-click on the desired directory entry and select **New Message** from the shortcut menu.

   The New Message dialog box displays (Figure 3-10), with the employee's name and e-mail address (if available) in the **To:** box.

Figure 3-10   New Message dialog box

3. Enter information about the person for whom you are taking the message in the **Name**, **Company**, **Phone number**, and **Extension** fields.

4. Enter the message in the **Message** edit box and, if desired, select any of the six message description check boxes in the **Attributes** group box.

5. After you have finished editing the new message, send the message by doing one of the following:

   • Click the **Send by e-mail** button to send the message to the employee by e-mail without further editing. If the e-mail address is not displayed when the New Message dialog box displays, enter the e-mail address. This e-mail address is then added to the database.

   • Click the **Edit in e-mail** button to edit the message in the default e-mail application. This action is very useful when sending the message to multiple people, or attaching wave file recordings. All of the message information you have entered will be displayed in the e-mail application.

   • Click the **Turn on lamp** button to turn on the employee's message waiting lamp and, on the 2400 series of PBX, display TMM on the phone display. The message is saved for the attendant to read to the employee when the employee calls back. If using the adjunct Message Reader application, employees can read their messages from their D^{term} screen.

Viewing Messages Use the following steps to review the messages for an employee.

1. If the Directory window (Figure 2-8 on page 19) is not displayed, open the Directory window by doing one of the following:

   • Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

     Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

   • Select **Window > Directory** from the Line Status window.

   • Press **CTRL+R**.

   The Directory window displays.

2. Do one of the following from the Internal directory:

   • Select the desired directory entry and click the **View** button.

   • Right-click on the desired directory entry and select **View Message** from the shortcut menu.

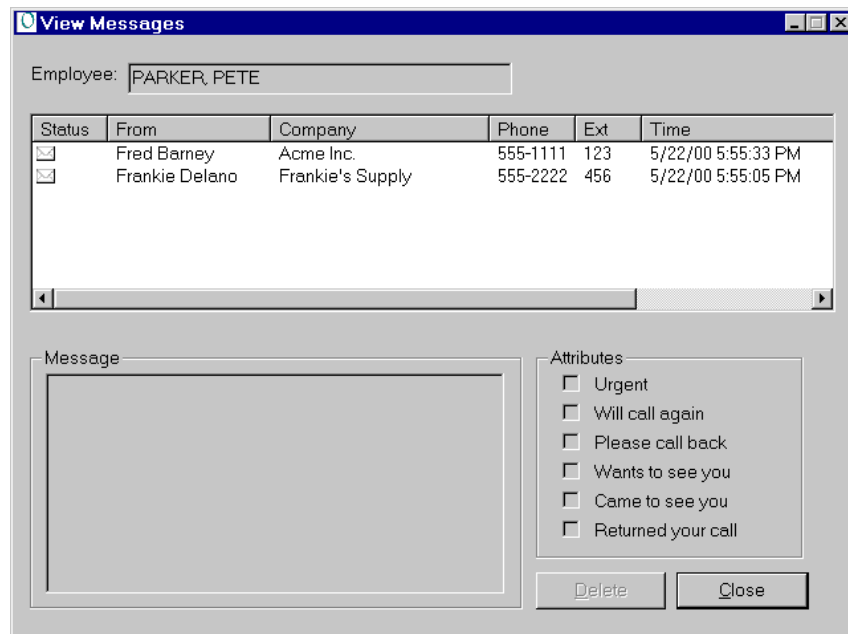   The View Messages window displays (Figure 3-11).

Figure 3-11   View Messages window

All messages for the employee stored in the database are displayed in the message list. Unread messages are indicated by a closed envelope in the **Status** column. Read messages are represented by an opened envelope in the **Status** column.

3. The message list can be sorted in the ascending or descending order by any of the fields displayed. To sort the list in the ascending order by a given field, click the **column header** of the appropriate field. Click on the **column header** again to sort the list by the field in descending order.

4. To read the text of the message, double-click the **message** entry. The message text displays in the **Message** edit box. Some of the check boxes to the right of the **Message** edit box may be selected. Once the message is read, the status of the message changes from unread to read, and the **Time** field indicates the time that the message was read. The employee's message waiting lamp is turned off when the message is marked read and there are no more unread messages.

5. Do one of the following:

   • Click **Delete** to delete the selected message. The message is deleted from the message database.

   • Click **Close** to exit the View Messages window without deleting the message. The View Messages window closes.

   Note: *A read message will only be retained in the database for the amount of time configured in the Business Attendant Administrator. It will be deleted after the configured amount of time elapses. (Refer to the Business Attendant System Administration Guide for more information.)*

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Chapter 4   Configuring the User Options

Overview

This chapter outlines the procedures used to change the Business Attendant Client options to create a more personalized environment. The options can be set individually by each user, so each user can customize their speed dials and screen layouts without affecting other users.

Chapter Topics

- About the Business Attendant Client Options Dialog Box
- Configuring the Speed Dial Keys
- Configuring the Window Display Options
- Setting the Health Check Server Interval
- Configuring Incoming Call Notification
- Selecting the Displayed Command Buttons
- Displaying the Call Source/Destination Information
- Configuring the Fields Displayed in the Directory Window
- Changing Passwords
- Saving the Screen Layout

About the Business Attendant Client Options Dialog Box

From the Business Attendant Client Options dialog box (Figure 4-1), you can configure the settings used by the Business Attendant Client application.
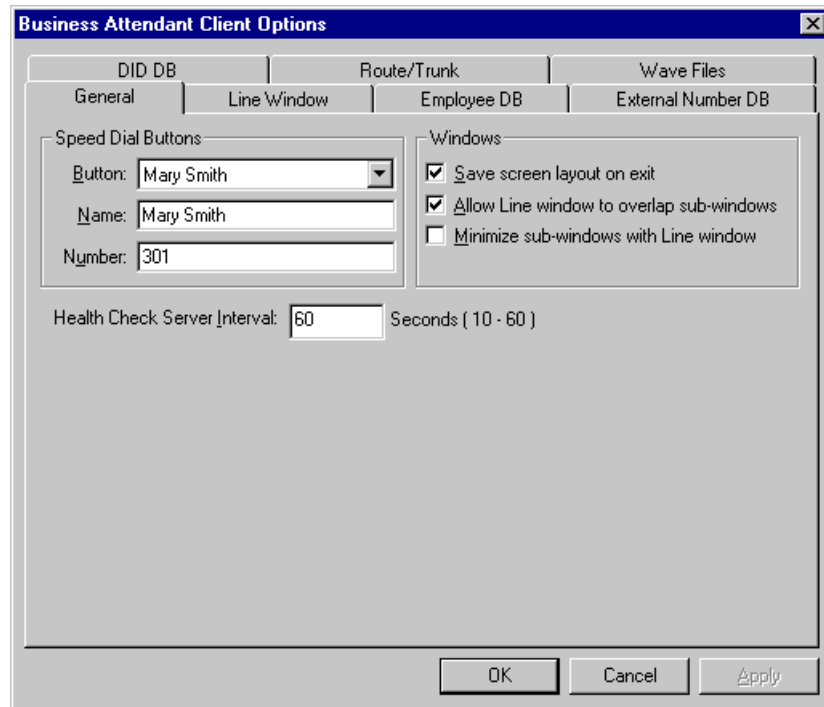

Figure 4-1   Business Attendant Client Options dialog box

The tabs in the Business Attendant Client Options dialog box contain the following information:

General
Contains the parameters for the speed dial buttons, display options, and the Health Check Server Interval.

Line Window
Configures the appearance and behavior of the Line Status window.

Employee DB
Configures the information displayed for employees in the internal Directory window and the Source/Destination area of the Line Status window.

External Number DB
Configures the information displayed for external numbers in the external Directory window and the Source/Destination area of the Line Status window.

DID DB
Configures the information displayed for DID numbers in the Source/Destination area of the Line Status window.

Route/Trunk
Configures the information displayed for routes and trunks in the Source/Destination area of the Line Status window.

Wave Files
Configures wave file parameters used for recording and playing back greetings and telephone conversations.

Note: *The Wave Files tab is displayed and functional only if the NEC D^{term} PC Card or an alternate device is installed. (Refer to the System Requirements in the Business Attendant System Administration Guide.)*

Configuring the Speed Dial Keys

You can add, modify, and delete your speed dial keys. The default number of speed dial keys shown is 16, but you can define up to 40 speed dial keys. (See "Speed Dials Window" on page 21 for more information.)

Adding or Modifying a Speed Dial Number

Use one of the following methods to add or modify a speed dial number.

Note: *If a name is too long to display on a speed dial button, you can modify the displayed name in the Speed Dial Buttons group box in the Business Attendant Client Options dialog box.*

To Add or Modify a Speed Dial from the Line Status Window

Use the following steps to add or modify a speed dial number from the Line Status window.

1. Select **Options > Preferences** from the Line Status window. The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).

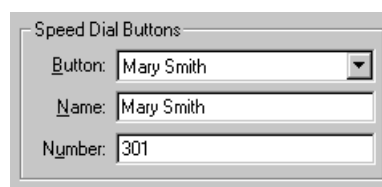2. Select the **General** tab, which contains the Speed Dial group box (Figure 4-2).

Figure 4-2   Speed Dial Buttons group box

3. Select the button that you want to use from the **Button** drop-down list in the Speed Dial Buttons group box.

4. Enter the name that you want to appear on the speed dial button in the **Name** field and enter the phone number that you want associated with this button in **Number** field.

5. Click **OK**. The speed dial button is updated.

To Add or Modify a Speed Dial Using the Directory

Use the following steps to add or modify a speed dial number using the Directory window.

1. If the Directory window is not displayed, open the Directory window by doing one of the following:

   • Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

      Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

   • Select **Window > Directory** from the Line Status window.

   • Press **CTRL+R**.

   The Directory window displays (Figure 5-1 on page 67).

2. If the Speed Dials window is not displayed, open the Speed Dials window by doing one of the following:

   • From the Line Status window, select **Window > Speed Dials**.

   • Press **CTRL+P**.

   The Speed Dials window displays (Figure 2-9 on page 21).

3. Do one of the following to update the speed dial button:

   • Click and drag the desired entry from the Directory window to the General tab of the Business Attendant Client Options dialog box (Figure 4-1 on page 52). Click **OK**. The speed dial button is updated.

