

# Panasonic®

## Operating Manual Communication Assistant Client User

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Model No.    **KX-NCP Series**  
                  **KX-TDE Series**



Thank you for purchasing this Panasonic product.  
Please read this manual carefully before using this product and save this manual for future use.

**Communication Assistant: Version 3.0 or later**

Document Version: 2010-10

# Introduction

Communication Assistant (CA) Client is a Computer Telephony Integration (CTI) application that integrates with your Panasonic PBX, and allows you to perform various telephone operations from your PC.

## About the Operating Manual

This Operating Manual is designed to serve as an overview of the features and setup of CA Client and supported programs.

The manual is divided into the following sections:

### 1 First Setting

This section provides information about using starting CA for the first time.

### 2 Login

This section provides information about logging into CA.

### 3 Call Control

This section explains how to use the call control features of CA Client.

### 4 Call History Review/Recall

This section explains how to use the Call History feature of CA Client.

### 5 CA Operator Console Features

This section provides information about using CA Operator Console features.

### 6 CA Supervisor Features

This section provides information about using CA Supervisor features.

### 7 Other Features

This section provides information about other CA features.

### 8 Microsoft Outlook Integration

This section explains how to integrate CA Client functionality with Microsoft® Outlook®.

### 9 Additional Information

This section provides additional information and conditions about CA can also be found here.

### 10 System Requirements

This section details the computer system requirements for running CA Client.

## Notice

- CA system has two modes, PBX mode and Server mode. There are some feature differences between PBX mode and Server mode.  
Please ask your administrator whether your system is working with PBX mode or Server mode.
- When you uninstall the CA application, the License Registration Keys of IP Softphones will be deleted. Please keep a record of the License Registration Keys of IP Softphones before you uninstall the CA application.
- If an older version of CA Client is installed over a newer version, the software may not function properly. If you want to downgrade your version of CA Client, uninstall the current version, then install the older version.
- When using CA Client, be sure the system display font is set to normal size (96 dpi).
- The use of this Software may be limited under the terms of the license agreement for your system. Please confirm the terms of your license before using this Software.

## Note

The contents and design of the software are subject to change without notice.

## IMPORTANT

CA Client stores personal information. In order to prevent data theft and leakage, we recommend the following:

- Set a password-protected screensaver to activate after your computer has been idle for a set amount of time.
- Use Windows Update to keep your system up-to-date with the latest software patches.
- When users change extensions, desks, etc., make sure that the access rights for their previous and new extensions are correct.
- Set a login password that is at least 5 characters long, and contains a combination of letters and numbers.
- Periodically change all login passwords to prevent unauthorized access by third parties.
- When the computer used for CA Client is transferred, disposed of, or taken out of service, ensure all sensitive data is securely erased.

**Trademarks:**

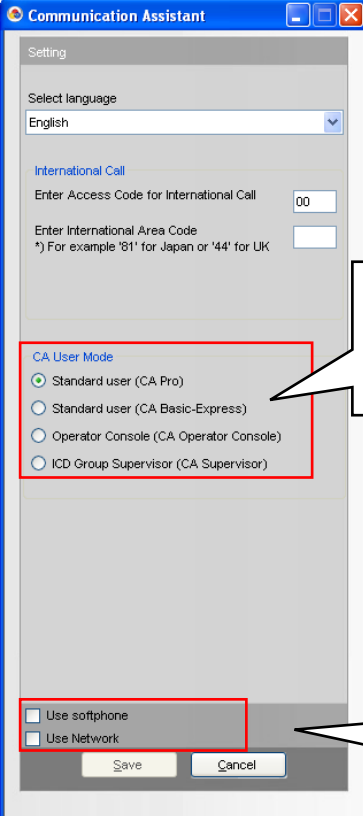
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# 1 First Setting

These initial settings must be made before using CA Client. Once you log in for the first time, these settings cannot be changed.



The screenshot shows the 'Communication Assistant' window with the 'Setting' tab selected. The window contains the following elements:

- Select language:** A dropdown menu currently set to 'English'.
- International Call:** Two input fields. The first is labeled 'Enter Access Code for International Call' with '00' entered. The second is labeled 'Enter International Area Code' with a note: '\*) For example '81' for Japan or '44' for UK'.
- CA User Mode:** A section with four radio button options:
  - ☒ Standard user (CA Pro)
  - ☐ Standard user (CA Basic-Express)
  - ☐ Operator Console (CA Operator Console)
  - ☐ ICD Group Supervisor (CA Supervisor)
- Use softphone:** An unchecked checkbox.
- Use Network:** An unchecked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Select the user mode you wish to log in with. A license is required for each user mode. If you are not sure which mode to select, confirm with your administrator.

Check the following features to use them in CA Client:

**Use softphone:** The IP Softphone will load automatically each time CA Client is started. An IP Softphone activation key for your extension is required to use this feature.

**Use Network:** You can view other PBX's contact lists and use CA features over a network connection. CA Server and a network activation key are required to use this feature.

## 2 Login

### 2.1 Login Information

The screenshot shows the 'Communication Assistant' window with a 'User Login' dialog box. The dialog box has three input fields: 'IP Address of CA Server' (containing '10 . 64 . 130 . 28'), 'Port' (containing '33334'), and 'Extension Number' (containing '303'). There is also a 'Password' field which is empty. At the bottom, there is a checkbox for 'Automatically login' and two buttons: 'Login' and 'Quit'. Three callout boxes provide instructions: the first points to the IP and Port fields, the second points to the Extension Number field, and the third points to the Password field.

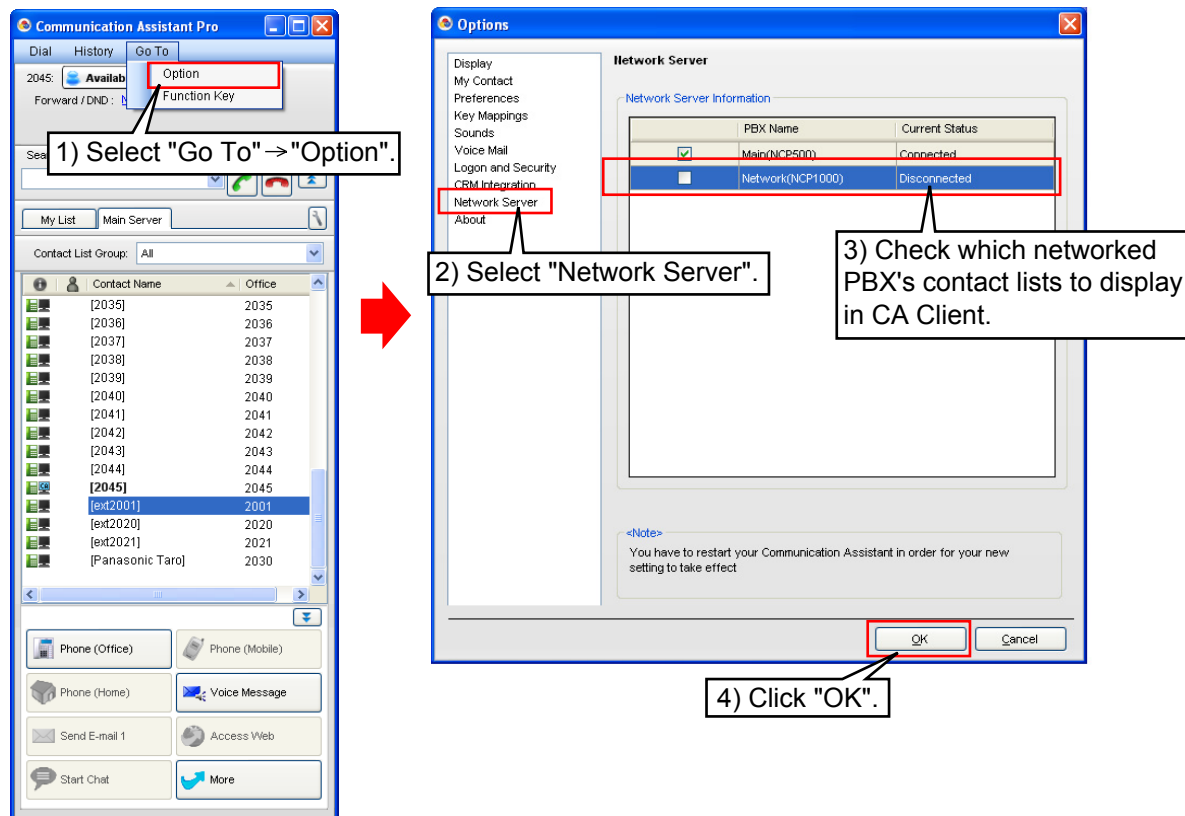
Enter the IP address and the port number of your CA Server or PBX after checking with your administrator.

Enter your extension number.

When logging in for the first time, press the "Login" button without entering a password.

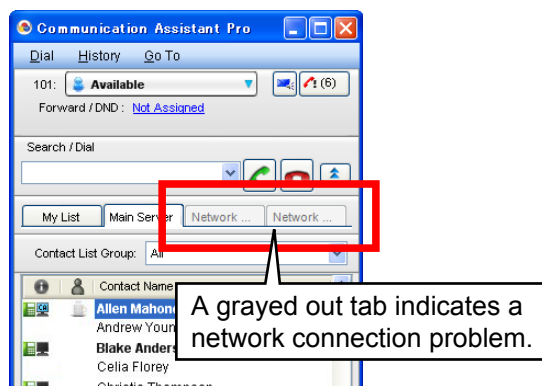
## 2.2 Network Settings

To enable the display of other networked PBX's contact lists, perform the following procedure:



### Note

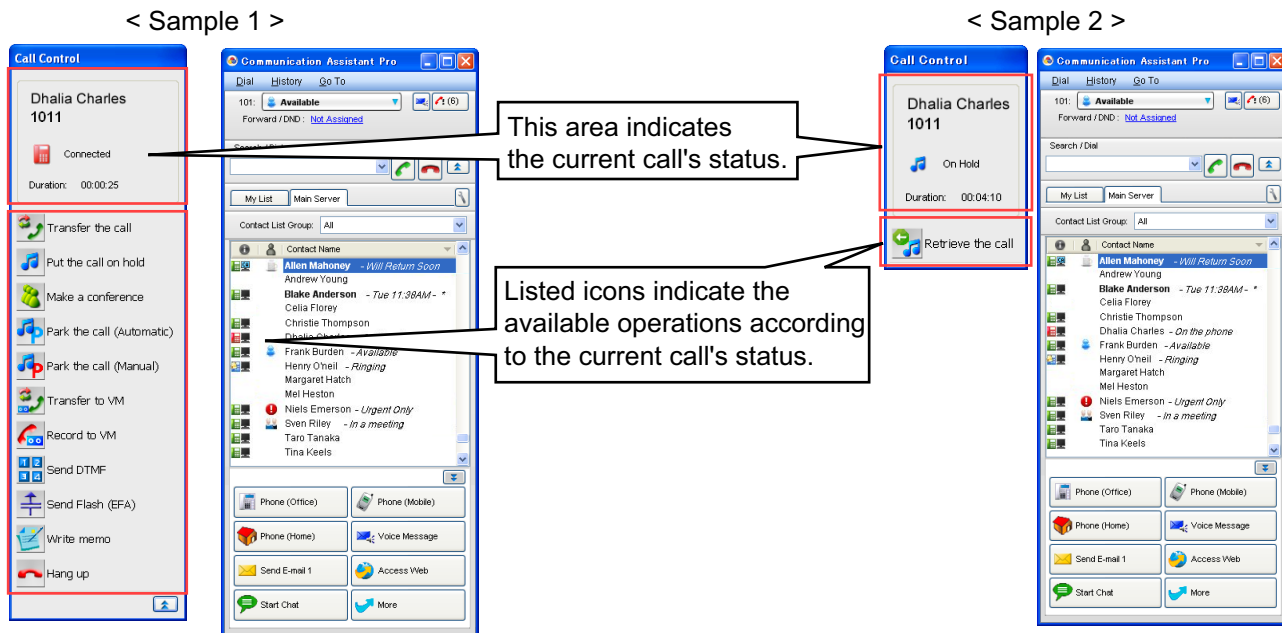
- Up to 8 PBXs (including your own) may be selected.
- During the initial setup of CA Client, "Use Network" must be checked, and CA Server and a network activation key are required to use this feature.
- If a network tab in CA Client is grayed out and not selectable, there may be a network communication problem or a problem with the CA Server node connected to that tab's PBX. If the tab does not return to normal after 15 minutes have passed, contact your network administrator.



### 3 Call Control

The call control window indicates the status and available features for each incoming or outgoing call. When the extension is idle, the window is not displayed. If a call is finished or disconnected, the window closes. When the call status changes to ROT (failed) status, CA disconnects the call.

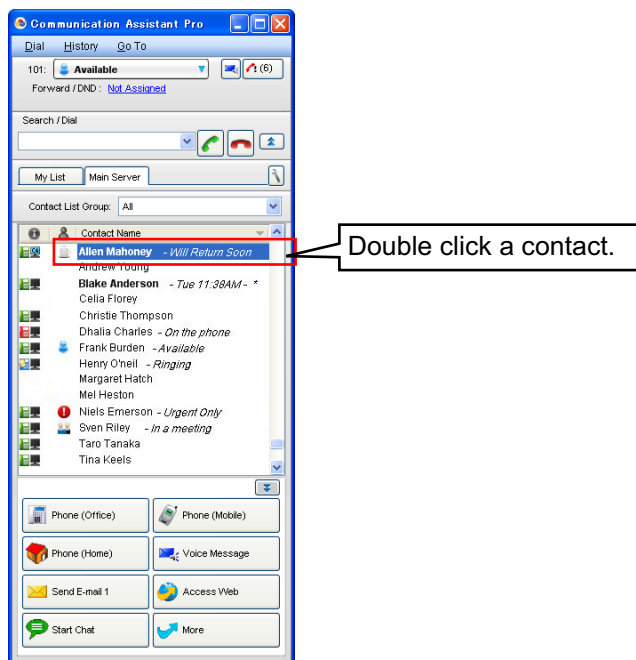
Call Control Window



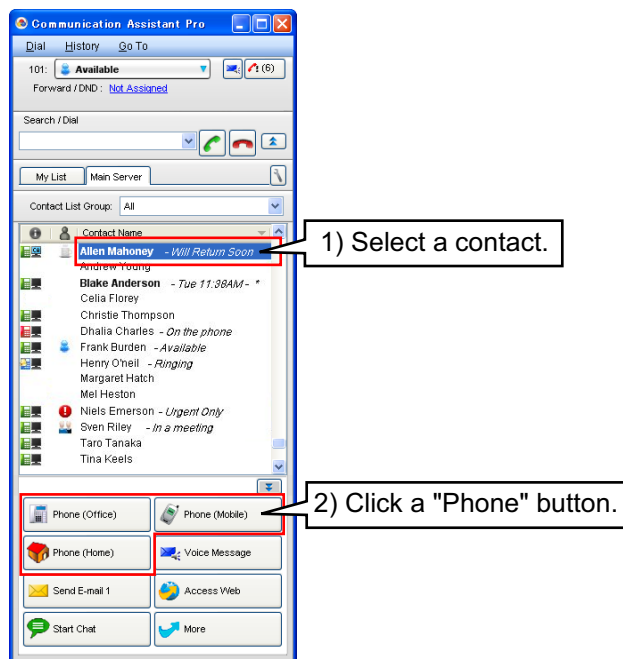


## 3.1 Making a Call

### Method 1



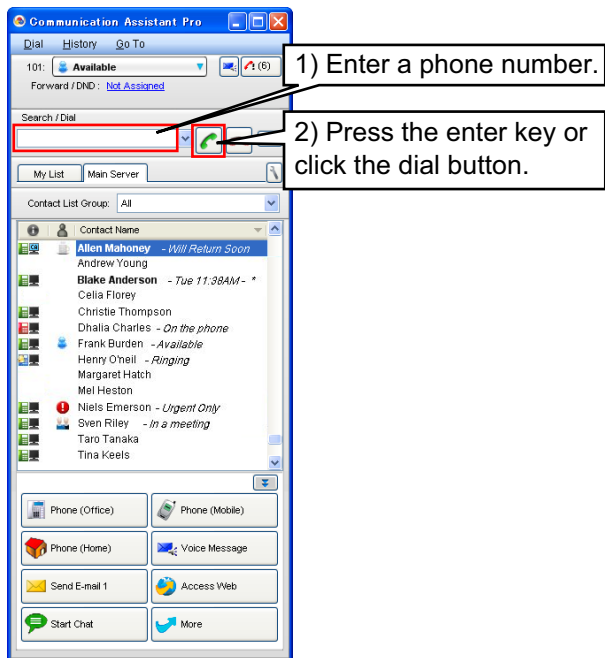
### Method 2



### Note

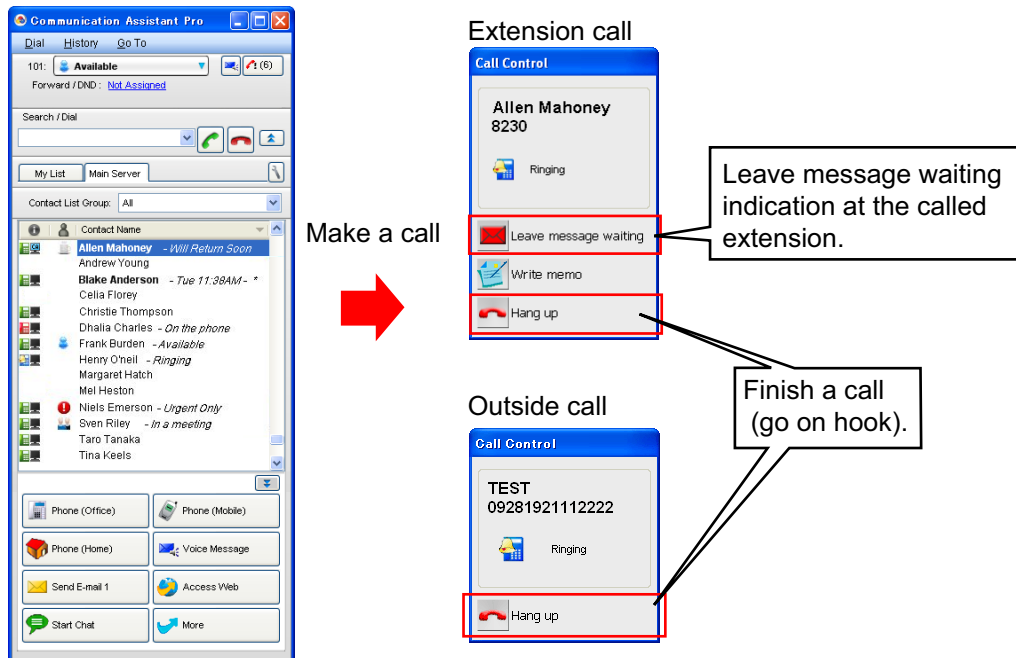
If a number is not entered for the contact, the button will not be active, and will be grey.

