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Sphere

Sphericall™

Sphericall Desktop User Manual

Sphericall Desktop User Manual

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USING THE TELEPHONE

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We welcome you as a new user of the Sphericall Desktop. As a Sphericall Desktop phone user, you must learn a few basics to get started.

This manual is designed with you in mind. If you follow each of the steps, you can answer, transfer, place, receive, or conference calls with the Sphericall Desktop. Refer to your voice mail user manual for any questions regarding voice mail system functionality.

Note: Some of the Sphericall Desktop features are dependent upon what features your system administrator has enabled for your particular phone. Please ask your system administrator for details about your organization's Sphere system.

SPHERICALL DESKTOP PHONE FEATURES
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Distinctive Ringing
If a call comes to your phone from within your organization's Sphere system, you will hear two short rings. If a call comes to your phone from outside your organization's Sphere system, you will hear one long ring.

Caller ID
If your Sphere system has caller ID enabled, the caller's information will appear on your display phone. If the caller does not have caller ID, no information will be displayed. If your Sphere system has not been enabled for external caller ID, you will only receive caller ID information on internal calls.

Call Waiting
If your telephone set has been enabled for call waiting, a tone will sound in your handset when another call is coming in while you are on the current call. Press FLASH/LINK on your telephone to access the second call.

Message Waiting
If your telephone is equipped with a message waiting light and the system administrator has enabled this feature, the light flashes when a message is waiting in your voice mailbox. A stutter dial tone may also sound to indicate you have a message (when you pick up the handset).

PLACING CALLS FROM THE TELEPHONE
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How do I place a normal call?

To place an external call

1   **Pick up the handset.**

2   **Dial the outside service number (typically 8).**

Outside service your organization's Sphere system uses: _____

3   **Dial the number you wish to call.**

To place an internal call

1   **Pick up the handset.**

2   **Dial the extension.**

PROGRAMMABLE PHONES

Programmable phones can be used in your organization's Sphere system. Program each number by first inputting the outside service number then the desired number (for example, 82478200).

ANSWERING CALLS FROM THE TELEPHONE
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The phone associated with the Sphericall Desktop operates just like any other phone: if it rings, you answer it!

To answer a call

The phone rings...

1   **Pick up the handset.**

The Sphericall Desktop supports distinctive ringing, caller ID, and call waiting.

PLACING A CALL ON HOLD

To place a call on hold using FLASH/LINK

1   **Press FLASH/LINK on the telephone to place the call on hold.**

2   **Press FLASH/LINK on the telephone again to retrieve the call from hold.**

The only way a caller hears Music-on-Hold, if your organization incorporates Music-on-Hold into its Sphere system, is if you press the FLASH/LINK button on the telephone. If you place the caller on hold using the HOLD button, the caller will *not* hear Music-on-Hold.

TRANSFERRING CALLS FROM THE TELEPHONE

Once I have answered a call, how do I transfer it to another extension?

Blind Transfer	Immediate transfer to other extension.
Attended Transfer	Allows you to announce the call prior to the transfer. When using attended transfer, the caller being transferred does not hear you announce the call. If your organization's Sphere system has Music-on-Hold, the caller hears music during the transfer.

Note: A blind transfer can be completed by using Star Codes. This option may be preferred when used with a programmable phone. Refer to the Star Code table later in this chapter for further information.

To complete a call (a blind transfer)

1   **Press FLASH/LINK on the telephone.**

   You will hear dial tone.

2   **Dial the extension.**

   Note: If you misdial or determine that you do not want to transfer the call, Press FLASH/LINK, prior to the call being answered, to return to the active call.

3   **Hang up the handset.**

To complete a call (an attended transfer)

1   **Press FLASH/LINK on the telephone.**

2   **Dial the extension.**

   Note: If you misdial or determine that you do not want to transfer the call, Press FLASH/LINK, prior to the call being answered, to return to the active call.

3   **Announce the call.**

4   **Hang up the handset to complete the transfer.**

CONFERENCING CALLS USING THE TELEPHONE

Now that I am talking to someone, how do I conference another person into our call?

To place a conference call

With one call already connected:

1   **Press FLASH/LINK on the telephone to place the current call on hold.**

2   **Dial the extension number or an outside number (outside service plus the desired number).**

3 **Press FLASH/LINK to place the new call on hold.**

4 **Dial *95.**

The conference call is now in progress.

NETWORK-SPECIFIC NOTES

• You may conference yourself plus five other callers in a conference call depending on available resources in an ATM-based network

• You may conference yourself plus two other callers (from your phone or Sphericall Desktop) in a conference depending on available resources in an IP-based network. With the addition of the Sphericall MeetingHub conference bridge, twenty concurrent 3-party conferences or any combination of conferences totalling 60 participants is available.

Note: Consult your organization's Sphere system Administrator for information on your organization's networking environment.

FLASH CODES FOR TELEPHONE FUNCTIONALITY

The Sphericall system uses the FLASH/LINK function on the telephone set to enable a single-line phone to function as a multi-line phone.

Pressing the FLASH/LINK key on the telephone set allows you to "toggle" or cycle between calls to transfer or make consultative calls.

Table 1.1 Flash/Link Functions

Action	Flash Explanation
Making a call • Pick up your phone receiver • Dial the number you wish to call	N/A
Placing a call on/off Hold	• Press Hold on the phoneset (no Music-on-Hold). or • Press FLASH/LINK (Music-on-Hold, if available).
Dialing an Outside Number	_____ (outside service provided by administrator)
Answering an incoming call while the phone is already off-hook (A call waiting tone will be generated)	Press FLASH/LINK.
Placing a call on Hold to make a second, third, fourth, etc., call (The maximum number of calls allowed is determined by your system administrator.)	Press FLASH/LINK, wait for dial tone, dial another number.

Action	Flash Explanation
Retrieving a second, third, fourth, etc., call on Hold	Press FLASH/LINK until the desired party is connected. • Continue to press FLASH/LINK to cycle through the calls as they were presented to you. • Pressing FLASH/LINK will provide dial tone to allow you to manage the last connected party (i.e. for transfer, conference, call parking, etc.). If applying call waiting, you will press flash and receive a call immediately without the dial tone.
Transferring the connected party (attended transfer)	Press FLASH/LINK, dial the extension, announce the call, hang up. • A hold reminder, a very brief ring, will notify you if you have left another call on hold. Pick up the phone to connect to the next person on hold.
Transferring the connected party (blind transfer)	Press FLASH/LINK, dial the extension, hang up. • A hold reminder, a very brief ring, will notify you if you have left another call on hold. Pick up the phone to connect to the next person on hold.

Note: Sphericall Desktop "tent cards" provide users with quick tips for applying star code commands and FLASH key function. Consult your organization's Sphere system administrator for these reference cards.

SPHERE TELEPHONE SET STAR CODE COMMANDS

The Sphericall Desktop is enabled with several star code commands that you can use directly from a telephone set. Use the following star code commands to set features and perform functions from any telephone.

Table 1   Sphere System Star Code Commands

Code	Action	Explanation
Authorization PIN	*99 + PIN + # + number to be dialed	Allows you to apply permissions from your user profile to another line and make calls from the associated phone.
Blind Transfer	FLASH/LINK + *96 + extension	Completes a blind transfer to another extension. **Note:** A confirmation tone will sound after applying this star code command.

Code	Action	Explanation
Call Forwarding Setup	*72 + number	Activates the station number to which all calls are to be forwarded. • The number can be an extension on the Sphere system or an outside telephone number with the appropriate outside service (i.e. 85551234). • If the number is not already on the call forwarding setup, it will be added and enabled. • Only a single, handset-entered forwarding number is entered at a time. Calls may be forwarded to multiple numbers (example: *72 + extension, hang up; *72 + another extension, hang up). **Note:** A confirmation tone will sound after applying this star code command. **Note:** Calls can be forwarded to one or more internal addresses, or one or more external addresses. Calls cannot be forwarded to a combination of internal and external addresses. If such a combination is configured, the Sphericall Manager will forward calls to the first established address.
Call Forwarding Deactivation	*73	Clears the telephone's existing call forwarding conditions. Once this star code is invoked, you must add any appropriate forwarding conditions back to the extension. **Note:** A confirmation tone will sound after applying this star code command.
Transfer Directly to Voice Mail	Flash + *74 + extension	Phone sets can transfer a party directly to another voice mailbox.
Call Detail Record	*75 + Code + # + number	Code is stored with the rest of the call information for retrieval and accounting purposes. Codes are assigned by your system administrator.
Intercom from non-intercom phone to intercom enabled phone	*76 + extension	Callers without intercom can enter this star code to intercom a phone equipped with intercom.
Conferencing	With a call connected: FLASH/LINK + extension or number + FLASH/LINK + *95	Conferences parties using FLASH/LINK and star code command.
Directed Park	With a call connected: FLASH/LINK *94 + extension	Places a call to a specific station, giving the user the ability to return to that station to retrieve the call.
Do Not Disturb Activation	*78	Activates Do Not Disturb for all calls bound to this extension. When Do Not Disturb is activated, the station is not alerted to any calls. Forwarding and/or Coverage behaves as usual. **Note:** A confirmation tone will sound after applying this star code command.
Do Not Disturb Deactivation	*79	De-activates Do Not Disturb for all calls to this extension. **Note:** A confirmation tone will sound after applying this star code command.
Drop Last Call	FLASH/LINK + *77	Drops the last active call before the FLASH operation. If used during a conference call, the last caller who was added to the conference is dropped from that conference call. **Note:** A confirmation tone will sound after applying this star code command.

Code	Action	Explanation
Pickup	*93 + extension	Retrieves a ringing call or an on-hold call at the entered extension.
Group Pickup	*92	Retrieves a ringing call from anywhere within the predefined Group Pickup area.
Park	FLASH/LINK + *8 + the number of the park zone as announced (by operator)	Places a call into a park zone, or an address/area where calls can be retrieved from any telephone on a Sphere system.
Unpark	*91 + the number of the park zone as announced (by operator)	Retrieves a call from the park zone extension entered. If there is more than one call in the zone, it will take the oldest call in the zone.
Paging	Number determined by your Sphere system administrator.	Contact your system administrator for information regarding your organization's paging system.

AUTHORIZATION PINS AND THE PHONESET

OVERVIEW

Authorization PINs provide users with the ability to apply individual dialing permissions, permissions that were originally associated with a user profile, to general lines throughout a Sphere system. These general lines may or may not have been configured with stricter dialing permissions.

When users apply their individual dialing permissions to a restricted station within a Sphere system, the new dialing privileges that correspond to the PIN will be activated only for that call session. Once the call is completed, the station's dialing permissions and privileges return to their configured defaults.

Consider the following example:

One Sphere system is configured within a school in which each classroom and each teacher requires separate extensions. Teachers are assigned PINs that provide them the ability to place telephone calls from classroom extensions—extensions that have previously been configured only for emergency number dialing permissions. The PINs also provide teachers the ability to place telephone calls from any station throughout the organization as opposed to the single station within their classroom.

Note: Sphere system Administrators must supply users with their Authorization PINs if that feature has been enabled within a Sphere system. If users lose or forget their PIN, the administrator must assign a new authorization code.

IMPLEMENTATION

To apply individual dialing permissions to a restricted station

From any telephone throughout a Sphere system:

1 **Dial *99.**

2 **Dial the PIN.**

3 **Dial #.**

4 **Dial the appropriate telephone number.**

Note: If you are using the Sphericall Desktop to place a telephone call, you have already been granted the appropriate dialing permissions for all call sessions. As long as you are logged on to the network (and your machine) with your user account (i.e. Domain_Name\User_Name) and have the Sphericall Desktop application open, you will maintain these dialing permissions.

SPHERICALL DESKTOP SOFTWARE

How do I use my telephone in conjunction with the Sphericall Desktop?

Use this chapter if your Sphere system administrator has integrated your telephone with the Sphericall Desktop. The following is an overview of the features you have access to on your computer.

Note: Even if your computer is not turned on, you have access to the telephone and can receive and place calls from your telephone set.

To start the Sphericall Desktop application

From the Start menu:

1   **Click Start\Programs\Sphericall\Desktop.**

The Sphericall Desktop opens and integrates with your telephone set.

Figure 2.1   Sphericall Desktop window
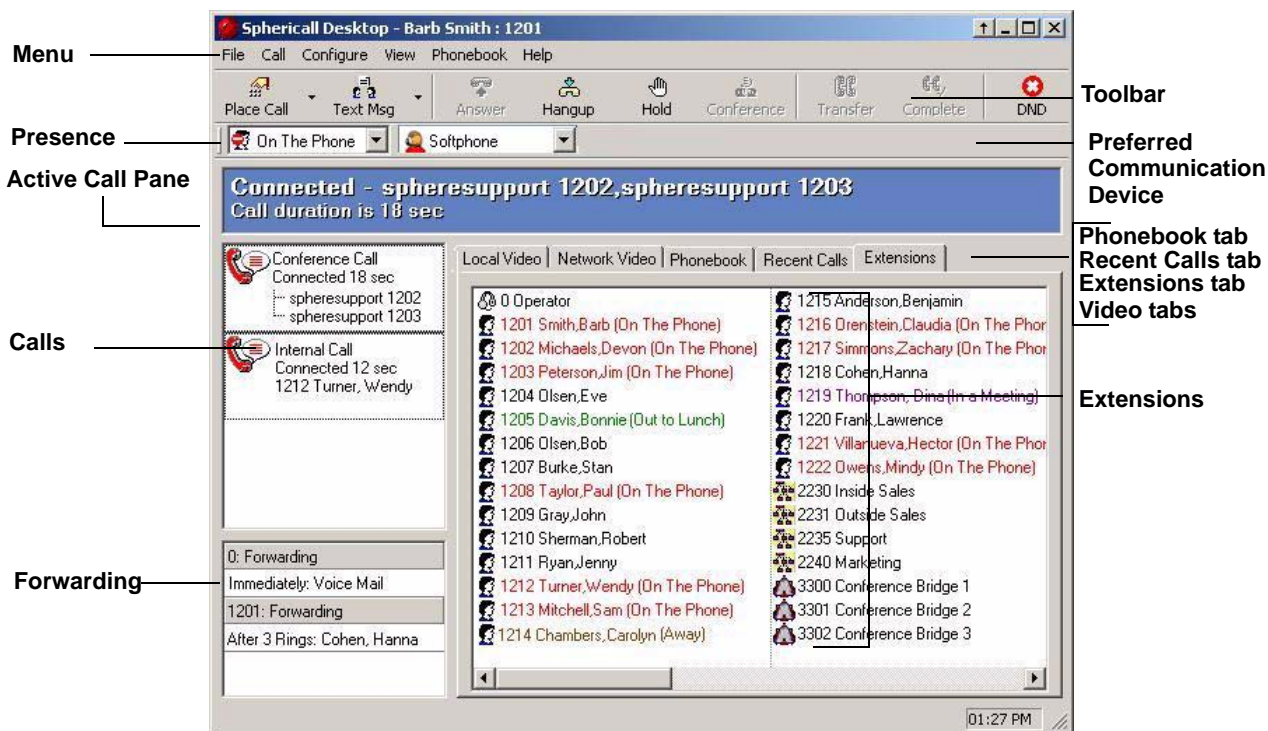
2   **Review the following major areas of the window**

Menus	Drop-down menus contain commands and tasks.
Toolbar	Button commands and tasks.
Folders	Stored number information.

Presence	Indicates the activity status of a Sphericall Desktop user.
Active Call pane	Live information about calls in-progress.
Phonebook, Recent Calls, Extensions tab	Phonebooks and organization number directories.
Local & Network Video	Controls the configuration and activity of video.
Calls	The Active Call icon which can be dragged to transfer, right-clicked for more tasks and options, etc.
Forwarding and Do Not Disturb Status	Indicates when Forwarding and Do Not Disturb are enabled.

EXTENSIONS LIST

Clicking the Extensions tab of the Sphericall Desktop window allows you to view all the extensions listed for your organization. However, the Extensions tab provides more than just names and numbers. It is a "smart directory" that functions as a window to the availability and productivity of coworkers.

Figure 2.2 Sphericall Desktop window
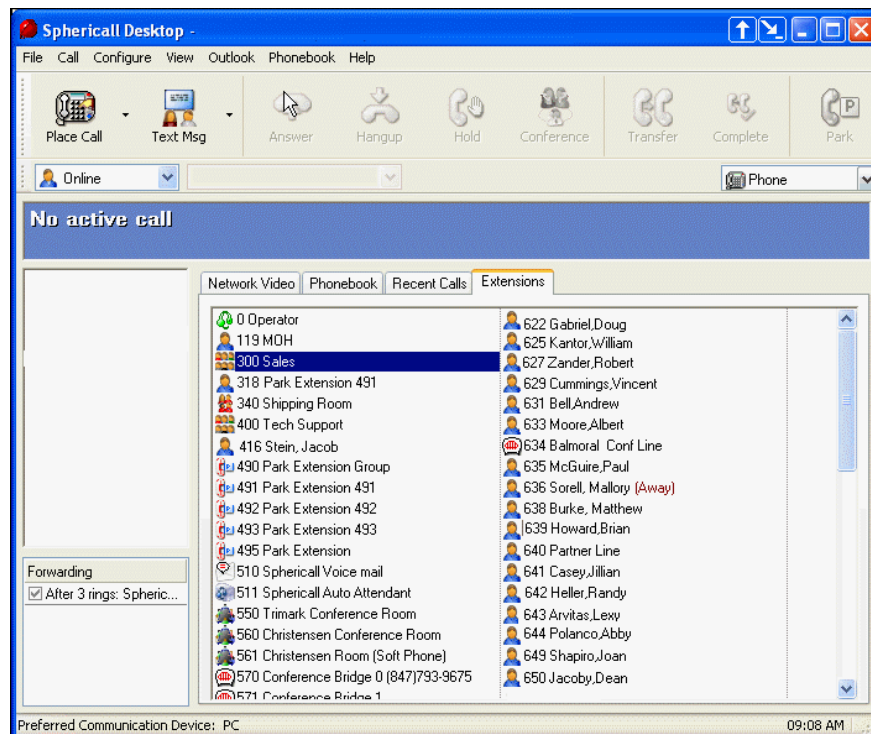
To place a call using the Sphericall Desktop

From Phonebook or Extensions tab:

- **Double-click any name or number.**

USING THE SPHERICALL DESKTOP

CHOOSING A LINE

When users are assigned rights to multiple lines, they have the ability to select which line to open at the beginning of each Sphericall Desktop session:

Figure 2.3   Choose a line window
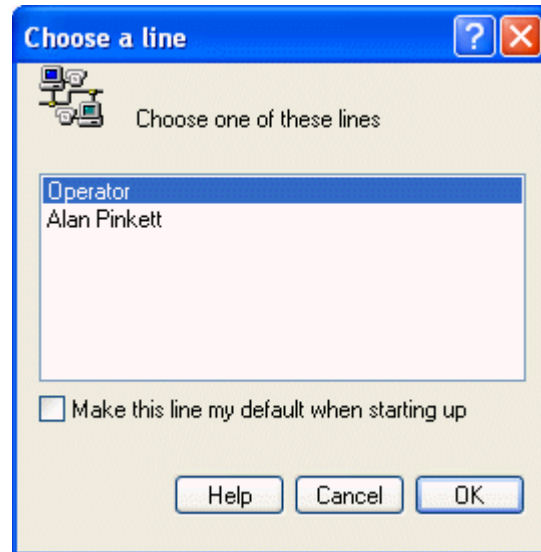
ANSWERING CALLS

In the Calls window, new calls will appear when the telephone rings.

• New calls appear with a yellow ringing bell image.

Figure 2.4   Ringing Bell image
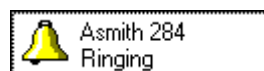
• Connected calls appear with a red handset image.

Figure 2.5   Call Connected image
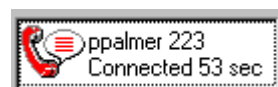
During an active call, you can right-click in the Calls pane to perform many call activities.

Answer	Transfer	Complete Transfer
Send To Voice Mail	Hold	Park

Hangup	Conference	Transfer Participant
Drop Participant	Send Text Message	Keypad
Switch Device (Softphone)	Call Log	Adjust Volume
View In Outlook	Save Contact Details	Create Journal
Show Journal		

EXTENSION SEARCH

Users of the Sphericall Desktop can place calls from three different areas of the Sphericall Desktop:

- The Extensions tab
- The Phonebook tab
- The integrated Outlook Contacts folder (in the Phonebook tab)

The Sphericall Desktop includes a search tool to ease the burden of locating a particular extension/contact.

To search for an extension/contact

1   **Click File\Search**

Figure 2.6   Search window

In the Search for field:

2   **Type in the last name of the person you would like to call.**

In the example above, typing the letters "P" and "a" are adequate to conduct a search for the last name.

In the Search in field:

3 **Select any or all of the check boxes to use for conducting the search.**

Note: To allow the Search tool to locate Outlook Contacts, you must have already loaded your Outlook Contacts onto the Spherical Desktop

For more information on Outlook and its integration with the Spherical Desktop, refer to the Spherical Desktop Options chapter.

4 **Click Start Search.**

The results will appear in the Search Results area. You may receive mulitple matches. For example, if you search for a user who has a business number and a mobile number (located in Outlook Contacts), both numbers will appear.

5 **Double-click the extension or click Dial to place a call to that extension/contact.**

TRANSFERRING CALLS

To transfer calls using the Spherical Desktop

1 **Place the call on hold by clicking the Hand icon on the Spherical Desktop toolbar.**

2 **Double-click the number in the Extensions tab.**
or
Drag and drop an active call to the appropriate number in the Extensions tab.

Users who transfer calls frequently can also click once in the Extensions tab then type the first letter of the person's last name to whom they wish to transfer the call. This will automatically jump the Extensions list to that alphabetical section. Double-clicking the appropriate name will complete the transfer.

Note: If you have attended transfer set in Configure\Options, you must click Complete Transfer to complete the transfer. This is not necessary for blind transfers.

3 **Hang up the handset.**

The call is transferred.

To speed transfer calls (for operators)

Users who transfer calls frequently will find it helpful to "jump" to the alphabetical letter of the person to whom they wish to transfer calls.

1 **Click once in the "white space" of the Extensions tab.**

Using the keyboard:

2 **Type the first letter of the last name of the person to whom you are transferring a call.**

This will automatically jump the extensions list to that alphabetical section.

3 **Double-click the appropriate name to complete the transfer.**

To transfer a call to a user's voice mailbox

1 **Answer a call.**

2 **Right-click the extension for the intended transfer.**

3 **Click "Transfer to this user's Voice Mailbox."**

The call you transferred will proceed to the voice mailbox.

Note: A voice mail system must be installed on the Sphere system in order to use this function.

To transfer a call to your own voice mailbox

1   **Answer a call.**

2   **Right-click your own extension in the Extensions tab.**

3   **Click "Transfer to this user's Voice Mailbox."**
    Or
    Right-click on the call and select "Sent To Voice Mail."