   • Click and drag the desired entry from the Directory window to the Speed Dials window, then drop onto the speed dial button you want to update. The speed dial button is updated.

To Add or Modify a Speed Dial from the Speed Dials Window

Use the following steps to add or modify a speed dial number from the Speed Dials window.

1. If the Speed Dials window (Figure 2-9 on page 21) is not displayed, do one of the following:

    • Select **Window > Speed Dials** from the Line Status window.

    • Press **CTRL+P**.

2. Right-click the desired speed dial button and select **Properties** from the shortcut menu. The Speed Dial Properties dialog box displays (Figure 4-3).
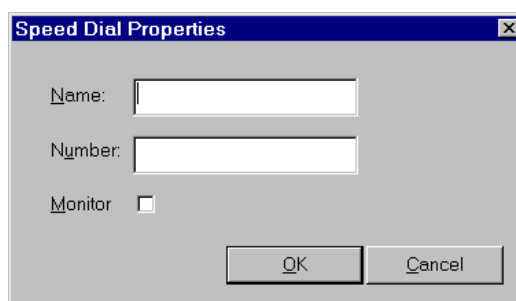

Figure 4-3   Speed Dial Properties dialog box

3. Enter the name that you want to appear on the speed dial button in the **Name** field.

4. Enter the phone number that you want associated with this button in **Number** field.

5. Do one of the following:

    • To turn on monitoring for this speed dial, select the **Monitor Speed Dial Buttons** check box. When monitoring is selected, the BAS will flash this speed dial button red if a call is ringing on this extension, and it will turn the button solid red if the extension is off hook.

       Note: *Only extensions on the local PBX or on the Fusion network can be monitored. Therefore, do not select this option if the speed dial number is an ACD pilot, an extension across CCIS, or an external phone number. If OAI traffic is heavy at your site, or if your PBX is running in two port mode and this extension already is being monitoring by other applications, such as Incoming Call Assistant or ACD, you may choose not to select this option.*

    • To turn off monitoring for this speed dial, clear the **Monitor Speed Dial Buttons** check box.

6. Click **OK**. The speed dial button is updated.

Deleting a Speed Dial Button

To Delete a Speed Dial from the Line Status Window

Use the following steps to delete a speed dial button from the Line Status window.

1. Select **Options > Preferences** from the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).

2. Select the **General** tab, which contains the Speed Dial group box (Figure 4-2 on page 53).

3. Select the button that you want to delete from the **Button** drop-down list in the Speed Dial Buttons group box.

4. Clear the information in the **Name** field.

5. Clear the information in the **Number** field.

6. Click **OK**. The information defined for that speed dial button is deleted.

To Delete a Speed Dial from the Speed Dials Window

Use the following steps to delete a speed dial number from the Speed Dials window.

1. If the Speed Dials window (Figure 2-9 on page 21) is not displayed, do one of the following:

   • Select **Window > Speed Dials** from the Line Status window.

   • Press **CTRL+P**.

2. Right-click the desired speed dial button and select **Properties** from the shortcut menu. The Speed Dial Properties dialog box displays (Figure 4-3 on page 55).

3. Clear the information in the **Name** field.

4. Clear the information in the **Number** field.

5. Clear the **Monitor Speed Dial Buttons** check box to turn off monitoring for this speed dial.

6. Click **OK**. The information defined for that speed dial button is deleted.

Configuring the Window Display Options

You can configure how the Business Attendant Client windows displays on your desktop.

Setting the Window Display Options

Use the following steps to configure the Business Attendant Client window display options.

1. Select **Options > Preferences** from the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).
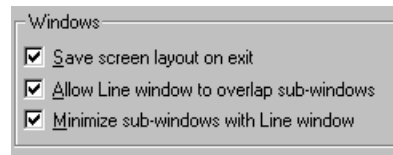
2. Select the **General** tab.

Figure 4-4   Windows group box

3. To save the current screen layout when you exit the Business Attendant Client, select the **Save screen layout on exit** check box in the Windows group box (Figure 4-4).

4. To configure the Line Status window to overlap the Directory and Speed Dials windows and remain active, select the **Allow Line window to overlap sub-windows** check box in the Windows group box (Figure 4-4).

5. To minimize the Directory and Speed Dials windows when the Line Status window is minimized, select the **Minimize sub-windows with Line window** check box in the Windows group box (Figure 4-4).

   Note: *This option is automatically chosen if the Allow Line window to overlap sub-windows option is not selected.*
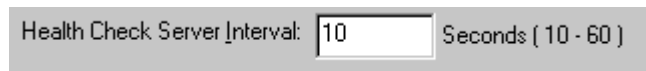
6. Click **OK**. The window display options are saved.

Setting the Health Check Server Interval

The Business Attendant Client periodically checks to see if the Business Attendant Server is working properly. You can configure how often the Business Attendant Client checks the Business Attendant Server in the Business Attendant Client Options dialog box.

Use the following steps to set the Health Check Server Interval.

1. Choose **Options > Preferences** on the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).

2. Select the **General** tab.

3. Enter the desired number of seconds the Business Attendant Client will wait between server health checks in the **Health Check Server Interval** field. The Health Check Server Interval can be configured for a minimum of 10 seconds and a maximum number of 60 seconds.

Health Check Server Interval: 10   Seconds (10 - 60)

Figure 4-5   Health Check Server Interval field

4. Click **OK**.The Business Attendant Client Health Check Server Interval is changed.

Configuring Incoming Call Notification

You can configure the Business Attendant Client to alert you to the presence of an incoming call whether or not the application is an active window. This feature allows you to minimize the Business Attendant Client while working in another application, and the system will notify you when you receive an incoming call. For example, if you are typing a letter in another application and you do not want the Business Attendant Client on your screen, you can minimize the Line Status window so that the Business Attendant Client is still running, but not displayed on your screen. When a call comes in, the Business Attendant Client either activates the application, beeps, or flashes on your screen so that you can answer that call, depending on the notification method you selected.

Use the following steps to configure how the Business Attendant Client will notify you of an incoming call.

1. Choose **Options > Preferences** from the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).
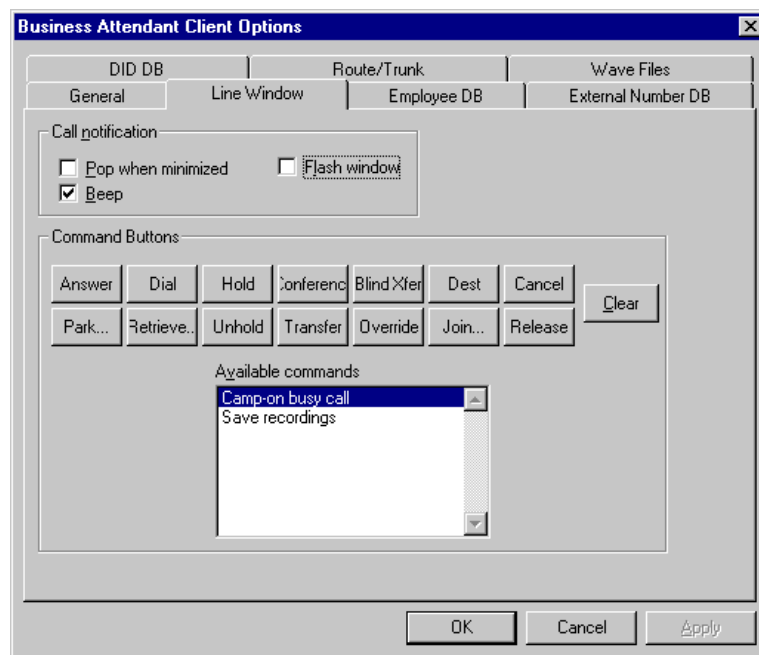
2. Select the **Line Window** tab (Figure 4-6).

Figure 4-6   Line Window tab

3. If you want the Business Attendant Client to be activated automatically when a call comes in, select the **Pop when minimized** check box.

4. If you want the window and the Business Attendant Client icon to flash when you receive a call, select the **Flash window** check box.

5. If you want to hear an audible tone when you receive a call, select the **Beep** check box.

6. Click **OK**. The incoming call notification options are saved.

Selecting the Displayed Command Buttons

You can specify which command buttons appear in the Line Status window when you are using the Business Attendant Client. For example, if call parking is not used by your organization, you can remove the Park, Retrieve, and Join buttons to simplify the user interface.

Use the following steps to select the commands displayed on the command buttons in the Line Status window:

1. Select **Options > Preferences** from the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).

2. Select the **Line Window** tab (Figure 4-6 on page 59). The commands displayed on the command buttons in the Line Status window display in the Command Buttons group box (Figure 4-7).
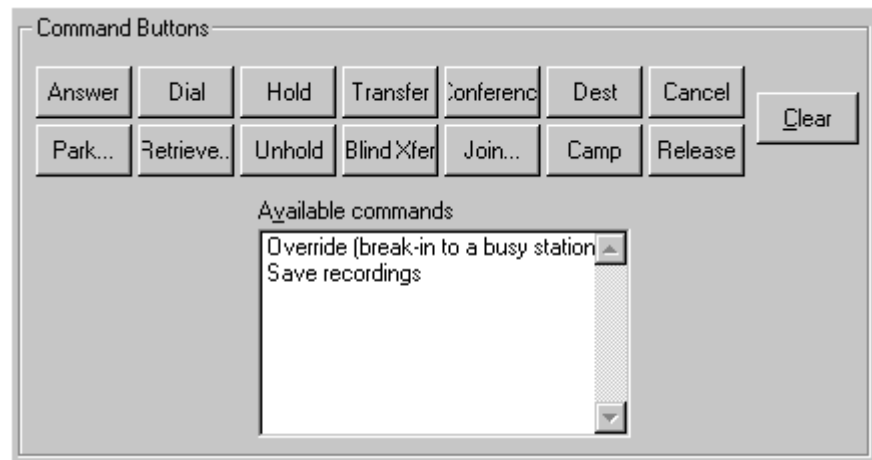

Figure 4-7   Command Buttons group box

3. To clear a command from the buttons, click on the button to be cleared to select it, then click **Clear**.

4. To add a command to a button, drag and drop the command from the **Available commands** list box to a blank command button. If you want to replace a displayed command, drag and drop an available command to the button you want to replace.