### Method 3

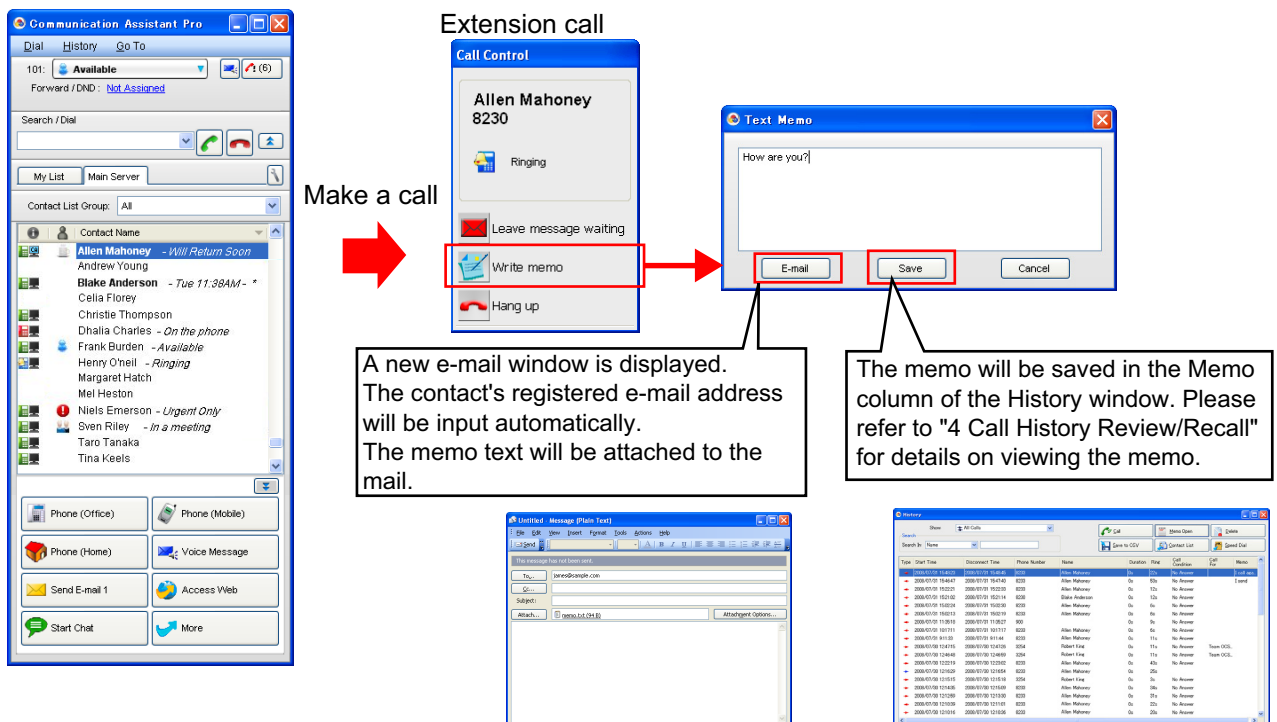


## 3.2 Operations while calling

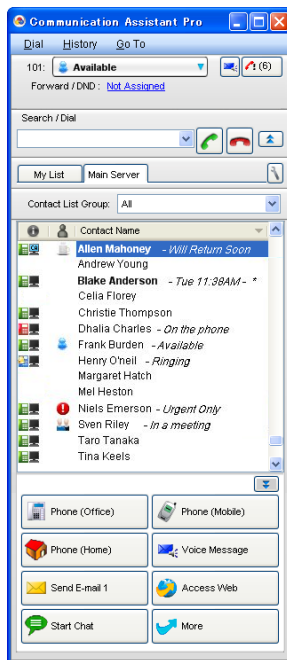
### Operations while calling



### Operations while calling (2)

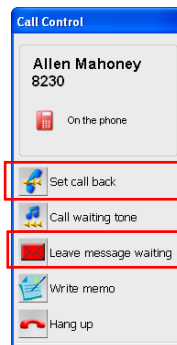


### Operations while calling (3)



When the extension is busy:

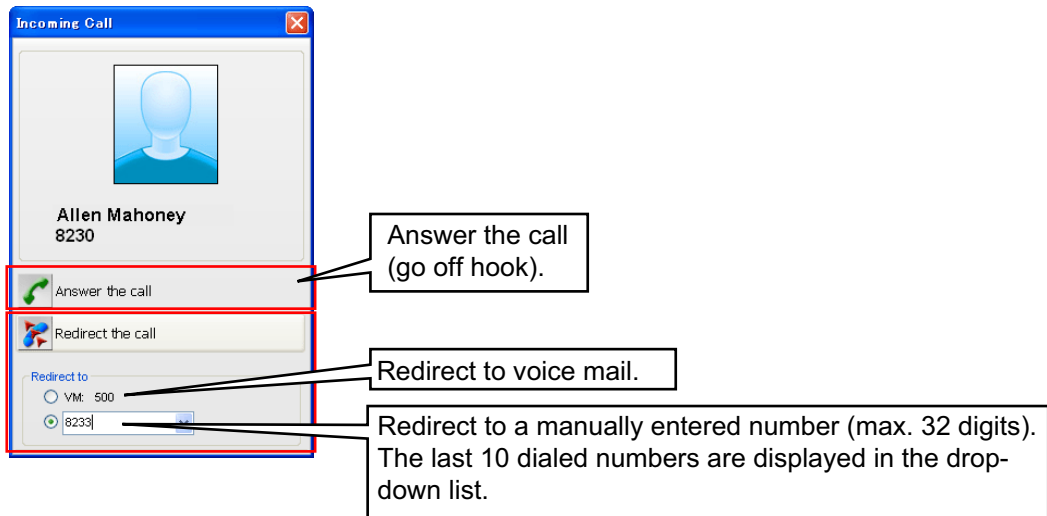
Make a call



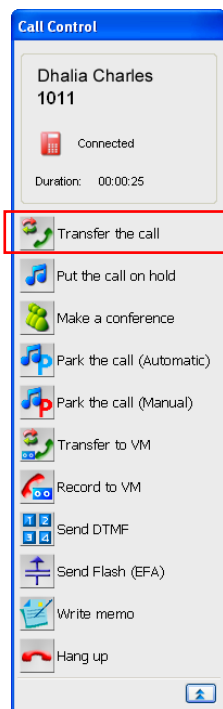
Set call back feature to own phone.

Leave message waiting indication at the called extension.

## 3.3 Answering a Call



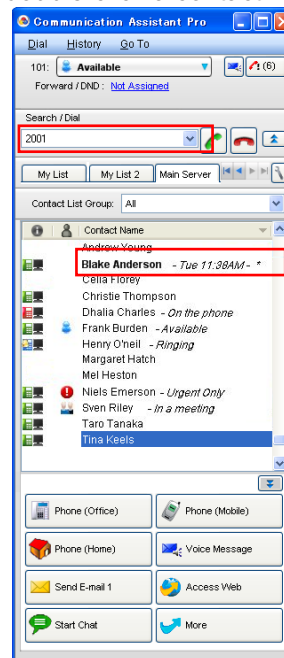
## 3.4 Transferring a Call



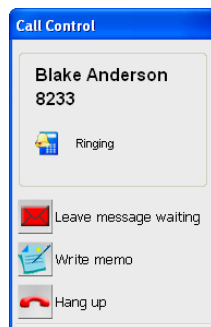
Put the party on consultation hold to transfer the call.



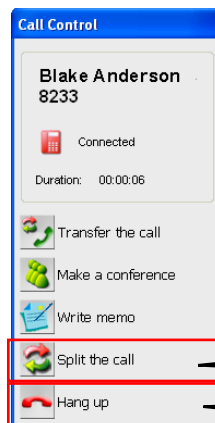
Enter a phone number or double-click a contact.



The transfer destination extension is called.



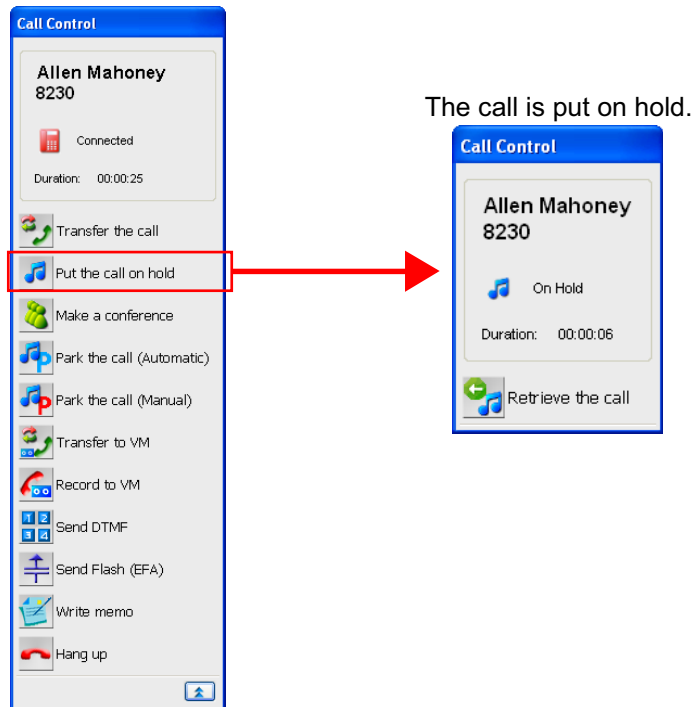
The call is answered.



Split the call on consultation hold.

Go on hook and complete the transfer.

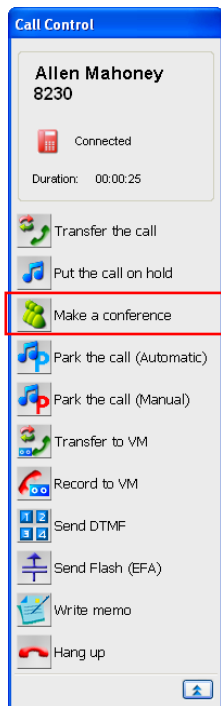
## 3.5 Putting a Call on Hold



### **Notice**

Exclusive hold is not supported.

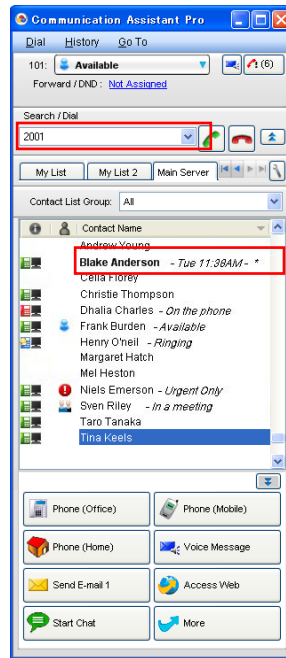
## 3.6 Making a Conference



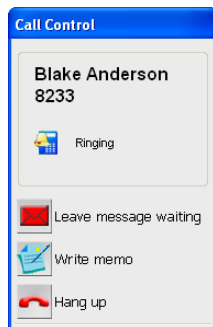
Put the party on consultation hold to make a conference.



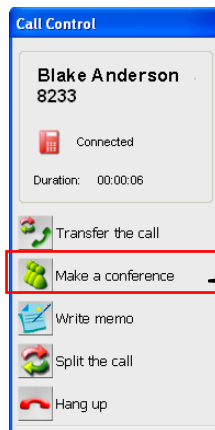
Enter a phone number or double-click a contact.



The second party is called.



The call is answered.



Start conference.



## 3.7 Conference Group Call

### Configuring a conference group

The diagram illustrates the process of configuring a conference group in Communication Assistant Pro. It consists of several screenshots and callouts:

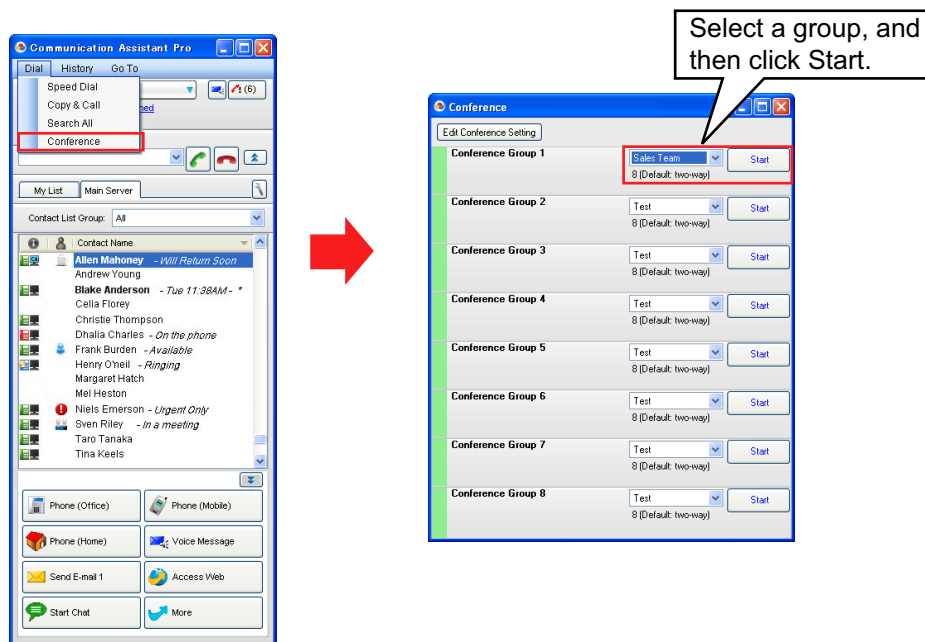
- Communication Assistant Pro:** The main interface showing a menu bar (Dial, History, Go To) and a toolbar. The 'Conference' option is highlighted in the menu.
- Conference Window:** A window titled 'Conference' showing a list of conference groups. The 'Edit Conference Setting' button is highlighted. The list includes:
 

Conference Group	Name	Start
Conference Group 1	Sales Team 8 (Default: two-way)	Start
Conference Group 2	Test 8 (Default: two-way)	Start
Conference Group 3	Test 8 (Default: two-way)	Start
Conference Group 4	Test 8 (Default: two-way)	Start
Conference Group 5	Test 8 (Default: two-way)	Start
Conference Group 6	Test 8 (Default: two-way)	Start
Conference Group 7	Test 8 (Default: two-way)	Start
Conference Group 8	Test 8 (Default: two-way)	Start
- Conference Setting Window:** A window titled 'Conference Setting' showing the configuration for a selected group (Sales Team). It includes fields for Name, PIN, and a list of members. Callouts indicate:
  - Select a group to edit.
  - Specify a name and PIN number for the group, and specify whether others can join the conference after it is established.
  - Save the current configuration.
  - Delete the current configuration.
  - Add a new member to the group.
- Contact List:** A list of contacts including Andrew Young, Blake Anderson, Celia Florey, Christie Thompson, Dhalla Charles, Frank Burden, Henry O'Neill, Margaret Hatch, Mel Heston, Niels Emerson, Sven Riley, Taro Tanaka, and Tina Keels. Callouts indicate:
  - Select the member's number.
  - Remove a group member.
  - You can drag and drop contacts into the conference group list.
  - You can also right-click a contact and select "Add Member to Conference" to add a conference member.

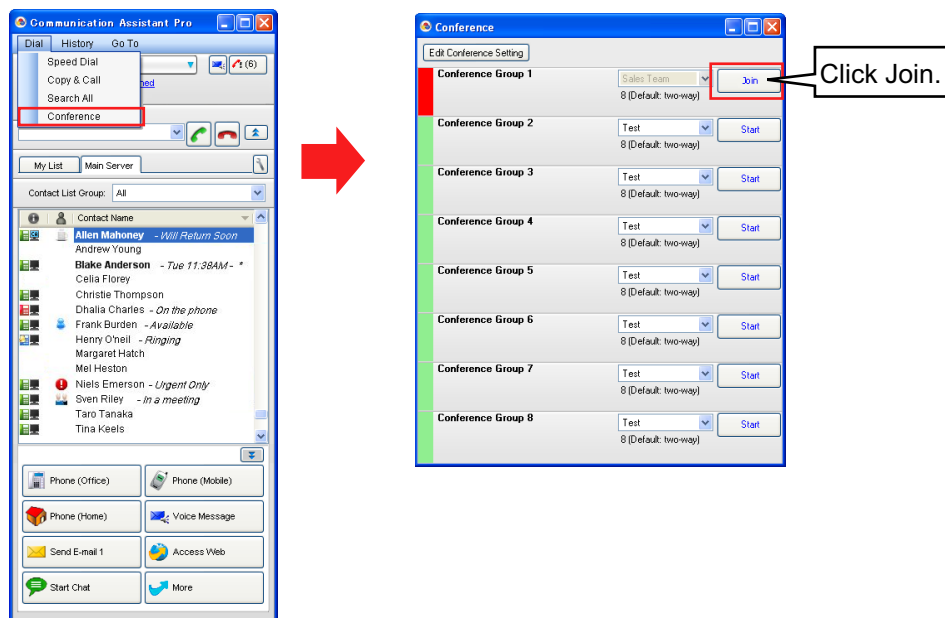
#### Note

If you make changes to conference member settings from CA Client and begin a conference call, the new settings will be used instead of the PBX's conference call settings, and the PBX's conference call settings will be cleared.

#### Starting a conference group call



#### Joining a conference that is in progress



During a conference (originator only)


Conference Room

Conference Room: Conference Group 1


End Conference

PIN:

Taro Tanaka  
2001



Tina Keels  
2002



Empty Slot

Empty Slot

Empty Slot

Empty Slot


Empty Slot


Duration: 00:00:18


Click to end the conference.

Click to remove the participant.