    The call you transferred will proceed to your voice mailbox.

    Note: A voice mail system must be installed on the Sphere system in order to use this function.

A NOTE ON MONITORING

Your organization's Sphere system administrator has the ability to grant monitoring rights to more than a user's own line. Using the Sphericall Desktop, an operator, for example, can place the mouse pointer over extensions and view user call information. This information includes the caller's name, if the call is inbound or outbound, caller ID (if available), and call length.

MONITORING INDIVIDUALS

Sphericall Desktop users, with the appropriate permissions, have the ability to select extensions and isolate their presence status. The monitor window will appear in the lower righthand side of their computer monitor (near the system tray).

To monitor individual extensions

From the extensions tab:

1   **Right-click the desired extension.**

2   **Select Monitor.**

    Note: There is no limit to the number of users that can be monitored. When a monitored user's presence status has changed, their information will appear bold.

3   **Right-click on the extension and select Stop Monitoring to disable the monitoring feature.**

Figure 2.7   Monitor window
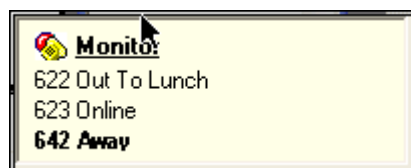
NOTIFY ON IDLE

Users that have monitoring rights may also choose to be notified when a user within the Sphere system is no longer on a call. The Notify on Idle feature allows a user to

right-click on an extension (involved in an active call) in the Extension pane and select "Notify Me When Idle". If this feature is enabled, a message will appear near the system tray when that extension no longer has an active call. The user will only be able to monitor one address at a time.

Figure 2.8   Notify on Idle window
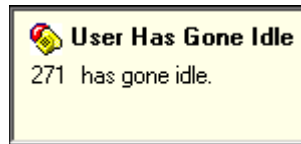
Note: The Notify on Idle message will only appear for 30 seconds and can be cleared by clicking on the window.

CONFERENCING CALLS

Conferencing calls with the Spherical Desktop is very easy to do.

To place a conference call

1   **Answer or initiate a call.**

2   **Place the call on hold.**

3   **Place a call to the new extension.**

4   **Drag either call onto the other call in the Calls window.**

The conference call will be connected.

Note: This process works when the Attended Transfer option is set up in Configure\ Options.

Figure 2.9   Conference Call image
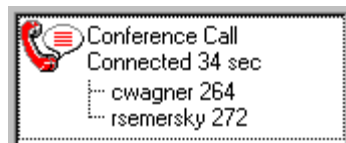
USING THE CONFERENCE BRIDGE

You may use your phone and/or Spherical Desktop to initiate/participate in conference calls with a maximum of three participants. However, if your organization has a VG3 MeetingHub (conference bridge), users can transfer callers into the conference bridge and include up to 60 participants.

For example, if you are part of a conference call of which you are the only participant within the Sphere system, you can do the following:

• Transfer the outside callers to a conference bridge extension

• Hang up the recently-transferred call and dial the conference bridge extension

• Have additional users dial the conference bridge extension

Note: Calls into a conference bridge CANNOT be conferenced in. This will not work. Calls must be transferred in.

MANAGING CALLS

When multiple calls arrive at your desk, the Sphericall Desktop allows you to effectively manage these calls.

Figure 2.10 Sphericall Desktop window

Call #1 ——————

Call #2 ——————
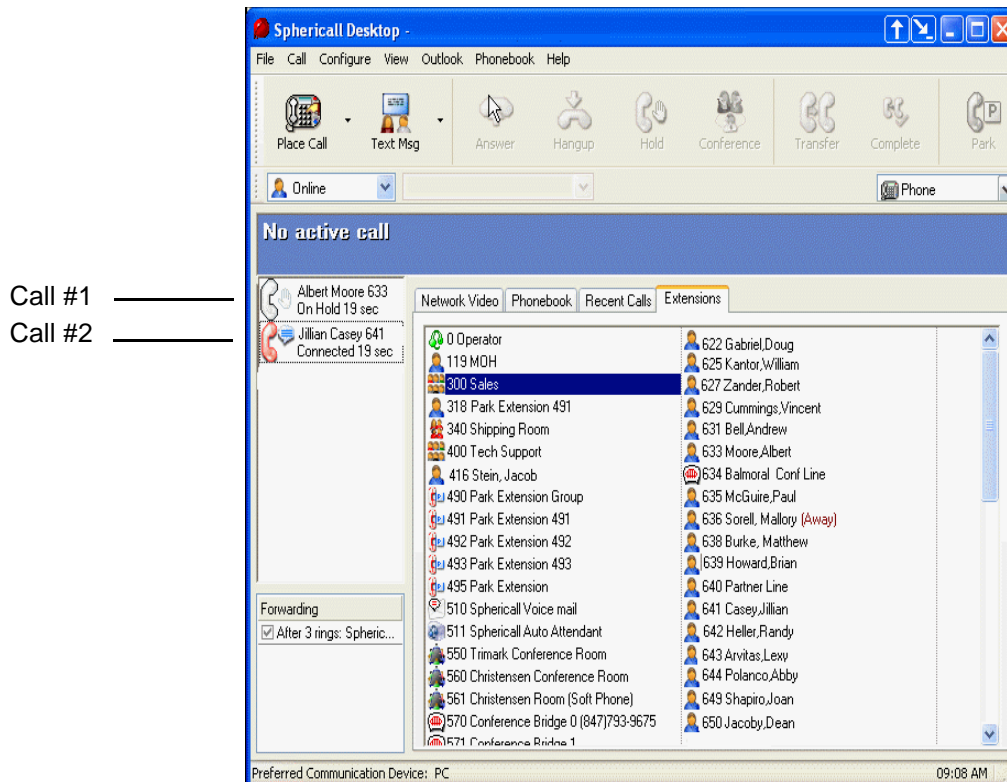
To manage multiple calls

While on an active call and another call comes in:

1 **Click the incoming call from the Calls window.**

The incoming call is now the active call and the other call will be <u>automatically placed on hold</u>.

2 **Repeat as necessary for additional incoming calls.**

Note: Observe the Calls window for current call activity.

LANGUAGE SELECTION

The Sphericall Desktop supports the following languages:

English	**Italian**
French {Canada}	**Spanish {Mexico}**
French {France}	**Spanish {Spain}**
German	

To select a different language

- **Click File\Change Language.**

TOOLBAR ICONS

The toolbar icons on the Sphericall Desktop give the user the ability to perform many functions with the click of a mouse. Below is the default order of toolbar icons. The order and appearance is configurable..

Click the Place Call icon to initiate a call to an extension within your organization or an outside number.

Click the Text Chat icon to initiate a text message conversation.

Click the Answer icon to answer the phone without picking up the handset (Requires headset or phone equipped with speaker).

Click the Hangup icon to terminate a call.

Click the Hold icon to place an active call on hold. The Hold icon can be used to initiate a transfer or conference call.

Click the Conference icon to create a conference call.

Click the Transfer icon to initiate a transfer call.

Click the Complete icon to complete a transfer call.

Click the Park icon to initiate the placing of a call into a "virtual parking lot" or park zone.

Click the Recording icon to initiate a recording of your phone call. Note: Certain user rights are required. Contact your Sphere admnistrator.

Click the Pickup icon to pick up a call from another extension within your pickup group.

Click the DND icon (also referred to as Do Not Disturb) to disable sending notification of inbound calls to the station and Sphericall Desktop. When the Do Not Disturb feature is enabled, a watermark will appear in the Calls pane.

To configure toolbar icon order and presence

1   **Click Configure\Toolbar.**

Figure 2.11   Configure Toolbar window
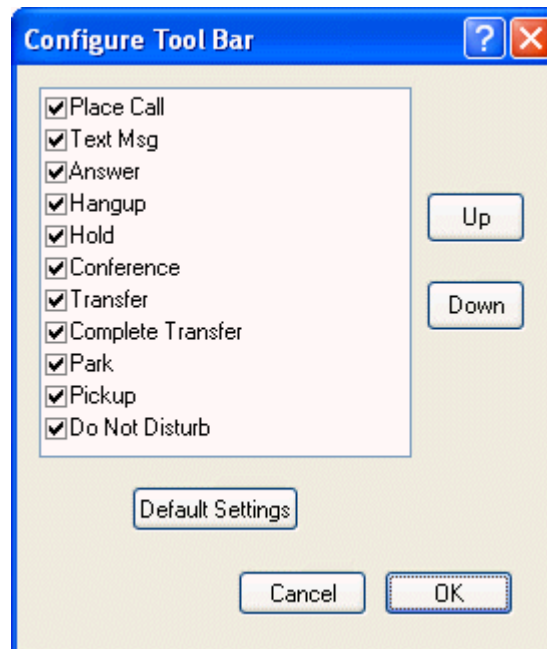
2   Select the Dial checkbox if you want the Dial icon to appear on the Sphericall Desktop.

3   Repeat the previous step for each icon.

4   Highlight a specific icon and click the Up or Down button to determine the order in which the icon will appear on the Sphericall Desktop toolbar.

5   Click OK.

TITLE BAR BUTTONS

The title bar buttons are located at the upper right of the Sphericall Desktop.

	Menu button - Click to retain only the Sphericall Desktop menu.
	Minimize button - Click to reduce the Sphericall Desktop window size.
	Maximize button - Click to restore the Sphericall Desktop window to full image size.
	Hide button - Hides the Sphericall Desktop application. The program will continue to run in the taskbar (near the clock) so you can be notified of phone calls and instant messages.

TASKBAR STATUS AREA ICONS

Taskbar status area icons are located in the lower right of the Sphericall Desktop.

	Status Area Shortcut - Opens the Sphericall Desktop window.
	Status Area Call Indicator - Indicates call(s) received.
	Message Waiting - Indicates that a message has been left on your third-party voice mailbox (where available).

TASKBAR STATUS AREA ICONS (OUTSIDE OF THE SPHERICALL DESKTOP

Taskbar status area icons are located in the lower right of the Sphericall Desktop.

Do Not Disturb- Indicates on your computer's desktop when Do Not Disturb is enabled.

SPHERICALL DESKTOP OPTIONS

3

OPTIONS WINDOWS

The Spherical Desktop provides several option windows for configuring and adjusting call settings, including appearance and functionality.

Option Window	Description
General	• Toolbar Style • Type of Transfer • Personal Details
Audio	General Ringing Characteristics
Calls	• Incoming/Outgoing Calls • General Call Activity
Extensions	• Extension Sorting • Extension Display • Zone Appearance • Mouse Action
Outlook	• Incoming Calls • Outgoing Calls • Journalling • Contract Groups in Phonebook tab • Meeting Calendar
PC Phone Settings	Spherical Softphone Configuration
Phonebook	General Phonebook Characteristics
Presence	Presence Display and Configuration
Recent Calls	Recent Calls Determination and color appearance
Video	Video Enablement and Device Declaration

GENERAL TAB

To set general options

From the Spherical Desktop window:

1 **Click Configure\Options\General.**

Figure 3.1   Options window
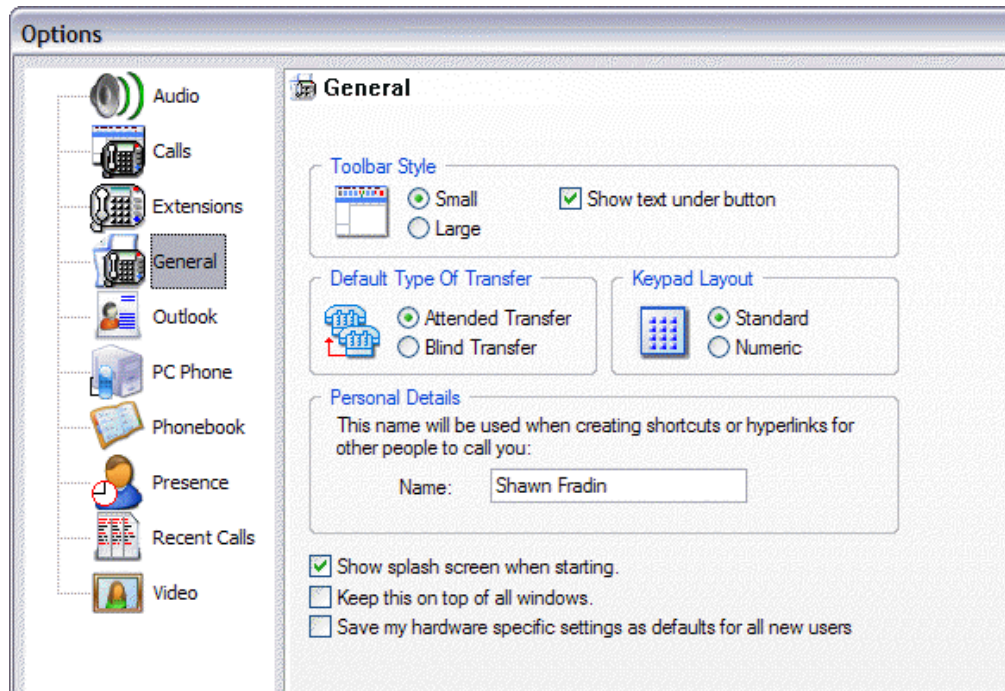
In the Toolbar Style group box:

2   **Select the Small or Large radio button to change the size of the Sphericall Desktop toolbar buttons.**

3   **Select Show text under button to include text under the toolbar buttons.**

In the Default Type Of Transfer group box:

4   **Select the Attended Transfer radio button to announce transferred calls.**
    or
    Select the Blind Transfer radio button to transfer calls without an announcement.

Keep in mind that by selecting attended transfer, you cannot double-click on an extension to transfer an active call. This places the active call on hold. If you have opted for attended transfer, you can still blind transfer. Right-click blind transfer on the extension to which you want to transfer the call.

In the Keypad Layout group box:

5   **Select the Standard or Numeric radio button to set the dial pad layout.**

In the Personal Details text box:

6   **Type the name that will be used when creating shortcuts or hyperlinks for other people to call you.**

7   **Select Show splash screen when starting to enable the appearance of the Sphericall logo splash when starting the Sphericall Desktop.**

8   **Select Keep this on top of all windows to allow the Sphericall Desktop to take precedence over other applications on your dekstop.**

9   **Select Save my hardware specific settings as default for all new users to allow the Sphere system administrator to define system parameter default files that will be used for any users that use this PC.**

10   **Click OK.**

PERSONAL DETAILS

Sphericall uses an application called URLdialer.exe to support telephone numbers on the Sphericall Desktop and the Internet. The information entered in this field allows users to drag and drop their own telephone number into other desktop applications.

Drag and drop your URL phone information from the inactive, blue Call Information pane to the Microsoft Windows desktop or to any e-mail or Microsoft Word document. If users receiving this document are on a Sphere system, they can click on the link and the URLdialer.exe application will dial from their desktop.

AUDIO TAB

To set audio options

From the Sphericall Desktop window:

1 **Click Configure\Options\Calls\Audio.**

Figure 3.2 Options window

AUDIO OPTIONS

Check Box	Description
Ring my phone when a new call arrives	Select this check box to enable the phone to ring when a new call arrives.
When a new call arrives, play the following through the specified audio device	• Play ringing tone - Select this radio button to play the familiar ringing tone. • Play this sound - Select this radio button to enable the speakers to broadcast a .wav file. when a user receives a call. Click Browse to select the appropriate .wav file.
Device: Select the appropriate audio device from the drop-down list box.	
If a second call arrives, play the following through the specified audio device	• Play ringing tone - Select this radio button to play the familiar ringing tone. • Play this sound - Select this radio button to enable the speakers to broadcast a .wav file. when a user receives a call. Click Browse to select the appropriate .wav file.
Device: Select the appropriate audio device from the drop-down list box.	

NEW CALL ARRIVAL

Microsoft Windows 2000 and XP Operating Systems

Figure 3.3   New Call

When a new call arrives to the Sphericall Desktop, a message containing caller ID information, call state, transfer information, precedence information (if available), and the called party will appear in the system tray.

Figure 3.4   Missed Call

When a call is dropped or unanswered, a missed calls window appears in the system tray. The window displays time, date, and caller ID information. The missed call window clears when the user hovers their mouse pointer over the Sphericall Desktop icon.

DISTINCTIVE RINGING

The Sphericall Desktop allows you to play .wav files on inbound calls. Your organization's Sphere system administrator can set up .wav files for all employees in a directory so that any time you place a call to an employee, a specific .wav file will play.

For example, you have enabled the Ring through my speakers when a new call arrives check box; Joe Murphy places a call to your extension; Instead of the telephone ringing, a .wav file plays, "Joe Murphy is calling from extension 271." in your computer's speakers.

Note: The Sphere system administrator would need to set up a .wav file for that particular employee (i.e. 271.wav).

In the Outgoing Calls group box:

2 **Select Popup if minimized to specify how outgoing calls appear within your Sphericall Desktop.**

In the General group box:

3 **Select Close window after hanging up last call to hide the Sphericall Desktop at the completion of a phone call.**

4 **Define, in seconds, the time it takes the Sphericall Desktop to close after the completion of a phone call.**

5 **Select Automatically switch call focus when a call is hung up**

6 **Click OK.**

CALLS TAB

To set call options

From the Sphericall Desktop window:

1 **Click Configure\Options\Calls.**

Figure 3.5 Options window
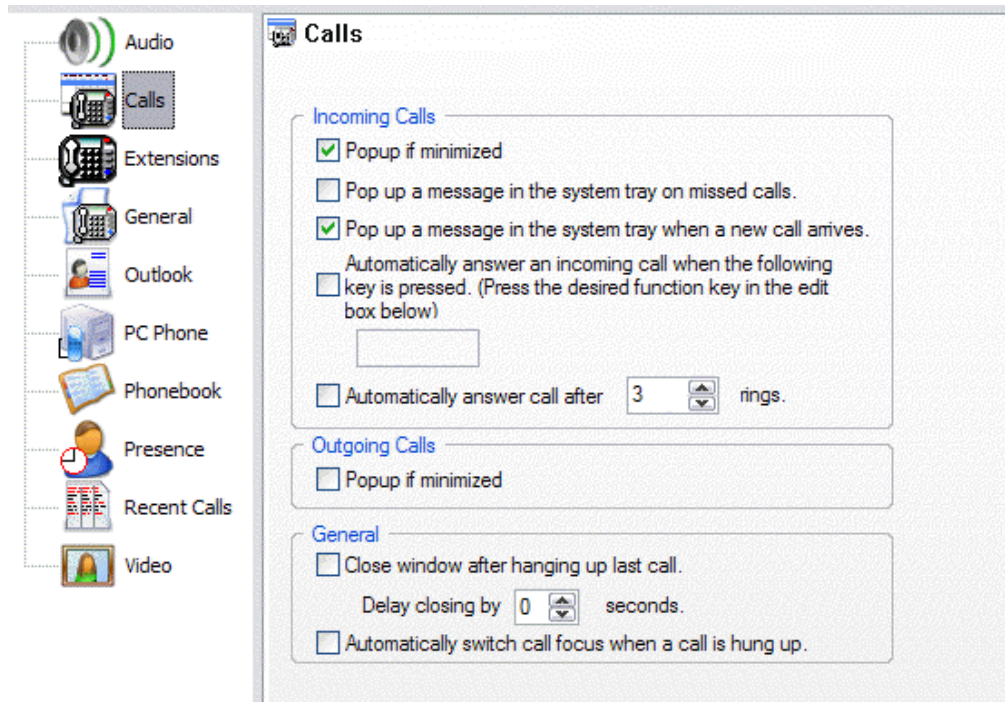
In the Incoming Calls group box:

INCOMING CALLS OPTIONS

Check Box	Description
Popup if minimized	If the Sphericall Desktop is minimized, the window will popup when a call is received.
Pop up a message in the system tray on missed calls	Select this check box to provide caller ID information in the system tray when a call is missed.
Popup a message in the system tray when a new call arrives	Select this check box to provide caller ID information in the system tray when a new call arrives.
Automatically answer an incoming call when the following key is pressed	Select this check box to give the keyboard to ability to answer when a new call arrives.
Automatically answer call after *n* rings	Select this check box if you wish the call to be answered after a defined number of rings.

EXTENSIONS TAB

To set extension options

From the Sphericall Desktop window:

1   **Click Configure\Options\Extensions.**

Figure 3.6   Options window
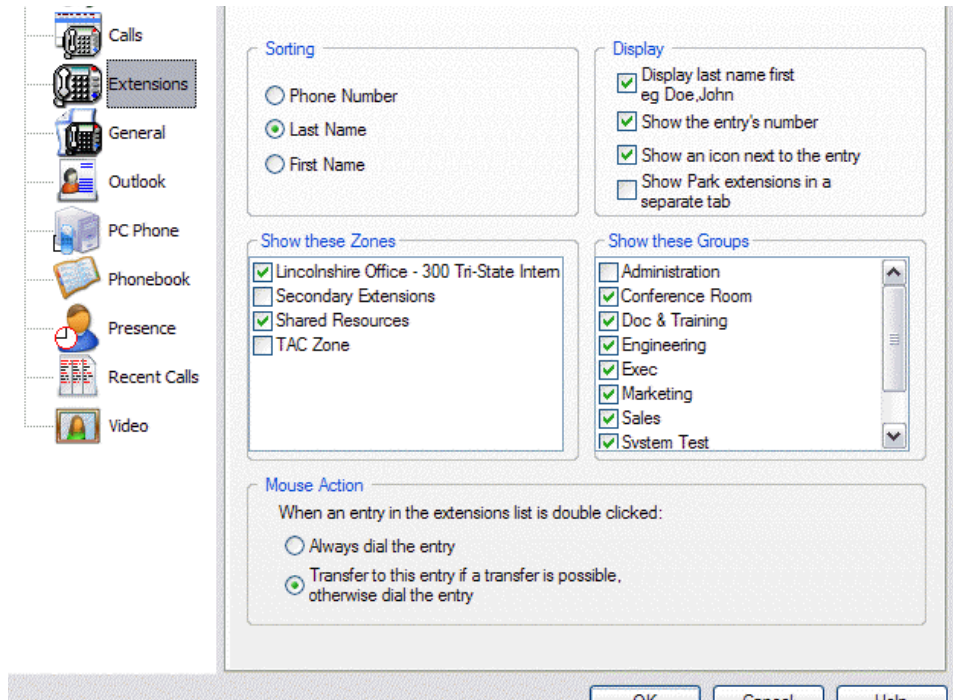
In the Sorting group box:

2   **Select the Phone Number, Last Name, or First Name radio button to sort Extensions.**

In the Display group box:

3   **Select Display last name first, Show the entries number, Show an icon next to the entry to establish how entries display in the Extension tab, or Show Park extensions in a separate tab.**

Note: Refer to the Park Zones section of this chapter for more information on Park extensions.