5. To remove a displayed command, drag and drop the command from the button to the **Available commands** list box.

6. Click **OK**. The command button display options are saved.

Displaying the Call Source/Destination Information

The Business Attendant Client displays information about the original inbound or outbound caller in the Source area and information about the party receiving a transfer or participating in a conference in the Destination area of the Line Status window. You can select the type of information that displays for internal calls and external calls. Additionally, you can select the type of information that displays for incoming DID calls and incoming Route/Trunk calls.

When you receive a call, the Business Attendant Client takes the information that is available about that call (such as Trunk ID, ANI, DNIS, and Extension number) and searches your directory to find a match of that information. If a match is found, the Business Attendant Client shows up to three lines of information about that call, depending on the options you selected.

If you are handling calls for several departments or companies, this feature enables you to answer the call with the appropriate greeting.

Use the following steps to select the source and destination display information.

1. Choose **Options > Preferences** on the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).

2. To change the information displayed for internal calls, select the **Employee DB** tab (Figure 4-8), then select the information that you want displayed on lines 1, 2, and 3 from the Source/Dest Caller Information group box. If you do not want to display any information on a line, select **None**.
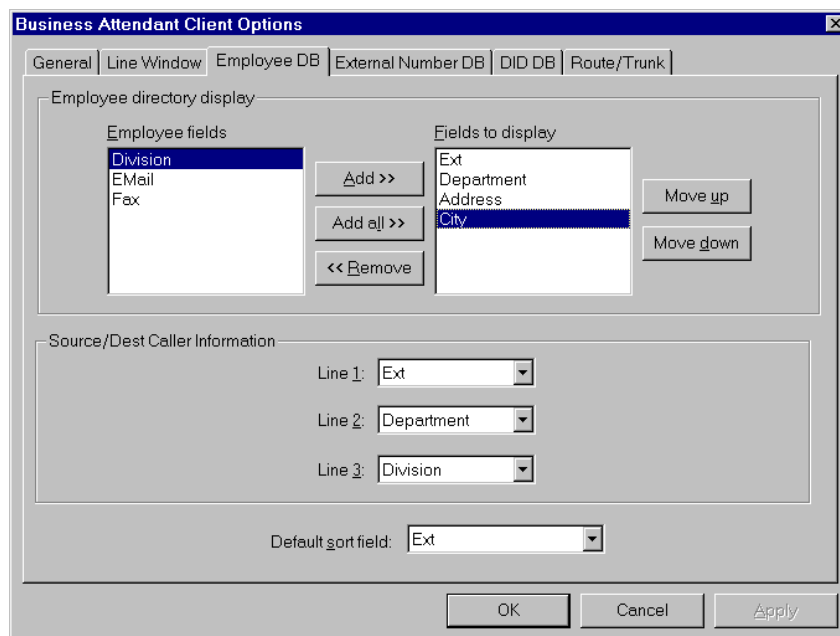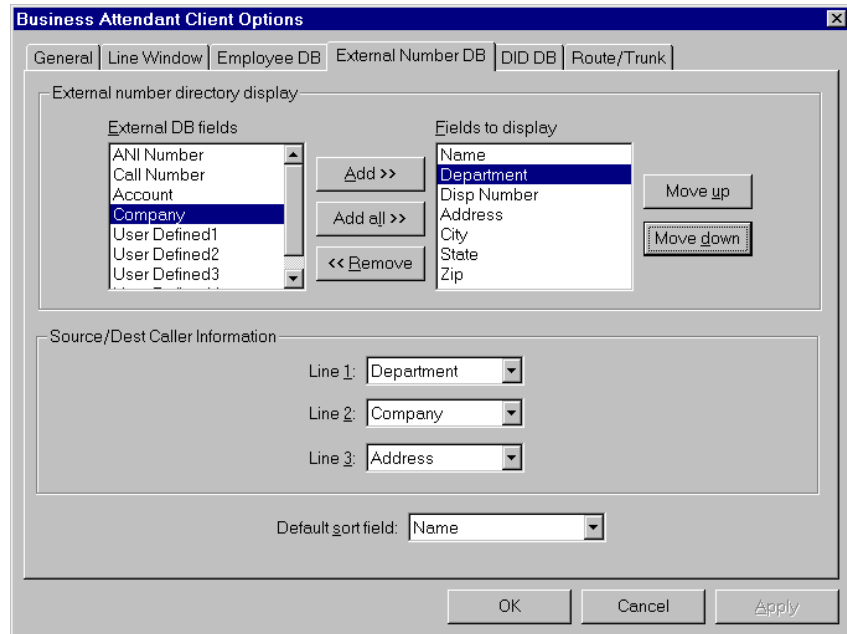

Figure 4-8   Employee DB tab

3. To change the information displayed for external calls, select the **External Number DB** tab (Figure 4-9), then select the information that you want displayed on lines 1, 2, and 3 from the Source/Dest Caller Information group box. If you do not want to display any information on a line, select **None**.

Figure 4-9   External Number DB tab

4. To change the information displayed for DID calls, select the **DID DB** tab (Figure 4-10), then select the information that you want displayed on lines 1, 2, and 3 from the Source/Dest DID Info group box. If you do not want to display any information on a line, select **None**.
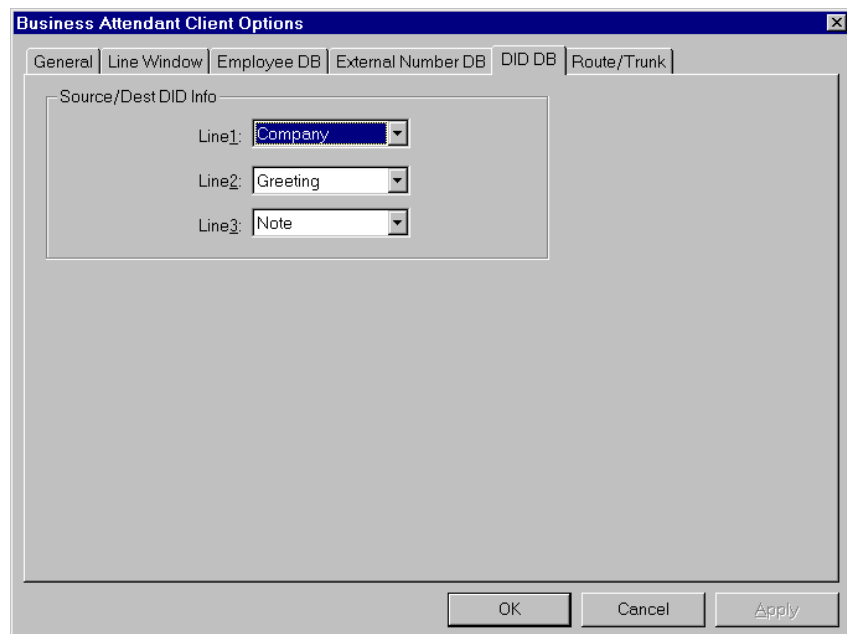

Figure 4-10   DID DB tab

5. To change the information displayed for calls coming in on a specific route and trunk, select the **Route/Trunk** tab (Figure 4-11), then select the information that you want displayed on lines 1, 2, and 3 from the Source/Dest Route/Trunk Information group box. If you do not want to display any information on a line, select **None**.
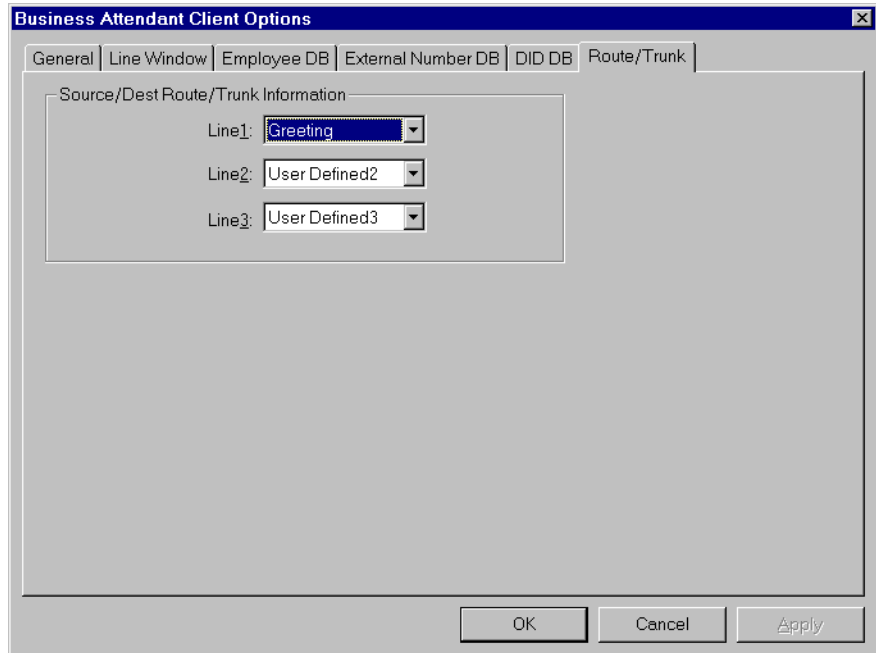

Figure 4-11   Route/Trunk tab

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

Configuring the Fields Displayed in the Directory Window

The Business Attendant Client directory is divided into internal and external directory. Each directory contains various fields about employees and external numbers, respectively. You can choose the fields for each directory that you want to display in the Directory window. (See "Directory Window" on page 19 for more information.)

Note: *The fields available to display in the directory can only be defined by the Administrator, using the Business Attendant Administrator application.*

Use the following steps to choose the fields displayed in the Directory window.

1. Select **Options > Preferences** on the Line Status window. The Business Attendant Client Options dialog box displays with the General tab selected.

2. Do one of the following:
   - Select the **Employee DB** tab to change the information displayed in the Employee Directory.
   - Select the **External Number DB** tab to change the information displayed in the external directory.
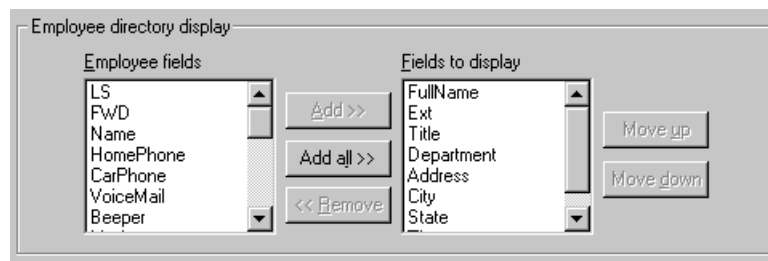

Figure 4-12   Employee Directory Display group box

The selected tab contains the fields available for display in the Directory window listed in either the Employee directory display group box or the External number directory display group box. The Fields to display box contains the fields that currently appear in the Directory window.