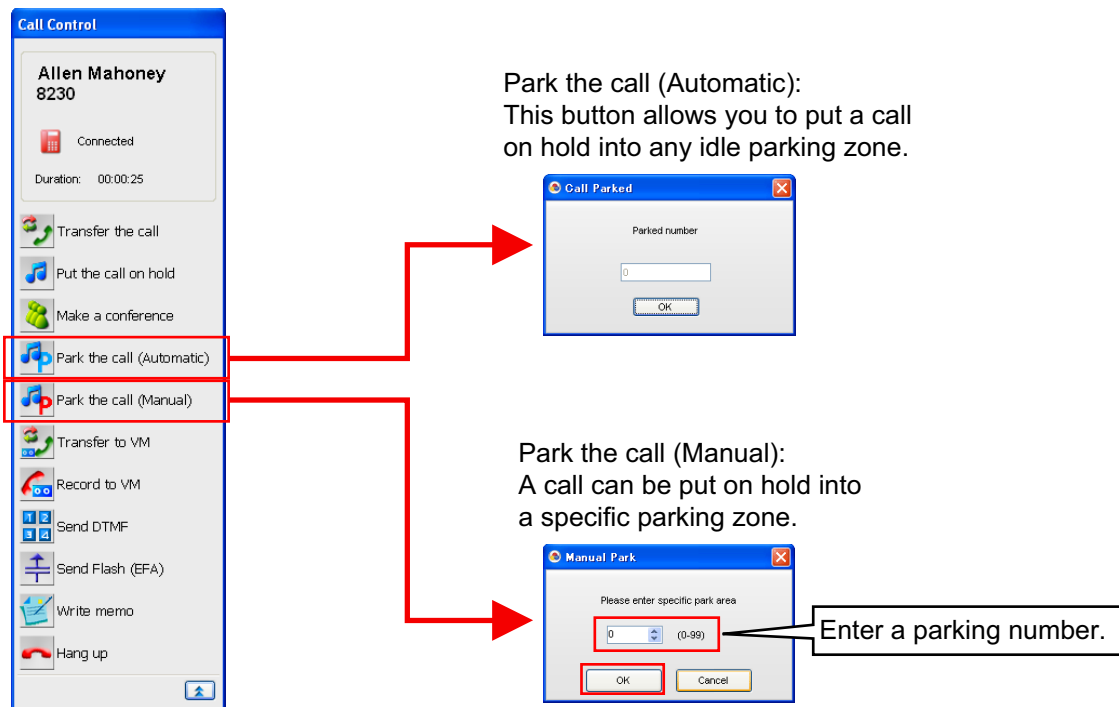
Participant status  
(click to change):

 Normal

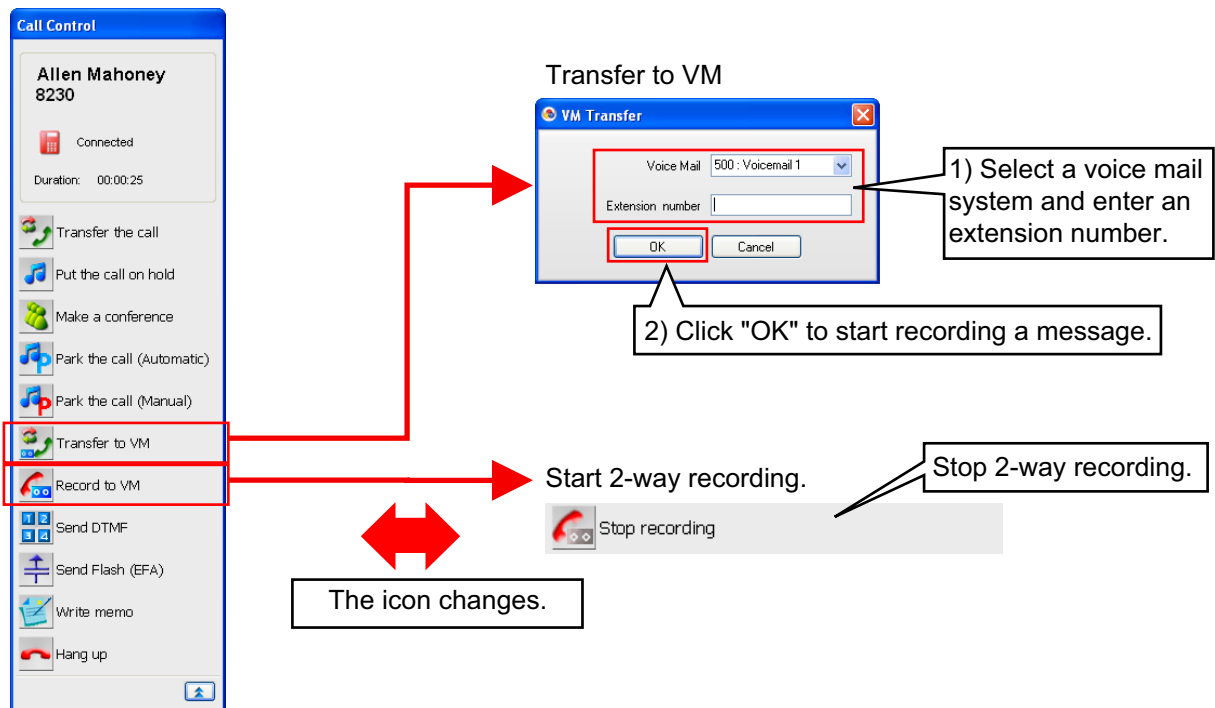
 Hold (This member will hear hold music.)

 Mute (This member will not be able to speak.)

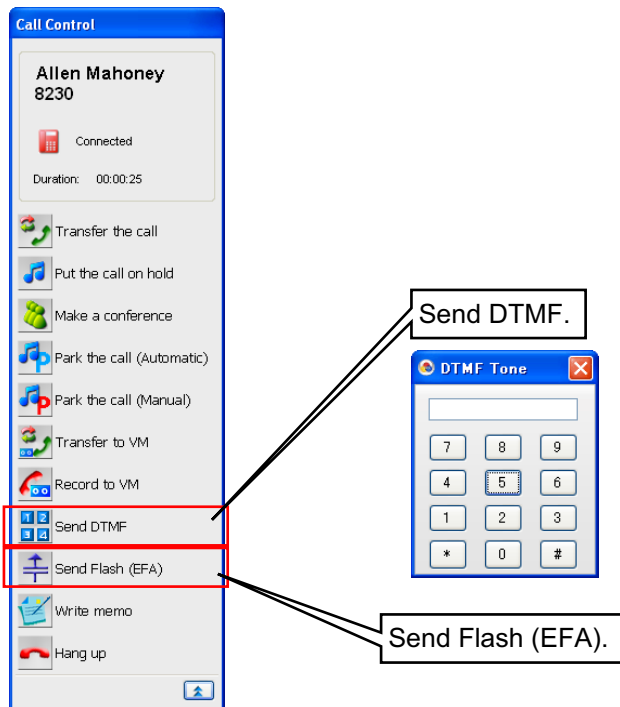
## 3.8 Parking a Call



## 3.9 Transferring to Voice Mail/Recording to Voice Mail



## 3.10 Sending DTMF Tone or Flash



## 3.11 Writing a Memo/Hanging Up

**Call Control**

Allen Mahoney  
8230

Connected  
Duration: 00:00:25

- Transfer the call
- Put the call on hold
- Make a conference
- Park the call (Automatic)
- Park the call (Manual)
- Transfer to VM
- Record to VM
- Send DTMF
- Send Flash (EFA)
- Write memo**
- Hang up**

**Text Memo**

How are you?

E-mail Save Cancel

A new e-mail window is displayed. The contact's registered e-mail address will be input automatically. The memo text will be attached to the mail.

The memo will be saved in the Memo column of History window. Please refer to "4 Call History Review/Recall" for details on viewing the memo.

**Compose** Message (Plain Text)

To: jared@sample.com

Subject: [memo.00020.0]

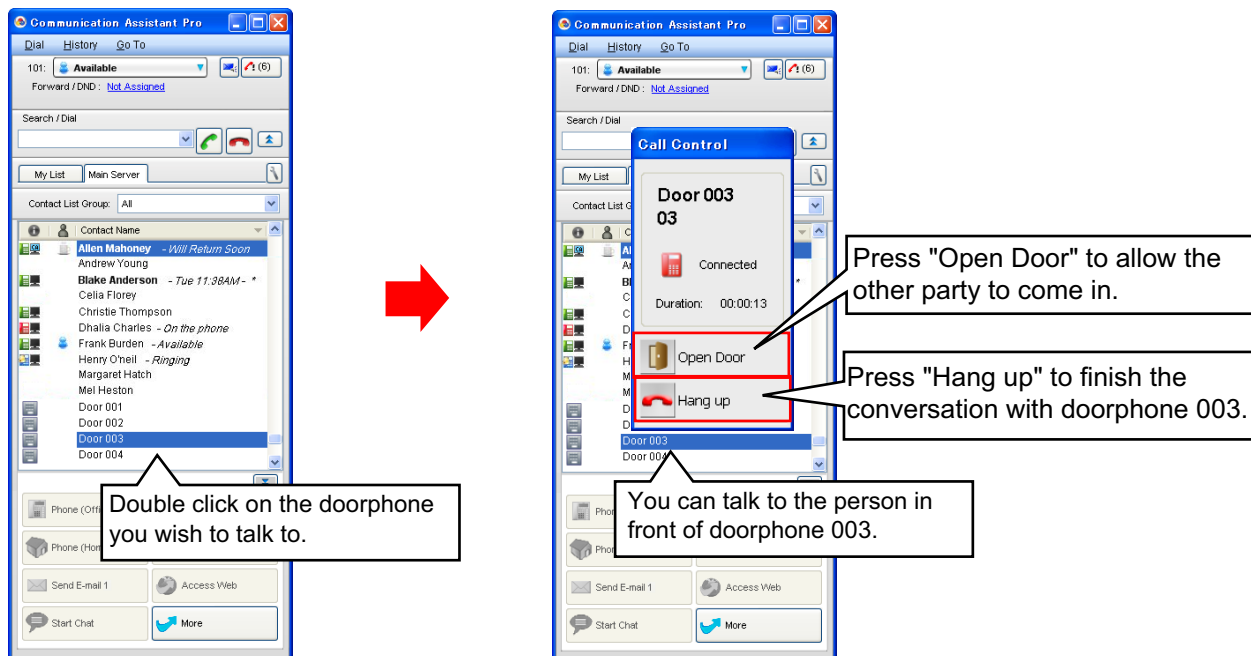
Attach (options...)

**History**

Time	Start Time	End Time	Phone Number	Name	Direction	Type	Location	Call Status	Notes
2009-01-10 10:00:00	2009-01-10 10:00:00	2009-01-10 10:00:00	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:01	2009-01-10 10:00:01	2009-01-10 10:00:01	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:02	2009-01-10 10:00:02	2009-01-10 10:00:02	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:03	2009-01-10 10:00:03	2009-01-10 10:00:03	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:04	2009-01-10 10:00:04	2009-01-10 10:00:04	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:05	2009-01-10 10:00:05	2009-01-10 10:00:05	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:06	2009-01-10 10:00:06	2009-01-10 10:00:06	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:07	2009-01-10 10:00:07	2009-01-10 10:00:07	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:08	2009-01-10 10:00:08	2009-01-10 10:00:08	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:09	2009-01-10 10:00:09	2009-01-10 10:00:09	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:10	2009-01-10 10:00:10	2009-01-10 10:00:10	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:11	2009-01-10 10:00:11	2009-01-10 10:00:11	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:12	2009-01-10 10:00:12	2009-01-10 10:00:12	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:13	2009-01-10 10:00:13	2009-01-10 10:00:13	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:14	2009-01-10 10:00:14	2009-01-10 10:00:14	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:15	2009-01-10 10:00:15	2009-01-10 10:00:15	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:16	2009-01-10 10:00:16	2009-01-10 10:00:16	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:17	2009-01-10 10:00:17	2009-01-10 10:00:17	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:18	2009-01-10 10:00:18	2009-01-10 10:00:18	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:19	2009-01-10 10:00:19	2009-01-10 10:00:19	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:20	2009-01-10 10:00:20	2009-01-10 10:00:20	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:21	2009-01-10 10:00:21	2009-01-10 10:00:21	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:22	2009-01-10 10:00:22	2009-01-10 10:00:22	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:23	2009-01-10 10:00:23	2009-01-10 10:00:23	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:24	2009-01-10 10:00:24	2009-01-10 10:00:24	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:25	2009-01-10 10:00:25	2009-01-10 10:00:25	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:26	2009-01-10 10:00:26	2009-01-10 10:00:26	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:27	2009-01-10 10:00:27	2009-01-10 10:00:27	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:28	2009-01-10 10:00:28	2009-01-10 10:00:28	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:29	2009-01-10 10:00:29	2009-01-10 10:00:29	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:30	2009-01-10 10:00:30	2009-01-10 10:00:30	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:31	2009-01-10 10:00:31	2009-01-10 10:00:31	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:32	2009-01-10 10:00:32	2009-01-10 10:00:32	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:33	2009-01-10 10:00:33	2009-01-10 10:00:33	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:34	2009-01-10 10:00:34	2009-01-10 10:00:34	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:35	2009-01-10 10:00:35	2009-01-10 10:00:35	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:36	2009-01-10 10:00:36	2009-01-10 10:00:36	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:37	2009-01-10 10:00:37	2009-01-10 10:00:37	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:38	2009-01-10 10:00:38	2009-01-10 10:00:38	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:39	2009-01-10 10:00:39	2009-01-10 10:00:39	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:40	2009-01-10 10:00:40	2009-01-10 10:00:40	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:41	2009-01-10 10:00:41	2009-01-10 10:00:41	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:42	2009-01-10 10:00:42	2009-01-10 10:00:42	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:43	2009-01-10 10:00:43	2009-01-10 10:00:43	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:44	2009-01-10 10:00:44	2009-01-10 10:00:44	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:45	2009-01-10 10:00:45	2009-01-10 10:00:45	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:46	2009-01-10 10:00:46	2009-01-10 10:00:46	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:47	2009-01-10 10:00:47	2009-01-10 10:00:47	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:48	2009-01-10 10:00:48	2009-01-10 10:00:48	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:49	2009-01-10 10:00:49	2009-01-10 10:00:49	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:50	2009-01-10 10:00:50	2009-01-10 10:00:50	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:51	2009-01-10 10:00:51	2009-01-10 10:00:51	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:52	2009-01-10 10:00:52	2009-01-10 10:00:52	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:53	2009-01-10 10:00:53	2009-01-10 10:00:53	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:54	2009-01-10 10:00:54	2009-01-10 10:00:54	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:55	2009-01-10 10:00:55	2009-01-10 10:00:55	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:56	2009-01-10 10:00:56	2009-01-10 10:00:56	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:57	2009-01-10 10:00:57	2009-01-10 10:00:57	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:58	2009-01-10 10:00:58	2009-01-10 10:00:58	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:00:59	2009-01-10 10:00:59	2009-01-10 10:00:59	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	
2009-01-10 10:01:00	2009-01-10 10:01:00	2009-01-10 10:01:00	8230	Allen Mahoney	In	Voicemail	Voicemail	Completed	

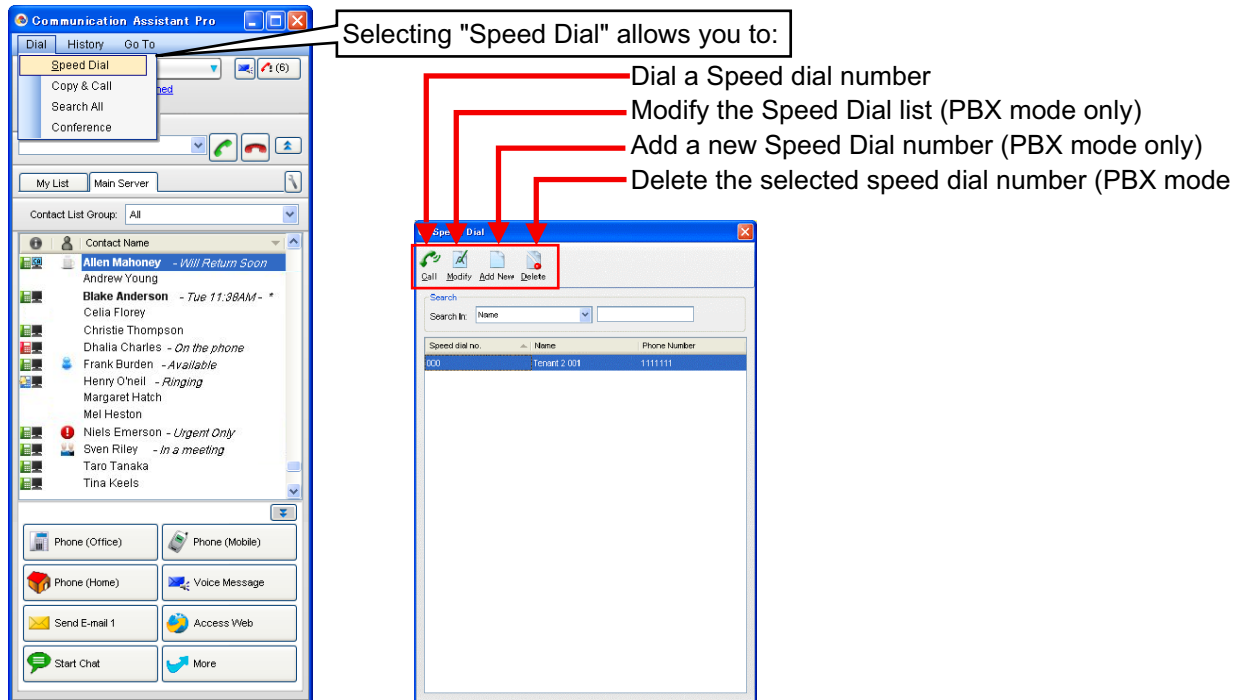
Hang Up (Go on hook).

## 3.12 Making a Doorphone Call

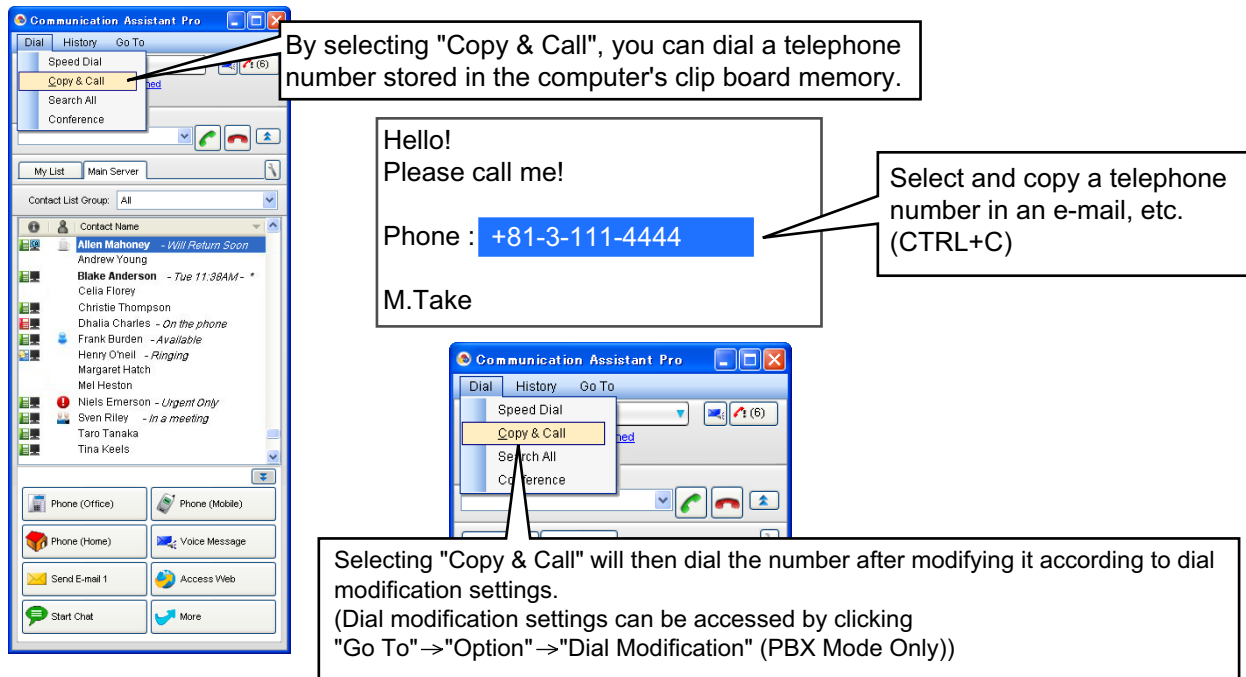




## 3.13 Using Speed Dial



## 3.14 Dial from Clipboard



By selecting "Copy & Call", you can dial a telephone number stored in the computer's clip board memory.