In the Mouse Action group box:

4   **Select Always dial the entry or Transfer to this entry if a transfer is possible, otherwise dial the entry to specify the action taken when an entry in the extension list is double-clicked.**

5   **Click OK.**

OUTLOOK TAB

Note: Microsoft Outlook is only used with systems which are integrated with Microsoft Exchange Server. If you orgnaization's Sphere system is integrated with Microsoft Outlook, you can click the Outlook tab on the Sphericall Desktop to select and set your preferences for importing Outlook Contacts, Journaling, etc.

To set Outlook options

From the Sphericall Desktop:

1 **Click Configure\Options\Outlook.**

Figure 3.7 Options window
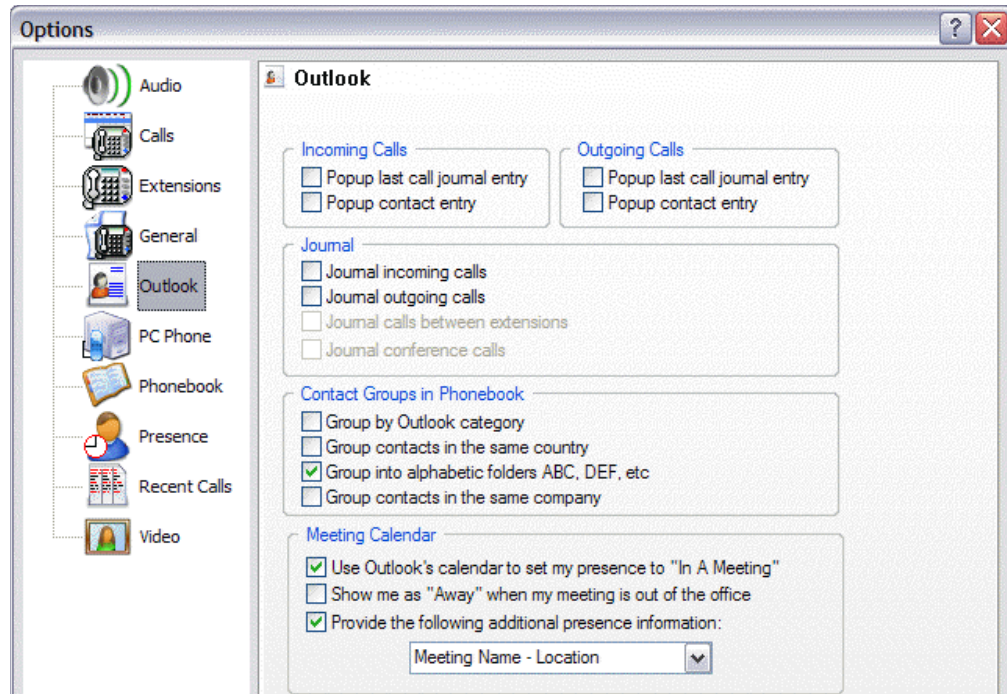
In the Incoming Calls group box:

2 **Select Popup last call entry or Popup contact entry.**

This opens a dialogue window in Outlook with the user's contact information.

In the Outgoing Calls group box:

3 **Select Popup last call entry or Popup contact entry.**

This opens a dialogue window in Outlook with the user's contact information.

In the Journal group box:

4 **Select Journal incoming calls, Journal outgoing calls, Journal calls between extensions, or Journal conference calls.**

In the Contact Groups in Phonebook group box:

Select Group by Outlook category, Group contacts in the same country, Group into alphabetic folders ABC, DEF, etc., or Group contacts in the same company.

In the Meeting Calendar group box:

5 **Select Use Outlook's calendar to set my presence to "In A Meeting", Show me as "Away", and Provide the following additional presence information.**

In the Sphericall Voice Mail group box:

6 **Select the Show Sphericall Voice Mail menu options checkbox.**

7 **Click OK.**

PC PHONE TAB

This tab is used for configuration of the Sphericall Softphone, an endpoint option that allows telecommuters and employees extensions to follow them as needed.

To set PC Phone options

From the Sphericall Desktop:

1 **Click Configure\Options\PC Phone.**

Figure 3.8 Options window
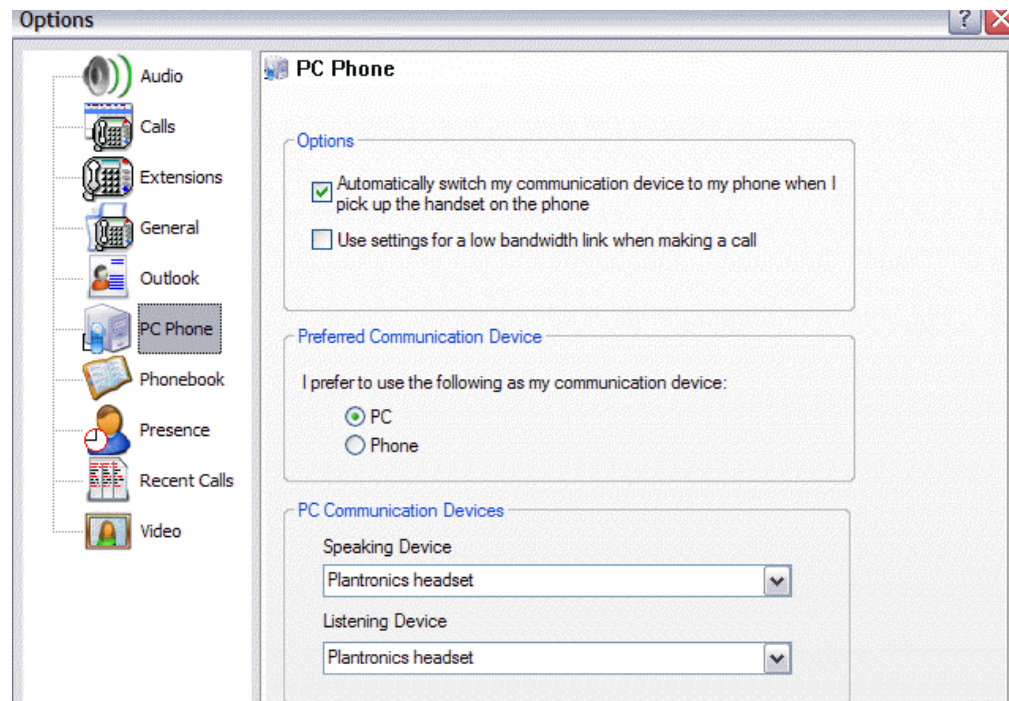
In the Options group box:

2 **Select Automatically switch my communication device to my phone when I pick up the handset on the phone.**

3 **Select Use settings for a low bandwidth link when making a call if voice quality is a concern and you are operating over a low bandwidth link.**

This option uses a particular codec associated with your station which improves voice quality.

In the Preferred Communication Device group box:

4 **Select the PC or Phone radio button to specify the communication device to use with the Sphericall Softphone.**

Note: This option is configurable from the main Sphericall Desktop window too.

In the PC Communication Devices group box:

5 **Select the device the user will use to speak into the softphone in the Speaking Device list box.**

6 **Select the device that the user will use for listening with the softphone in the Listening Device list box.**

7 **Click OK.**

PHONEBOOK TAB

To set phonebook options

From the Sphericall Desktop window:

1   Click Configure\Options\Phonebook.

Figure 3.9   Options window
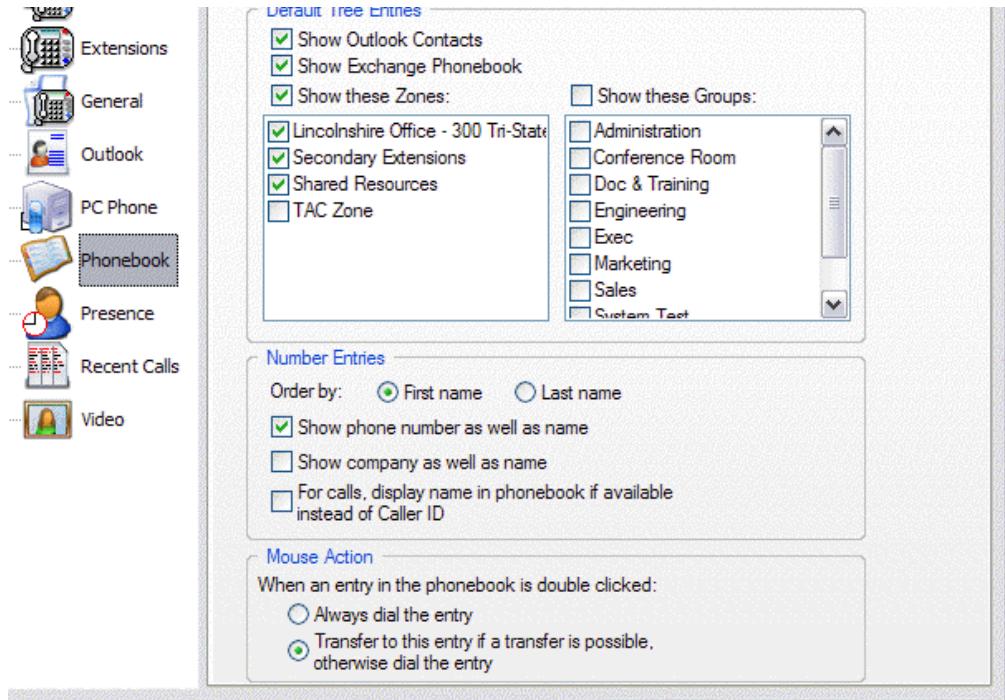
In the Default Tree Entries group box:

2   Select Show Outlook Contacts, Show Exchange Phonebook, or Show these Zones to specify how you wish to view numbers in the Phonebook.

In the Number Entries group box:

3   Select the First name or Last name radio button to sort Phonebook entries.

4   Select Show phone number as well as name, Show company as well as name, or For calls, display name instead of Caller ID to specify how you prefer your Phonebook entries to appear.

In the Mouse Action group box:

5   Select Always dial the entry or Transfer to this entry if a transfer is possible, otherwise dial the entry to specify the action taken when an entry in the extension list is double-clicked.

6   Click OK.

PRESENCE TAB

Presence makes it possible for users to locate and identify another user's availability. The Sphericall Desktop provides a number of presence definitions based upon colors and states. A Sphericall Desktop user can define and declare their presence.

To set Presence options

From the Sphericall Desktop window:

1 **Click Configure\Options\Presence.**

Figure 3.10 Options window

In the Display area:

2 **Choose how presence information should appear in your Extension list.**
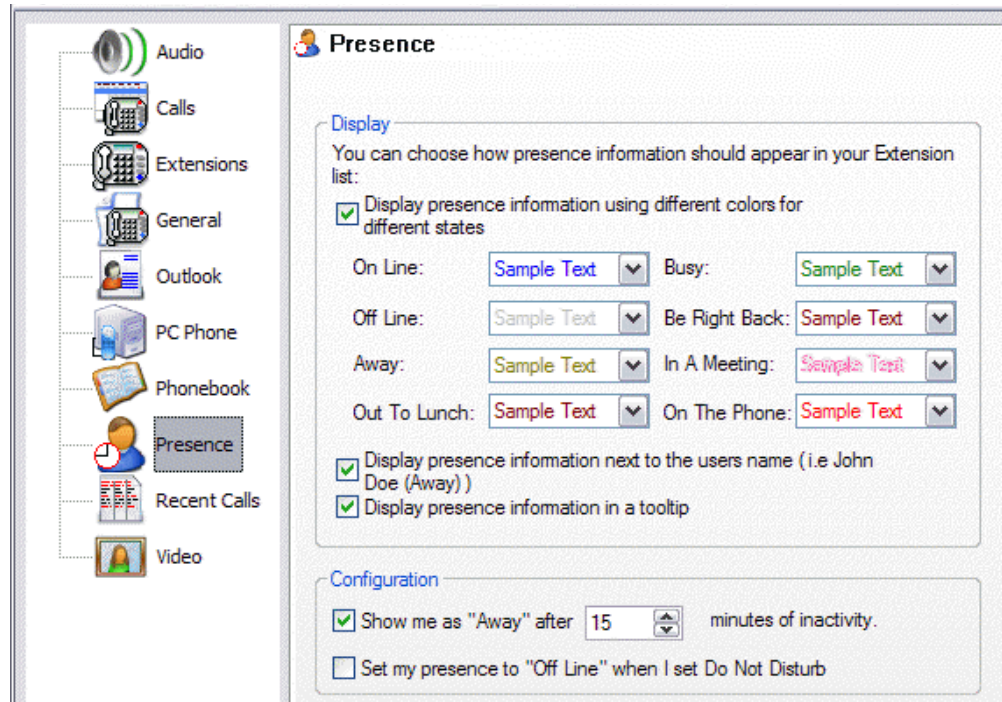
3 **Click OK.**

RECENT CALLS TAB

To set recent call options

From the Sphericall Desktop window:

1 **Click Configure\Options\Recent Calls.**

Figure 3.11 Options window
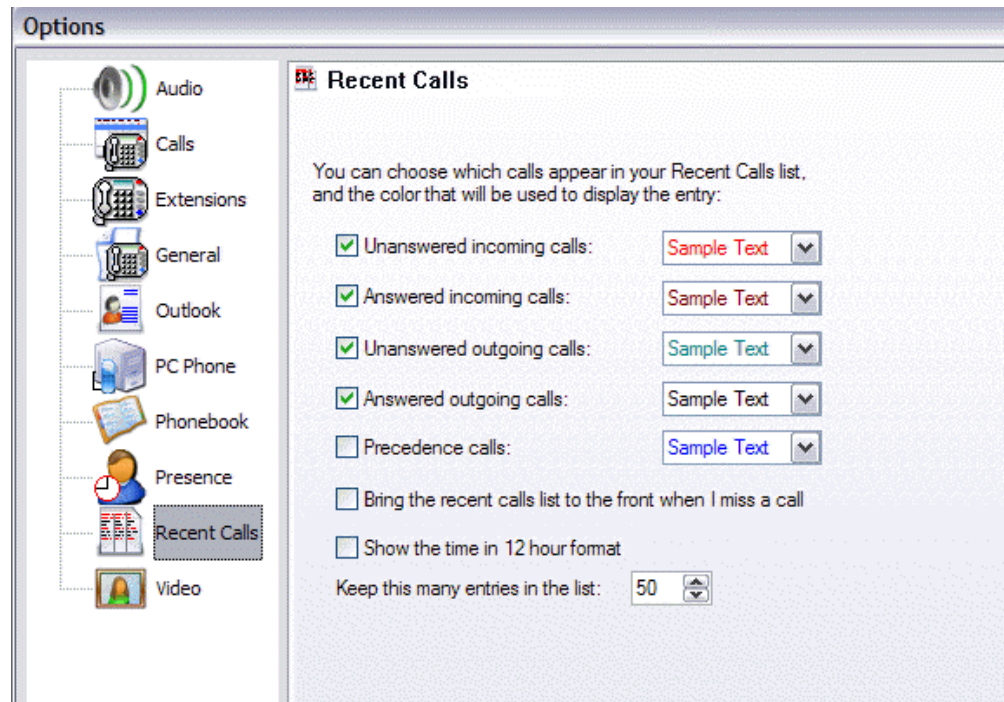
2 **Select Unanswered incoming calls, Answered incoming calls, Unanswered outgoing calls, Answered outgoing calls, or Precedence calls to establish which calls appear in the Recent Calls tab.**

Note: Precedence calling (a CallNOW feature) allows users to specify a priority level for each call based on need, importance, and profile configuration within the Sphere system. Based on the precedence level, the call receives a higher routing priority than that of a regular telephone call on the network.
The CallNOW feature may or may not be enabled within your organization's Sphere system. Consult your organization's Sphere system administrator for further information.

3 **Change colors in the drop-down list box to differentiate varying recent calls.**

4 **Select bring the recent call to the front when I miss a call.**

This is helpful when you step away from your desk and miss a call. The recent calls list will appear. You have the ability to double click on the missed call to perform callback (or any of the calls on the recent calls list).

5 **Select Show the time format in 12 hour format for a more traditional view of the recent callers list.**

6 **Click OK.**

VIDEO TAB

This tab enables the sending and receiving of video to the Sphericall Desktop.

To set Video setting options

From the Sphericall Desktop:

1   **Click Configure\Options\Video.**

Figure 3.12   Options window
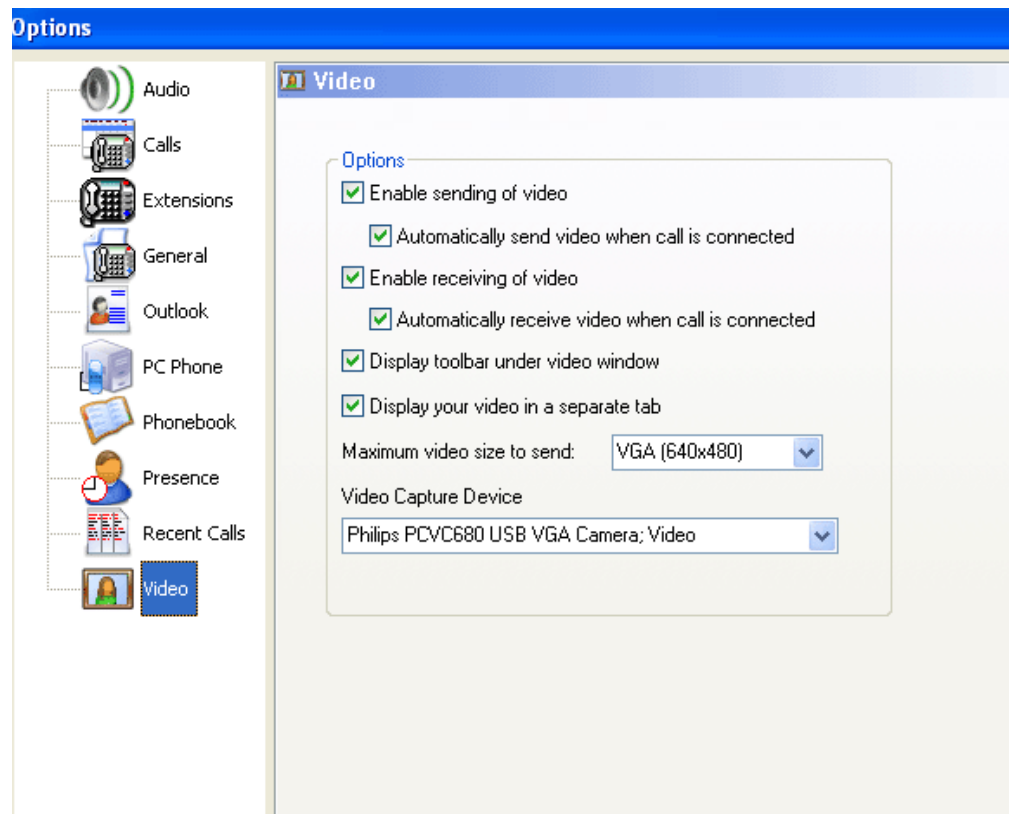
In the Options group box:

2   **Select Enable sending of video, Enable receiving of video, or Display toolbar under video window and Dispaly your video in a separate tab.**

3   **Select Maxium video size to send.**

The Sphericall Desktop offers a "Maximum video size" option. The list will contain four video formats: QCIF (176x144), CIF (352x288), QVGA (320x240), VGA (640x480).

4   **Select the device the user will use to capture video in the Video Caputure Device list box.**

5   **Click OK.**

TEXT MESSAGING

Text Messaging (IM), or text chat, adds another form of communication to the Sphere system. Instant Messaging is a less obtrusive form of communication that can be used in place of voice or video calls. It can also supplement audio conference calls by establishing side conversations with one or more of the conference participants or parties not on the call.

Text Messaging sessions are supported between Sphericall Desktops on the same SIP domain. SIP clients that reside on a different SIP domain than Sphericall, cannot send Text Messages to each other when using Sphericall as their communication source.

FUNCTIONALITY

Instant Messaging is available from a Sphericall Desktop that has a station line opened. If a second Sphericall Desktop opens the s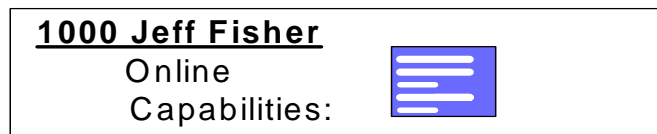ame line, Instant Messaging for this Sphericall Desktop is disabled. The Sphericall Manager hosting the opened station line is used as the SIP proxy for Instant Messaging.

Figure 3.13 Media Capabilities

The Sphericall Desktop receives and displays presence information indicating if the Text Messaging feature is supported.

Note: The Sphericall Desktop prohibits instant messages to Sphericall Desktops that have their presence set to "off-line".

INITIATING TEXT MESSAGING SESSIONS

As is the case with many features of the Sphericall Desktop, a Text Message can be initiated from several different areas.

To send a text message from the Extensions tab

1   **Right-click on an extension and select "Send Text Message".**
    or

Figure 3.14 Text Message Button

2   **Highlight an extension and click the Text Msg toolbar button.**

Figure 3.15 Send a Text Message window
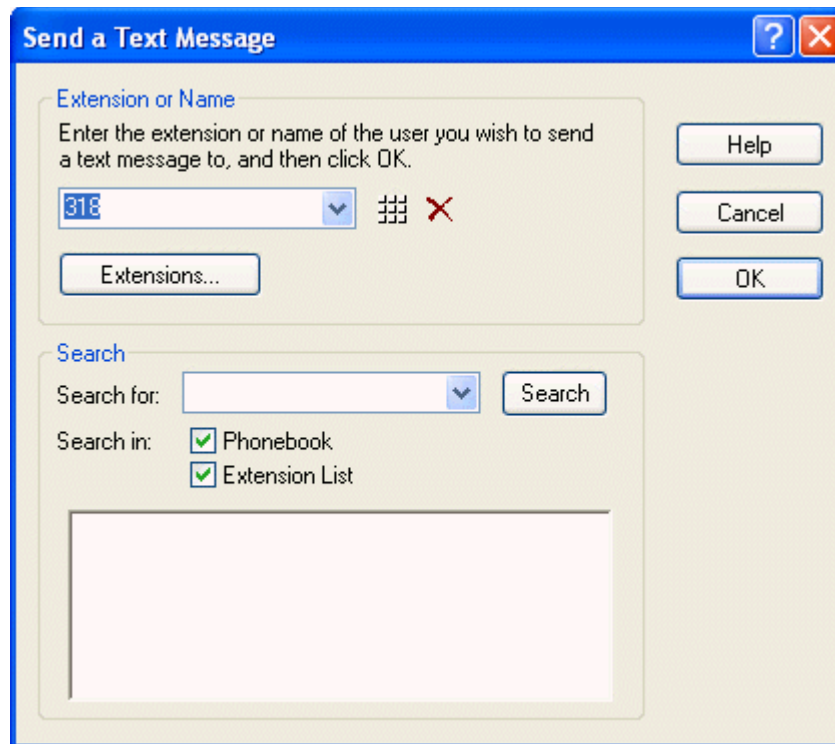
3   **Click OK.**

Note: A user's presence state determines whether he can receive instant messages.