3. Do one of the following from the Employee fields box or the External DB fields box:
   - To add a field, select the desired field from the **Employee** fields or the **External DB** fields and click **Add**. You can also double-click the field.
   - To select all of the available fields, click **Add all**.
   - To remove a field from the Directory window display, select the desired field from the **Fields to display** box and click Remove. You can also double-click the field.
   - To change the order in which the fields are displayed, select a field and click the **Move up** or **Move down** button.

4. Click **OK**. The Directory window shows any changes to the fields that you made.

Changing Passwords

You can change your password for the Business Attendant Client application by using the Change Password dialog box.

Use the following steps to change your password:

1. Select **Options > Change password** from the Line Status window. The Change Password dialog box displays (Figure 4-13).
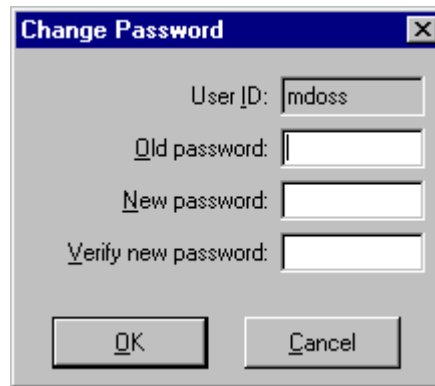
Figure 4-13   Change Password dialog box

2. Enter your current password in the **Old password** field.

3. Enter your new password in the **New password** field. The maximum length of the password is ten characters, either letters or numbers. This field is not case-sensitive.

4. Enter the new password again in the **Verify new password** field.

5. Click **OK**. Your password is changed as specified in the New Password field. Use it the next time you log in to the Business Attendant Client.

Saving the Screen Layout

Once the workstation is configured to your preferences, you can save the current layout of the Business Attendant Client windows for future use. The next time you start the application, the layout will be restored to the last saved layout. You can also configure the Business Attendant Client to automatically save the screen layout every time you exit.

• To save the current screen layout, select **Options > Save screen layout** from the Line Status window. The Business Attendant Client windows configuration is saved and will be restored the next time you log in.

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Chapter 5   Working With the Directory

Overview

This chapter outlines the procedures used to change the Business Attendant Client options to create a more personalized environment. The options can be set individually by each user, so each user can customize their speed dials and screen layouts without affecting other users.

Chapter Topics

- About the Directory Window
- Displaying the Directory
- Sorting the Directory
- Adding a Directory Entry
- Modifying a Directory Entry
- Deleting a Directory Entry

About the Directory Window

The Directory window (Figure 5-1) contains the internal and external directories. Double-click on an entry in the directory, press **Enter**, or drag it to the Line Status window to place a call. You can also use the Directory window to define the speed dial buttons on the Speed Dials window. (See "Adding or Modifying a Speed Dial Number" on page 53 for more information.)

Figure 5-1   Directory window

Displaying the Directory

The Directory window contains the internal and external directories. You can open the directory when the station is in "Idle" status or while the attendant is connected to a source caller.

From the Line Status window (Figure 3-1 on page 26), use one of the following methods to display the Directory window (Figure 5-1).

- Start typing the name in the **Number Entered** field on the Line Status window to find the matching entries in the Directory.

  Note: *If no records are found, check the Search for field listed on the Directory Window to verify that the BAS is searching for either the **FullName**, **LastName**, or **FirstName** field. If it is not, select a different Default sort field in the **Options>Preferences>Employee DB** tab from the Line Status Window.*

- Select **Window > Directory** from the Line Status window.

- Press **CTRL+R**.

Sorting the Directory

You can sort the information in the internal and external directories in various ways. When you change the sort criteria of the directory, the application changes the directory search criteria to the same value. For example, if you sort the directory by LastName, the Business Attendant Client searches the directory by LastName when you enter information in the **Search for** field on the Directory window or in the **Number Entered** field on the Line Status window.

In the internal directories, you can sort and search by the following fields listed in Table 5-1.

Table 5-1 Valid Sort and Search Fields in the Directory Window

Field Names

Extension	Company
FullName	Division
FirstName	Department
LastName	Building
Title	Pager
City	Fax
State	Loc Status
Zip	Return Date
Mail Stop	

For external directories, you can sort and search by most of the displayed fields. (See "Directory Window" on page 19 for more information.)

You can also apply a secondary sort. For instance, you can find all people with the last name of "Smith" in Accounting by sorting by the **FullName** or **LastName** with a secondary sort on the **Department**.

Changing the Default Sort Order

Use the following steps to change the default sort order of the displayed directory.

1. Select **Options > Preferences** on the Line Status window (Figure 3-1 on page 26) to open the Business Attendant Client Options dialog box (Figure 4-1 on page 52).

2. Select the **Employee DB** or **External Number DB** tab.

3. Select the field from the **Default sort field** drop-down list (Figure 5-2).

Default sort field: City

Figure 5-2   Default Sort field

4. Click **OK**. The Business Attendant Client Options dialog box closes, saving the parameters.

Adding a Directory Entry

Use the following procedures to add new listings in the internal and external directories.

Adding an Internal Directory Entry

Use the following steps to add an entry to the internal directory.

1. Do one of the following to open the internal directory:
   - Select the **View > Internal** directory from the Directory window (Figure 5-1 on page 67).
   - Select the **Internal** tab in the Directory window (Figure 5-1 on page 67).

2. Do one of the following:
   - Select **Edit > Add**.
   - Right-click on an entry and select **Add** from the shortcut menu.
   The Add Employee dialog box displays (Figure 5-3).
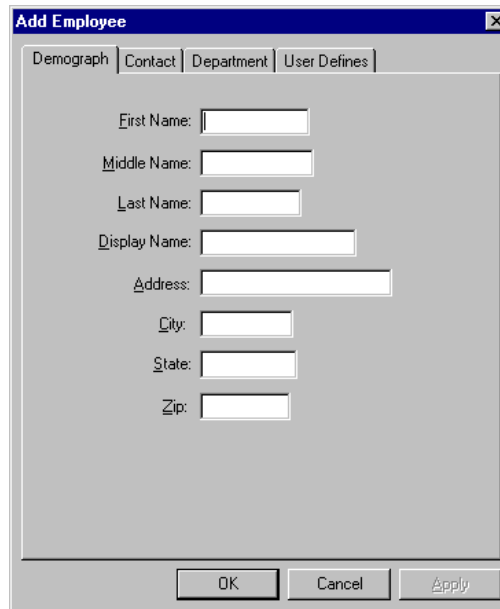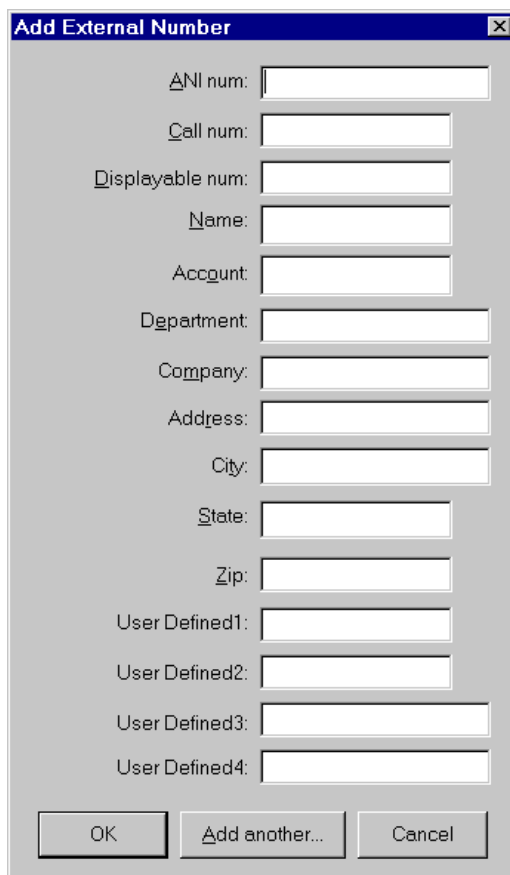
Figure 5-3   Add Employee dialog box

3. Enter data in each of the available fields. Click on the desired tab to navigate between the tabs.

4. Click **OK** to save the entry and exit the Add Employee dialog box. The Add Employee dialog box closes, adding the entry to the directory.

Adding an External Directory Entry

Use the following steps to add an entry to the external directory.

1. Do one of the following to open the external directory:
   - Select the **View > External** directory from the Directory window .
   - Select the **External** tab in the Directory window .

2. Do one of the following:
   - Select **Edit > Add**.
   - Right-click on an entry and select **Add** from the shortcut menu.
   The Add External Number dialog box displays .

Figure 5-4   Add External Number dialog box

3. Enter the available information in the following fields:
   - ANI num
     A ten digit number used to find this record or displayed when answering calls. (For example, enter 9725551212 as a valid ANI number.)
   - Call num
     The access code and number used when placing and transferring calls to this destination. (For example, 99725551212 or 95551212.)
   - Displayable num

The number to be displayed in the directory, complete with spaces, hyphens, and parentheses. (For example, (972) 555-1212.)

- Name
- Account
- Department
- Company
- Address
- City
- State
- Zip
- User Defined fields 1 - 4

4. To save the entry and add another entry without exiting the Add External Number dialog box, click **Add Another**.

5. Click **OK** to save the entry and exit the Add External Number dialog box. The Add External Number dialog box closes, adding the entry to the directory.

Modifying a Directory Entry

Use the following procedures to edit an entry in the internal or external directory.

Modifying an Internal Directory Entry

Use the following steps to modify an entry in the internal directory.

1. Do one of the following to open the internal directory:
   - Select the **View > Internal** directory from the Directory window (Figure 5-1 on page 67).
   - Select the **Internal** tab in the Directory window (Figure 5-1 on page 67).

2. Select the directory entry that you want to modify.

3. Do one of the following:
   - Select **Edit > Modify**.
   - Right-click on an entry and select **Modify** from the shortcut menu.