Hello!  
Please call me!

Phone : +81-3-111-4444

M.Take

Select and copy a telephone number in an e-mail, etc. (CTRL+C)

Communication Assistant Pro

Dial History Go To

Speed Dial

Copy & Call

Search All

Conference

My List Main Server

Contact List Group: All

Contact Name

Allen Mahoney - Will Return Soon

Andrew Young

Blake Anderson - Tue 11:38AM - \*

Celia Flory

Christie Thompson

Dhalia Charles - On the phone

Frank Burden - Available

Henry O'Neill - Ringing

Margaret Hatch

Mel Heston

Niels Emerson - Urgent Only

Sven Riley - In a meeting

Taro Tanaka

Tina Keels

Phone (Office)

Phone (Mobile)

Phone (Home)

Voice Message

Send E-mail 1

Access Web

Start Chat

More

Communication Assistant Pro

Dial History Go To

Speed Dial

Copy & Call

Search All

Conference

Selecting "Copy & Call" will then dial the number after modifying it according to dial modification settings.  
(Dial modification settings can be accessed by clicking "Go To" → "Option" → "Dial Modification" (PBX Mode Only))

## 4 Call History Review/Recall

### Call History (1)

You can open the call history screen from the History menu.

Clicking this icon also opens the call history screen.

Missed incoming calls are displayed here.

The screenshot shows the 'Communication Assistant Pro' window. The 'History' menu is open, showing options: 'All Calls', 'Incoming Missed Calls', 'Incoming Received Calls', 'Outgoing Unanswered Calls', and 'Outgoing Answered Calls'. A red box highlights the 'History' menu. Another red box highlights a missed call icon (a red telephone handset) next to the number '101: Available'. A third red box highlights the 'History' menu item in the top bar.

### Call History (2)

You can select the type of calls to review.

The screenshot shows the 'History' window. A dropdown menu is open, showing options: 'All Calls', 'Incoming Missed Calls', 'Incoming Received Calls', 'Outgoing Unanswered Calls', and 'Outgoing Answered Calls'. A red box highlights the dropdown menu. The main window displays a table of call history with columns: Type, Start Time, Disconnect Time, Phone Number, Name, Duration, Ring, Call Condition, Call For, and Memo.

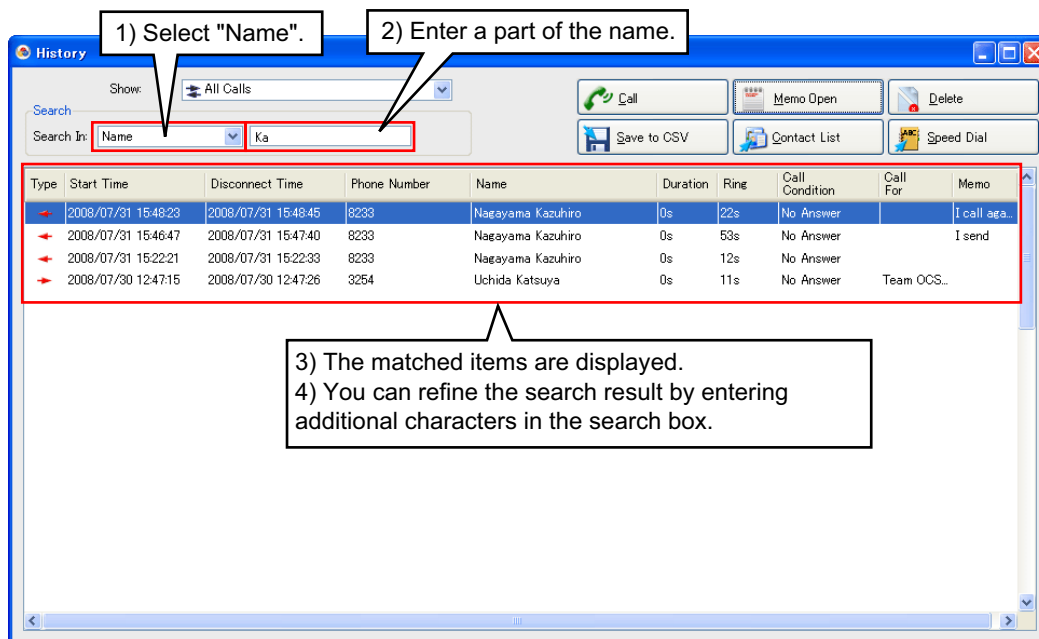
Type	Start Time	Disconnect Time	Phone Number	Name	Duration	Ring	Call Condition	Call For	Memo
→	2008/07/31 15:48:23	2008/07/31 15:48:45	8233	Allen Mahoney	0s	22s	No Answer		I call aea...
→	2008/07/31 15:46:47	2008/07/31 15:47:40	8233	Allen Mahoney	0s	53s	No Answer		I send
→	2008/07/31 15:22:21	2008/07/31 15:22:33	8233	Allen Mahoney	0s	12s	No Answer		
→	2008/07/31 15:21:02	2008/07/31 15:21:14	8230	Blake Anderson	0s	12s	No Answer		
→	2008/07/31 15:02:24	2008/07/31 15:02:30	8233	Allen Mahoney	0s	6s	No Answer		
→	2008/07/31 15:02:13	2008/07/31 15:02:19	8233	Allen Mahoney	0s	6s	No Answer		
→	2008/07/31 11:35:18	2008/07/31 11:35:27	900		0s	9s	No Answer		
→	2008/07/31 10:17:11	2008/07/31 10:17:17	8233	Allen Mahoney	0s	6s	No Answer		
→	2008/07/31 9:11:33	2008/07/31 9:11:44	8233	Allen Mahoney	0s	11s	No Answer		
→	2008/07/30 12:47:15	2008/07/30 12:47:26	3254	Robert King	0s	11s	No Answer	Team OCS...	
→	2008/07/30 12:46:48	2008/07/30 12:46:59	3254	Robert King	0s	11s	No Answer	Team OCS...	
→	2008/07/30 12:22:19	2008/07/30 12:23:02	8233	Allen Mahoney	0s	43s	No Answer		
→	2008/07/30 12:16:29	2008/07/30 12:16:54	8233	Allen Mahoney	0s	25s	No Answer		
→	2008/07/30 12:15:15	2008/07/30 12:15:18	3254	Robert King	0s	3s	No Answer		
→	2008/07/30 12:14:35	2008/07/30 12:15:09	8233	Allen Mahoney	0s	34s	No Answer		
→	2008/07/30 12:12:59	2008/07/30 12:13:30	8233	Allen Mahoney	0s	31s	No Answer		
→	2008/07/30 12:10:39	2008/07/30 12:11:01	8233	Allen Mahoney	0s	22s	No Answer		
→	2008/07/30 12:10:16	2008/07/30 12:10:36	8233	Allen Mahoney	0s	20s	No Answer		

## Call History (3)

### Search by name

1) Select "Name".

2) Enter a part of the name.



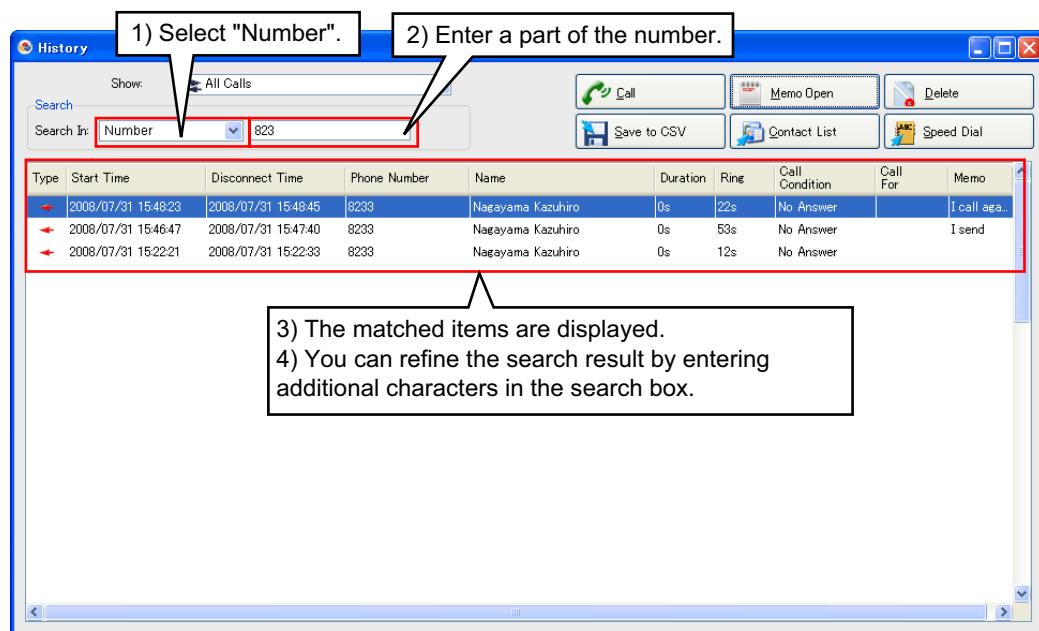
3) The matched items are displayed.  
4) You can refine the search result by entering additional characters in the search box.

Type	Start Time	Disconnect Time	Phone Number	Name	Duration	Ring	Call Condition	Call For	Memo
→	2008/07/31 15:48:23	2008/07/31 15:48:45	8233	Nagayama Kazuhiro	0s	22s	No Answer		I call aga...
→	2008/07/31 15:46:47	2008/07/31 15:47:40	8233	Nagayama Kazuhiro	0s	53s	No Answer		I send
→	2008/07/31 15:22:21	2008/07/31 15:22:33	8233	Nagayama Kazuhiro	0s	12s	No Answer		
→	2008/07/30 12:47:15	2008/07/30 12:47:26	3254	Uchida Katsuya	0s	11s	No Answer	Team OCS...	

### Search by number

1) Select "Number".

2) Enter a part of the number.

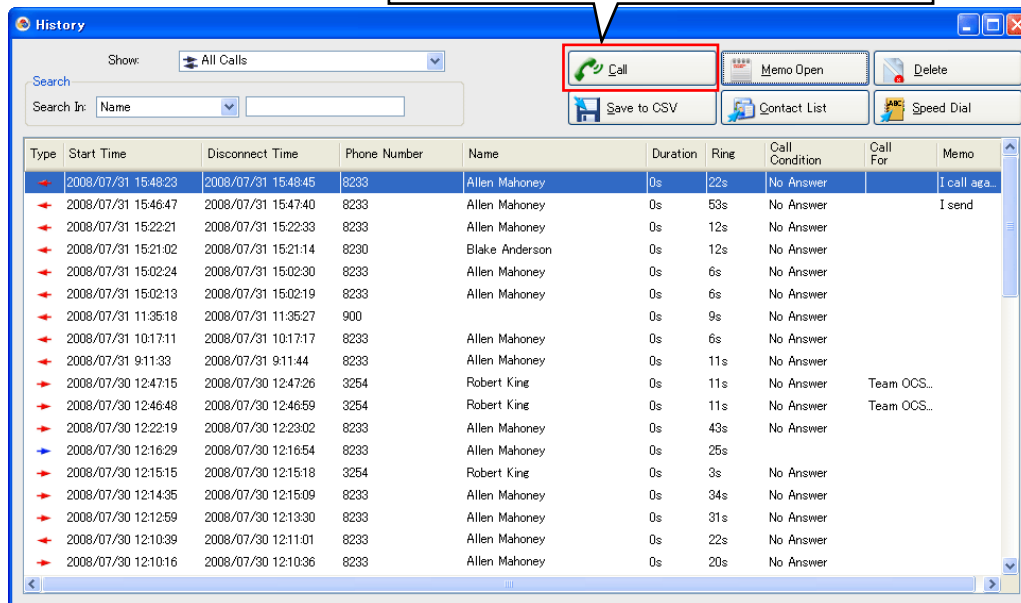


3) The matched items are displayed.  
4) You can refine the search result by entering additional characters in the search box.

Type	Start Time	Disconnect Time	Phone Number	Name	Duration	Ring	Call Condition	Call For	Memo
→	2008/07/31 15:48:23	2008/07/31 15:48:45	8233	Nagayama Kazuhiro	0s	22s	No Answer		I call aga...
→	2008/07/31 15:46:47	2008/07/31 15:47:40	8233	Nagayama Kazuhiro	0s	53s	No Answer		I send
→	2008/07/31 15:22:21	2008/07/31 15:22:33	8233	Nagayama Kazuhiro	0s	12s	No Answer		

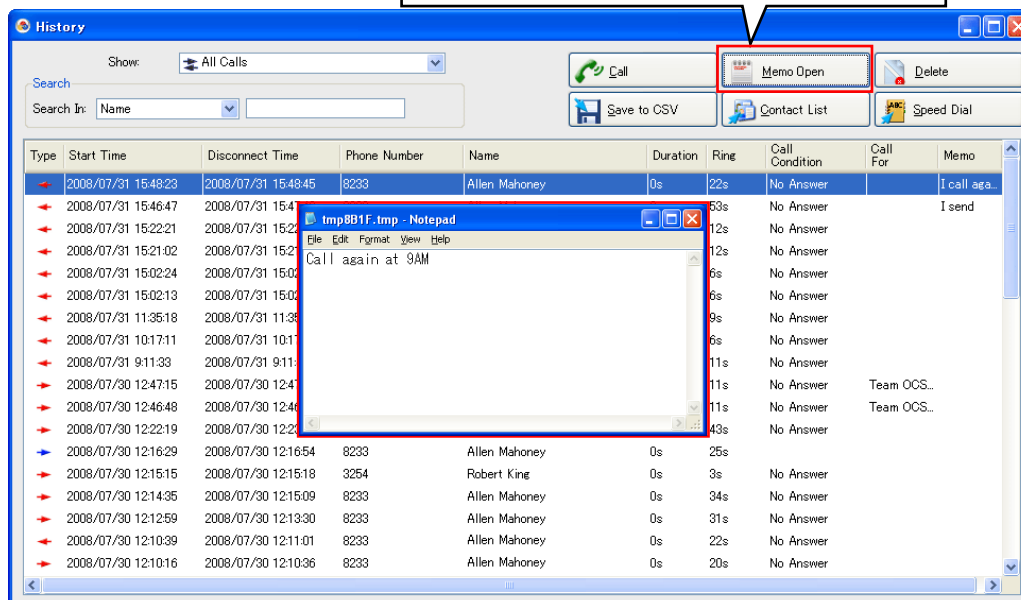
## Call History (4)

The "Call" button allows you to dial the selected phone number.

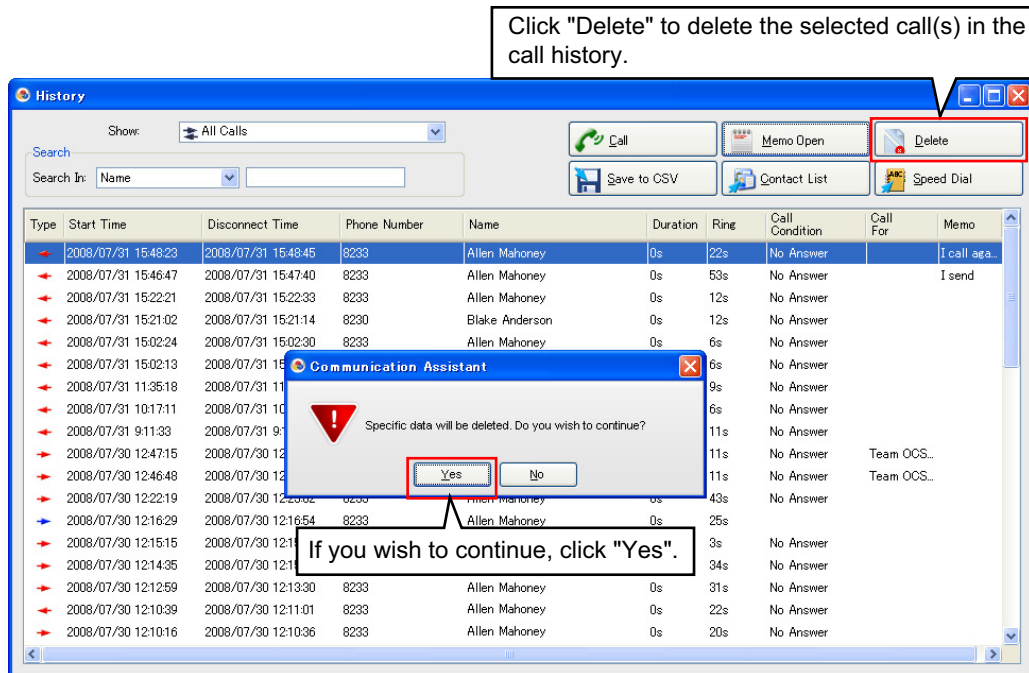


## Call History (5)

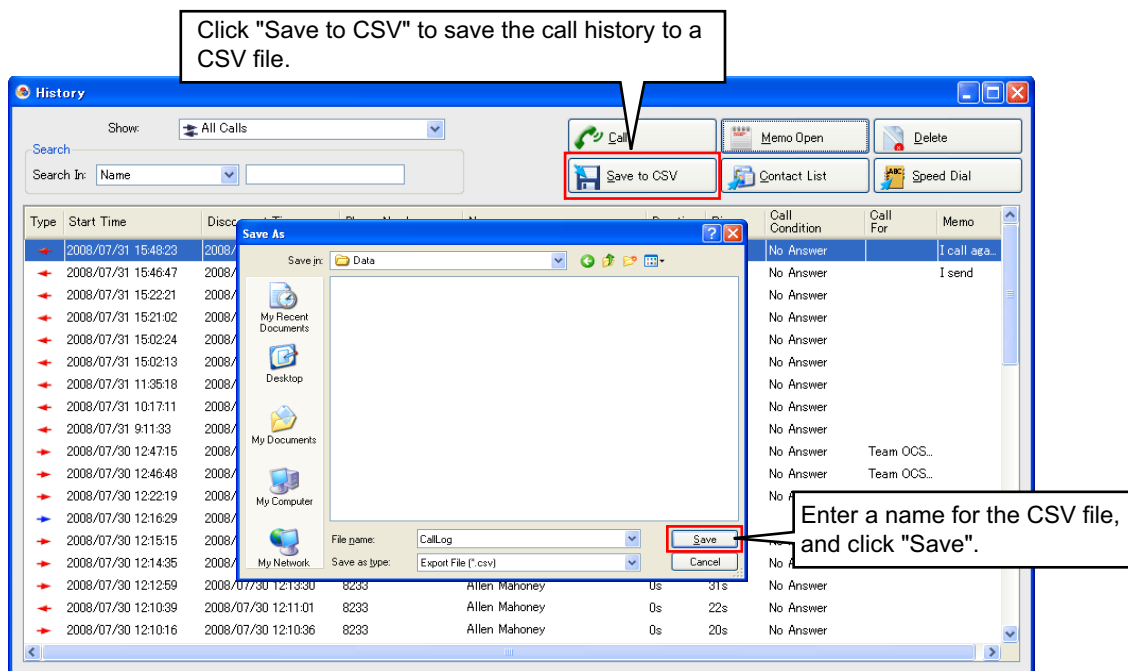
Click "Memo Open" to read any text memos you left.