Figure 3.16 Text Message window
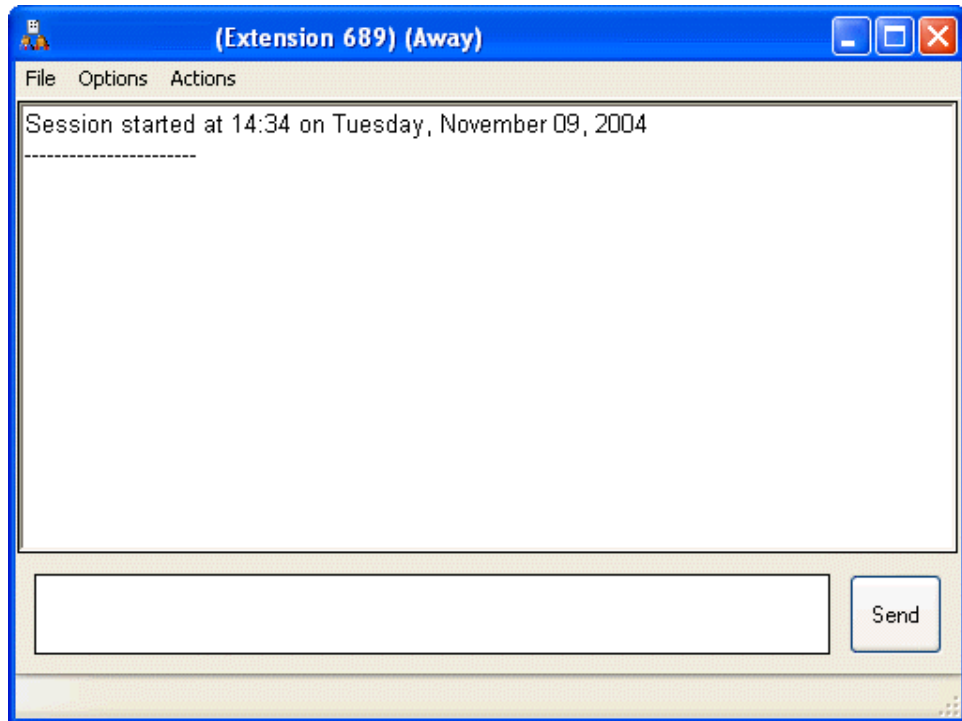
SPHERICALL DESKTOP INTEGRATION WITH MICROSOFT OUTLOOK

OVERVIEW

The Sphericall Desktop can utilize the Microsoft Outlook application to place requests in a call journal for:

- The storage and retrieval of contact information
- The recording of telephone call information via the ActiveX automation interface

The Sphericall Desktop is a real-time application that does not automatically launch Microsoft Outlook in order to satisfy these storage/retrieval requests. As such, you must start Microsoft Outlook prior to utilizing the Sphericall Desktop in order to take advantage of this integration functionality.

CONFIGURING THE MICROSOFT OUTLOOK DIALER

In order to integrate the Sphericall Desktop with Microsoft Outlook, you must configure the Microsoft Outlook dialer associated with the appropriate user account(s) and workstation(s).

To configure the telephony settings on a workstation

Before you can configure the Microsoft Outlook dialer, you must configure the telephony settings of the workstation associated with the appropriate user/user account. These settings define how the computer is to behave as more of a telephone between Microsoft Outlook and the Sphericall Desktop.

On a Microsoft Windows 2000 Professional or XP workstation:

Step	Action
1	Click Start\Settings\Control Panel\Phone and Modem Options\Advanced.
2	Select Sphericall Service Provider.
3	Click Configure.
4	Click OK to confirm that the TAPI service provider has been configured.
5	Click the Dialing Rules tab.
6	Click edit.
7	Type the outside service that users in your organization's Sphere system must dial in order to place external calls.
8	Click OK.
9	Click OK.
10	Close the Control Panel window.

To configure the Microsoft Outlook dialer

On any Microsoft Windows 2000 Professional or XP workstation:

1 **Open the Microsoft Outlook application.**

In the Outlook Today folder list:

2 **Click Contacts.**

From the Toolbar:

Figure 3.17 Microsoft Outlook Dialer button

3 **Click the Dialer icon.**

Figure 3.18 New Call window
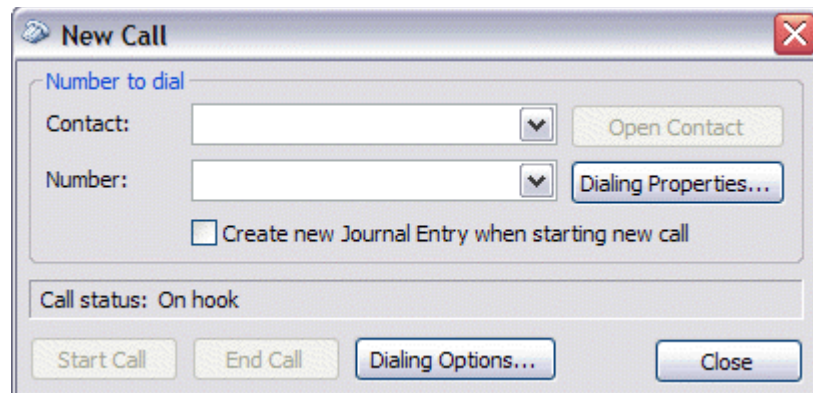
4   **Click Dialing Options.**

Figure 3.19 Dialing Options window
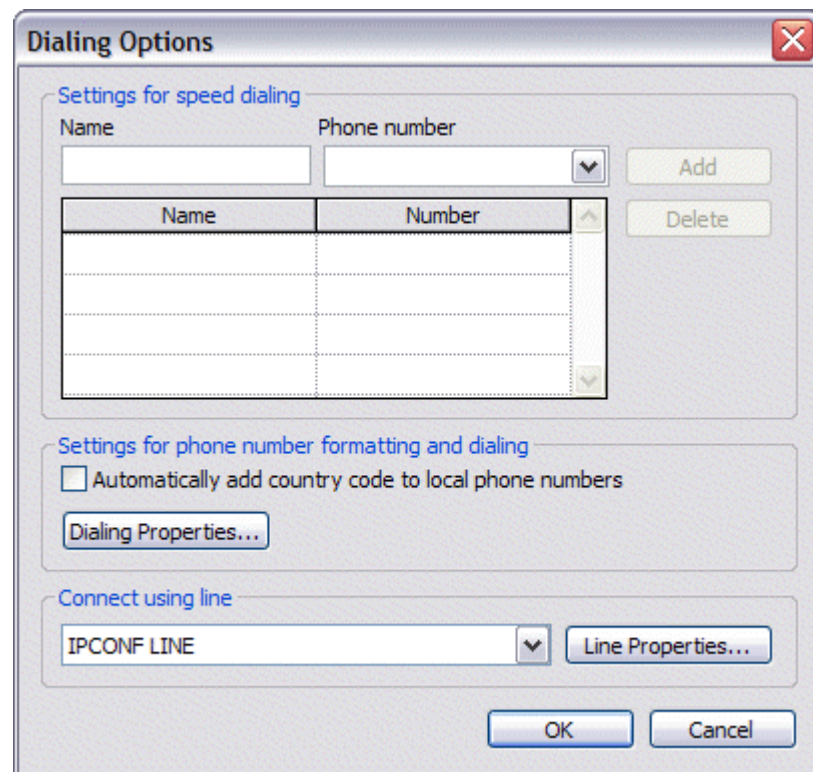
In the Connect using line area:

5   **Select the appropriate line to use for telephone number dialing from the list.**

In the Settings for phone number formatting and dialing area:

6   **Click Dialing Properties.**

7   **Double-click the appropriate location instance in the display area.**

8   **Verify that the outside service is correctly set for local and long distance calls.**

9   **Click OK.**

10   Click OK.

11   Click OK.

12   Click Close.

This workstation is now enabled for integration between the Sphericall Desktop and Microsoft Outlook.

To test the integration

1   Select a contact created within Microsoft Outlook.

2   Click Dial.

If the integration has been correctly configured, the Sphericall Desktop will initiate a call to the appropriate contact.

THE SPHERICALL DESKTOP AND MICROSOFT OUTLOOK CONTACTS

CREATING CONTACTS

To create a Microsoft Outlook contact from the Sphericall Desktop

From the Sphericall window:

**1   Click the Recent Calls tab
or
Right-click on an active call.**

2   Right-click any entry listed in the table.

3   Select Save Contact Details.

4   Click Yes to create a new contact.

Figure 3.20   New Contact window
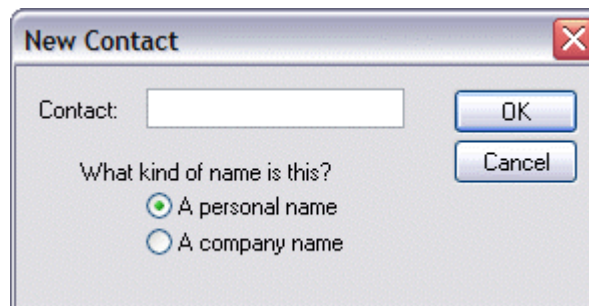
When attempting to create a contact entry in Microsoft Outlook, the Sphericall Desktop will query if the intended contact is an individual or an organization. Once the type of contact is specified, the Sphericall Desktop will query for more information about the contact to be created.

Figure 3.21 Contact Details window

The Sphericall Desktop, then, creates and populates the contact fields as listed in the following table:

Table 3.1 Sphericall Desktop and Microsoft Outlook Contact Information

Field Name	Description
Personal Contact (Individual)	
Subject	Individual's name
Full Name	Individual's full name (first and last) *Note: If a station on a Sphere system receives a call with caller ID number information but no caller ID name information, the caller ID number is used as the name in the contact. This information can later be modified to include the appropriate contact name.*
File As	Determines how contact will be filed (by first name, by last name, etc.): the Sphericall Desktop uses this information as its primary lookup key when searching for the appropriate contact
Company Contact (Organization)	
Company Name	Name of the company *Note: If a station on a Sphere system receives a call with caller ID number information but no caller ID name information, the caller ID number is used as the name in the contact. This information can later be modified to include the appropriate contact name.*
File As	Determines how contact will be filed

Notes

Although the information within other fields can be changed, the information within the *File As* and *Caller ID* fields should match for this contact. If the information in these two fields does not match, the Sphericall Desktop may be unable to locate the contact record and will subsequently create a new (and unnecessary) contact record.

If a Microsoft Outlook contact already exists for an individual or an organization, you can associate it with the Sphericall caller ID information by typing the caller ID name or number information in that contact's *File As* field. The syntax of the information

included in the *File As* field, however, must match exactly the value that will be received by the Sphericall Desktop.

LOCATING CONTACTS

If configured to do so, the Sphericall Desktop will attempt to locate a contact in Microsoft Outlook using the caller ID information as a key to search the contacts list:

• The *Subject* field is searched first

• The *Full Name* field is searched second

• The *File As* field is searched third

• The *Company Name* field is searched last

Note: If information changes in Outlook, a user should refresh the Sphericall Desktop by right-clicking on the Outlook folder in the Phonebook tab and selecting Refresh.

IUPDATING CONTACTS

Once a contact exists in Microsoft Outlook, the Sphericall Desktop's Save Contact Details command—invoked by right-clicking an entry listed in the Recent Calls tab— allows users to update or create a telephone number field against that contact (with users able to select the appropriate telephone number category). This allows for the saving of a telephone number in such a way that Microsoft Outlook can use it at a later date.

Note: The Sphericall Desktop will query users regarding their desired method of saving a telephone number to a contact.
An issue exists with all v3.x Sphericall Desktops, however, in that when a contact is created, the Sphericall Desktop does not update the *Phone Number* field.
As such, users either must invoke the Save Contact Details command after the Sphericall Desktop creates the contact or they must open the contact as it appears in Microsoft Outlook and manually add the telephone number information.

JOURNALING CALLS

The journal in Microsoft Outlook automatically records activities relating to contacts selected from the Outlook contact list. Each entry in the journal represents one activity (i.e. a telephone call when discussing the Sphericall Desktop). Entries are recorded based upon the time and date of the activity.

Before Microsoft Outlook can journal calls for the Sphericall Desktop, you must configure both applications to be able to support and recognize the appropriate activities (i.e. telephone calls within a Sphere system).
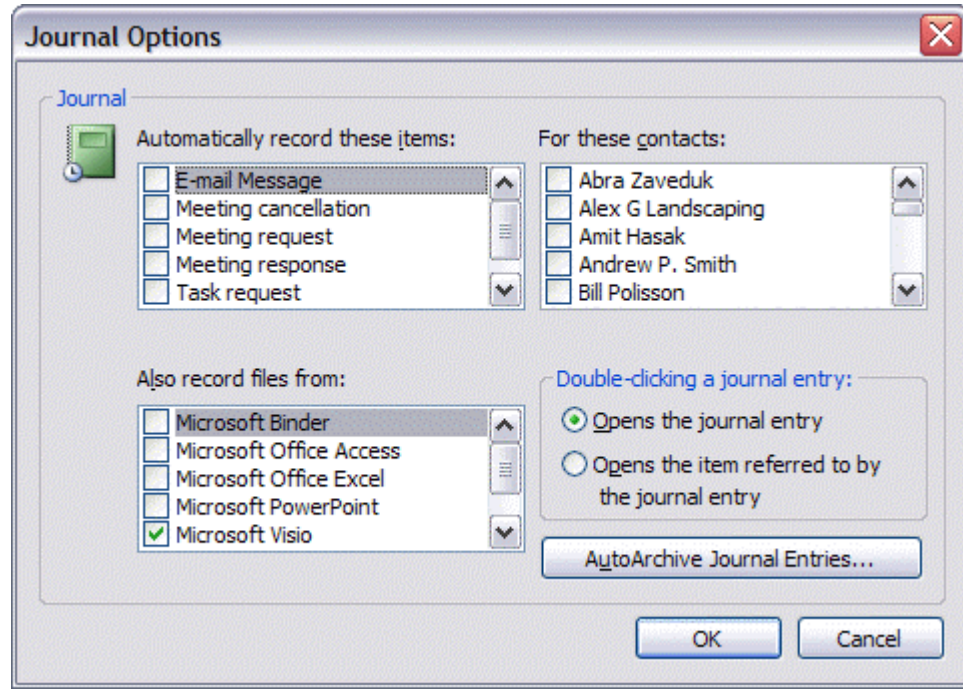
To configure Microsoft Outlook for journaling

1 **Open the Microsoft Outlook application.**

From the Toolbar:

2 **Click Tools\Options.**

3 **Click the Preferences tab.**

In the Contacts area:

4   **Click Journal Options.**

Figure 3.22   Journal Options window

In the Also record files from display area:

5   **Select the Sphericall check box.**

6   **Click OK.**

7   **Click OK.**

Note: Microsoft Outlook, not the Sphericall Desktop, manages the journal records.

The Sphericall Desktop can be configured, in the Options window\Outlook tab, to pass the appropriate information to Microsoft Outlook for the call journaling.

Figure 3.23   Journal area
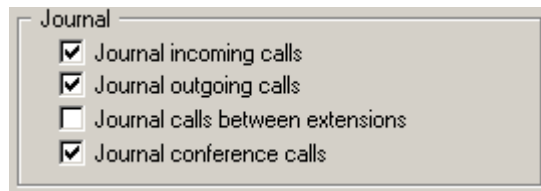
When a user completes a call, an entry is logged in the Microsoft Outlook journal that includes the time and date of the call, its duration, as well as the contact name and/or telephone number. A hyperlink (via URLdialer.exe) is also included as an attachment that, when clicked, will dial that contact. All journal entries appear in Outlook's Journal folder under "Entry Type: Phone call."

Figure 3.24 Journal display area
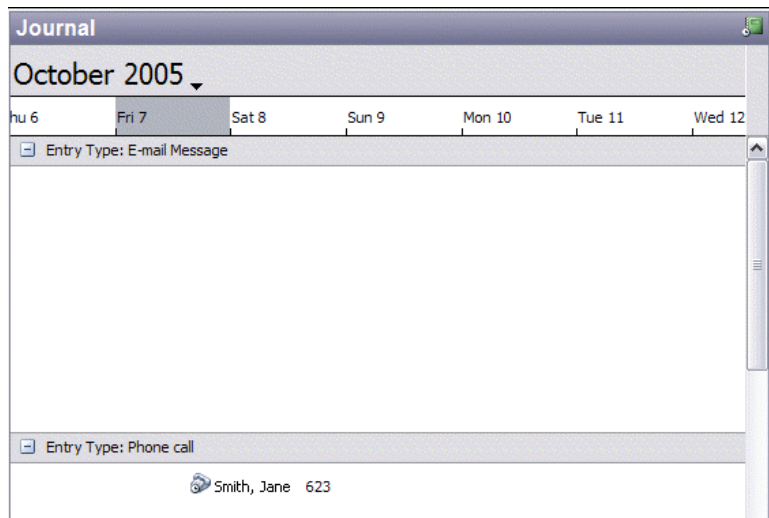
Because the Sphericall Desktop creates an internal identifier for the last created journal entry, users can invoke the Last Journal Entry command to review the last recorded entry.
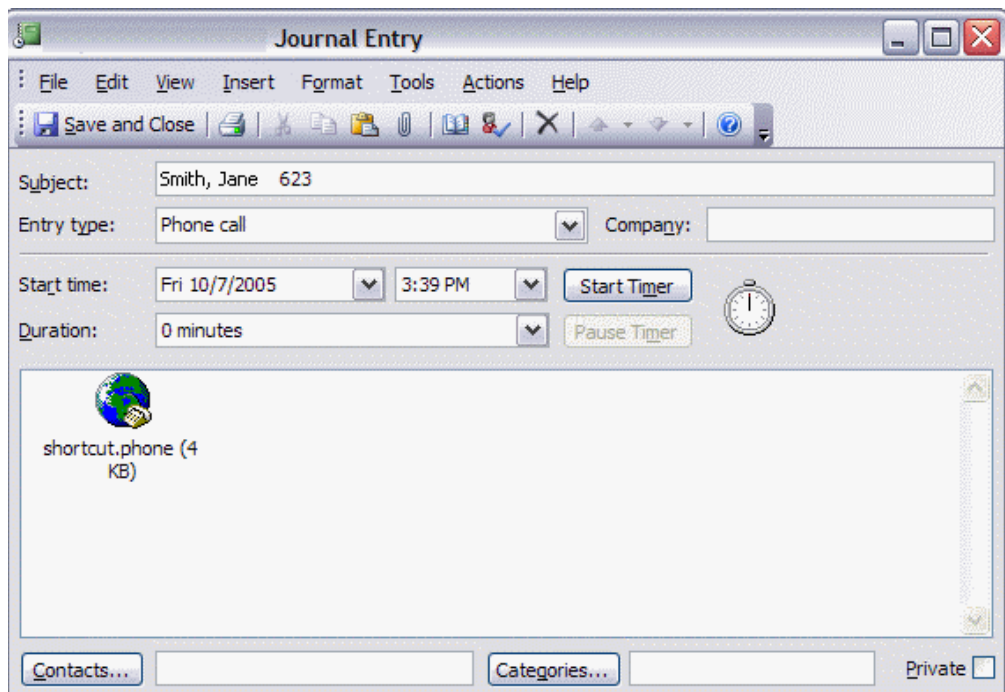
Figure 3.25 Journal Entry window

Moreover, the Sphericall Desktop's Phone Call Journal command requests that Microsoft Outlook display its journal category of the same name. Because the Sphericall Desktop cannot request Microsoft Outlook to open the phone call (i.e. the Entry Type) header, users must open the header manually.

Options have been added so that you can view a journal for an active call or create a new journal entry for a call from the Spherical Desktop.

### To journal calls while using the Spherical Desktop

While on an active call:

1   **Right-click on the call in the Active Call pane.**

2   **Select Create Journal or Show Journal.**

MISCELLANEOUS MICROSOFT OUTLOOK FUNCTIONALITY

Integrating the Spherical Desktop with Microsoft Outlook provides the additional feature functionality:

- Given a specific contact entry and its corresponding contact entry form, Microsoft Outlook can place a call to the contact using TAPI.

Figure 3.26   New Call window
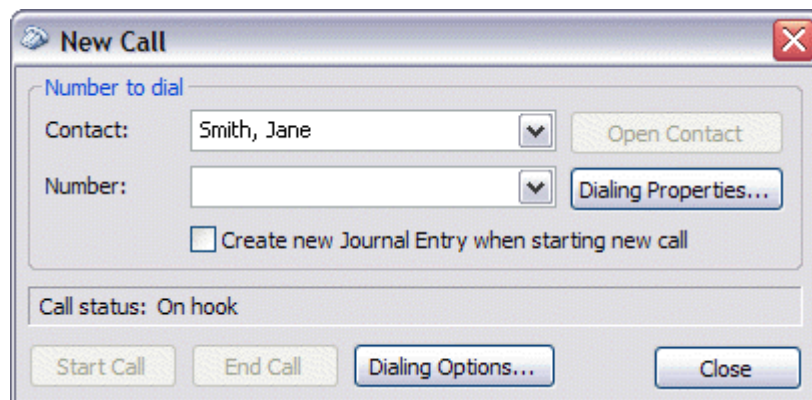
- The Spherical Desktop, in the Phonebook tab\Outlook Contacts directory, allows users to browse their Microsoft Outlook contacts. However, only those contacts that have telephone numbers defined in one of their tagged telephone number fields (e.g. *Business*, *Business2, Home*, etc.) will be listed: having a telephone number in the *File As*, *Subject*, *Full Name*, or *Company Name* fields is not sufficient.

INTEGRATION NOTES

The performance of these Spherical Desktop features is rather dependent upon the performance of Microsoft Outlook. Because Microsoft Outlook's automation interface is not designed for speed, some scenarios may surface where some features do not perform as expected:

- The machine may have slower processor, lower memory, or smaller hard drive specifications
- Microsoft Outlook may have a large number of defined contacts

- The machine may be running multiple applications in addition to the Sphericall Desktop and Microsoft Outlook (i.e. CPU utilization is at a maximum level)
- Sphericall Desktop users may receive a large number of telephone calls, causing a great deal of journaling activity within Microsoft Outlook

Some experimentation is necessary in order to find an appropriate balance of these features based upon system and user constraints.

In order to reduce as much burden as possible, the Sphericall Desktop limits the fields it analyzes during its searches and only looks for exact matches within those fields. For example, the telephone number 847-2478200 as listed in the *File As* field will not be matched with a caller ID of 8472478200.

FORWARDING

Forwarding options must be set for each user. If you have the Sphericall Desktop, you can establish the settings for forwarding yourself.

FORWARDING

Forwarding, or the temporary "follow me" feature of the Sphere system, rings *both* your extension and other *internal* extensions where the call is forwarded.

Note: Calls can be forwarded to external numbers, however, the phone will only ring at the number to which calls are forwarded.