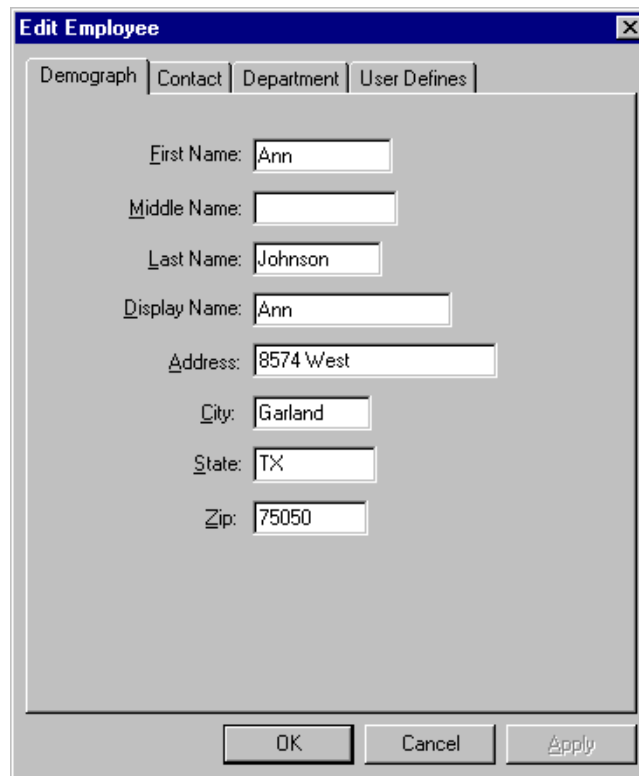   The Edit Employee dialog box displays (Figure 5-5).
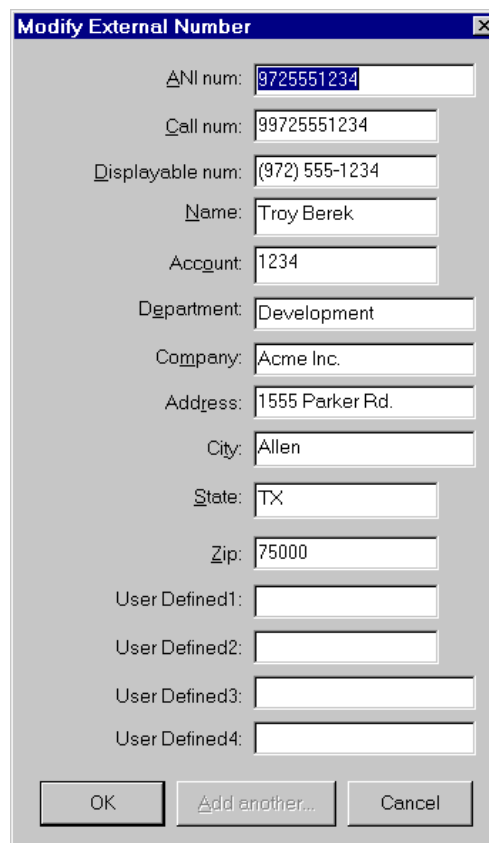

Figure 5-5   Edit Employee dialog box

4. Enter the new information in the desired field(s). Click on the desired tab to navigate between the tabs.

5. Click **OK** to save the entry and exit the Edit Employee dialog box. The Edit Employee dialog box closes, modifying the directory entry.

Modifying an External Directory Entry

Use the following steps to modify an entry in the external directory.

1. Do one of the following to open the external directory:
   - Select the **View > External** directory from the Directory window (Figure 5-1 on page 67).
   - Select the **External** tab in the Directory window (Figure 5-1 on page 67).

2. Select the directory entry that you want to modify.

3. Do one of the following:
   - Select **Edit > Modify**.
   - Right-click on an entry and select **Modify** from the shortcut menu.

   The Modify External Number dialog box displays (Figure 5-6).

Figure 5-6   Modify External Number dialog box

4. Enter the new information in the desired field(s).

5. Click **OK** to save the entry and exit the Modify External Number dialog box. The Modify External Number dialog box closes, modifying the entry in the directory.
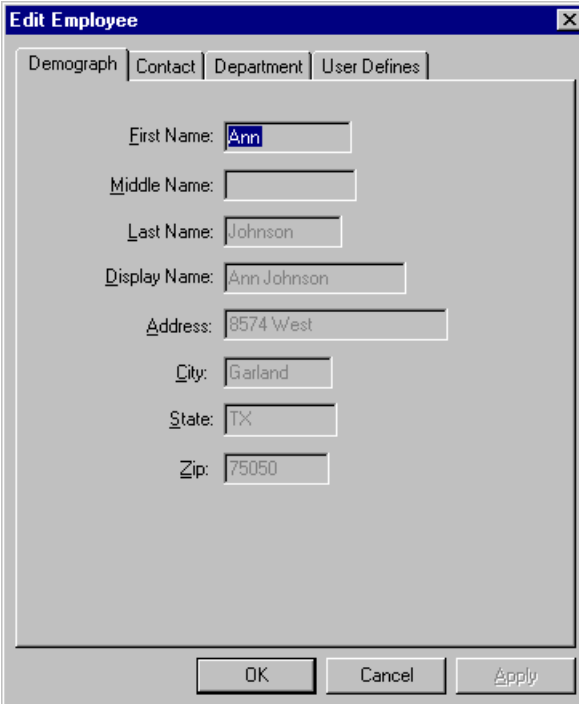
Deleting a Directory Entry

Use the following procedures to delete listings in the internal and external directories.

Deleting an Internal Directory Entry

Use the following steps to delete an internal directory entry.

1. Do one of the following to open the internal directory:
   - Select the **View > Internal** directory from the Directory window (Figure 5-1 on page 67).
   - Select the **Internal** tab in the Directory window (Figure 5-1 on page 67).

2. Select the directory entry that you want to delete from the Directory window.

3. Do one of the following:
   - Select **Edit > Delete**.
   - Right-click on an entry and select **Delete** from the shortcut menu.
   The Edit Employee dialog box displays (Figure 5-7).

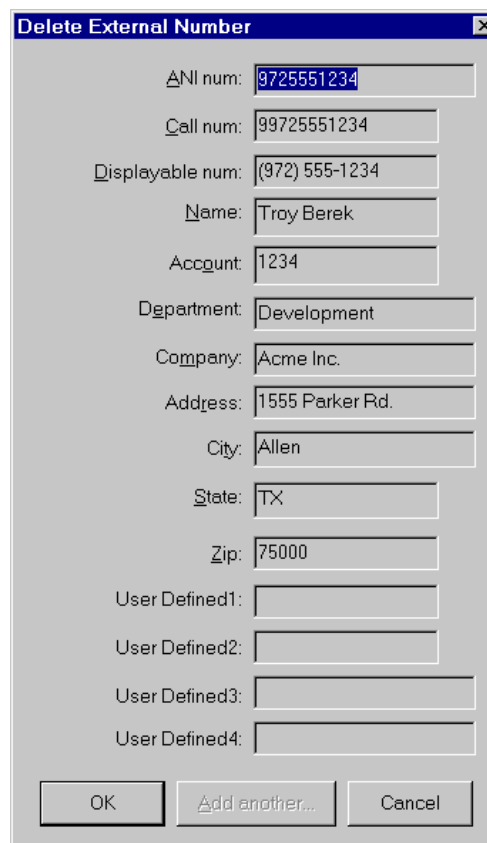**Figure 5-7 Edit Employee dialog box**

4. Click **OK** to delete the entry and exit the Edit Employee dialog box. The Edit Employee dialog box closes, deleting the entry from the directory.

Deleting an External Directory Entry

Use the following steps to delete an external directory entry.

1. Do one of the following to open the external directory:
   - Select the **View > External** directory from the Directory window (Figure 5-1 on page 67).
   - Select the **External** tab in the Directory window (Figure 5-1 on page 67).

2. Select the entry that you want to delete from the Directory window.

3. Do one of the following:
   - Select **Edit > Delete**.
   - Right-click on an entry and select **Delete** from the shortcut menu.

   The Delete External Number dialog box displays (Figure 5-8).

Figure 5-8   Delete External Number dialog box

4. Click **OK** to delete the entry and exit the Delete External Number dialog box. The Delete External Number dialog box closes, deleting the entry from the directory.

Chapter 6   Using the Wave File Recording Features

Overview

This chapter outlines the procedures used to work with recorded wave files with the Business Attendant System, including playing and recording greetings and conversations.

Chapter Topics

- About Wave File Recording
- Configuring Wave Files Settings
- Working with Greetings
- Working with Recorded Calls
- Deleting Wave Files
- Troubleshooting Wave Files

About Wave File Recording

If you have installed the NEC D^{term} PC Board and its driver or an alternate device, you can use the wave file recording and playing feature the Business Attendant System provides. After the wave device has been configured, the attendant can record and play back wave files, including greetings and conversations. (See "Working with Greetings" on page 86 for more information.) If automatic call recording is enabled, the Business Attendant System automatically records calls and allows attendants to play them back. (See "Working with Recorded Calls" on page 89 for more information.)

Wave File Naming Conventions

Each wave file has a .wav extension. The Business Attendant Client uses the following conventions in naming the files.

Table 6-1 Wave File Naming Conventions

| When You See	It Indicates
g	This is a greeting wave file.
i	This is an internal greeting wave file.
e	This is an external greeting wave file.
gxxxx	This is a greeting wave file for called number xxxx.
dy	This is a greeting wave file used all day.
am	This is a greeting wave file used only for mornings.
pm	This is a greeting wave file used only for afternoons.

Table 6-1 Wave File Naming Conventions

When You See	It Indicates
File name is all digits (example: 12121212)	If the file name contains all digits, the file is a recorded call conversation. The numbers indicate the time that the conversation was recorded. The first two digits indicate the day, the second two digits indicate the hour, the third two digits indicate the minutes, and the fourth set of two digits indicate the seconds. As a result of this format, the call may be overwritten within a month of the recorded time.

Configuring Wave Files Settings

Before using the wave file recording and playing functionality of the Business Attendant System, the wave devices for playing greetings and phone conversation recordings must be configured. Wave device and file settings can be made through the Wave Files tab of the Business Attendant Client Options dialog box (Figure 6-1).

Use the following steps to display the Wave Files tab.

1. Select **Options > Preferences** on the Line Status window (Figure 3-1 on page 26). The Business Attendant Client Options dialog box displays (Figure 4-1 on page 52).