## Call History (6)



## Call History (7)



## Call History (8)

Click "Contact List" to add the contact information of the selected call record to your contact list.

The name and phone number are copied to a new contact entry.

Type	Start Time	Disconnect Time	Phone Number	Name	Duration	Ring	Call Condition	Call For	Memo
→	2008/07/31 15:48:23	2008/07/31 15:48:45	8233	Allen Mahoney	0s				
→	2008/07/31 15:46:47	2008/07/31 15:47:40	8233	Allen Mahoney	0s				
→	2008/07/31 15:22:21	2008/07/31 15:22:33	8233	Allen Mahoney	0s				
→	2008/07/31 15:21:02	2008/07/31 15:21:14	8230	Allen Mahoney	0s				
→	2008/07/31 15:02:24	2008/07/31 15:02:30	8233	Allen Mahoney	0s				
→	2008/07/31 15:02:13	2008/07/31 15:02:19	8233	Allen Mahoney	0s				
→	2008/07/31 11:35:18	2008/07/31 11:35:27	900	Allen Mahoney	0s				
→	2008/07/31 10:17:11	2008/07/31 10:17:17	8233	Allen Mahoney	0s				
→	2008/07/31 9:11:33	2008/07/31 9:11:44	8233	Allen Mahoney	0s				
→	2008/07/30 12:47:15	2008/07/30 12:47:26	3254	Robert King	0s				
→	2008/07/30 12:46:48	2008/07/30 12:46:59	8233	Allen Mahoney	0s				
→	2008/07/30 12:22:19	2008/07/30 12:23:02	8233	Allen Mahoney	0s				
→	2008/07/30 12:16:29	2008/07/30 12:16:54	8233	Allen Mahoney	0s				
→	2008/07/30 12:15:15	2008/07/30 12:15:18	3254	Robert King	0s				
→	2008/07/30 12:14:35	2008/07/30 12:15:09	8233	Allen Mahoney	0s				
→	2008/07/30 12:12:59	2008/07/30 12:13:30	8233	Allen Mahoney	0s				
→	2008/07/30 12:10:39	2008/07/30 12:11:01	8233	Allen Mahoney	0s				
→	2008/07/30 12:10:16	2008/07/30 12:10:36	8233	Allen Mahoney	0s				

## Call History (9)

Click "Speed Dial" to add the contact information of the selected call record to your System Speed Dial. This feature is supported only in PBX mode.

Click "OK" to continue.

Type	Start Time	Disconnect Time	Phone Number	Name	Duration	Ring	Call Condition	Call For	Memo
→	2008/07/31 15:48:23	2008/07/31 15:48:45	8233	Allen Mahoney	0s	22s	No Answer		I call aga...
→	2008/07/31 15:46:47	2008/07/31 15:47:40	8233	Allen Mahoney	0s	53s	No Answer		I send
→	2008/07/31 15:22:21	2008/07/31 15:22:33	8233	Allen Mahoney	0s	12s	No Answer		
→	2008/07/31 15:21:02	2008/07/31 15:21:14	8230	Allen Mahoney	0s		No Answer		
→	2008/07/31 15:02:24	2008/07/31 15:02:30	8233	Allen Mahoney	0s		No Answer		
→	2008/07/31 15:02:13	2008/07/31 15:02:19	8233	Allen Mahoney	0s		No Answer		
→	2008/07/31 11:35:18	2008/07/31 11:35:27	900	Allen Mahoney	0s		No Answer		
→	2008/07/31 10:17:11	2008/07/31 10:17:17	8233	Allen Mahoney	0s		No Answer		
→	2008/07/31 9:11:33	2008/07/31 9:11:44	8233	Allen Mahoney	0s		No Answer		
→	2008/07/30 12:47:15	2008/07/30 12:47:26	3254	Robert King	0s		No Answer		Team OCS...
→	2008/07/30 12:46:48	2008/07/30 12:46:59	3254	Allen Mahoney	0s		No Answer		Team OCS...
→	2008/07/30 12:22:19	2008/07/30 12:23:02	8233	Allen Mahoney	0s		No Answer		
→	2008/07/30 12:16:29	2008/07/30 12:16:54	8233	Allen Mahoney	0s		No Answer		
→	2008/07/30 12:15:15	2008/07/30 12:15:18	3254	Robert King	0s	3s	No Answer		
→	2008/07/30 12:14:35	2008/07/30 12:15:09	8233	Allen Mahoney	0s	34s	No Answer		
→	2008/07/30 12:12:59	2008/07/30 12:13:30	8233	Allen Mahoney	0s	31s	No Answer		
→	2008/07/30 12:10:39	2008/07/30 12:11:01	8233	Allen Mahoney	0s	22s	No Answer		
→	2008/07/30 12:10:16	2008/07/30 12:10:36	8233	Allen Mahoney	0s	20s	No Answer		

## 5 CA Operator Console Features

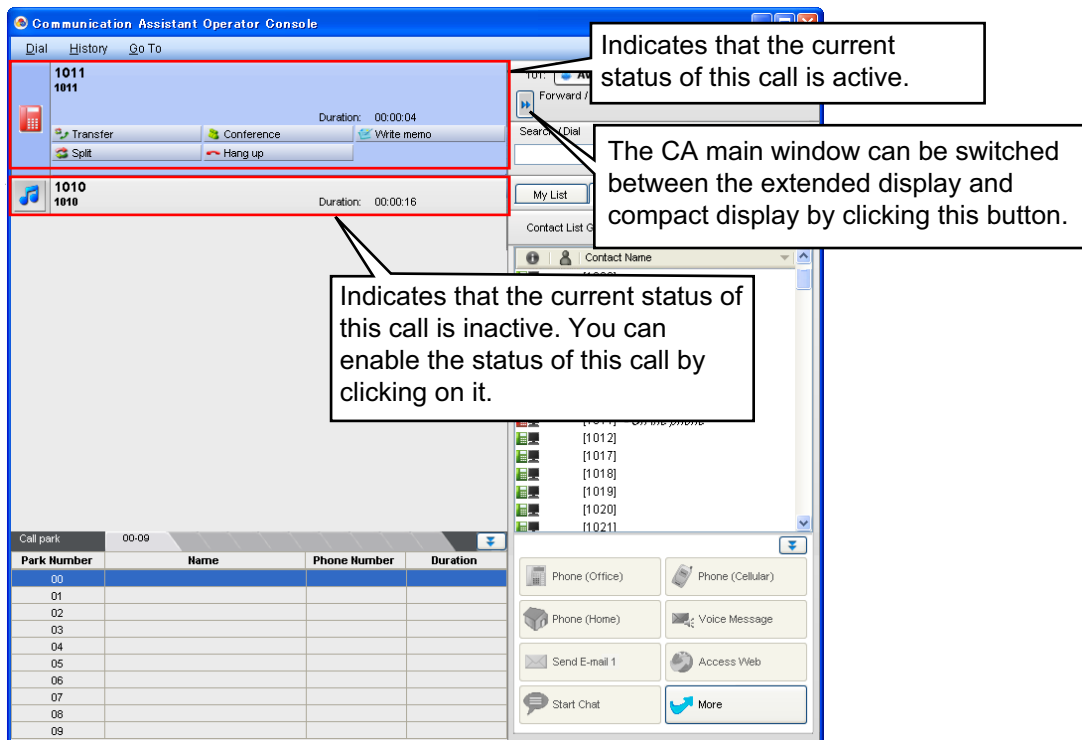
By logging in to CA client in Operator Console mode, you can manage multiple calls simultaneously using a graphic interface.

Notable features include call parking and call transfer.

An additional license is required in order to log-in to this mode.

### 5.1 Arriving Calls Screen

By using the Operator Console feature, you can manage multiple calls simultaneously using the Arriving Calls Screen.



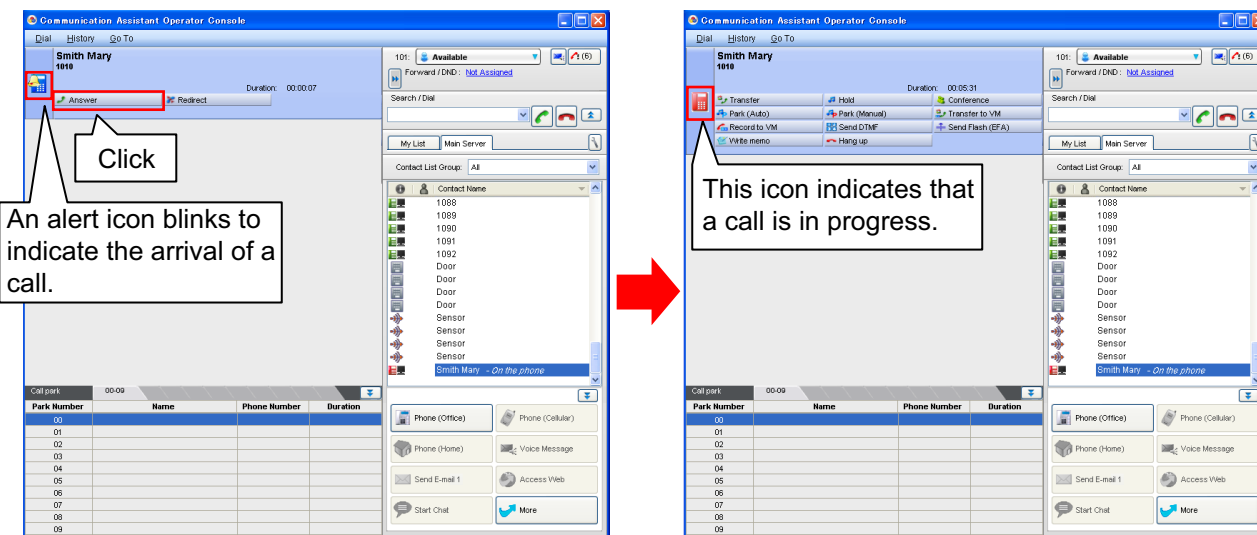


## 5.2 Call Parking

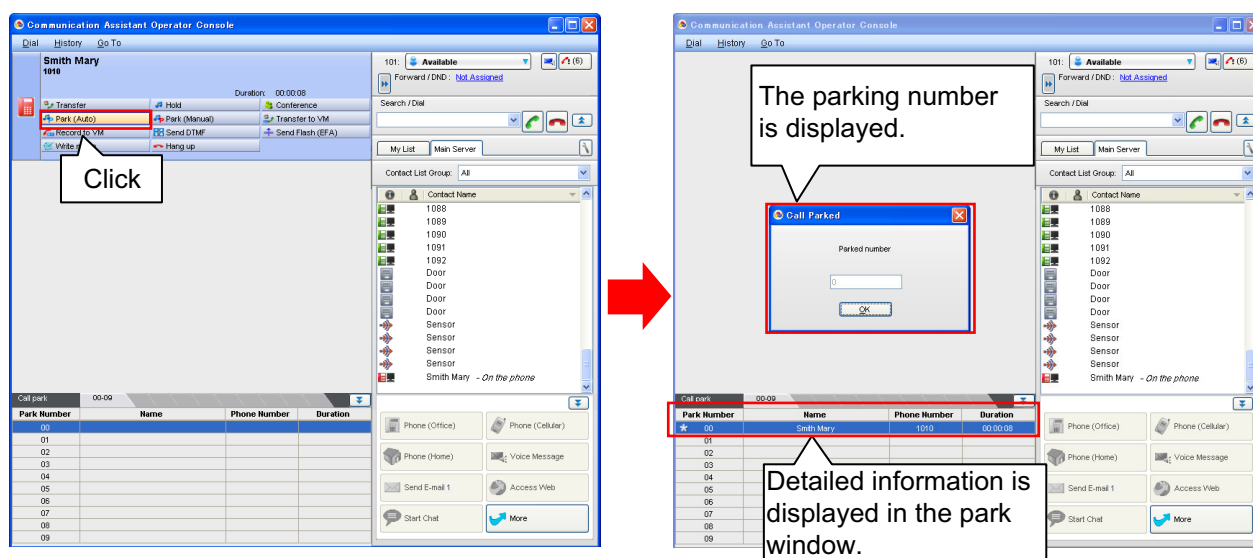
When calls are parked, they are placed on hold and pooled into a common parking zone, which can then be retrieved by any extension user. There are two call parking methods, automatic parking and manual parking.

A sample scenario with the related operations is shown below:

- 1) You are a receptionist in the sales department and currently logged into CA Client in Operator Console mode.
- 2) You receive a call from Mary in the accounting department, and answer it.

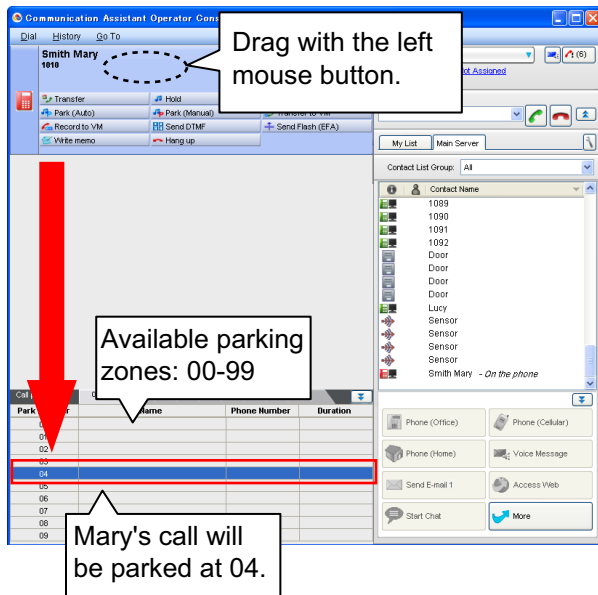


- 3) Mary says she wants to talk to John in your section. So, you park the call by clicking "Park(Auto)".
- 4a) The parking number is automatically assigned.

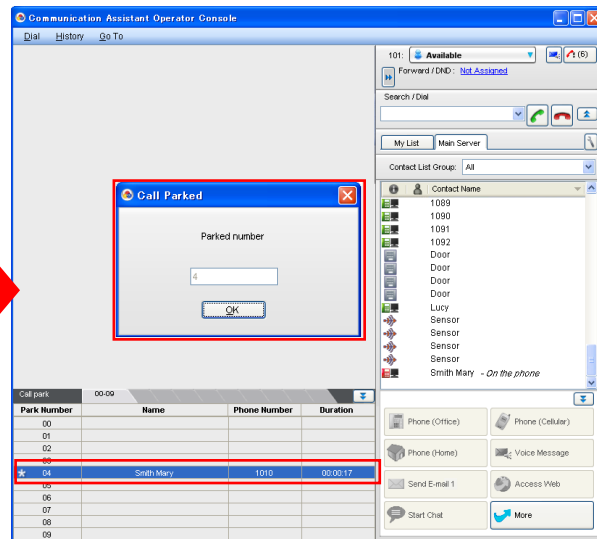


## 5.2 Call Parking

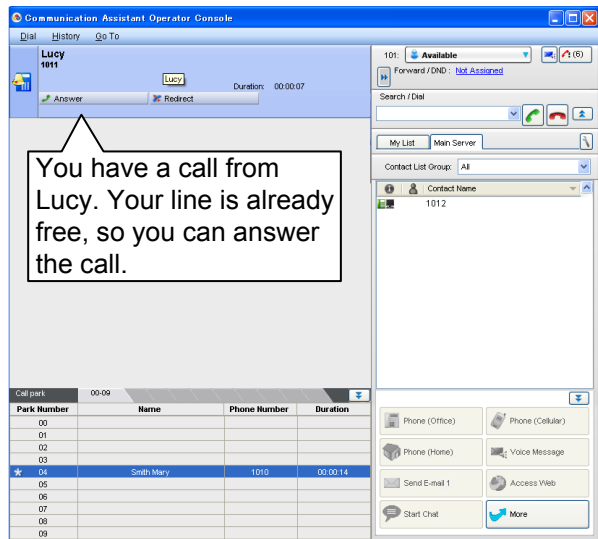
4b) You can perform manual parking by clicking the "Park(Manual)" button, or by dragging the call to an available parking number.



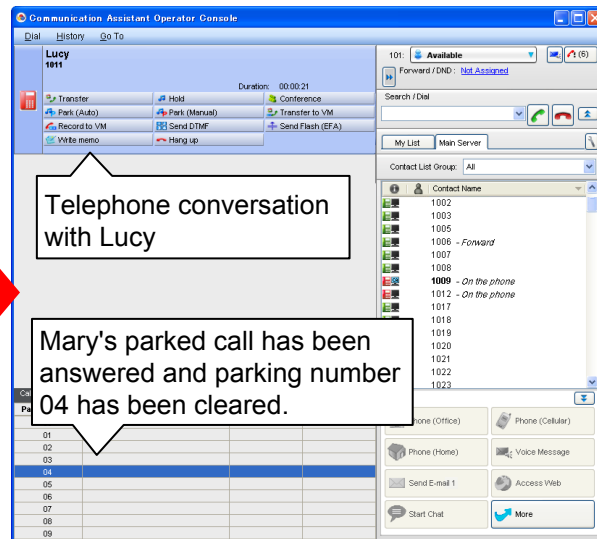
4c) You can drag and drop Mary's call into any available parking number. Your line is now free to make and answer calls.



5) You can let John know that Mary's call is parked in parking number 04. John (or any extension user) can take the parked call.