Note: Calls can be forwarded to one or more internal addresses, or one or more external addresses. Calls cannot be forwarded to a combination of internal and external addresses. If such a combination is configured, the Sphere system will forward calls to the first address listed in the Forwarding area (be it an internal or an external address).

To set forwarding conditions

The Forwarding window provides a summary of configuration. From this window, navigation to forwarding conditions and advanced forwarding features may be accomplished. However, to simply forward your calls to Voice Mail, for example, a profile is not necessary.

From the Sphericall Desktop window:

1   **Click Configure\Forwarding.**

Figure 3.27 Forwarding window
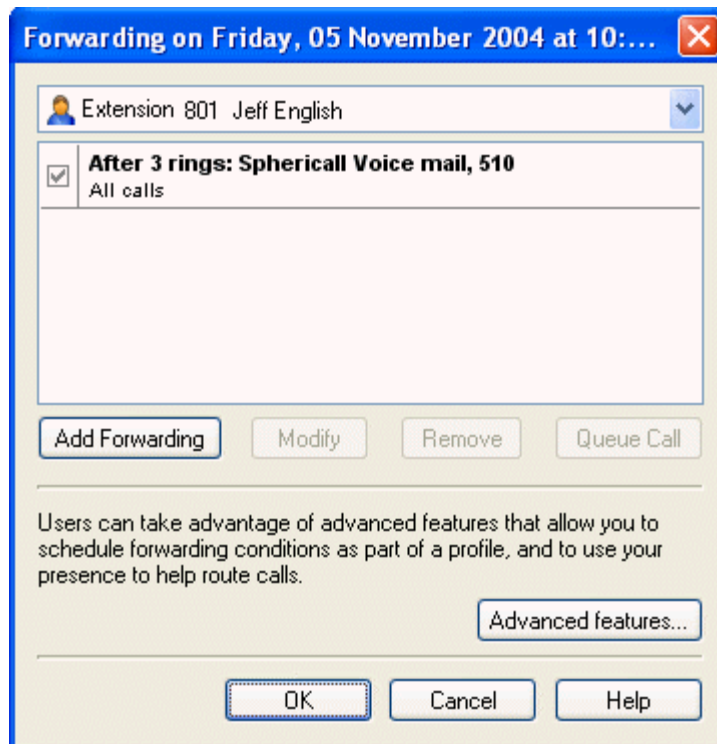
In the Forwarding group box:

2   **Select the Enable forwarding check box to enable forwarding.**
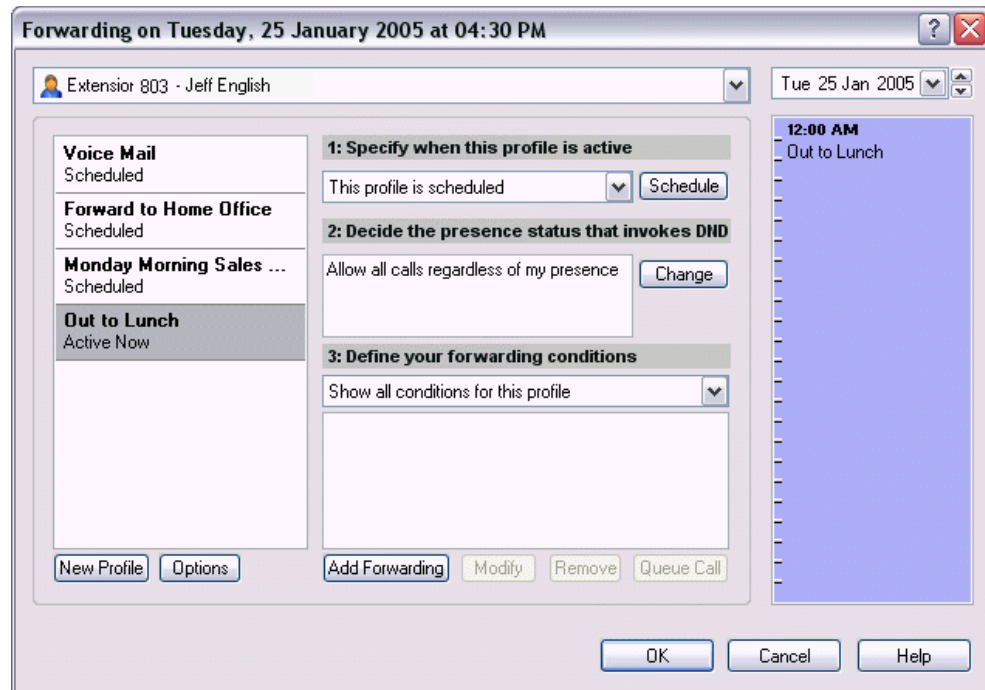
3   **Click OK.**

ADVANCED FORWARDING

The Advanced Features window of the Sphericall Desktop allows users to forward calls based on situations such as day of week or presence status.

To configure Advanced Forwarding features

Figure 3.28 Forwarding window

1   **Click Configure\Forwarding.**

2   **Click Advanced Forwarding.**

PROFILES

Profiles are buckets used to specify how incoming calls to a station should be routed. A forwarding profile contains one or more forwarding conditions, each of which identifies a number and rules of when it should be applied. Forwarding profiles can be scheduled, forced to be currently active, or disabled by the user.

The following table includes a number of scenarios for invoking profiles for forwarding.

Profile Name	Forwarding Conditions
Monday Sales Call	• Monday, February 16 • 9:00 AM to 10:00 AM • Presence Status: Appear Offline
Home Office on Friday	• Friday - Continues forever • All Day • Regardless of presence status
Lunch	• Monday thru Thursday - Continues forever • 11:30 AM to 12:30 PM • Presence Status: Out To Lunch

3   **Click New Profile (and give it a name) or use the Default profile.**

NAME

The user can name forwarding profiles. Names are typically chosen based on the user activity during the period. For example, "In the office", "Out to lunch", "In a meeting", "Out of the office".

SCHEDULING

Figure 3.29   Schedule window

From the drop-down menu next to the Schedule button:

4   **Select the activity of the respective Profile.**

Profile activity can be configured with the following settings:

- This profile is disabled
- This profile is scheduled
- This profile overrides all schedules

5   **Click Schedule.**

Note: The Schedule window automatcally appears after creating a profile.

A forwarding profile can be scheduled. A schedule is weekly based with each day having a start and stop time along with an enable/disable flag. A schedule can be configured to run forever (reoccurring weekly), or to run only between a set of dates. Scheduling rules are available in the following increments:

- Start of day
- End of day
- 15 minute increments

Once a schedule is defined, you will need to associate it with the appropriate Profile.

FORCING

A forwarding profile can be forced by the user to override scheduled profiles. Forcing a second profile causes the first to revert to being scheduled.

ACTIVE PROFILE

One forwarding profile can be active at a time. When there is a conflict in schedules, it is resolved using the following set of rules:

- If a profile is Forced, this is the current profile.
- All profiles that are Disabled are ignored.
- If the current time falls within the schedule of only one profile, this is the current profile.

Note: If there is an overlap of forwarding profile schedules, the newest schedule (the one created last) will be made active.

DO NOT DISTURB

Forwarding profiles can be configured to not ring the phone during specific presence states. The forwarding profile DND state is managed separately from the manual DND flag.

The presence states that effect DND can originate from either being manually or automatically set.

When the forwarding profile's DND is set, users who are capable of monitoring will see the monitored client as being unreachable for voice calls.

FORWARDING CONDITIONS

6 **Click Add Forwarding.**

Figure 3.30   Forwarding Condition window

Four tabs: Destination, Call Origin, Call Presence and Call Precedence, allow users the ability to determine various forwarding conditions and characteristics.

The **Destination tab** provides a search tool to locate a desired extension within the organization. Users may also have the ability to forward calls to numbers outside of the Sphere system.

- Type any logical name that makes sense in the Name field.
- Type the number without the outside service (use the default outside service as listed in the Service field above) in the Number field. If your Sphere system has more than one outside service (i.e. one for long-distance calls, one for local calls, etc.), be sure to select the appropriate outside service from the Service dialog box.
- If your phone is set to forward to an outside number, it will not ring at your desk phone and the outside number. It will only ring at the number where you have forwarded the call.
    - Once you have enabled forwarding to an outside number, the call will not follow any other forwarding conditions.
- Once the destination is added, choose the number of rings before the call forwards to this previously-defined number.

The **Call Origin tab** lets you apply conditions for forwarding calls based upon call origin, and caller I.D. presentation.

The **Presence tab** lets you apply conditions for forwarding calls based upon presence status.

The **Call Precedence** tab lets you apply conditions for forwarding based upon priority calls, non-priority calls, or all calls.

Note: Precedence calling (a CallNOW feature) allows users to specify a priority level for each call based on need, importance, and profile configuration within the Sphere system. Based on the precedence level, the call receives a higher routing priority than that of a regular telephone call on the network.
The CallNOW feature may or may not be enabled within your organization's

Sphere system. Consult your organization's Sphere system Administrator for further information.

7   Click OK.

FORWARDING - EVERYDAY SITUATIONS

Here is a realistic scenario for forwarding calls based on presence. Typically, Sphericall Desktop users have their calls forwarded to voice mail after three or four rings. A user can have another forwarding condition to go to voice mail immediately when he is on the phone.

Figure 3.31   Forwarding Profiles

MULTIPLE EXTENSIONS WITH FORWARDING

At the top of the Forwarding window is a drop-down list box with your name in the user field.

To set multiple extensions

If you have been given "ownership" of more than one extension or group extension:

1   Click the drop-down list box with your name in the user field to view each of the lines of which you have ownership.

For example, it is common for one user in a Sales or Support group to have ownership of the Sales or Support number; this person can set its forwarding and coverage options.

2   Set the forwarding options for that extension.

3   Click OK to return to the main Sphericall Desktop window.

NUMBER SPECIFIC FORWARDING

Users can route calls based on caller ID name and number ranges. If the incoming caller name contains the string, it will be a match. For example, a specification string of "Sphere" will trigger a match for inbound calls with caller name of "Spherecom", "Redsphere", "Thesphereishere", etc.

A specification string of "184779396" will trigger a match for inbound calls with caller numbers of "8477939600-8477939699" and not "2184779396".

You can establish the following condition:

- **Sphericall Desktop Presence set to "Out to Lunch"**

- **Calls received from <u>this</u> phone number, "18474040540" will forward immediately to your cellular phone number, "18474927527"**

In order for the number specific forwarding feature to function, the Caller ID field in the Call Origin window, must include a "1" or a "+1" before the phone number.

Figure 3.32 Forwarding Condition window
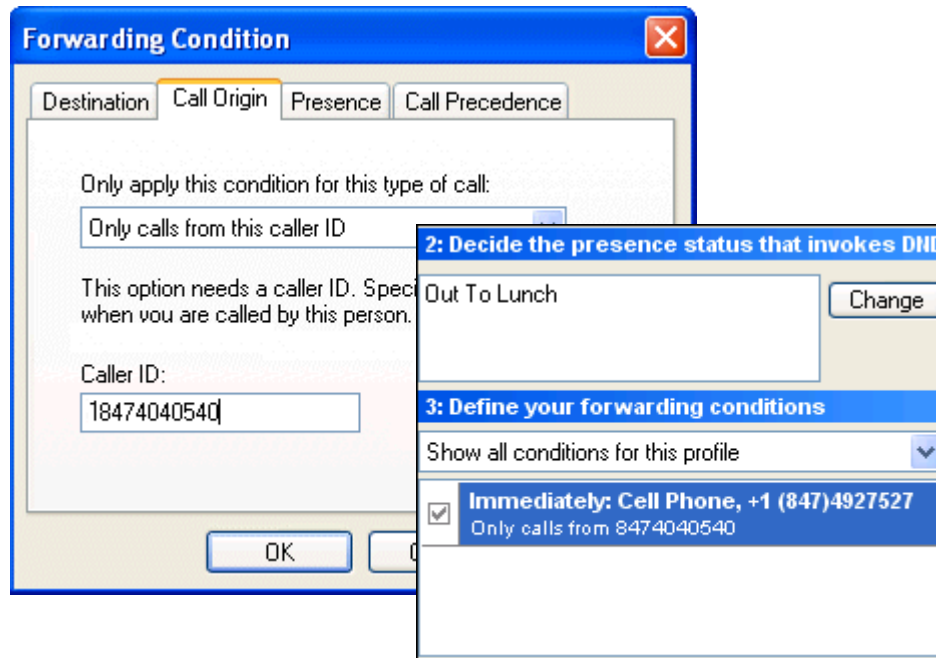
In the previous scenario, calls are forwarded from a specific phone number. However, you have the ability to forward all calls from all phone numbers within an area code. For example, typing 1847 into the Caller ID area of the Call Origin window includes all calls placed from the 847 area code.

Figure 3.33 Forwarding Condition window
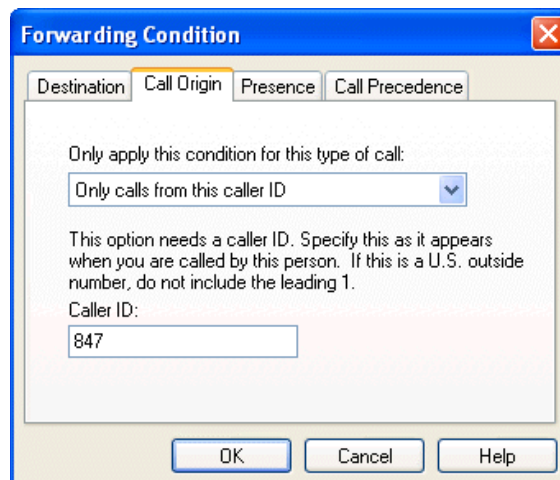
HANDSET FORWARDING

Forwarding from an analog or digital handset is accomplished by pressing *72+ <forwarding to number> #. Multiple numbers may be entered in this fashion. Pressing *73 deletes all forwarding conditions no matter from where they were set (handset or phone GUI). The forwarding button on IP phones allows entry of a single number. Pressing the forwarding button for a second time duplicates the *73 functionality by deleting all forwarding conditions. Forwarding numbers that were set using the handset are denoted in the phone and Sphericll Desktop by a destination description of "Configured from handset".

In Sphericall v4.0+, handset forwarding is, in effect, like entering a new handset forwarding number. This will create a forwarding condition with defaults of: "Apply this Condition" ring count of "immediately", "continue ringing my phone" is enabled, and no presence or precedence filters.

Figure 3.34   Forwarding Conditions window
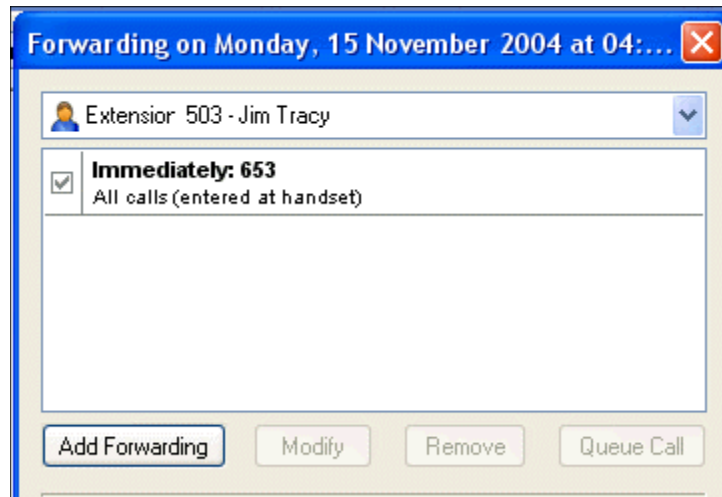
The handset forwarding conditions will be shown in every forwarding profile. Changing or deleting a handset forwarding condition in one forwarding profile will also update the view in all other profiles.

OUTLOOK CALENDAR INTEGRATION

Outlook integration allows Sphericall Desktop presence to automatically be set to "In a Meeting" based on appointments in the user's Outlook calendar.

For times when the system automatically sets the presence to "In a Meeting", the user has the option to set presence notes to one of the following:

• Subject of the meeting as defined in the Outlook meeting request

• Location of the meeting as defined in the Outlook meeting request

• Indication the meeting is out of the office as defined in the Outlook meeting request

• Any combination subject, location, or out of office indication

This feature is defaulted "on" and can be disabled by the user.

QUEUING

Queuing is the act of "stacking" or holding calls to be handled by a specific person or group of people. Sphericall supports group addresses that are used, in many cases, to set up small groups of agents to handle many calls. An environment such as a help desk benefits from the queue feature.

To use the queuing feature

Note: The queuing feature must be enabled by your organization's Sphere system administrator.

Note: A queuing announcement must be associated with your extension.

Note: In order for the Queuing feature to function, maximum calls for a line **must** be set to 1.

From the Sphericall Desktop:

1   **Click Configure\Forwarding.**

2   **Click New Profile to create a queuing profile.**

In the Schedule-Queuing window:

3   **Determine the schedule for which queuing will apply.**

4   **Click Queue Call to set the queuing conditions for this profile.**

5   **Click OK.**

6   **Click OK.**

DO NOT DISTURB

The Do Not Disturb button on the toolbar of the Sphericall Desktop window allows you to "silence" your phone: the phone will not ring at your desk. All calls go directly to your forwarding options.

If no forwarding options are set, the phone will ring a "fast busy."

CAUTION!   PHONE MANUFACTURERS HAVE DIFFERING WAYS OF INDICATING THAT DO NOT DISTURB IS ACTIVATED, AND IT IS EASY TO FORGET THAT YOU HAVE DO NOT DISTURB ACTIVATED. REMEMBER TO DEACTIVATE IT TO RESUME NORMAL CALL ACTIVITY.

PHONEBOOK ENTRIES AND FOLDERS
....
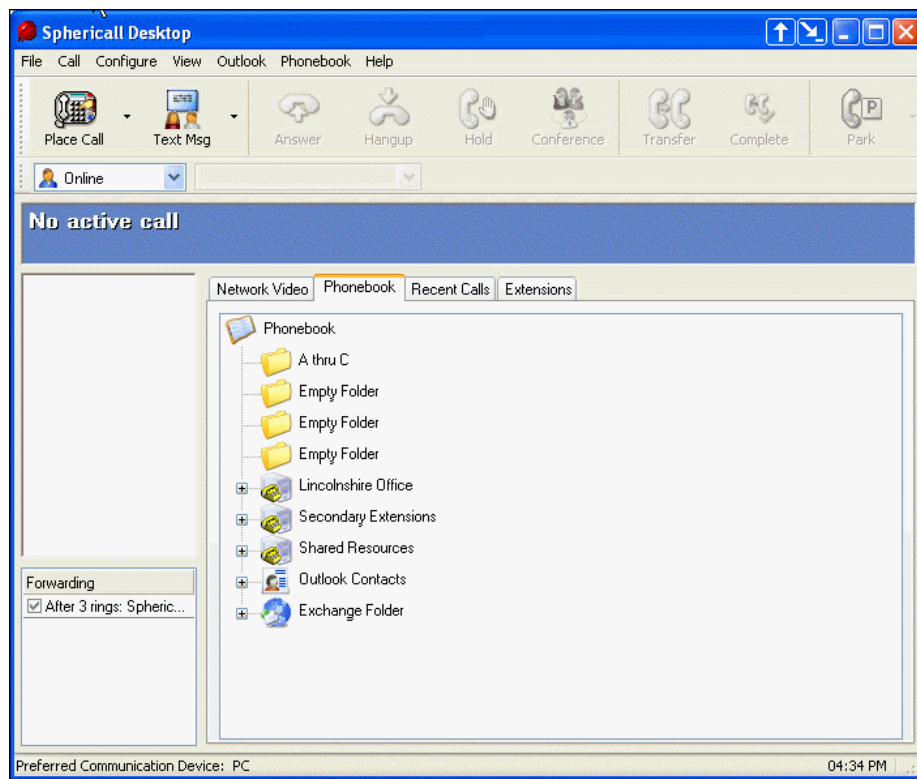
THE PHONEBOOK PANE

The Phonebook pane on the Sphericall Desktop window displays your personal extensions. By default, extensions on your organization's Sphere system will be listed in a "tree" format. If you expand the tree, you will see all of the users on your system divided by groups.

This allows you to set up your personal folders on your Sphericall Desktop. All you need to do to place a call is double-click an entry in the Phonebook. Information in the Phonebook is stored on your local PC. If you want to transfer those numbers to a new PC, you must contact your Sphere system administrator.

To add a personal folder

From the Sphericall Desktop window:

Figure 3.35 Sphericall Desktop window

1   **Click the Phonebook tab.**

2   **Right-click the Phonebook directory to select New Folder.**

3   **Type a logical name for the folder.**

4   **Press Enter.**

A new folder has been created. Now you can add entries to the folder.

5   **Highlight the new folder.**

From the Sphericall Desktop menu:

6 **Click Phonebook\New Entry.**

Figure 3.36 Phonebook Entry window

In the Details group box:

7 **Type the First Name and Last Name for the person you are adding to the Phonebook entry. If only using one word, type the word in the Last Name field.**

For example, Home.

8 **Type a name in the Company field if desired.**

9 **Select the Image check box if you have a bitmap image of someone.**

10 **Click the associated button to browse your computer for a bitmap image.**

The bitmap image appears in the Active Calls pane when placing or receiving calls.

Figure 3.37 Numbers group box

In the Numbers group box:

11 **Enter a number in the Number column to associate with the Type of phonebook entry.**

Phonebook entry Types are Business, Business2, Home, Home2, Car, Mobile, Other, Pager, Radio, ISDN, Company, Callback, and Assistant.

12 **Select Inside in the Address Type column to specify phonebook entries within your organization.**

13 **Select Outside in the Address Type column to specify phonebook entries outside of your organization.**

When Outside is selected, country code and area code (+1(XXX)) automatically populate the Number column.

14 **Select Special Outside in the Address Type column to specify entries not following the +1(XXX) format.**

Special Outside numbers bypass internal processing and are placed as is as a normal call. An example of a Special Outside number is 411.

Note: Emergency numbers should not be configured in the phonebook.

15 **Click OK.**

You will now see this new entry in the recently-created folder. Whenever you call or receive a call from this number, you will see this image in the Active Calls pane.

You can drag or copy Outlook Contact information and Default Zone information into personal folders.

PARK ZONES

Park zones place calls in "hold" parking lots where user's can retrieve these calls from any phone on the Sphere system.

For example, an operator within your organization answers a call from a customer who needs to speak to you. However, you are away from your desk. The operator can place the caller in a park zone, and use your organization's paging system to tell you that the caller is in a park zone. You can retrieve the call from any phone within your organization.

The Sphere system has a number of park zones to aid in placing calls on hold and retrieving them from another phone within the system: instead of placing a call on hold, you can use the Park feature. This allows you to summon another person in the organization to unpark the call by using the Sphericall Desktop or by applying the star code command *91 plus the number of the appropriate park zone.

To place calls into a park zone

From the Sphericall Desktop window:

1 **Click the Park button.**
or
Right-click the call in progress.