2. Select the Wave Files tab (Figure 6-1).
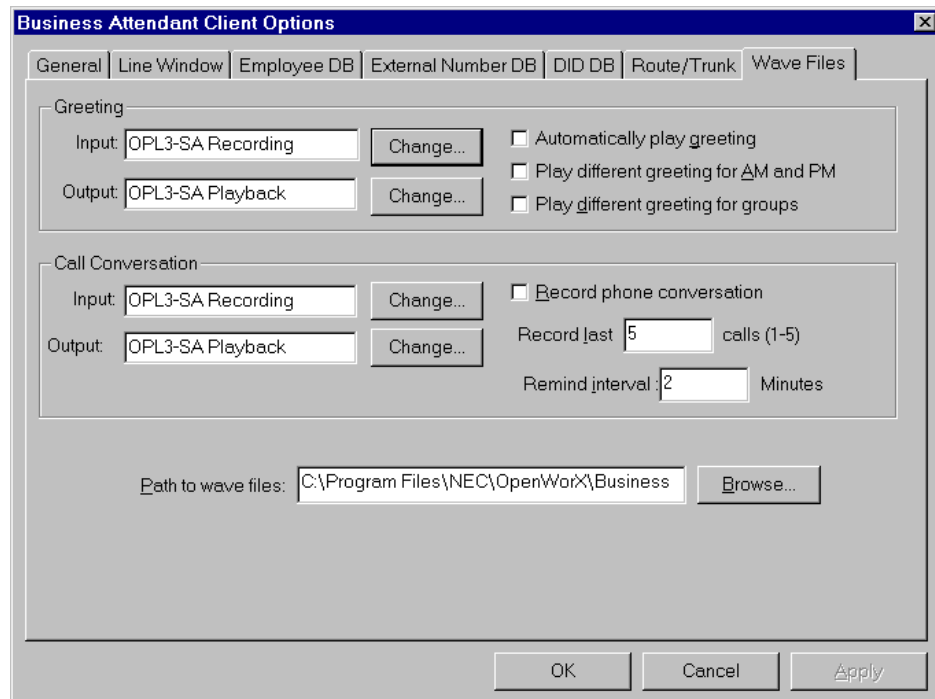
Figure 6-1 Wave Files tab

Configuring Greetings

The Greeting group box (Figure 6-2) on the Wave Files tab (Figure 6-1 on page 78) contains the settings the Business Attendant System uses to record and play greetings.
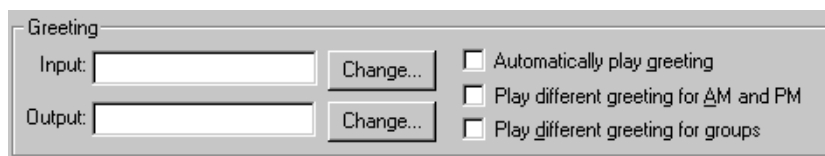

Figure 6-2   Greeting group box

The input and output wave devices for recording and playing back greetings must be configured before the Business Attendant System can use recorded greetings. Additionally, through the settings in the Greeting group box, you can configure the Business Attendant System to use different greetings for nights and different greetings for groups.

Setting Up Greeting Recording Wave File Input/Output Devices

Use the following steps to select the wave file input and output devices for recording and playing back greetings.

1. To select the device that will be used to record the greeting, click the **Change** button beside the **Input** field in the Greeting group box (Figure 6-2). The Wave Input Device dialog box displays (Figure 6-3).
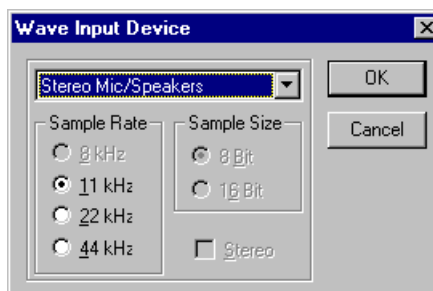

Figure 6-3   Wave Input Device dialog box

2. To select the device that will be used to play back the greetings, click the **Change** button beside the **Output** field in the Greeting group box (Figure 6-2). The Wave Output Device dialog box displays (Figure 6-4).
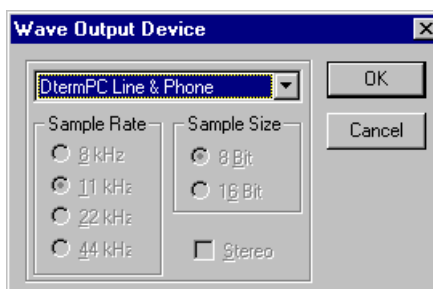

Figure 6-4   Wave Output Device dialog box

3. Select the device that will be used to record and play back the greeting wave file from the following options in the drop-down list.

Table 6-2 Wave File Device Options

Option	Recording and Play Back Method
Stereo Mic/Speakers	Recording is done from the Mic input and the recording is played back through the speakers. To use this device for recording and playing back wave files, plug a microphone into the D^{term} PC board's microphone jack and plug in a speaker to the D^{term} PC Board's SPKR jack.
Phone Voice Channel	Recording is done with the adjunct telephone, recording over the dial tone. The recording is played back to the phone.
D^{term} PC Line and Phone	Recording is done from both the adjunct telephone and the far party. The recording is played back to both the adjunct telephone and the far party.

Note: *The Sample Rate, Sample Size, and Stereo fields are related to the wave file format. These fields can be changed if they are enabled. The higher the sample rate chosen, the better the recording quality, but the more disk space is needed for every second of recording. For example, to record a wave file for one second at 11KHz uses 10.78 KB disk space, at 22KHz uses 21.53KB disk space, and 44KHz uses 43.06KB disk space.*

4. If available, select the desired sample rate from the **Sample Rate** group box.

5. If available, select the desired sample size from the **Sample Size** group box.

6. If desired, click the **Stereo** check box to record in Stereo.

   Note: *In addition to the sample rate, the Input Gain and Wave Volume affect the record and playback quality of your wave files. These items can be set through the D^{term} PC Board Configure software that comes with your D^{term} PC Board Package. The D^{term} PC Installation Guide for D^{term} PC Series III contains detailed information about wave device settings. The Input Gain and Wave Volume for selected wave devices can be adjusted before or during recording or playing back wave file.*

7. Click **OK**. The Wave Input/Output Device dialog box closes and the Business Attendant Client Options dialog box displays.

8. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Configuring Automatic Greetings

Use the following steps to enable the Business Attendant System to play a greeting automatically.

1. From the Business Attendant Client Options dialog box (Figure 4-1 on page 52), select the **Wave Files** tab (Figure 6-1 on page 78).

2. Select the **Automatically play greeting** check box.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Configuring Time-Dependent Greetings

The Business Attendant System allows you to play a different greeting depending on the time of day.

Use the following steps to enable the Business Attendant System to use a time-dependent greeting.

1. From the Business Attendant Client Options dialog box (Figure 4-1 on page 52), select the **Wave Files** tab (Figure 6-1 on page 78).

2. Select the **Play different greeting for AM and PM** check box.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Configuring Group Greetings

The Business Attendant System can be configured to play different greetings for different groups or DIDs. The groups/DIDs are configured in the Business Attendant Administrator application. Group greetings are configured when recording greetings. (See "Recording a Greeting" on page 86 for more information.)

Use the following steps to enable the Business Attendant System to use different greetings for groups.

1. From the Business Attendant Client Options dialog box (Figure 4-1 on page 52), select the **Wave Files** tab (Figure 6-1 on page 78).

2. Select the **Play different greeting for groups** check box.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.
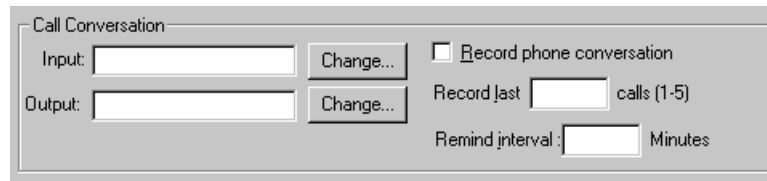
Configuring Automatic Call Recording

The Call Conversation group box (Figure 6-5) on the Wave Files tab (Figure 6-1 on page 78) contains the settings the Business Attendant System uses to enable attendants to record conversations.

Figure 6-5   Call Conversation group box

If automatic recording is selected, the Business Attendant System warns the attendant after the configured number of minutes that the conversation is being recorded. The attendant can then decide to continue or to stop recording. Since the wave files require a large amount of disk space, the attendant might want to stop recording after the warning displays.

Note: *Please follow the FCC rules regarding the legality of recording telephone conversations before you start recording a phone conversation.*

Before the Business Attendant System can record calls, call recording must be enabled and the input and output wave devices for recording and playing back call conversations must be configured. Additionally, the Call Conversation group box allows you to configure the number of calls that will be recorded automatically, and the length of time between recording reminders.

Enabling Call Recording

Before the Business Attendant System can record any call conversations, conversation recording must be enabled. Use the following steps to enable call recording.

1. From the Business Attendant Client Options dialog box (Figure 4-1 on page 52), select the **Wave Files** tab (Figure 6-1 on page 78).

2. Select the **Record phone conversation** check box.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Setting Up Call Recording Wave File Input/Output Devices

Use the following steps to select the wave file input and output devices for recording and playing back calls.

1. To select the device that will be used to record the calls, click the **Change** button beside the **Input** field in the Call Conversation group box (Figure 6-5). The Wave Input Device dialog box displays (Figure 6-3).
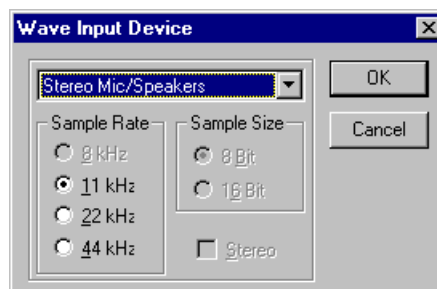
Figure 6-6   Wave Input Device dialog box

2. To select the device that will be used to play back the wave files of the calls, click the **Change** button beside the **Output** field in the Call Conversation group box (Figure 6-5). The Wave Output Device dialog box displays (Figure 6-3).
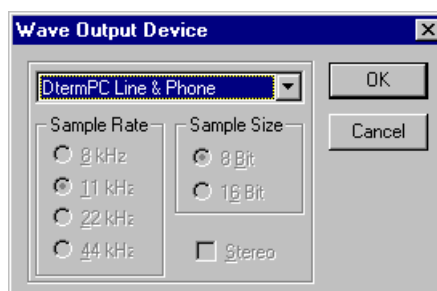
Figure 6-7   Wave Output Device dialog box

3. Select the device that will be used to record and play back the recorded call wave files from the following options in the drop-down list.