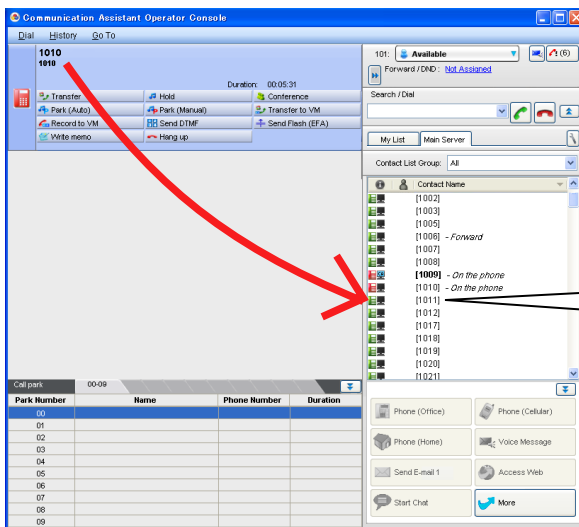
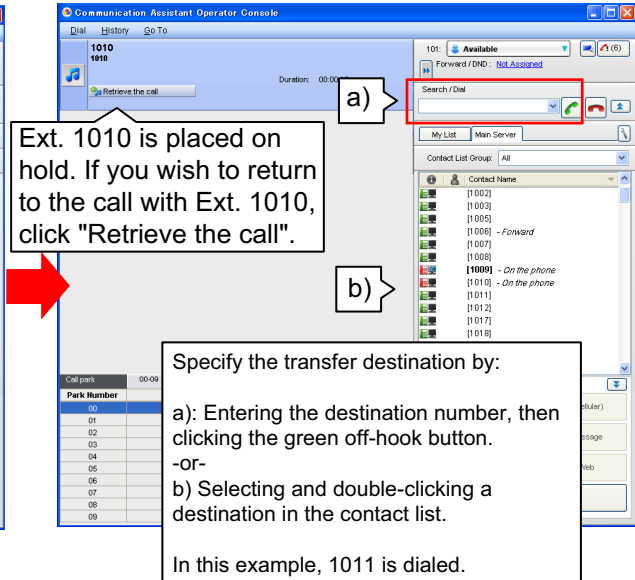
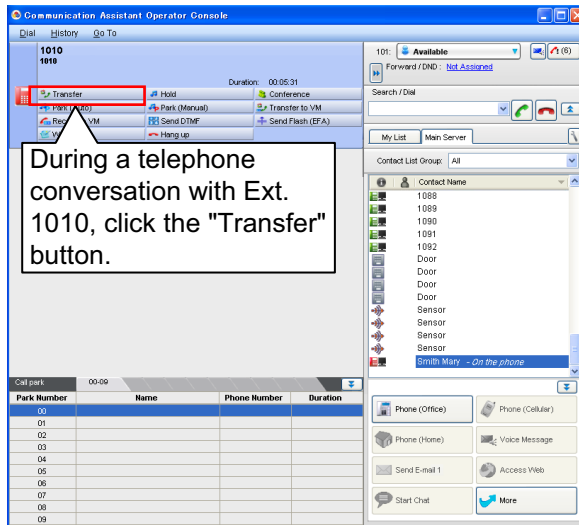


6) When the parked call is answered it is removed from the parking zone.



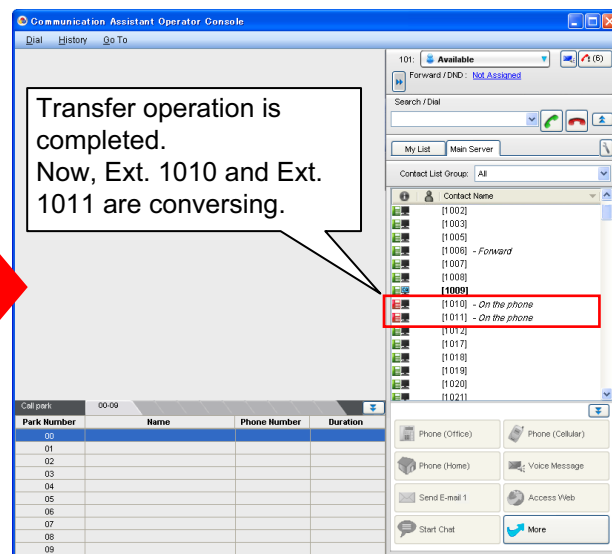
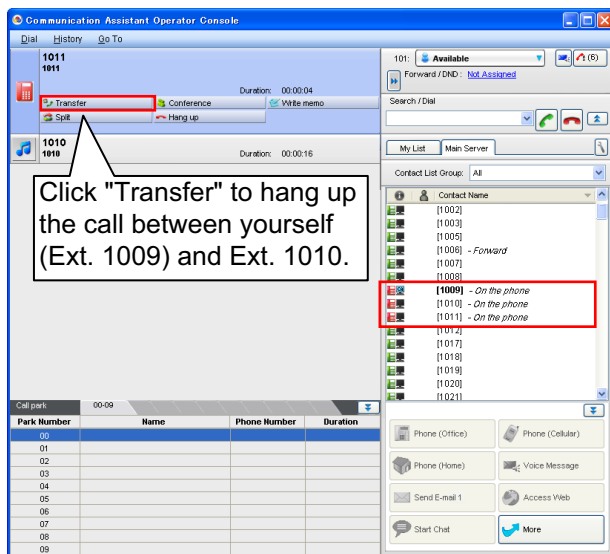
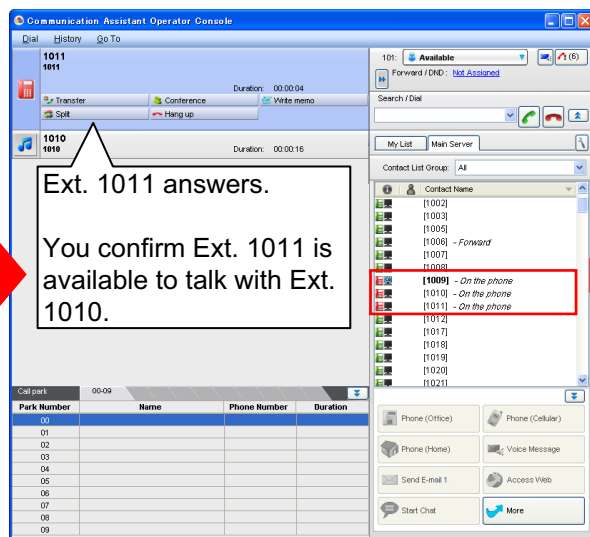
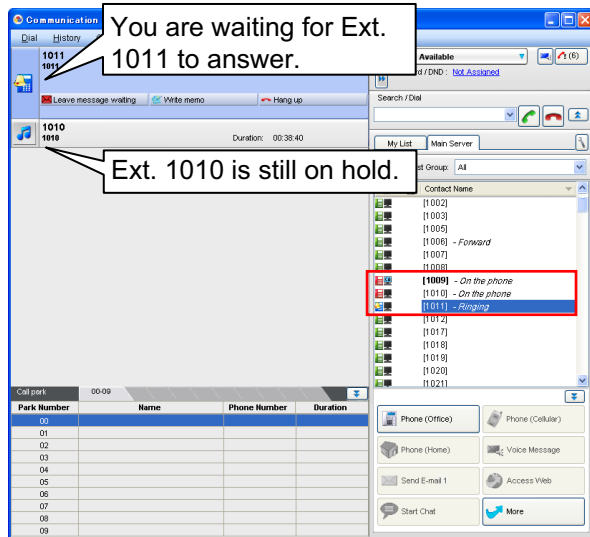
## 5.3 Call Transfer

During a telephone conversation, you can place the call on hold and then transfer it to any other extension user.

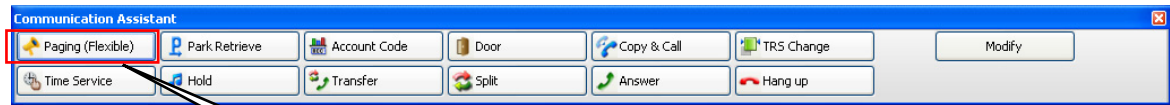


You can also initiate a transfer by dragging the active caller window onto a contact in your contact list.

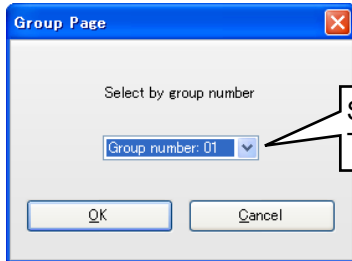
### 5.3 Call Transfer



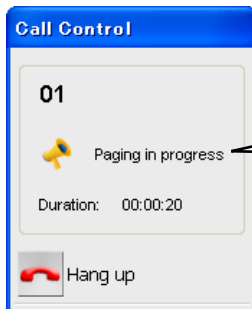
## 5.4 Paging



Click the "Paging" button from function key window.



Select the group number you wish to access. Then, click "OK".



Members of the selected group number hear your voice from the speaker until you hang up.

## 6 CA Supervisor Features

By logging in to CA Supervisor mode, you can monitor the status of specific extension groups (ICD groups) and perform other supervisory features.

Other notable features include listening in on telephone conversations, and taking over calls.

An additional license is required in order to log-in to this mode.

### 6.1 Group Call Monitor

You can monitor the status of a target group's members with Group Call Monitor feature.

"Current Waiting Call" indicates the number of calls currently waiting to be answered in the selected group.

"Longest Waiting Time" indicates the longest waiting time among all incoming calls in the selected group.

"Current Member Status" indicates the number of extensions currently in the state of wrap up, on the phone, ringing, or idle, in the selected group.

Select the group you wish to monitor.

It is possible to reset the call counter and change other option settings by clicking this button.

Members of the selected ICD group are displayed in the contact list field.

These figures, such as "Total Incoming Call" indicate the statistics of the selected group. To update these values, click the "Get Latest Report" button. It is possible to reset the call counters by selecting "Clear Report" from the "Utility" button above.

When you view the presence of busy ICD group members, information about their call and the party they are talking to is also displayed.

Phone Status	Log-in	Log-out
Wrap up	0	0
On the phone	2	0
Ringing	0	0
Idle	2	9

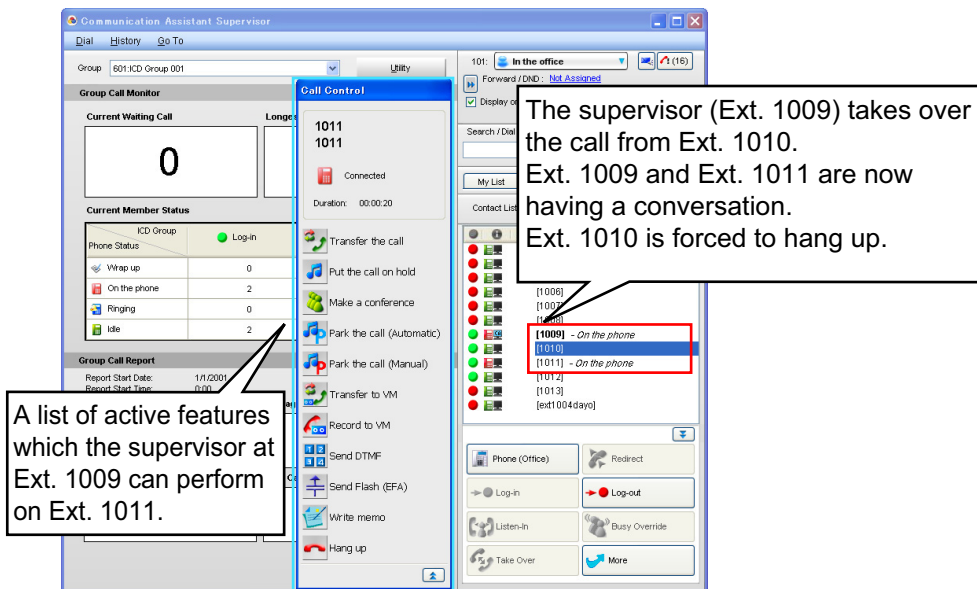
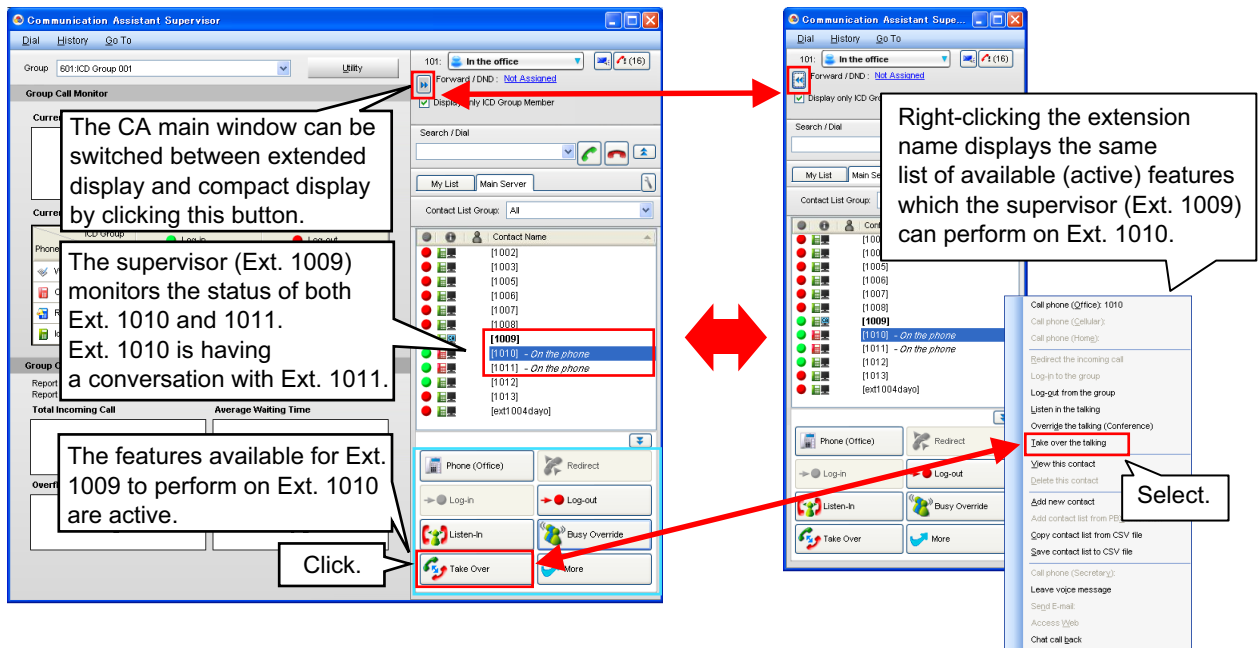
Group Call Report	Report Start Date:	Report Start Time:	Get Latest Report
Total Incoming Call	1/1/2001	0:00	
Average Waiting Time			
Overflow Call			
Lost Call			

Contact List Group	Contact Name
[1002]	
[1003]	
[1005]	
[1006]	
[1007]	
[1008]	
[1009]	
[1010]	- On the phone
[1011]	- On the phone
[1012]	
[1013]	
[1014]	

EXT-101	101
1:EXT-101	
Busy	
Mike Smith	
0925551234	
Duration : 00:00:54	

## 6.2 Take over

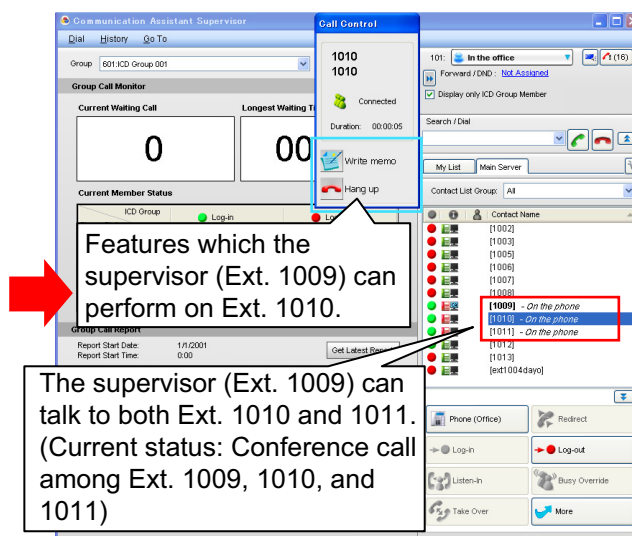
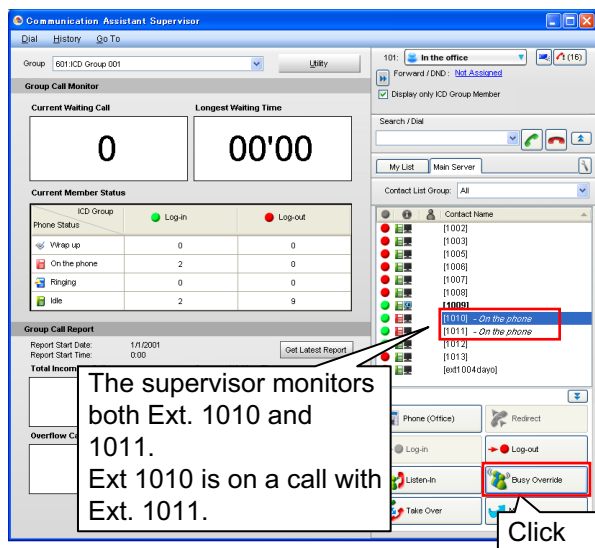
A user logged into CA Client in Supervisor mode can take over the telephone conversation of any extension number listed in supervised ICD groups.



## 6.3 Busy Override

A user logged into CA Client in Supervisor mode can override the call of any extension number listed in its ICD group members.

To use this feature, your extension must have "Executive Busy Override" enabled in its Class of Service (COS) settings.





## 6.4 Listen-in

A user logged into CA Client in Supervisor mode can listen in to the conversation of any extension number listed in its ICD group members.

To use this feature, your extension must have "Call Monitor" enabled in its Class of Service (COS) settings.

The diagram illustrates the Listen-in feature in the Communication Assistant Supervisor interface. It shows the transition from the main supervisor dashboard to a detailed call control window for extension 1010.

**Left Panel (Main Dashboard):**

- Group Call Monitor:** Shows 'Current Waiting Call' as 0 and 'Longest Waiting Time' as 00'00.
- Current Member Status:** A table showing the status of extensions in the group.
 

Phone Status	Log-in	Log-out
Wrap up	0	0
On the phone	2	0
Ringing	0	0
Idle	2	9
- Group Call Report:** Shows 'Total Incoming Call' as 33 and 'Average Waiting Time' as 00'00.
- Overflow Call:** Shows 0.
- Lost Call:** Shows 0.
- Buttons:** Includes 'Listen-In' (highlighted with a red box and a 'Click.' callout), 'Take Over', 'Busy Override', and 'More'.
- Call List:** A list of extensions with their status. Extensions 1010 and 1011 are highlighted with red boxes and a callout: "The Supervisor monitors both Ext. 1010 and 1011. Ext. 1010 is on a call with Ext. 1011."