2 **Select Park.**

Figure 3.38 Park Zones progress image
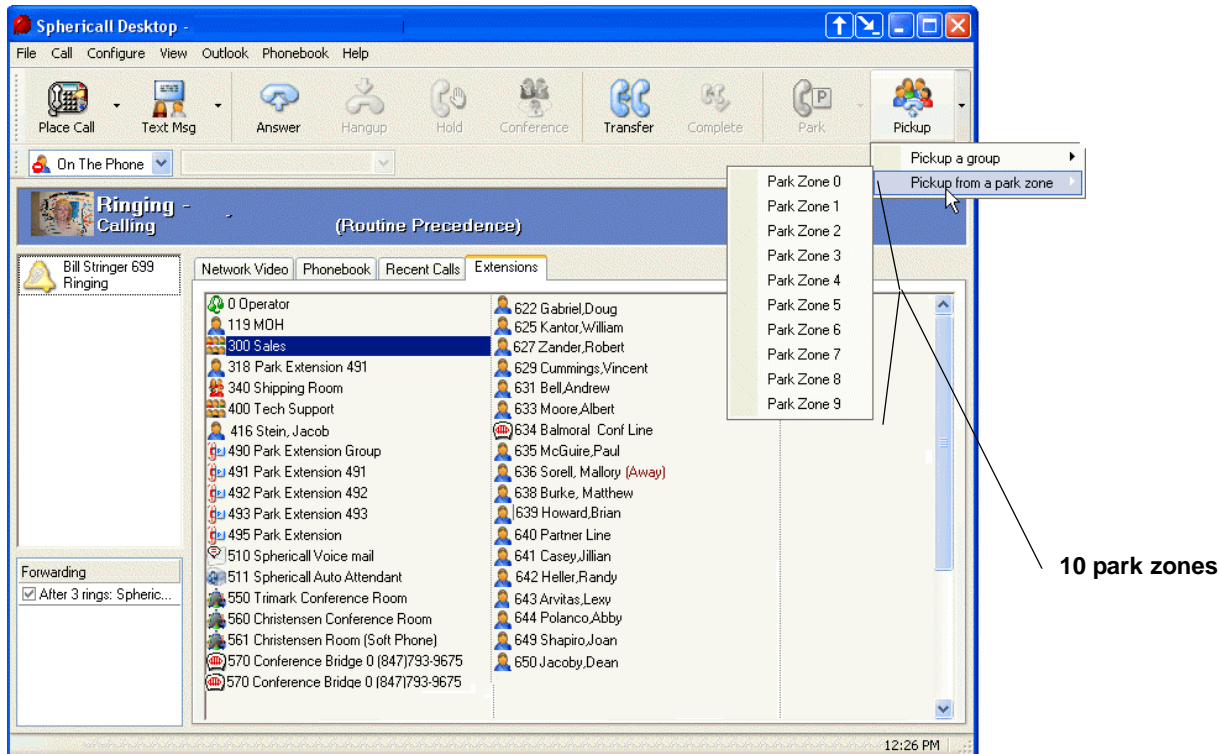
10 park zones

To retrieve calls from the park zone

1   **Select the call currently parked in a park zone (identified by the Park button).**

2   **Right-click the call.**

3   **Click Park.**

    Calls are unparked by first call in, first call out. The person holding the longest in a park zone will be the first caller unparked from a single zone.

DIRECTED PARK

A call may be parked at another station on your organization's Sphere system. For example, if a user receives a call at an inappropriate location, the call may be parked at the user's station by **right-clicking on a user's extension and selecting park**. The user can access the parked call at the extension to which the call was parked by going off-hook.

Note: The telephone set provides a tone notification until a directed park call is picked up.

PARK EXTENSIONS

Users may park calls to specifically-assigned park extensions.

> **Note:** A separate Park Zone tab may be added in the Options\Extensions tab. Refer to the Extensions tab section in this chapter for more information on Park Zone tab configuration.

To park calls into park extensions

1   **Drag and drop the active call to the desired park extension.**

or

2   **Right-click the park extension to which you want to park the call.**

3   **Click Park At.**

To retrieve calls from park extensions

1   **Select the call currently parked in a park extension.**

2   **Click Pickup.**

PICKUP

■ ■

The Pickup feature of Sphericall Desktop allows you to answer a ringing phone at someone else's desk. If you hear a ringing phone, follow this procedure.

To pickup a call using the Sphericall Desktop

From the Sphericall Desktop window:

Figure 3.39   Pickup button

1   **Click the Pickup button.**
    Or
    Switch to another Pickup Group by clicking the arrow next to the Pickup button.

    or

2   **Right-click the extension that you wish to pick up.**

3   **Select Pickup.**

You should now be connected to the person dialing the other person's desk.

To pickup a call using the telephone set

1   **Dial *92 from your telephone keypad.**

This retrieves a call that is ringing within your geographical Pickup Group area.

To pickup a call ringing at a particular extension

Dial *93 and the appropriate extension number.

CALL LOG

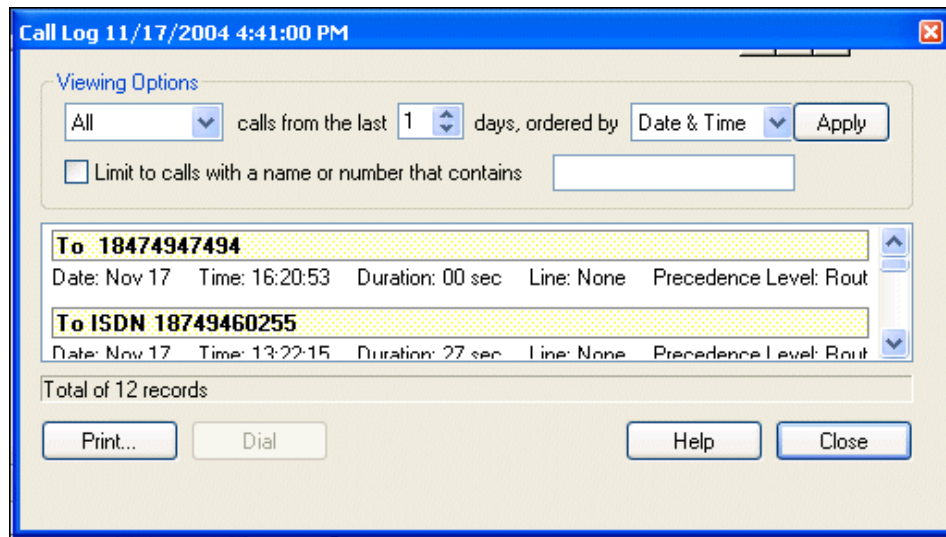▪▪

Sphericall Desktop users can use the Call Log to review the most recent calls made to and from their extension.

To configure the Call Log

From the Sphericall Desktop window:

1   Click View/Call Log.

Figure 3.40   Call Log window

In the Viewing Options group box:

2   Select which calls are logged.

The drop-down list box options are All, Inbound, or Outbound.

3   Select the number of days to log calls.

Calls may be logged from one to thirty days.

4   Sort the order by which calls are to be logged.

Calls may be sorted by Date & Time, Name, Number, or Duration.

5   Select Limit to calls with a name or number that matches if you prefer to log specific calls.

6   Click Apply.

You may highlight a call and click Dial to auto-dial a number from the log.

LINE DETAILS

▪▪

You can configure and review details of your telephone extension.

To View Line Details

From the Sphericall Desktop window:

1   Click Configure\Line.

Figure 3.41   Line Details window

Line Detail information available for review includes **Address**, **Port**, and **Zone**.

Line Detail information that can be changed includes **Pickup Group**, **maximum calls**, **call waiting tones**, **caller ID information**, and **Primary extensions**.

Maximum Calls

The Maximum Calls field is the maximum number of concurrent calls a station/user can have before inbound calls stop being offered. This field is not used when originating calls. For example, a user that has "max calls" set to 2 will not receive any more calls if he already is managing 2 active calls although the user may originate a third, fourth, etc. call."
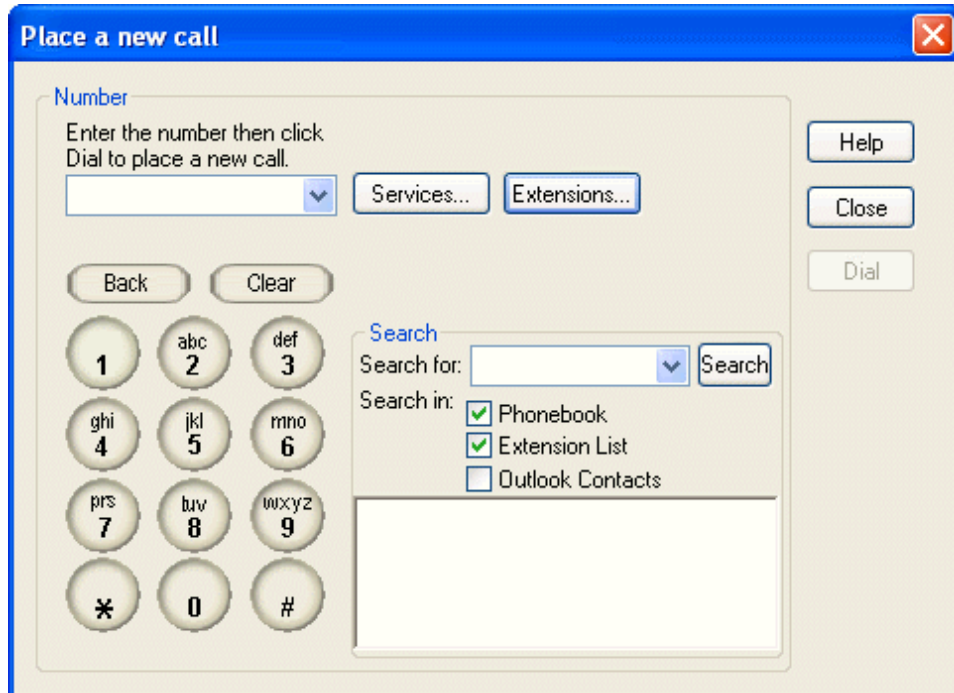
ENTER A NUMBER TO DIAL
. . . .

To dial from the Sphericall Desktop

From the Sphericall Desktop:
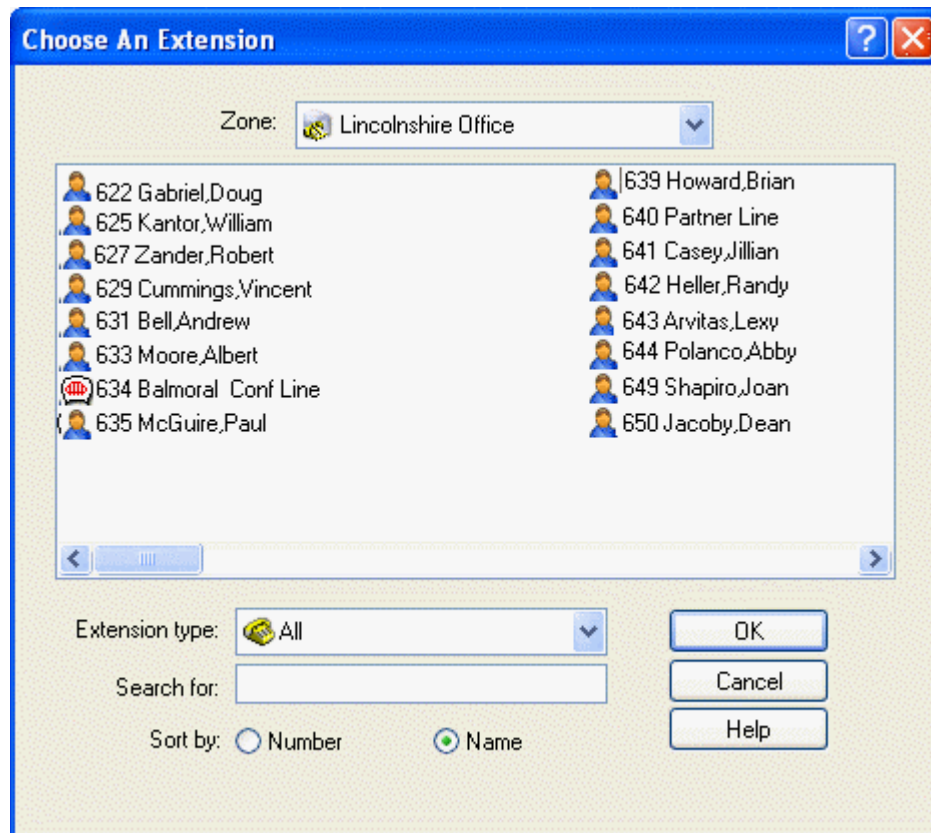
Figure 3.42 Dial button

1 **Click the Place Call button on the Sphericall Desktop toolbar to access the dial pad window.**

Figure 3.43 Place a new call window

In the Number field:

2 **Click Extensions to view numbers within your organization.**

Figure 3.44 Choose An Extension window

3   **Highlight the appropriate extension to dial.**

     or

4   **Click Services to select an Outside Service number for dialing numbers outside of your organization.**

5   **Highlight the appropriate Outside Service number.**

6   **Click OK.**

7   **In the Number box, select a previously dialed number or enter a number you wish to dial. Or**
     Using the mouse pointer, click the numbers on the Keypad to dial a desired number.
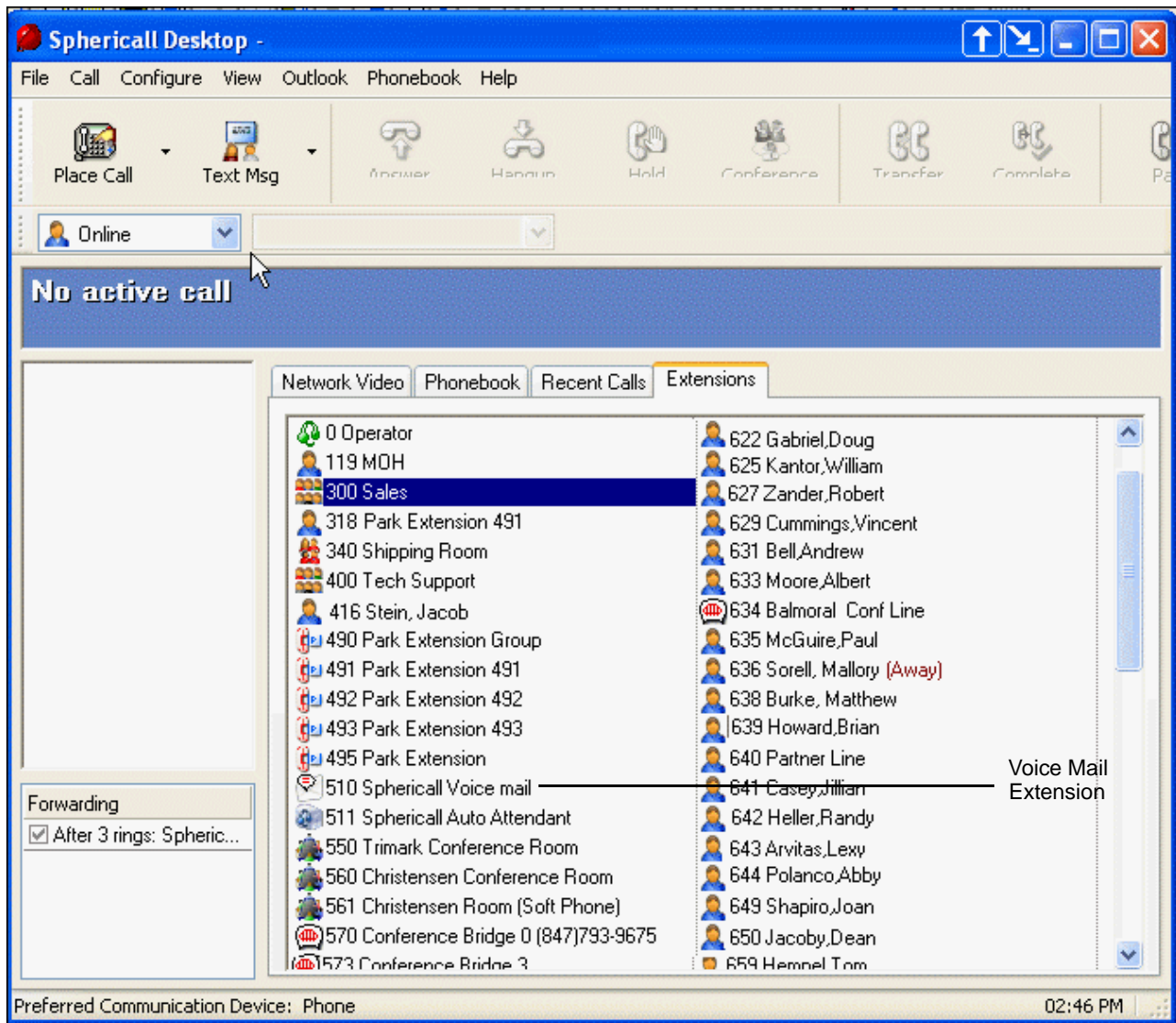
8   **Click Dial.**

SPHERICALL VOICE MAIL

SPHERICALL VOICE MAIL

Sphericall Voice Mail is a user-friendly, feature-rich application that includes voicemail/auto attendant and unified messaging.

VOICE MAIL AND THE SPHERICALL DESKTOP

To access Sphericall Voice Mail

When dialing from inside your organization:

Figure 4.1   Sphericall Desktop window

1   **Dial or double-click on the desired extension.**
    OR

    When dialing from outside your organization:

2   **Dial the desired phone number.**

3   **Press # or enter the desired phone number.**

4   **Enter your extension + #.**

    Note: At your own phone, press # only.

5   **Enter your password + #.**

    Once you have successfully entered a name and password, Sphericall Voice Mail
    gives you access to a subscriber menu.

EMPLOYEE DIRECTORY LOOKUP

Upon dialing into Sphericall Voice Mail for the first time, you will be asked to enter a new password. You will also be prompted to record your name for association with the employee directory lookup feature.

L

Sphericall Voice Mail

To enter your mailbox for messages:
Dial ext:
Or number:
+
Press #
If you are at your ext. press # only.
+
Enter password + #.

Menu Options:
1 New Messages
2 Old Messages
3 Send Messages
4 Transfer extensions
5 Personal Options
6 Message Count
9 To exit

Press 0 at any time to reach the operator.
Press # at any time to repeat a menu.
Press * for the previous menu.
Please note, systems using the Directory
Lookup feature require that users record
their name.
‡Check with system administrator for
availability of this feature.

Message Options:
Skip date/time info
1 Skip to next message
2 # Delete
3 Reply
4 Forward
5 Replay
6 Return the call‡

During a message:
1 Skip to next message
2 # Delete
7 Rewind
8 Pause
9 Fast Forward

Reply/Forward Review:
1 Send message
2 Review
3 Re-record
* Previous menu

Call Back Options:
1 Call this number
2 Call a different number
* Previous Menu

Message Review:
1 Send message
2 Review message
3 Re-record
4 Enter callback number
* Previous menu

1 Additional
Destination
extension

1 Use this number
2 Use a new number
* Previous menu

Enter the destination extension:
or
1 + # to lookup by name

Record message
Press # to end message

Personal Options:
1 Administer greeting
2 Administer extended
absence greeting
3 Enable/Disable
absence greeting
4 Administer name
5 Change password

Personal Admin:
1 Review greeting or name
2 Re-record
3 # Delete

Review:
1 Save
2 Review
3 Re-record

To play back voice mail messages in Microsoft Outlook from your desktop

1   Double-click the message in your Microsoft Outlook Inbox.

Figure 4.2   Voice Mail Form window

Time Stamp —————

Volume Control

Note: When you pick up a message in Microsoft Outlook, the time and date for the message that was left are stamped in the Received column. When you play back the message, the time and date are stamped in the Sent field of the play back form. These times may vary depending on system resources.

A form will appear that provides you with a way to listen and respond to voice mails. From the form, you can choose which playback and recording device to use. The length of the message and the current playback position are displayed in seconds.

A tracking bar is available to place the current position anywhere in the file.

Messages can be forwarded, replied to, or deleted. You are also presented with an option to record an introduction when forwarding and replying to voice messages.

A volume control on the lower right hand side of the form allows you to adjust the volume to a desired level.

2   Click Configure\AGC (Automatic Gain Control) to attempt to play back all voice mail messages at a constant volume level.

3   Click Configure\Volume to adjust the volume levels of a voice mail message.

Table 4.1   Sphericall Voice Mail Form Commands

Button Feature	Action
To record a message	Press the red sphere
To stop recording	Press the black square box
To save the recording	Press the diskett button
To close the window	Press File/Exit or X in the upper right corner

To adjust audio settings from the voice mail playback window

1   **Select Configure from the menus.**

Select or de-select AGC (Automatic Gain Control).
A feature that attempts to playback voice mail messages through the PC at a constant volume level.

To set up a password in Microsoft Outlook for accessing Sphericall Voice Mail

If a user forgets his password for accessing Sphericall Voice Mail from his telephone set, he can create a new password in the Microsoft Outlook application. However, before doing so, the user must activate this feature on the Sphericall Desktop.