Table 6-3 Wave File Device Options

Option	Recording and Play Back Method
Stereo Mic/Speakers	Recording is done from the Mic input and the recording is played back through the speakers. To use this device for recording and playing back wave files, plug a microphone into the D^{term} PC board's microphone jack and plug in a speaker to the D^{term} PC Board's SPKR jack.
Phone Voice Channel	Recording is done with the adjunct telephone, recording over the dial tone. The recording is played back to the phone.

Table 6-3 Wave File Device Options

Option	Recording and Play Back Method
D^{term} PC Line and Phone	Recording is done from both the adjunct telephone and the far party. The recording is played back to both the adjunct telephone and the far party.

Note: *The Sample Rate, Sample Size, and Stereo fields are related to the wave file format. These fields can be changed if they are enabled. The higher the sample rate chosen, the better the recording quality, but the more disk space is needed for every second of recording. For example, to record a wave file for one second at 11KHz uses 10.78 KB disk space, at 22KHz uses 21.53KB disk space, and 44KHz uses 43.06KB disk space.*

4. If available, select the desired sample rate from the **Sample Rate** group box.

5. If available, select the desired sample size from the **Sample Size** group box.

6. If desired, click the **Stereo** check box to record in Stereo.

Note: *In addition to the sample rate, the Input Gain and Wave Volume affect the record and playback quality of your wave files. These items can be set through the D^{term} PC Board Configure software that comes with your D^{term} PC Board Package. The D^{term} PC Installation Guide for D^{term} PC Series III contains detailed information about wave device settings. The Input Gain and Wave Volume for selected wave devices can be adjusted before or during recording or playing back wave file.*

7. Click **OK**. The Wave Input/Output Device dialog box closes and the Business Attendant Client Options dialog box displays.

8. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Configuring the Number of Calls Recorded

The Business Attendant System can record up to the last five calls. Use the following steps to configure the number of calls the Business Attendant System records automatically.

1. From the Business Attendant Client Options dialog box , select the **Wave Files** tab .

2. Enter the number of calls, ranging from 1 to 5, that the Business Attendant System will record in the **Record last calls** field.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Configuring the Notification Warning

Use the following steps to configure how long the conversation is recorded before the BAS reminds the attendant that the call is being recorded.

1. From the Business Attendant Client Options dialog box , select the **Wave Files** tab .

2. Enter the number of minutes that the Business Attendant System should record the conversation before displaying a reminder in the **Remind interval** field.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Setting the Wave File Path

Before wave files can be played and recorded using the Business Attendant System, you must enter a path indicating the location of the wave files. You can store the wave files for all attendants in a common directory to save disk space on the local machines, instead of having each attendant store their individual wave files on their local machine. If the wave files are stored in a common directory, the administrator can view, playback, or delete the wave files to maintain the files and disk space. In the common directory, each attendant has their own folder. Attendants can only view, play, or delete their own wave files.

Use the following steps to configure the wave file common directory.

1. From the Business Attendant Client Options dialog box (Figure 4-1 on page 52), select the **Wave Files** tab (Figure 6-1 on page 78).

2. Do one of the following:
    *   Enter the desired path in the **Path to wave files** field.
    *   Click the **Browse** button and select the desired path from the available directories.

3. Click **OK** to save this parameter and exit the Business Attendant Client Options dialog box.

Working with Greetings

If you have installed the D^{term} PC Board and its driver or alternate device in your computer, you are able to record and play wave files from or to a telephone line. The Business Attendant System provides the following options for playing greeting wave files:

Automatically play greeting
This option enables the Business Attendant System to automatically play back a prerecorded greeting wave file when an incoming call is connected.

Play different greeting for AM and PM
This option enables the Business Attendant System to play back different greeting wave files in the morning and in the afternoon.

Play different greeting for groups
This option enables the Business Attendant System to play back different greeting wave files to different external group callers.

When a call comes in and is connected, a prerecorded greeting wave file is played for the calling party. If your selected greeting wave file does not exist, no greeting is played.

Recording a Greeting

Attendants can record greeting wave files after the greetings parameters are configured on the Wave Files tab in the Business Attendant Client Options dialog box. Before you start recording, verify that the record and play back devices have been properly configured. (See "Configuring Greetings" on page 79 for more information.) Use the following steps to record a greeting.

1. Select **Options > Record greeting** from the Line Status window (Figure 3-1 on page 26). The Record Greeting dialog box displays (Figure 6-8). The Record Greeting dialog box contains controls that are similar to those on a tape recorder.
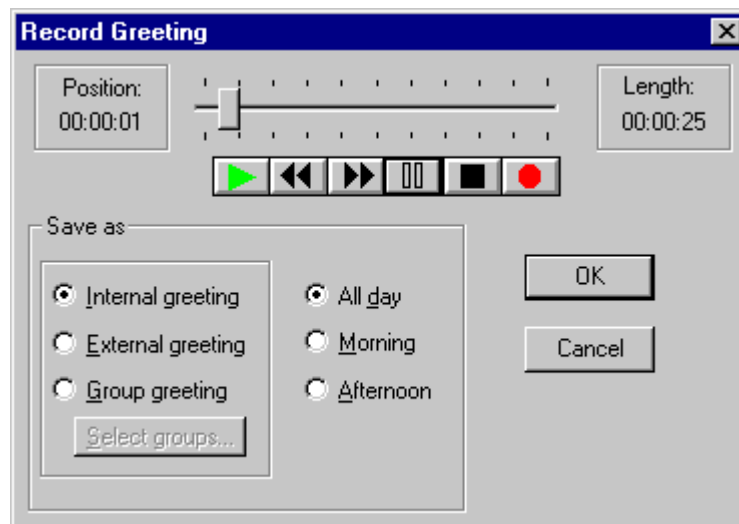

Figure 6-8   Record Greeting dialog box

2. Click the red **Record** button to start recording. The slider moves while you record the message. The length of the file displays in the **Position** and **Length** fields.

> **Note 1:** *The Stereo Mic/Speakers option is recommended to ensure the highest quality of recording.*

> **Note 2:** *If you have selected the D^{term} Phone Voice Channel, take the receiver off the hook and speak the desired greeting. The dial tone will not be incorporated in the recording.*

3. Use the play back controls to navigate within and play the wave file:
   - Click the **Play** button to play the wave file.
   - Click the **Fast Forward** or **Rewind** button to move to the beginning or end of the wave file. After reaching the desired location, click the **Play** button to play the wave file.
   - Move the **Slider Control** to move to a specific location in the wave file. After reaching the desired location, click the **Play** button to play the wave file.
   - Click the **Pause** button to stop playing the wave file at the current location. Click the **Pause** button again to resume playing the wave file.
   - Click the **Stop** button to stop the wave file from playing.

4. Once you are satisfied with your recording, you can save the file as one of the following types of greetings.

Table 6-4 Greeting Types

Greeting Type	Action
Internal Greeting	Plays for internal incoming calls.
External Greeting	Plays for external incoming calls in spite of the called numbers.
Group Greeting	Plays for external incoming calls according to their groups. Groups are defined by called numbers.

5. If you selected the **Group greeting** radio button, click the **Select groups** button to select the group(s) that you want to hear the wave file greeting. The Save Greeting for Groups dialog box displays (Figure 6-9), displaying the groups previously configured using the Business Attendant Administrator.
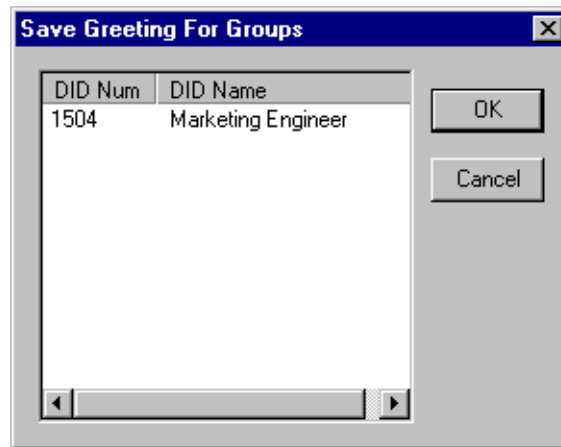
Figure 6-9   Save Greeting for Groups dialog box

6. Click the group(s) to select the desired groups. Click **OK** when all groups are selected. The Save Greeting for Groups dialog box closes.

7. Select the time of day that you want the message to be played:

   • All day

   • Morning

   • Afternoon

8. Click **OK**. The Record Greeting dialog box closes, saving the greeting.

Working with Recorded Calls

The Business Attendant System gives attendants the capability to record and play back call conversations. If configured, the Business Attendant System will automatically record a number of calls and save them as wave files for attendants to play back. (See "Configuring Automatic Call Recording" on page 82 for more information.)

Recording a Call

If the Business Attendant System is configured to automatically record the phone conversations, the specified number of calls are recorded. The files are not permanently saved to the hard drive since the files often require large amounts of disk space. Instead, the temporary files are saved to the location configured in the Business Attendant Client Options. (See "Configuring Automatic Call Recording" on page 82 for more information.)

Note: *Please follow the FCC rules regarding the legality of recording telephone conversations before you start recording a phone conversation.*

Use following methods to save call recordings, with a note attached.

Note: *The Save Recording option is only available after hanging up with the caller you were recording.*

- Click the **SvRec** command button in the Line Status window (Figure 3-1 on page 26).
- **CTRL+F9**
- Select **Call > Save Recording** from the Line Status window (Figure 3-1 on page 26).
  The recording is saved to the location configured in the Business Attendant Client Options dialog box.

Playing a Recorded Call

Use the following steps to play a wave file of a recorded call.