**Right Panel (Call Control Window):**

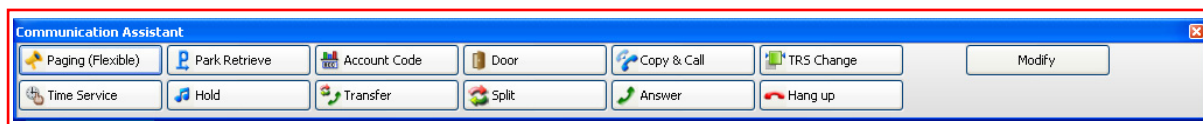
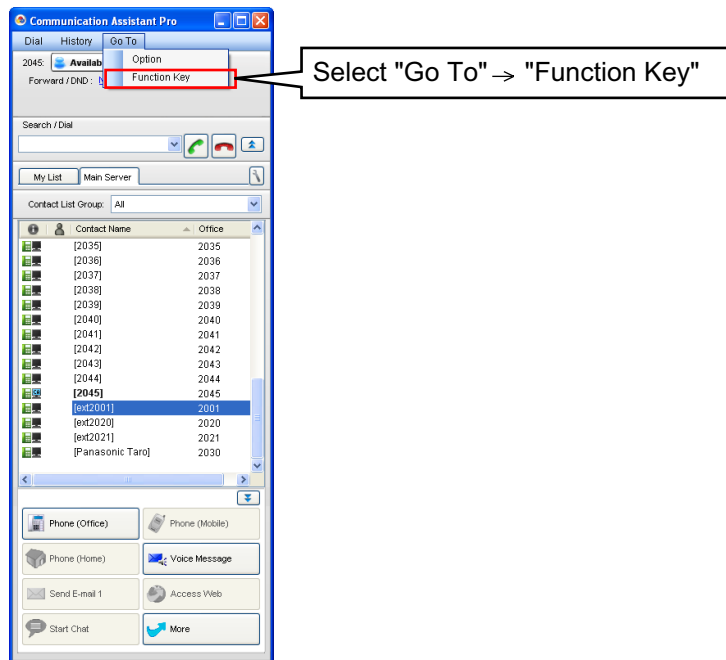
- Call Control:** Shows extension 1010 is 'Connected' with a duration of 00:00:10. It includes buttons for 'Write memo' and 'Hang up'.
- Supervisor Status:** A list of extensions with their status. Extensions 1009, 1010, and 1011 are highlighted with red boxes and a callout: "Supervisor Ext. 1009 is listening in on the conversation between Ext. 1010 and 1011. Neither Ext. 1010 nor 1011 can talk to the supervisor."
- Buttons:** Includes 'Phone (Office)', 'Redirect', 'Log-in', 'Log-out', 'Listen-In', 'Busy Override', 'Take Over', and 'More'.

**Callout:** "Features which the supervisor (Ext. 1009) can perform on Ext. 1010."

## 7 Other Features

### 7.1 Function Key

You can set a function key window to display at the top of your PC Desktop.

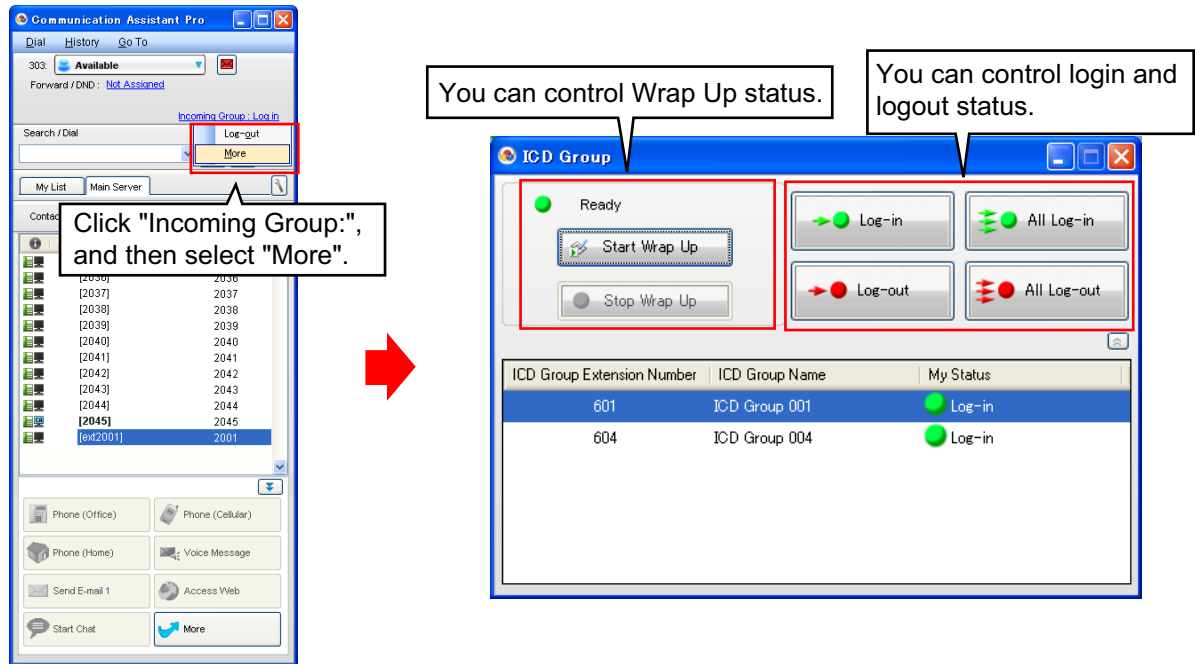


You can access various PBX features by clicking them.

You can customize the list of buttons.

## 7.2 ICD Group Agent Feature

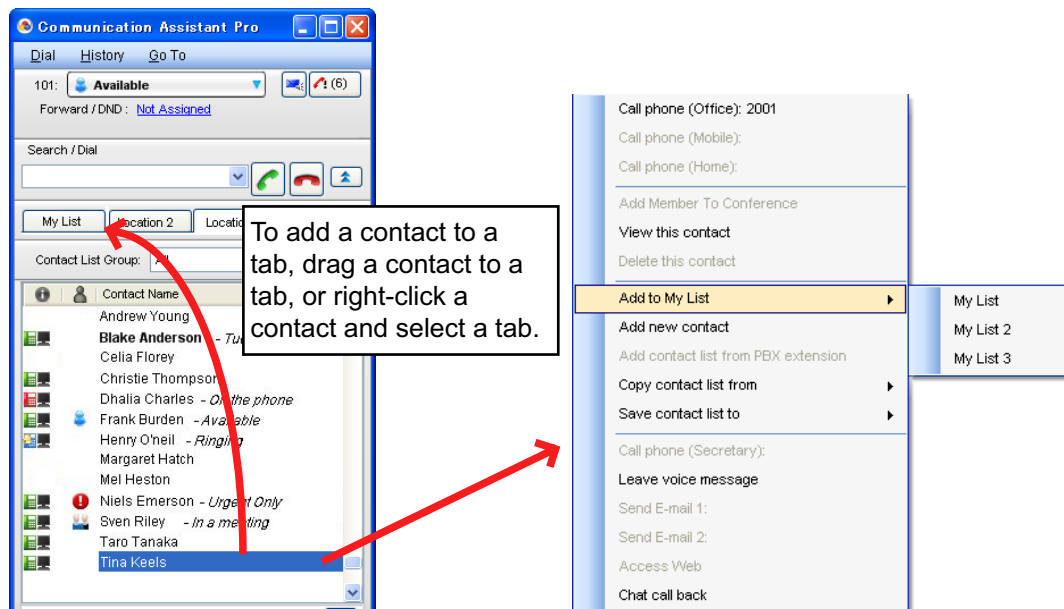
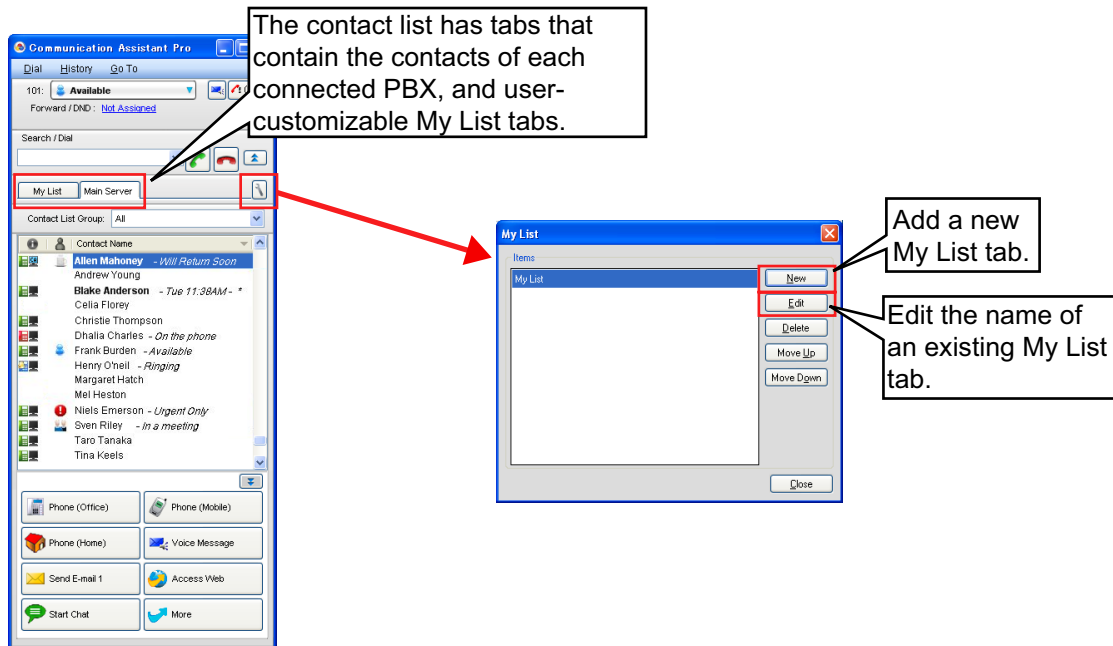
You can control the current status of the ICD group you belong to.



### Note

Depending on your extension's PBX settings, this feature may not be available. Contact your administrator about using this feature.

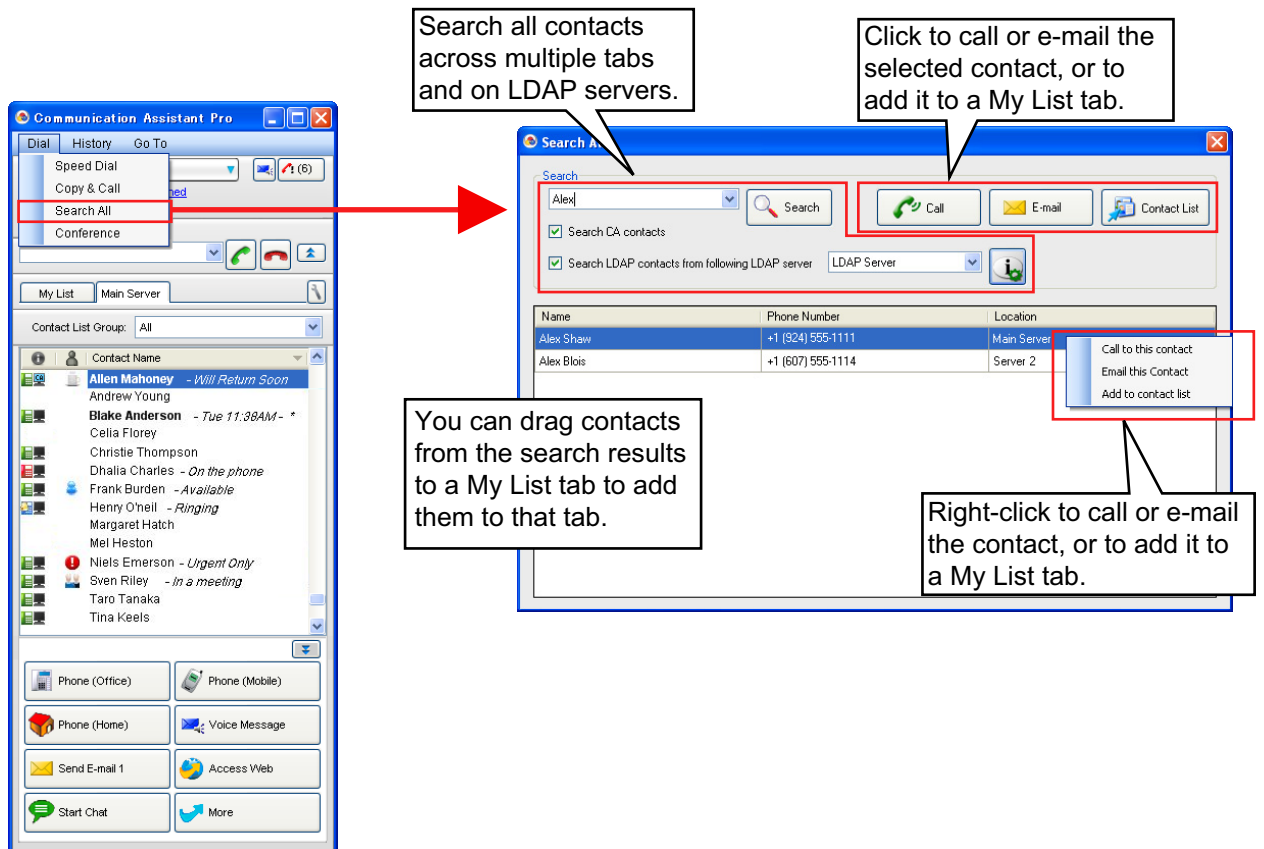
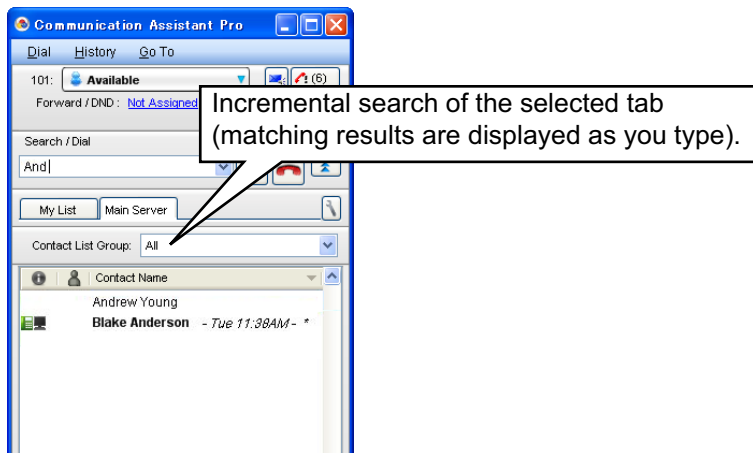
## 7.3 Organizing Contacts with "My List"



### Note

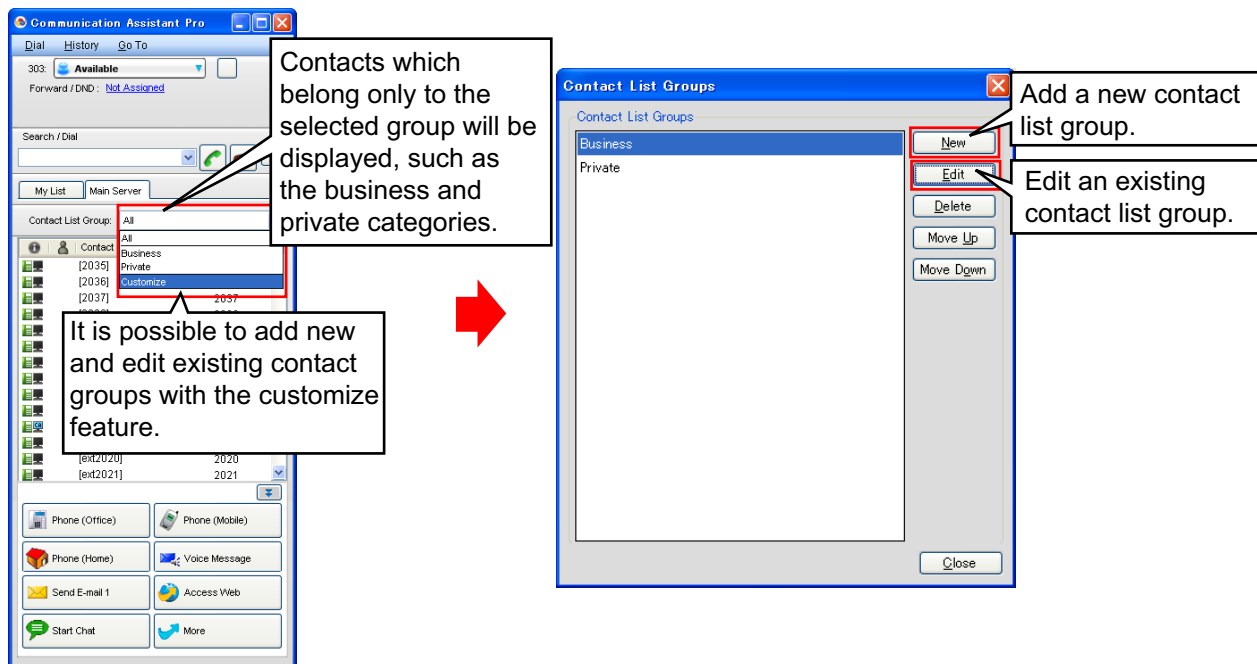
- CA Server is required to use the My List feature.
- A maximum of 5 different My List tabs can be created, with up to 128 contacts per tab.