1   **Open the Sphericall Desktop.**

From the toolbar:

2   **Click Configure\Options.**

3   **Click the Outlook tab.**

Figure 4.3   Options window
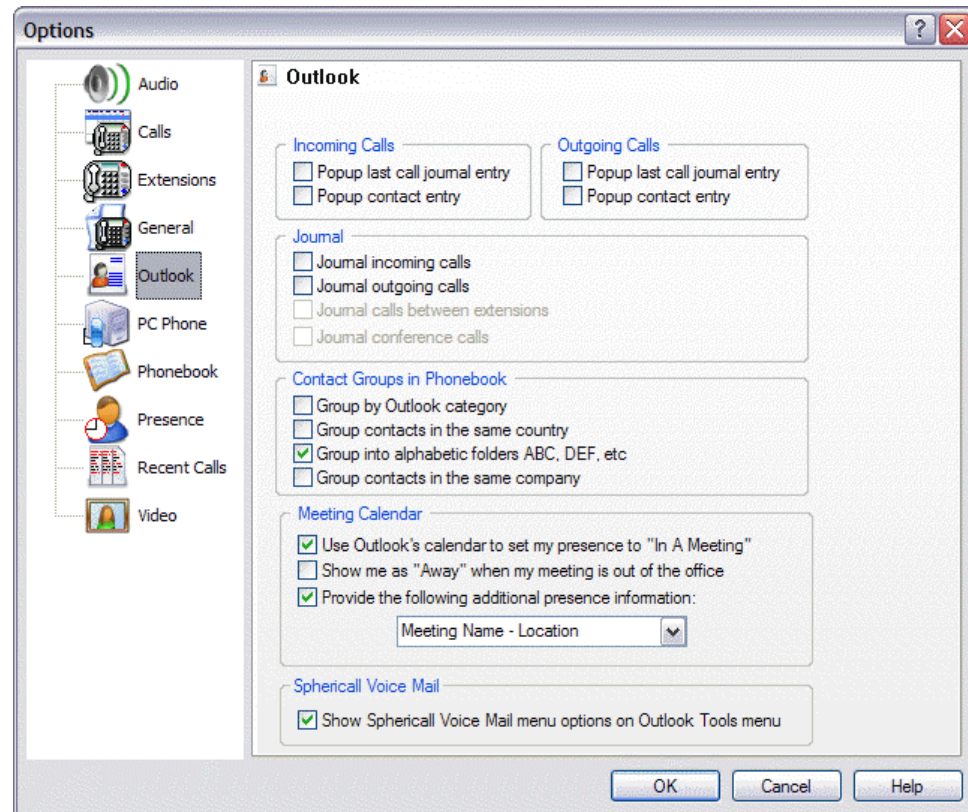
In the Sphericall Voice Mail area:

4   **Select the Show Sphericall Voice Mail menu options check box.**

5   **Click OK.**

6   **Open the Microsoft Outlook application.**

From the Toolbar:

7   **Click Tools\Voice Mail\Configuration.**

Figure 4.4   Voice Mail window
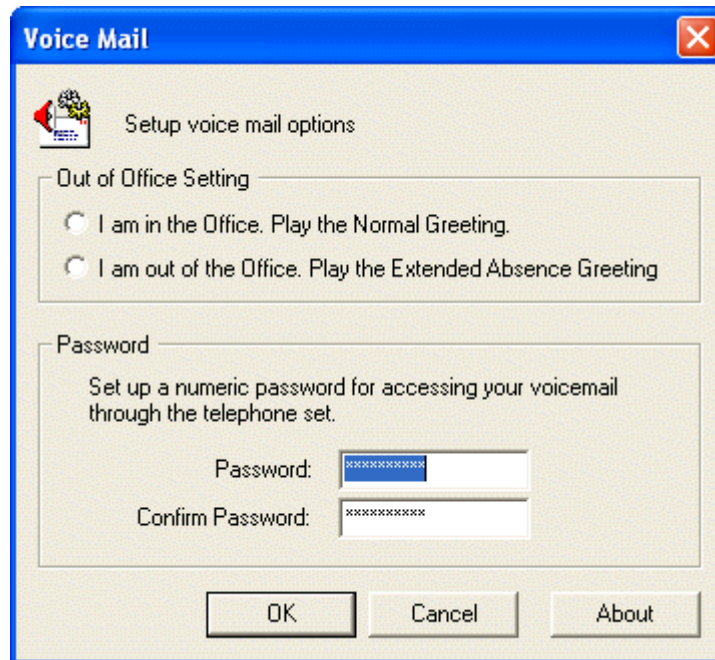
In the Password area:

8   **Type a password for accessing Sphericall Voice Mail through the telephone set in the Password field.**

9   **Re-type the password in the Confirm Password field.**

10   **Click OK.**

Note: For further information on integrating Microsoft Outlook with Sphericall Voice Mail, confer with your organization's Sphericall system Administrator.

To set your Extended Absence Greeting from Outlook

In Microsoft Outlook:

1   **Click Tools\Voice Mail\Configuration.**

2   **Click the I am out of the office. Play the Extended Absence Greeting radio button.**

3   **Click OK to exit.**

To save your voice messages in Outlook

In Microsoft Outlook:

1   **Leave voice messages in your inbox to save them and access them from either the Outlook application or from the telephone.**

To sort your voice messages in Outlook

In Microsoft Outlook:

1   **Creat a Voice Mail folder (or any other appropriate name) in your Personal folders area.**

2   **Drag and drop voice messages to this folder to save.**

Note: These messages are no longer accessible from the telephone.

To delete voice messages from Outlook

1   **Highlight the voice message in the folder.**

2   **Press the Delete key on the keyboard OR right click and select the Delete option.**

> **Note:** Messages deleted in Outlook are not longer available by telephone. Messages deleted via the telephone are no longer available for listening in Outlook.

To playback voice messages from a mobile device

1   **If you are trying to play Sphericall Voice Mail on a hand-held device, then you may need some additional software.**

2   **There are several open source, free Media Players that support both Palm OS and Windows Mobile - http://tcpmp.corecodec.org. These players are robust and well supported.**

3   **Once installed the only change required is to select the WAV file under the list of supported file formats. Opening a voice mail message and clicking on the attachment cause the audio to be automatically played.**

SPHERICALL DESKTOP SOFTPHONE

5

SPHERICALL DESKTOP SOFTPHONE

OVERVIEW

The Sphericall Desktop Softphone is an endpoint option that proves valuable for telecommuters and employees who need their extensions to follow them to other locations. The Sphericall Softphone turns a networked PC into a virtual business telephone, with features just like any other extension on the system. Using Sphericall Desktop software and the PC's sound card or a USB headset, there is no need for a conventional phone.

SOFTPHONE USER DETERMINATION

The Sphere system administrator must consider how the softphone user is going to be using his phone:

Local Softphone User	• This user has a physical station/phone • This user has User Rights configured for this station/phone
Remote Softphone User	• This user exists without a physical station/phone • This user requires the configuration of a softphone line

The administrator needs to determine this before any further planning can continue. Once this is determined, the paths for softphone line creation differentiate.

The option to install the Sphericall Desktop Softphone feature may be available from a user's Sphericall Desktop. However, it is highly recommended that your administrator perform all administrarive tasks as they relate to the softhphone.

SPHERICALL SOFTPHONE LOCAL USER

This mode lets a user control a Media Gateway station line. As calls are presented to the Media Gateway, a representation is also presented to the Sphericall Desktop.

Both the Media Gateway and the Sphericall Desktop control the same call which allows a user to toggle between their handset and a USB headset.

VERIFICATION

Before creating a Sphericall Desktop Softphone line, the Sphere system administrator should verify that certain elements are in place:

- **Verify that the user (for whom you are creating a softphone line) has an extension number and an associated station.**
- **Verify that the user has user rights to the appropriate station in order to open their Sphericall Desktop.**
- **Test the user's Sphericall Desktop**
- **Verify that the appropriate USB and sound card drivers required for softphone use are installed on the local machine. Refer to the Sphericall Desktop Softphone System Specifications table for recommended PC Communication devices.**
- **Test the functionality of the USB headset.**

STOP	After verifying these elements, please refer to thePC Phone Settings topic in this chapter for further information related to the Sphericall Desktop Softphone feature.

SPHERICALL DESKTOP SOFTPHONE REMOTE USER

This mode provides an independent gateway and call control interface within one application. In this mode, the Sphericall Desktop Softphone has no physical station.

An example of a remote user would be an organization who has a sales representative with an office in his home. With the appropriate network connections (see Sphericall Desktop Softphone System Specifications), his personal computer can act as an extension within the organization.

VERIFICATION

Before creating a Sphericall Desktop Softphone line, the Sphere system administrator should verify that certain elements are in place:

- **Verify that the user has Local Administration rights, or the right to install software on their local machine.**
- **Verify that the appropriate USB and sound card drivers required for softphone use are installed on the local machine. Refer to the Sphericall**

**Desktop Softphone System Specifications table for recommended PC
Communication devices.**

• **Test the functionality of the USB headset.**

|	
STOP	Please refer to the PC Phone Settings topic in this chapter for further information related to the Sphericall Desktop Softphone feature. At this point, except for a few minor points, where noted, the documentation does not differ between a local user and a remote user..

PC PHONE SETTINGS

You can configure a number of communication/phone options in the PC Phone
Settings tab on the Sphericall Desktop.

To set PC Phone Setting options

From the Sphericall Desktop:

1   **Click Configure\Options\PC Phone.**

Figure 5.1   Options window
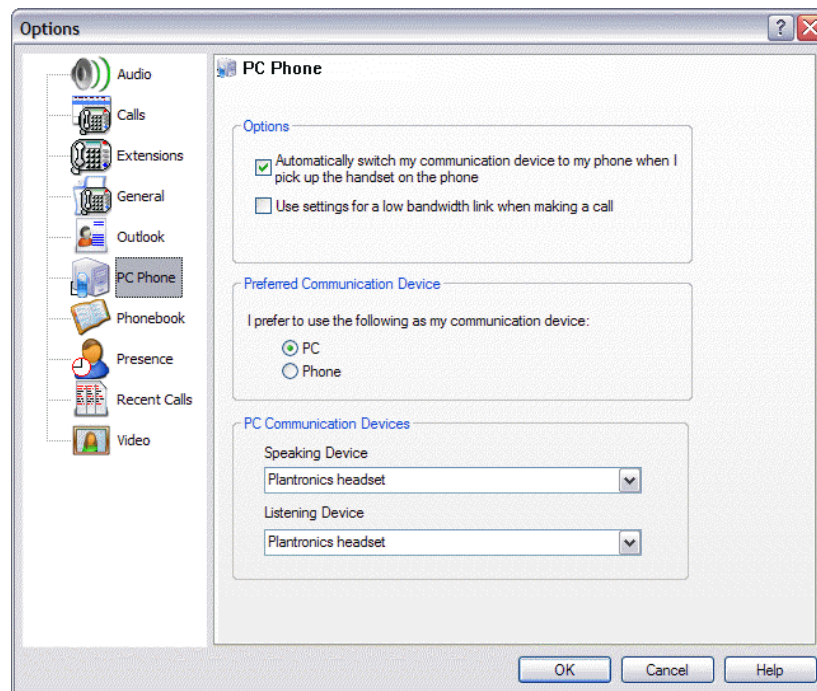
In the Options group box:

2   **Select Automatically switch my communication device to my phone when I pick up the
handset on the phone.**

In the Preferred Communication Device group box:

3 **Select the PC or Phone radio button to specify the communication device to use with the Sphericall Desktop Softphone.**

In the PC Communication Devices group box:

4 **Select the device the user will use to speak into the softphone in the Speaking Device list box.**

5 **Select the device that the user will use for listening with the softphone in the Listening Device list box.**

6 **Click OK.**

Figure 5.2 Volume Settings window

Dial Pad
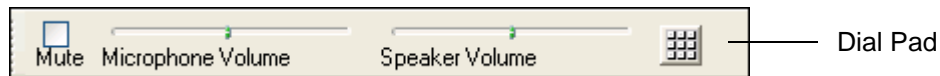
While on an active call, you can adjust the volume of the either the microphone or speakers from the Sphericall Desktop. As well, you can click on the keypad the dial additional numbers (an extension, for example) while on a call.

SWITCHING BETWEEN MODES OF OPERATION

When the softphone is started, the user is presented with a list of lines to which the logged in user has rights (unless the user only has rights to one extension). Choosing a hardware MG line will put the softphone in gateway call control mode. If the PC supports audio hardware, the switch device command is available, thus denoting the availability of dual mode operation.

ALERTING

Depending on which mode is established on the softphone, an inbound call will alert the softphone, the MG station or both. The softphone provides options for alerting of inbound calls:

* ring the telephone
* play a predefined audio file
* ring the telephone and play a predefined audio file
* no audio indication - visible animated ringing phone icon

These options are configured in the Calls tab on the Sphericall Desktop

To configure options for alerting of an inbound call

From the Sphericall Desktop:

1 **Click Configure\Options\Calls.**

Figure 5.3   Options window

In the Incoming Calls group box:

INCOMING CALLS OPTIONS

Check Box	Description
Popup if minimized	If the Sphericall Desktop is minimized, the window will popup when a call is received.
Ring my phone when a new call arrives	Select this check box to enable the phone to ring when a new call arrives.
When a new call arrives, play the following through the specified audio device	• Play ringing tone - Select this radio button to play the familiar ringing tone. • Play this sound - Select this radio button to enable the speakers to broadcast a .wav file. when a user receives a call. Click Browse to select the appropriate .wav file.
Device: Select the appropriate audio device from the drop-down list box.	
If a second call arrives, play the following through the specified audio device	• Play ringing tone - Select this radio button to play the familiar ringing tone. • Play this sound - Select this radio button to enable the speakers to broadcast a .wav file. when a user receives a call. Click Browse to select the appropriate .wav file.
Device: Select the appropriate audio device from the drop-down list box.	
Pop up a message in the system tray on missed calls	Select this check box to provide caller ID information in the system tray when a call is missed.
Popup a message in the system tray when a new call arrives	Select this check box to provide caller ID information in the system tray when a new call arrives.
Automatically answer call after *n* rings	Select this check box if you wish the call to be answered after a defined number of rings.

2   Click OK.

ANSWERING

Either the MG station or the softphone can answer an inbound call. You can configure the preferred audio device on the Sphericall Desktop/Softphone in the PC Phone Settings tab. When you answer a call by double-clicking on the call, the preferred audio device will be used. Though, you have the ability to switch audio devices during a call.

To switch audio devices during a call

Figure 5.4 Spherricall Desktop window
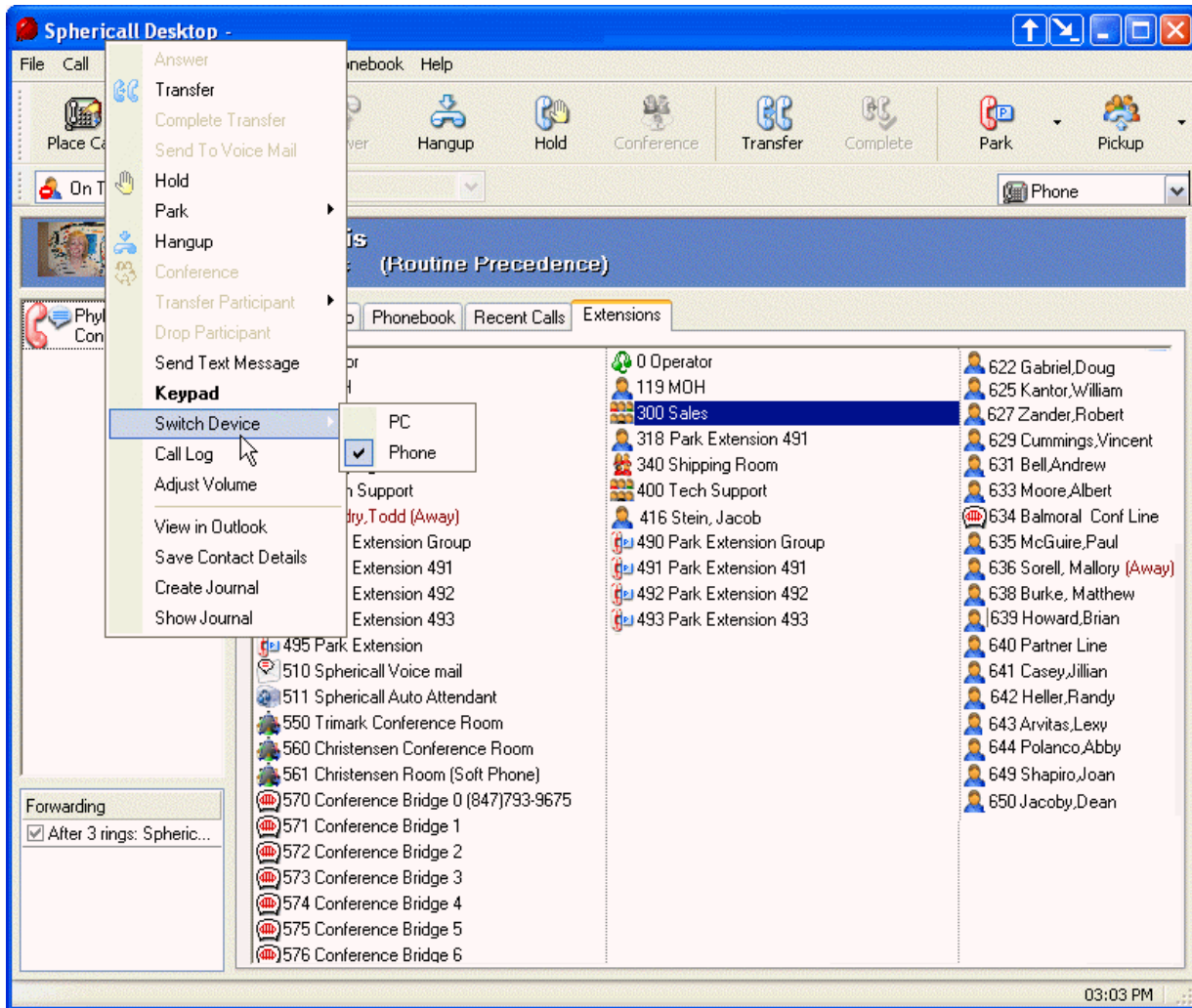
On an active call:

1 **Right-click the call in the Calls pane.**

2 **Select either PC or Phone for the desired audio device.**

The preferred communication device is indicated in the lower left hand side of the Spherricall Desktop window.

Note: You may also select the preferred communication device from the list box in the upper right hand side of the Spherricall Desktop.
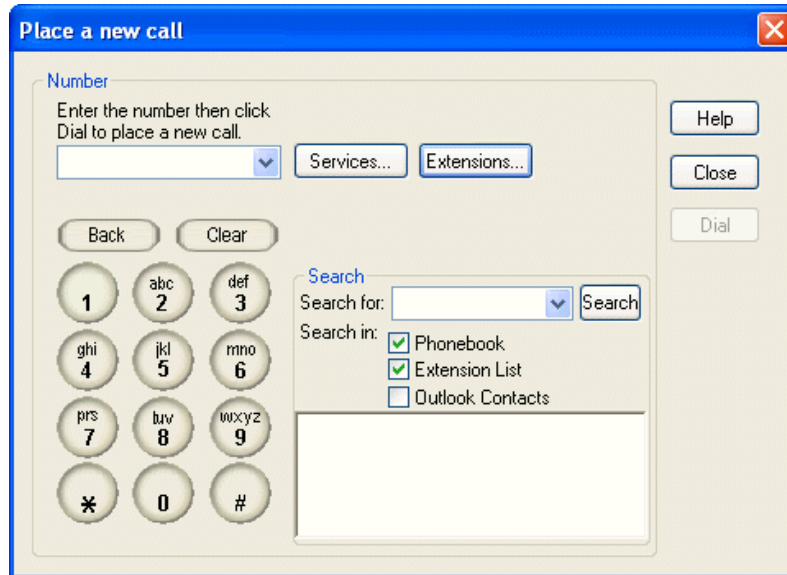
DIALING

The softphone has a touch tone feature that allows users to place calls from a virtual keypad during an active call.

To access the touch tone feature

On an active call:

1 Right-click the call in the Calls pane.

2 Select Keypad.

Figure 5.5 Place a New Call window

3 Type the appropriate digits using the computer's keypad.

Note: You will need to dial the appropriate outside service to place calls when using the touch tone feature.

ADDITIONAL SETTINGS

6

In this chapter, you will learn about

- **Call Recording**
- **The Conference Bridge**
- **Sphericall Desktop Video**
- **Sphericall Desktop Updates**
- **User Images in the Sphericall Desktop**
- **Phonebook Export/Import Feature**
- **Web Browser Dialing**

CALL RECORDING

ON DEMAND RECORDING

The Sphericall Desktop allows users to playback call recordings that were initiated on demand.

- If an on-demand recording is initiated while a Sphericall Desktop has the line open, the username will be stored with the call recording. This applies whether an on demand call recording was initiated from an IP phone or by the Sphericall Desktop application.

- If an on-demand recording is only initiated from an IP phone when no Sphericall Desktop has the line open, no username will be stored against the recording.

The Sphericall Desktop user is allowed to access on-demand recordings for playback that match both their primary extension and username. Playback is restricted for call recordings that are from a user's primary extension but have usernames that do not match the current logged-in user "viewable" in the call log list. Any person who has privileges to open a station can view the call log for the primary extension, but only users that made the call are allowed to play back the recording. A user that can playback an on-demand recording can also delete the recording.

RECORDING NOTIFICATION

In the United States, State laws, which govern use of recordings, vary. Many states require both parties to be notified when a call is being recorded. If an inbound call is to be recorded, it is recommended the call first go through an auto-attendant that informs the caller the conversation may be recorded.

Given the notification requirements of some states, the Sphere system administrator must decide if it's appropriate for any outbound calls to be automatically recorded. Recipients of outbound calls should be notified by the caller before the on-demand recording feature is invoked.

Call recording is generally done for quality monitoring, workforce management, training, evaluation, verification, dispute resolution and for accurate incident reconstruction. When considering call recording in your enterprise, it is helpful to know the laws in your country or state before you commence recording. Many countries mandate that you notify one or more parties that the call is being recorded.

Sample Notification Statement:

"Thank you for calling ABC Medical, your call may be monitored for training or quality assurance purposes."

Please consult your system administrator for an approved Recording Notification. Some countries or localities may require by law specific notification statements..

Visual Indication of Recording:

IP phone and Sphericall Desktop users will be provided with a visual indication that their call is being recorded as follows:

- **On-Demand Recordings**
  Sphericall Desktops will have an active Call Recording button on the toolbar for users who have permission to do on-demand recording.
- Only the caller who initiates an on-demand recording will have an icon indicating that they are recording.
- IP phones enabled for on-demand recording have a "record" softkey available. Phones without this button, do not have the capability to record on demand.
- IP phones that have the "record" softkey can record on demand. If recording, the only indicator that there is a recording in progress is the availability of the softkey "End Recording."
- Unless other parties are notified, they will not know that they are being recorded (auto record or on demand) by another caller.

- **Automatic Recordings**
  If the system is enabled for a station or line to have an AutoRecord Indicator, you will see an icon indication that a call is being recorded.
- If the system is not enabled for AutoRecording Indicator, you may not know if or when the system is auto recording.
- If a phone or user is set to AutoRecord, this user cannot also do on-demand recording.

To record a call from the Sphericall Desktop
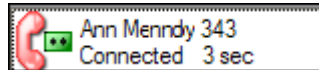
While a call is active:

- Click the Record icon located on the Sphericall Desktop toolbar.

Figure 6.1 Record icon
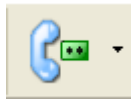
Once call recording is applied, the calls pane will display caller information with an icon of a phone and a cassette.

Figure 6.2 Call Recording indicator

CALL RECORDING PLAYBACK

The Sphericall Desktop allows playback of recorded calls. The call log viewer list has a modified display to indicate which calls are recorded. Selecting a recorded call followed by invoking a new "Play" command displays an integrated playback application similar to the one used for the playback of voice mail messages. The recorded call player provides indications for recording length, current playback position, caller name and address, and called name and address, as well as the traditional buttons for play, stop and pause.

Auto-Recording Playback

The Sphericall Desktop allows the user to select other extensions and addresses over which they have been given permission to view and playback calls.

Auto-recorded calls cannot be deleted by the user.

Since each endpoint initiates its own recording, it is possible that two recordings are made for the same call. The Sphericall Desktop user may be granted permission to playback both recordings. Each recording is indexed from the endpoint's address that initiated the recording.

Saving Recordings

Calls that can be played back by a user can also be saved to a local directory. The original copy of the recording will remain on the resource server.

E-mail Recordings

Call recordings that can be played back by a user can also be e-mailed via Outlook. The original copy of the recording will remain on the resource server.