1. Select **Options > Play back** from the Line Status window (Figure 3-1 on page 26). The Play Back dialog box displays (Figure 6-10).
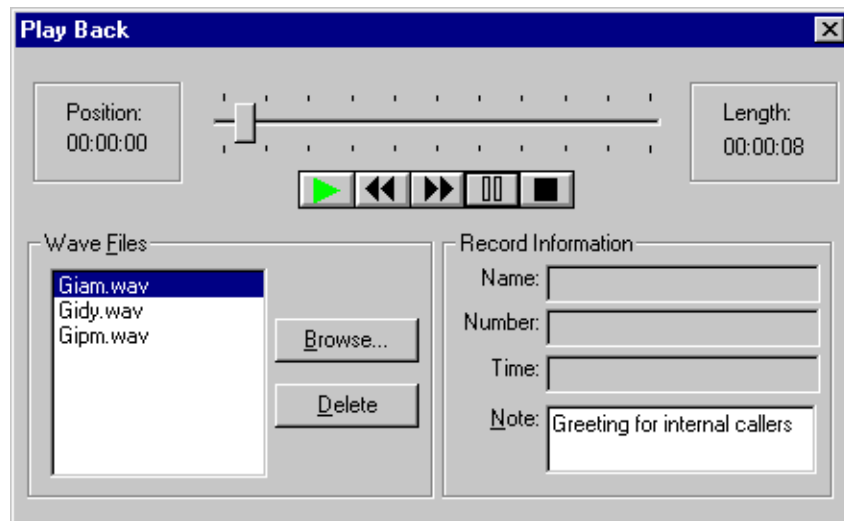

Figure 6-10   Play Back dialog box

2. Select the wave file that you want to play from the Wave Files group box.

   • To open wave files that are not saved in the default folder, click the **Browse** button, then open the desired wave file.

   • Information about the wave file displays in the Record Information group box, including the name of the caller or called party, the phone number, the time of the call, and any notes that the operator entered when saving the recording.
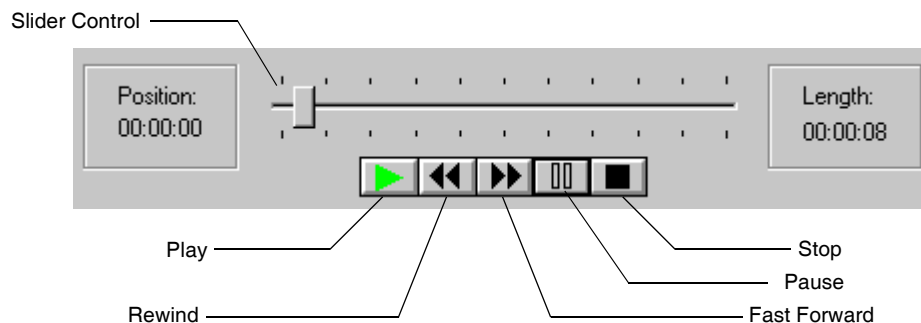
Figure 6-11   Play Back Controls - Play Back dialog box

3. The Play Back dialog box controls (Figure 6-11) are similar to those on a tape recorder. Use the play back controls to navigate within and play the wave file:

   • Click the **Play** button to play the wave file.

- Click the **Fast Forward** or **Rewind** button to move to a specific location in the wave file. After reaching the desired location, click the **Play** button to play the wave file.

- Move the **Slider Control** to move to a specific location in the wave file. After reaching the desired location, click the **Play** button to play the wave file.

- Click the **Pause** button to stop playing the wave file at the current location. Click the **Pause** button again to resume playing the wave file.

- Click the **Stop** button to stop the wave file from playing.

4. To select another wave file in the list, click on the name of the desired file.

5. To exit the Play Back dialog box, click the **close** box at the top of the screen.

Deleting Wave Files

Wave files require a large amount of disk space, so at times, you may want to delete unneeded wave files to free disk space. Use the following steps to delete a wave file.

1. Select **Options > Play back** from the Line Status window . The Play Back dialog box displays .

2. Select the wave file that you want to delete from the Wave Files group box.
   - To open wave files that are not saved in the default folder, click the **Browse** button, then open the desired wave file.
   - Information about the wave file displays in the Record Information group box, including the name of the caller or called party, the phone number, the time of the call, and any notes that the operator entered when saving the recording.

3. Click the **Delete** button. The Delete Wave File dialog box displays.

4. Click **OK**. The Play Back dialog box displays.

5. To exit the Play Back dialog box, click the **close** box at the top of the screen.

Troubleshooting Wave Files

NEC recommends that administrators should test the wave file quality by having the attendants record and play back a greeting to an incoming call, as well as record and play back a caller's conversation so that the administrator can adjust the configuration of the D^{term} PC board or the alternate device to establish a satisfactory wave file quality.

Some problems that may occur when dealing with wave files are listed below with possible solutions:

Table 6-5 Possible Wave File Problems and Solutions

Problem	Suggestions
You can't hear a recorded greeting or conversation regardless of volume.	• Choose a different wave device. • The record input gain for the record device is too low.
The recorded wave file is noisy.	• Decrease the volume of the wave device.

Appendix A   Error Messages

The following table lists the error messages that might be encountered when using the Business Attendant System Client application, the cause, and the suggested remedy.

Table 6-6 Business Attendant Client Error Messages

Message	Cause	Action
All loops are full, please process the calls on the loops.	• The attendant tried to answer a call with calls waiting on all loops.	Process other calls waiting on the loops first.
BAS Server compact and repair routine has ended. Continue with call processing but report unusual behavior to an administrator immediately.	• A Client was logged in when the Server was scheduled to run the compact and repair routine on the **BASQueueDB.mdb** file.	Report the error to the Administrator. The Administrator should consult log for error codes and try to reschedule the compact and repair routine to non-business hours, if possible, to cut down on the chances of a locked Database.
Camp request failed, please try again.	• Call processing error.	Try again or check the **OAI.log** file on the OpenWorX Server for detailed error information.
Cannot dial an orbit number. Use the Retrieve Parked Call option.	• The attendant dialed an orbit number.	Use Park Retrieve to retrieve the parked call.
Could not change password. Database error:	• Invalid Database Version • Corrupt Database	Note the error code and contact Support.
Could not create new CallState record. Database error:	• CallStateDB corruption • Invalid path • File locked	Note the error code and contact Support.
Could not delete CallState record. Database error:	• CallStateDB corruption • Invalid path • File locked.	Note the error code and contact Support.
Could not initialize the database due to error:	• Failed to initialize Database • Invalid Database version • Corrupt Database	Note the error code and contact Support.
Could not update CallState record. Database error:	• CallStateDB corruption • Invalid path • File locked	Note the error code and contact Support.

Table 6-6 Business Attendant Client Error Messages

Message	Cause	Action
Database error:	• Database error	Note the error code, try the action again, and contact support if you receive the error.
Destination number was forwarded unanswered back to us. Canceling transfer!	• The destination phone had forwarded calls sent to the Operator.	Change the destination's forwarding to the desired location or send the current call to the destination's voice mail.
Dialed number was either forwarded back to attendant or it was a monitored number.	• The destination phone had forwarded calls sent to the Operator. • The destination phone is a monitored number.	Verify that the destination's phone number is valid. If the number is valid, change the destination's forwarding to the desired location.
Error connecting to NEC Application Server	• The Business Attendant Server machine name is invalid.	Verify that the Business Attendant System Client installation was successful.
Error: BAS Server compact and repair routine resulted in an error. Continue with call processing but report unusual behavior to an administrator immediately.	• A Client was logged in when the Server was scheduled to run the compact and repair routine on the **BASQueueDB.mdb** file, and an error occurred.	Report the error to the Administrator. The Administrator should consult log for error codes and try to reschedule the compact and repair routine to non-business hours, if possible, to cut down on the chances of a locked Database.
Error: Failed to read Server name.	• Failed to read the registry on the Server machine.	Verify that the Business Attendant System Client installation was successful.
Failed to login to the Business Attendant System Server. The number of allowable users was exceeded.	• The security device will only allow a certain number of Clients to log in to the system.	Verify the purchase agreement for the number of Clients allowed.
Hold request failed. Please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
New password cannot be blank	• The user left the Password field blank when changing an existing password or entering a new password.	Blank passwords are not allowed. Enter a password.
Old password is incorrect.	• The user entered an incorrect password while attempting to change the password.	Re-enter the old password.

Table 6-6 Business Attendant Client Error Messages

Message	Cause	Action
Operation failed, Line is busy.	• The attendant tried to answer a call, but failed because the attendant's subline was off-hook or busy.	Complete the current call or manually release the call with the receiver on the D^{term} to clear the line.
Operation failed. Verify attendant's phone is idle and try again.	• Call processing error	Complete the current call or press the receiver on the D^{term} to clear the line.
Out of memory. Application will terminate	• The Client workstation does not have enough memory to run the application.	Verify that the workstations meet the minimum system configuration requirements for the Business Attendant Client application.
Out of resource memory. Application will terminate.	• A resource exception occurred on the Client workstation.	Verify that the workstations meet the minimum system configuration requirements for the Business Attendant Client application.
Override failed.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Park request failed. Please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Release failed, please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Release failed. Please manually release call with receiver to clear phone line.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Retrieve Hold request failed. Please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Retrieve parked call failed. Please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.

Table 6-6 Business Attendant Client Error Messages

Message	Cause	Action
The local workstation is not a valid workstation. Have someone with administrator rights set up this workstation in the database.	• The Business Attendant Client's workstation was not entered in the Database using the Business Attendant Administrator application.	Contact the Administrator to set up the workstation.
The make call attempt failed. Please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
The values for New password and Verify password do not match	• The user entered an incorrect password while attempting to change the password.	Re-enter the old password and the new password correctly when prompted.
There was an error initializing the Windows Sockets interface.	• The TCP/IP socket failed to initialize.	Reboot system and try again. If the problem persists, contact support
Toggle source/dest failed. Please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Transfer failed, please try again.	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.
Transfer failed, the dialed extension is probably busy.	• Call processing error	Try again. If the destination is busy, try transferring to a different extension or transfer to the extension's voice mail. If this fails, check the **OAI.log** file on the OpenWorX Server for detailed error information.
Transfer failed, the dialed extension was an orbit number.	• The attendant dialed an orbit number while attempting a transfer.	Attendants cannot transfer a call to a call parked on an orbit number.
Transfer to voice mail failed. Reconnecting call...	• Call processing error	Try again and check the **OAI.log** file on the OpenWorX Server for detailed error information.

Table 6-6 Business Attendant Client Error Messages

Message	Cause	Action
WARNING: BAS Server has began a compact and repair routine on the database. Please wait until further notification is given.	• A Client was logged in when the Server was scheduled to run a compact and repair routine on the **BASQueueDB.mdb** file.	Report the error to the Administrator. The Administrator should consult the log for error codes and try to reschedule the compact and repair routine to non-business hours, if possible, to cut down on the chances of a locked Database.