## Searching contact lists



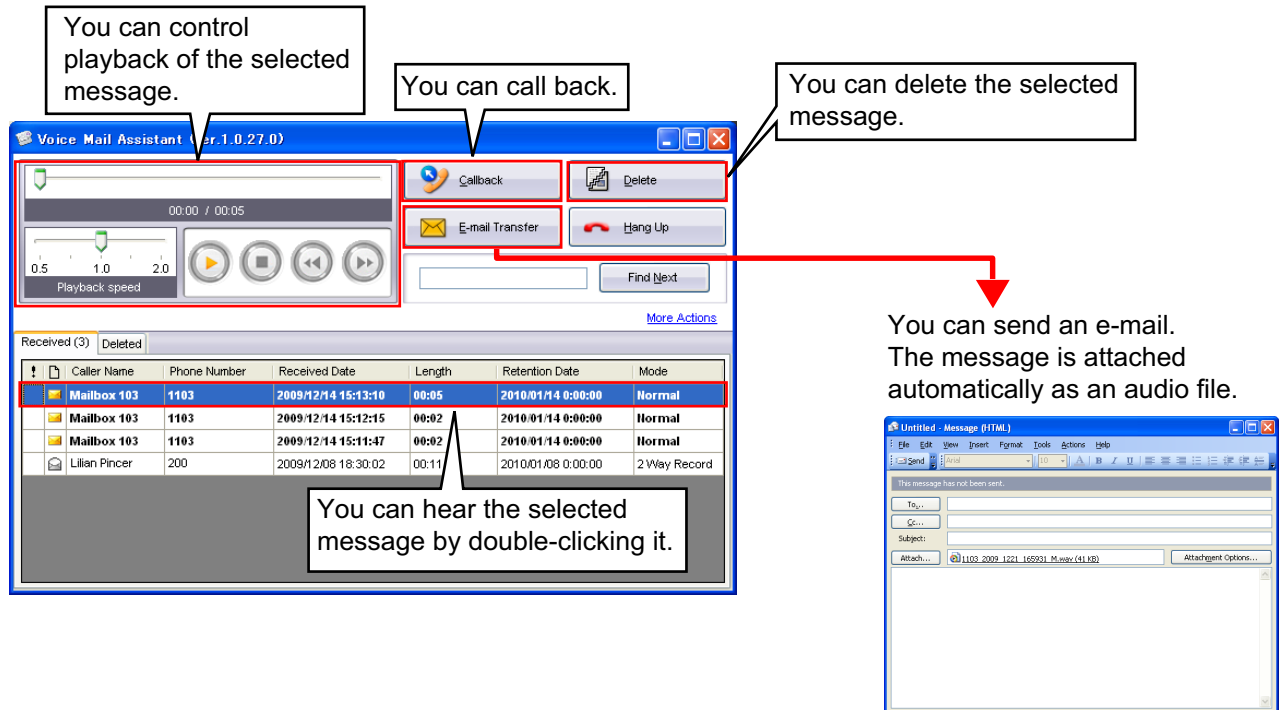
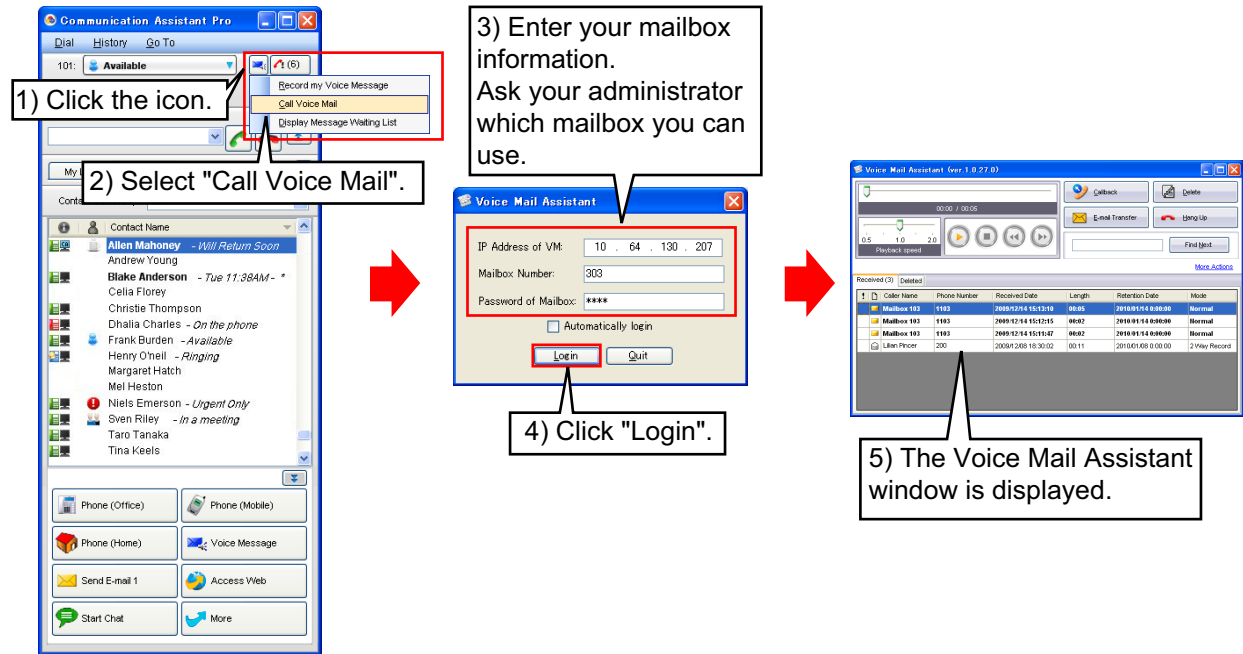
## 7.4 Contact List Group

You can display lists of contacts in groups. You can add or edit contact groups.



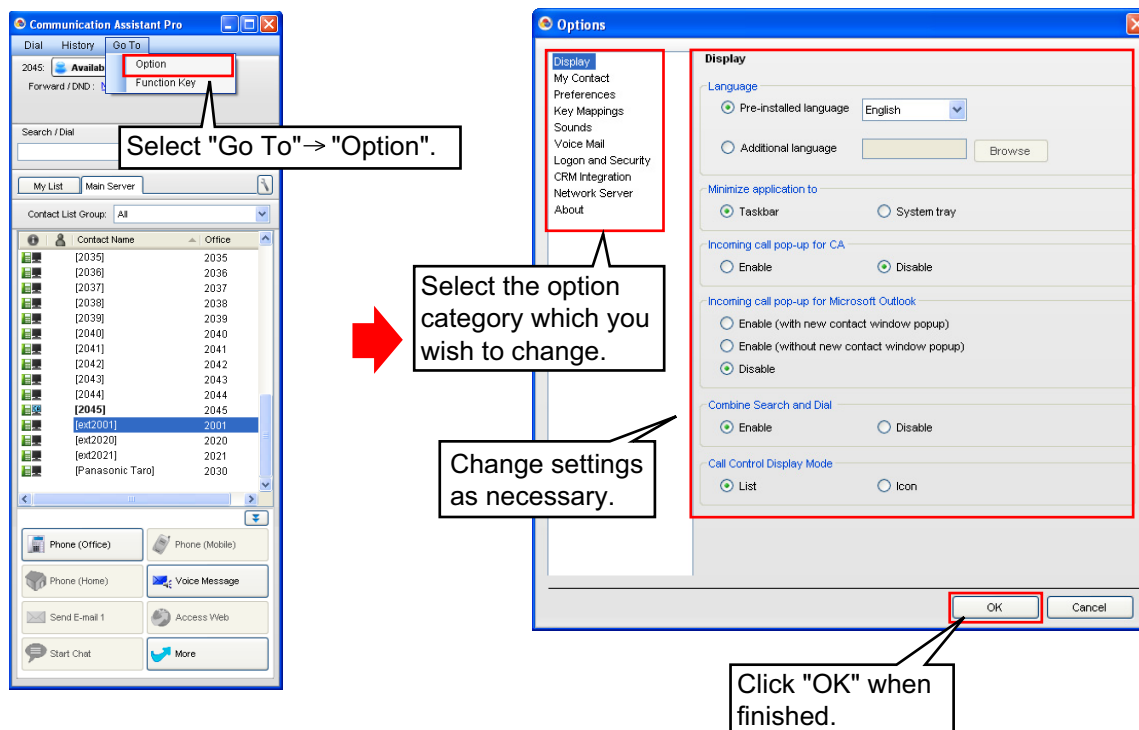
## 7.5 Voice Mail Assistant (VMA)

You can listen to and manage voice mail messages using a graphical user interface.



## 7.6 Options

You can customize detailed options from the Options screen.

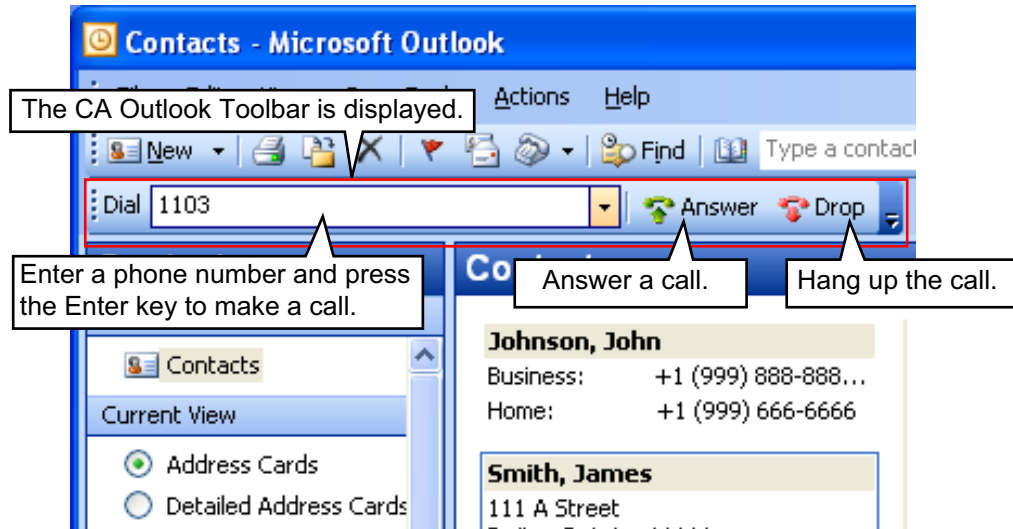




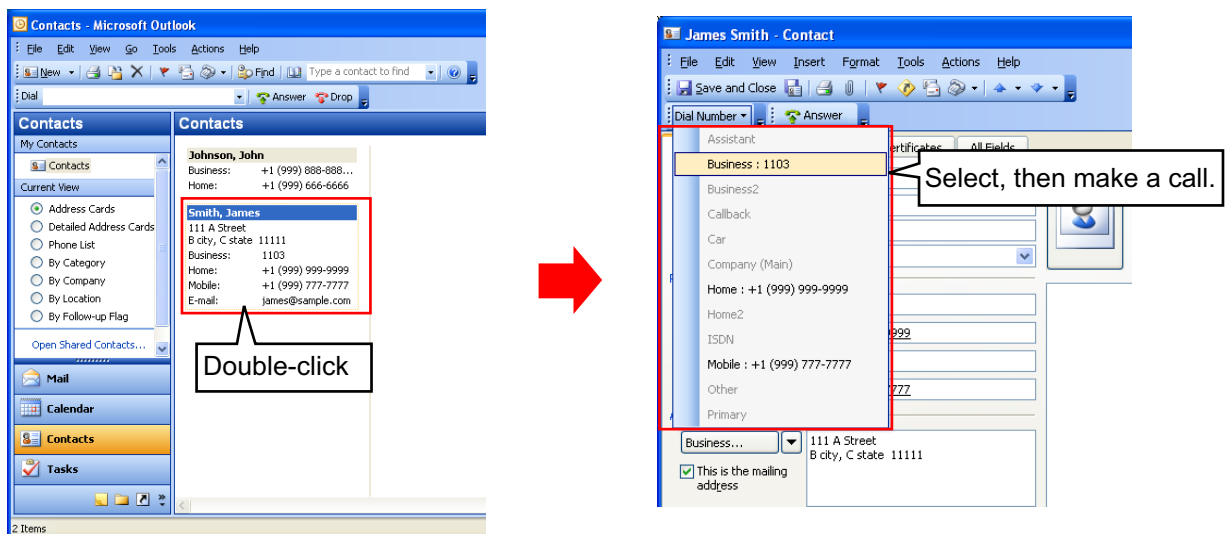
## 8 Microsoft Outlook Integration

### 8.1 Making a Call from CA Outlook Toolbar

You can make calls directly from Microsoft Office Outlook 2003/2007/2010 using the CA Outlook Toolbar.

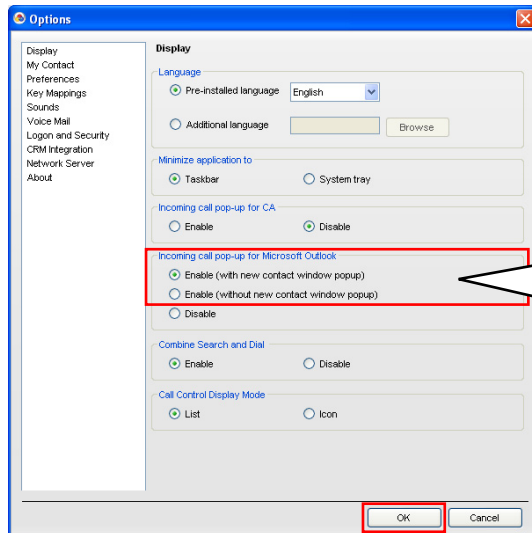


You can also make a call from a toolbar in your contacts.



## 8.2 Popup Outlook Contact Window for Incoming Call

You can have an Outlook contact window popup when a call is incoming. To enable this feature, the following setup procedure is required:

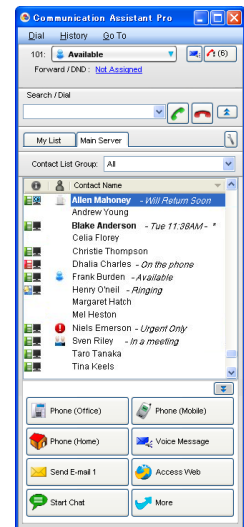
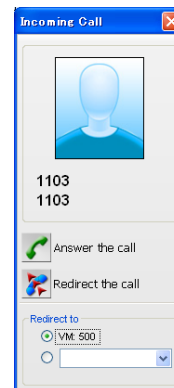
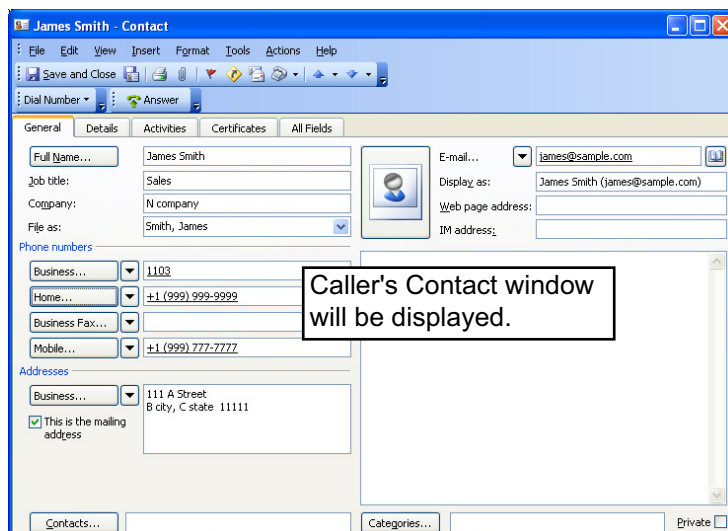


Choose one of the following:

"Enable (with new contact window popup)":  
A new contact input window will pop up if a caller not in your contact list calls you.

"Enable (without new contact window popup)":  
A new contact input window will not pop up if a caller not in your contact list calls you.

If selected, when a call is incoming, the Outlook contact information of that caller will appear.



## 9 Additional Information

### CA Client Mode Feature Comparison

CA Client has 4 operating modes: Basic-Express, Pro, Operator Console, and Supervisor. The following table summarizes the features available for each mode.

Feature	Basic-Express	Pro	Operator Console	Supervisor
View other extensions' presence from main menu	No	Yes	Yes	Yes
Maximum number of contacts	10	1000	1000	1000
Maximum history length	10 calls	1000 calls	1000 calls	1000 calls
ICD group login/logout	No	Yes	Yes	Yes
Listen-in/Busy override/Take over	No	No	Yes	Yes
ICD group supervisor	No	No	No	Yes
Conference Interface	No	Yes	Yes	Yes
Network Features	No	Yes	Yes	Yes

### Conditions

Refer to the following information for conditions and restrictions when using the various features of CA Client.

- The following table shows which kinds of telephones can be used with CA Client:

Telephone Type	Use with CA Client
Digital Proprietary Telephone (DPT)	✓
Analog Proprietary Telephone (APT)	✓
IP Proprietary Telephone (IP-PT)	✓
IP Softphone	✓
Portable Station (PS)	✓
Single Line Telephone (SLT)	✓
SIP Extension	

- If you log in to CA Client using an SLT extension, you cannot use the answer call, hold retrieve, busy override, listen in, TRS change, or call waiting functions in CA Client.
- The following call functions are not be available when CA Client is used with a PS:
  - Answering incoming calls using the CA Client interface
  - Listen In (CA Supervisor, CA Operator Console)
  - Busy Override (CA Supervisor, CA Operator Console)
  - Take Over (CA Supervisor, CA Operator Console)
- When callback ringing is used with the following features, the call must be manually answered using the PS:
  - Make call
  - Message Waiting callback
  - Account Code Entry

- 
- Call Pickup
  - Leave Message Waiting
  - Open door
  - The following are not supported in CA Client:
    - Call handling with a PS in Wireless XDP Parallel mode
    - Calls using the PDN/SDN button
  - When logging in to CA Client, if you enter the wrong password for a given extension number a pre-programmed number of times, the CA Client password will be locked.  
To clear the password lock:
    - For PBXs without CA Server, the extension PIN lock needs to be cleared. Clear the extension's PIN lock using PT Manager programming. When the PIN lock is cleared, the CA Client password and CA password lock are also cleared.
    - For PBXs with CA Server, the password lock must be cleared by using CA Web Manager. For details, see the CA Client/CA Server Installation Manual.
  - The VM menu feature for a display PT should be disabled in the Class of Service (COS) settings on the Voice Processing System (VPS). If it is not disabled, you cannot record a VM greeting message in CA Client.
  - If the PBX settings are changed, you must restart CA Client in order for the changes to be reflected in CA Client.
  - **CRM Integration**  
This feature may not work with some CRM software depending on the software's specifications.
  - CA Client does not support calling restrictions between PBX tenants. The presence for other tenant's extensions are displayed in CA Client.
  - If CA Server is installed, and settings are changed using CA Web Manager, you must restart CA Client in order for the changes to be reflected in CA Client.
  - Calls that you make or receive from your extension when you are not logged in to CA Client are not recorded in the call history.
  - **Conference Features**  
During a conference, a maximum of 8 participants (including the originator) can have the ability to speak at one time. To allow other members to speak, one of the participants that already has the ability to speak must first be muted using the conference interface.

# 10 System Requirements

## PC Specifications

When CA Client is connected to your PBX directly, the number of contacts that can be displayed in the contact list depends on your computer's specifications. When CA Server is used, the number of contacts, including contacts of other networked PBXs, is not limited by your PC's specifications.

CPU	Memory	Number of Contacts in Contact List	
		Direct PBX Connection	CA Server Connection
1.0 GHz Intel® Pentium®/Celeron® processor or comparable CPU	512 MB	32	1000
2.0 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	128	1000
2.6 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	256	1000
2.6 GHz Intel Core™2 Duo processor or comparable CPU	1 GB	1000	1000

### Note

The above specifications are approximations and may vary according to your computer's status, network conditions, other programs running, etc.

Other specifications are as follows:

	Minimum	Recommended
<b>OS</b>	Microsoft Windows® XP Professional Service Pack 2 or later Windows Vista® Business Windows 7 Professional	Microsoft Windows XP Professional Service Pack 2 or later Windows Vista Business Windows 7 Professional
<b>Hard Disk</b>	1.5 GB available space	2.0 GB available space
<b>Video Resolution</b>	1024 × 768	1280 × 1024
<b>Interface</b>	10/100Base-T	100Base-T

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