Note: Contact your Sphere system administrator for guidelines and details regarding how long recordings will be archived on your system and therefore available for saving or e-mail.

To playback a recorded call

Note: The icon for playback of a recorded call is the same for initiating a recorded call. The text below the icon changes from "View" to "Record" when a call is active.

From the Sphericall Desktop:

1   **Click View\Call Recordings.**
    OR
    Click the View icon.

Figure 6.3   Record icon
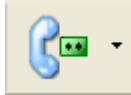
Figure 6.4   Call Log window

2   **Highlight an entry in the Call Log list.**

3   **Use the call recording tools to play, delete, or save a recording, or e-mail a recording to an individual's e-mail address.**

When a call recording is played back, a form (similar to the form used for playback of Sphericall Voice Mail) appears.

If you delete a recorded call, the record will remain in the window until it is purged. The purging of call logs is a system-wide setting, and is defined by your system administrator.

Note: Be sure to use the call recording tools to play back a call recording. Double-clicking a call log entry, instead, dials that entry's phone number.

Note: If you are the owner of a secondary (tertiary, etc.) address, you have the option to view the addresses call recordings by typing it into the "for address" field. Or, you can select from available addresses by clicking the Addresses button.

Figure 6.5   Call Recording Playback form
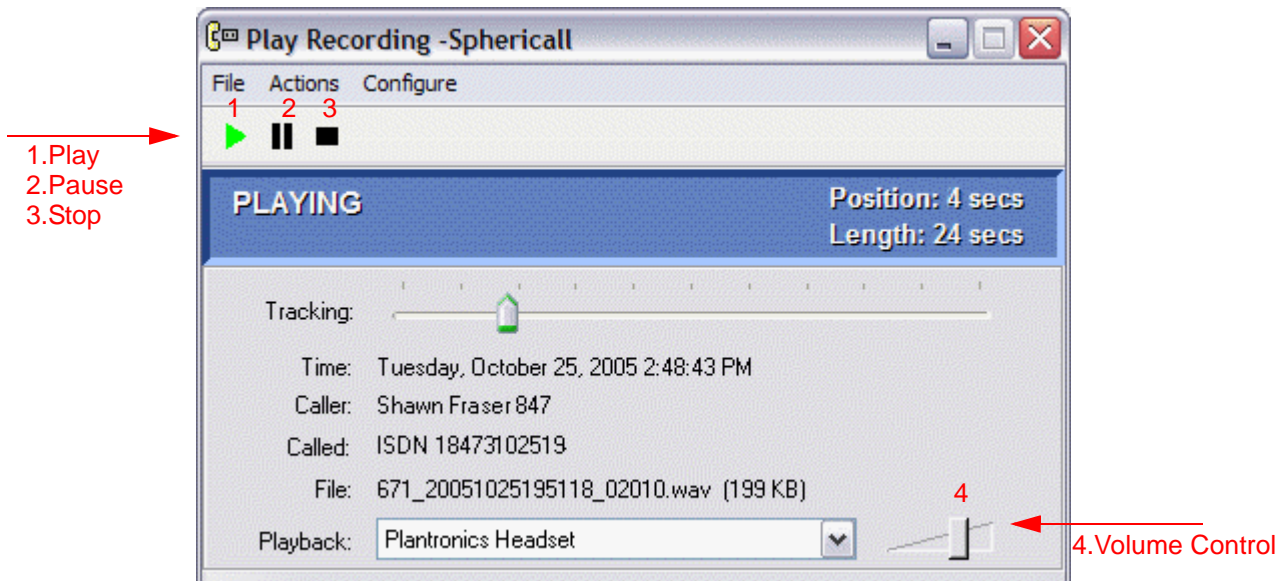
CONFERENCE BRIDGE
. . . .

Conference addresses, associated with the Sphere MeetingHub, allow up to 60 users to dial-in to a conference call managed by the Sphericall Softswitch.

Note: If you are adding callers to the Conference address from an IP phone, you can use the drag and drop feature of the Sphericall Desktop application. Because the Sphere system will interpret this as a "conference" call, you will be limited in the use of the drag and drop functionality with the integration.

To add calls to the Conference Bridge

For the user who will be forwarding calls to the Conference address:

1   **Initiate a call to the address (i.e. dial extension 530).**

2   **As additional calls are received for the conference, place the calls to the address (i.e. extension 530) on hold.**

3   **Double-click the call represented in the Sphericall Desktop application to answer the incoming call.**

4   **Right-click the new incoming call.
and
Select Transfer.
OR
Click the Transfer button on the toolbar.
and
Type the Conference address.
and
Press enter/click Transfer.**

5   **Double-click the on-hold call in order to return to the conference call.**

SPHERICALL DESKTOP VIDEO

OVERVIEW

The Sphericall Desktop uses DirectX technology to handle the capturing and displaying of video. When a video call is in progress, a user selects the Local Video tab to display the video that is being sent to the other user.

To receive the video, a user selects the Network Video tab. The video from the other party will be available even if the recipient does not have a camera. Without a camera, video may be received but not sent.

Note: For camera installation instructions, refer to the documentation supplied with your camera.

CAMERA CONFIGURATION

Users may change their camera settings through a menu displayed over the Sphericall Desktop Local Video window.

Note: Your camera must support the ability to configure settings from the Sphericall Desktop. If your camera does not support this feature, a message will appear.

Figure 6.6 Local Video tab

. . .
. . .
A D D I T I O N A L   S E T T I N G S
Sphericall Desktop Video
. . .
. . .
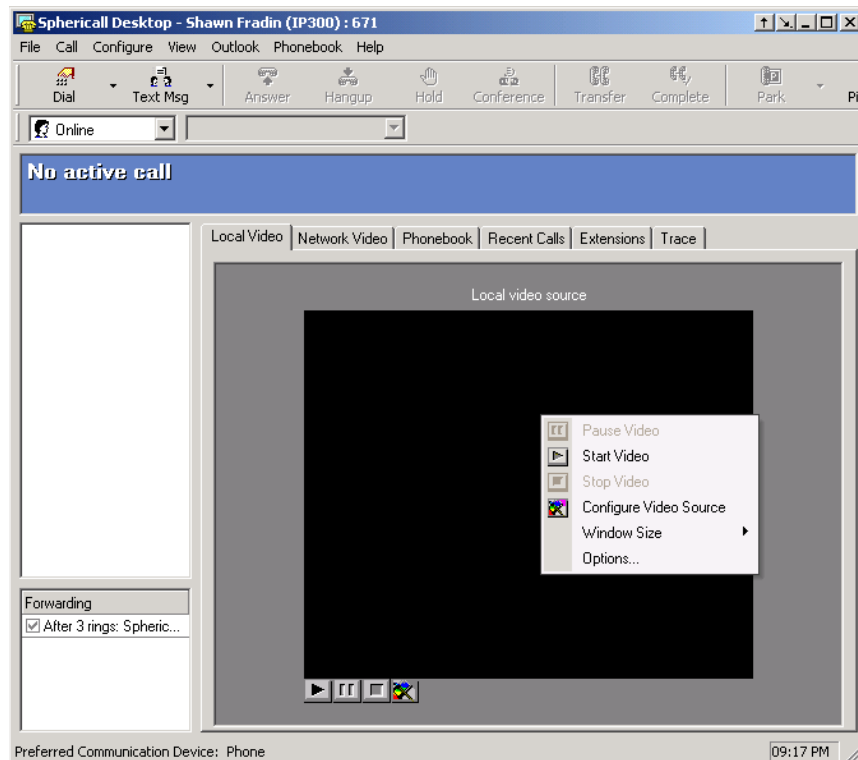
To configure camera settings

From the Sphericall Desktop:

1 **Click Local Video.**

2 **Right-click in the window.**

3 **Click Configure Video Source.**

or

4 **Click the Configure Video Settings icon.**

Note: Camera video settings vary from camera to camera. The following property windows are examples of a particular camera's settings.

VIDEO CONFIGURATION

Several options for sending and receiving of video are configured in the Video options tab.

Note: The Video options tab is not available if Video is disabled in the profile assigned to the user. For further information, consult your organization's Sphere system administrator.

Figure 6.7 Video options tab
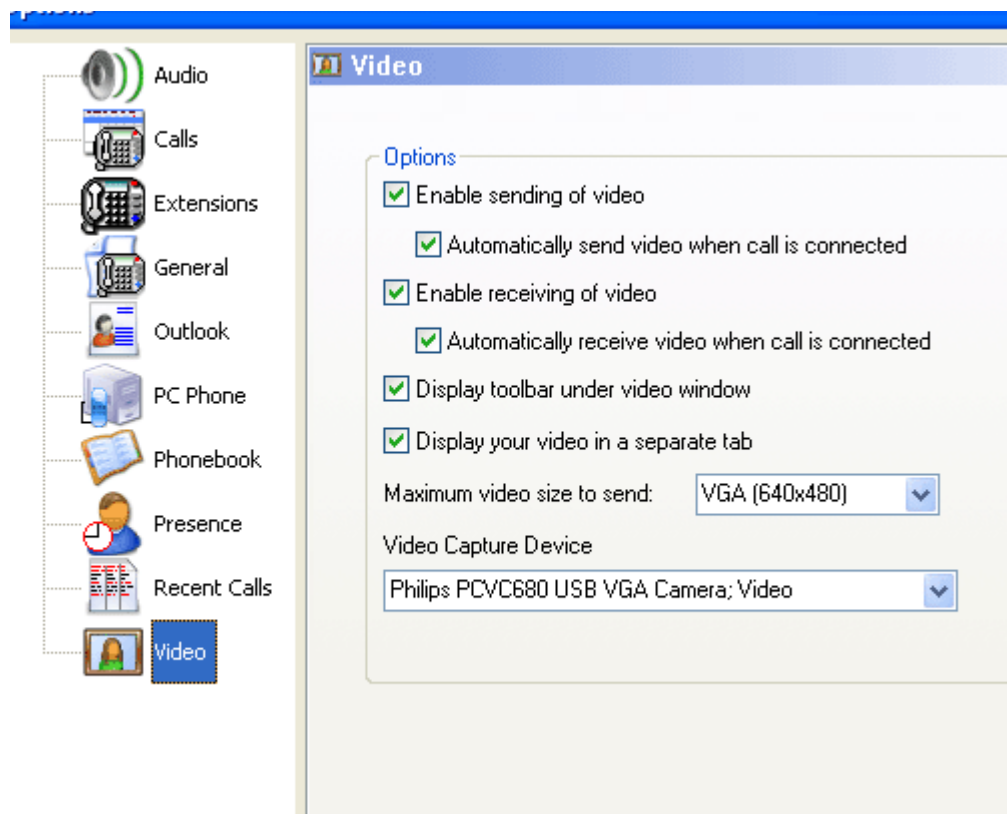
To configure video settings

From the Sphericall Desktop:

1 **Click Configure\Options\Video.**

In the Options group box:

2   **Select Enable sending of video, Automatically send video when call is connected, Enable receiving of video, Automatically receive video when call is connected, or Display toolbar under video window.**

3   **Select Maxium video size to send.**

The Sphericall Desktop offers a "Maximum video size" option. The list will contain four video formats: QCIF (176x144), CIF (352x288), QVGA (320x240), VGA (640x480). If the user's camera cannot support the video format, then the format will not be offered.

4   **Select Display local video in a separate tab.**

5   **Select the number of Frames Per Second.**

This setting represents frames per second the user is sending, not receiving. The range is 5 to 30.

CAUTION!   FRAMES PER SECOND AFFECTS BANDWIDTH USAGE WHEN A VIDEO CALL IS MADE. THE HIGHER THE FRAMES PER SECOND, THE MORE BANDWIDTH USED.

6   **Select the Video Capture Device in the drop-down box.**

VIDEO OPERATION

NETWORK VIDEO WINDOW

Figure 6.8   Network Video
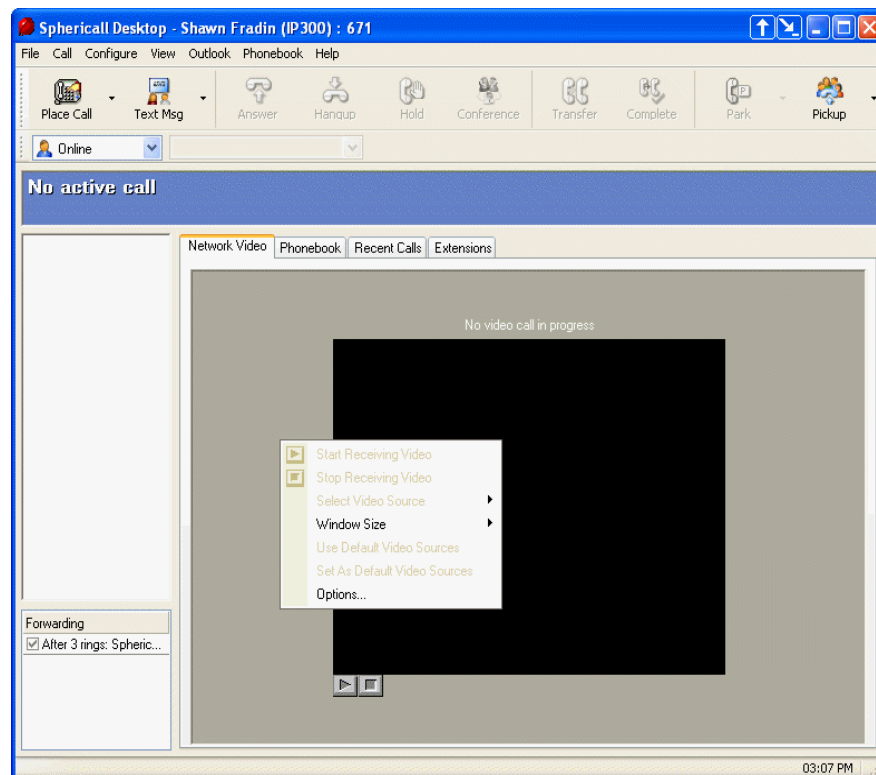
The Network Video window displays the video being sent from the other user. Users have the ability to control video after a call has been established. While a call is in progress, users may select a variety of options through an integrated menu that displays over the Sphericall Desktop Network Video window.

Note: Video from the other party will appear on the Sphericall Desktop, even if you do not have a camera, provided the other party is transmitting video.

To enable/disable video during an active call

From the Sphericall Desktop:

1 **Click Network Video.**

2 **Right-click in the window.**

3 **Click Start Video or Stop Video.**

4 **Click Window Size to change the size of the video window.**

Window size options are small and large.

5 **Click Options to be directed to the Video options tab.**

Note: Buttons appear under the Network Video window that allow the user to start or stop video. To add these buttons, Click the Display toolbar under video window check box located in Configure/Options/Video.

The Local Video window displays the video that is being sent to the other user. Users have the ability to control video. While a call is in progress, users may select a variety of options through an integrated menu that displays over the Sphericall Desktop Local Video window.

To enable/disable local video

When a video call is in progress:

1 **Select the Local Video tab.**

The video from your camera is sent to the called party.

2 **Right-click in the window.**

3 **Click Start Video or Stop Video.**

4 **Click Window Size to change the size of the video window.**

Window size options are small and large.

5 **Click Configure Video Source to be directed to the Video options tab.**

STANDALONE VIDEO WINDOW

The Standalone Video window is available if you have chosen not to display local video in a separate tab.

To enable standalone video

From Configure/Options/Video:

1 **Clear the Display local video in a separate tab check box.**

From the Network Video tab

2 **Right-click Show My Video.**

A local video window will appear.

THREE PARTY VIDEO CONFERENCE

The Sphericall Desktop allows for three party video conferencing. Setting up the conference is identical to initiating a normal audio conference with the additon of sending and receiving of video.

Note: For more information on conferencing, refer to the conferencing topic in this manual.

ERROR HANDLING

FAILURE TO LOAD VIDEO FILTERS

It the Sphericall Desktop application is started and fails to load the video filters, a message stating that the video is unavailable appears. The option to enable video will still be available and the Sphericall Desktop will retry to load the filters. If the Sphericall Desktop cannot load the filters, an error message will be displayed above the Local Video window.

CAMERA NOT RESPONDING

If the camera is not responding, an error message will display above the Local Video window notifying the user of a problem.

TROUBLESHOOTING

If the Sphericall Desktop Video is not functioning properly, your organization's Sphere system administrator may need to add a Trace tab to your Sphericall Desktop. The Trace tab creates a log of all activity and communication between the Sphericall Manager and the Sphericall Desktop.

CAUTION!   LOCAL AND NETWORK VIDEO FUNCTIONALITY SHOULD NOT BE ENABLED WITHIN ANY SPHERICALL DESKTOP APPLICATION THAT WILL BE RUNNING ON ANY SPHERICALL MANAGER THROUGHOUT A SPHERE SYSTEM.

SPHERICALL DESKTOP UPDATES

Software updates to the Sphericall Desktop can be enabled with the click of a button. Most likely, you will be notified of software updates by your organization's Sphere system administrator.

To run the Sphericall Desktop update

1   **Open the Sphericall Desktop.**

If an update is available within the Sphere system, the following window appears:

Figure 6.9 Spherical Update Available window
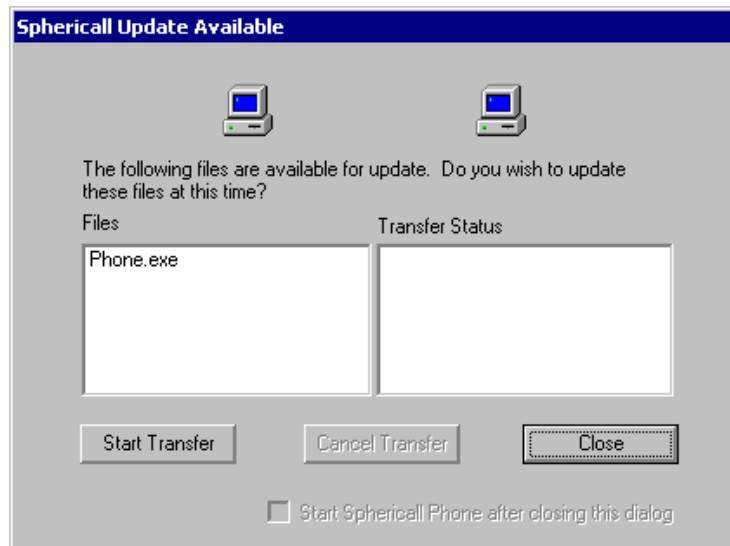
2   **Click Start Transfer.**

The appropriate files will be downloaded to the Spherical Desktop.

Figure 6.10 Spherical Update Available window
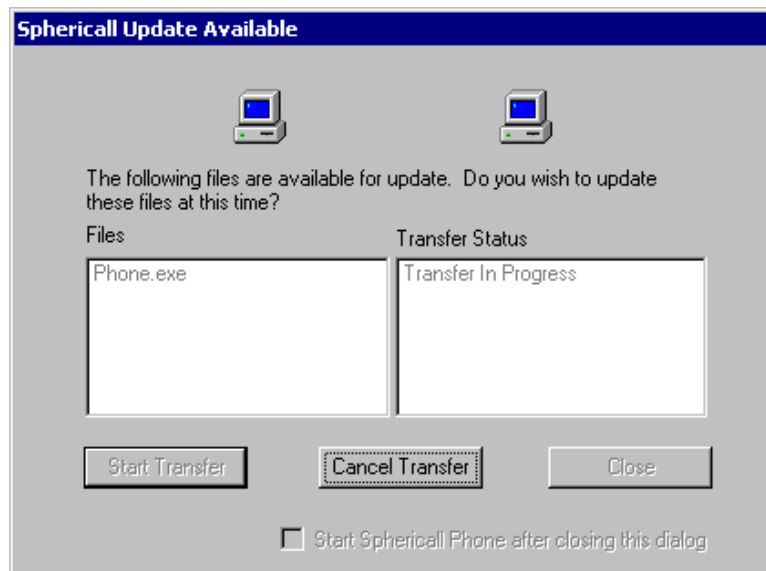
Once the transfer is complete (as noted within the Spherical Update Available window):

3   **Click Close.**

USER IMAGES IN THE SPHERICALL DESKTOP

The Sphericall Desktop can display a user image along with the active telephone call during a call session on a Sphere system.

Figure 6.11   Sphericall Desktop Active Call Pane

When users place telephone calls via the Sphericall Desktop, an attempt will be made to match the dialed caller name/number with an image file (if one exists), and the Sphericall Desktop will display the appropriate image (if available).

To view a user image in the Sphericall Desktop

1   **Click the image file that appears in the Active Call Pane of the Sphericall Desktop during a call session.**
    or
    Right-click a user extension listed in the Extensions tab of the Sphericall Desktop and select View Picture.

PHONEBOOK EXPORT/IMPORT

The Sphericall Desktop provides a feature which allows users to export their phonebook entries into a .txt file and import phonebook entries from a previously-exported .txt file.

For example, if you plan on rebuilding the computer on which the Sphericall Desktop resides, instead of re-adding your phonebook entries, you can export the entries to a desired location and import them back onto your Sphericall Desktop.

The export/import feature also allows users to have identical phonebooks on their Sphericall Desktops. Create the phonebook on one user's Sphericall Desktop, export those entries to a .txt file and import the file onto another user's PC.

To export phonebook entries

In the Phonebook tab:

1   **Right-click on the Phonebook.**
2   **Select Export.**
3   **Click Browse.**
4   **Designate the appropriate destination location for the saved export file.**
5   **Click Save.**
6   **Click Export.**
7   **Click OK.**

To import phonebook entries

In the Phonebook tab:

1 **Right-click on the Phonebook.**

2 **Select Import.**

3 **Select the Overwrite existing entries check box if you want to file to be imported to overwrite the entries presently in the Phonebook.**

4 **Click Browse.**

5 **Locate the *.txt file containing the phonebook information to be imported into your Sphericall Desktop.**

6 **Highlight the *.txt file you wish to import.**

7 **Click Open.**

8 **Click Import.**

9 **Click OK.**

WEB BROWSER DIALING
··

The Sphericall Desktop allows dialing of telephone numbers from an Internet Explorer v5.0 or later web page. The Sphericall Desktop must be running to use this feature.

To dial from a web browser

1 **Highlight a number on any web page.**

2 **Right mouse click on the selection and select "Sphericall Dial".**

The Sphericall Desktop will attempt to dial the number.

The format of the number dictates how it is dialed. Numbers in the format of <+1 (area code) number> or <(area code) number> are assumed to be PSTN numbers and are dialed without any other user input. All other numbers are displayed in a pop-up dialog box where the user has the option to manipulate them. For example, a selection of 847-793-9600 will pop a prompt box asking the user for verification. Selections +1(847)793-9600 and (847)793-9600 will be dialed directly.

Note: This function is governed by an Internet Explorer setting. To get the "dial prompt box" to display, users must enable the "Allow active content to run in files on My Computer" under Tools->Internet Options->Advanced.

Figure 6.12 Web Browser Dialing example
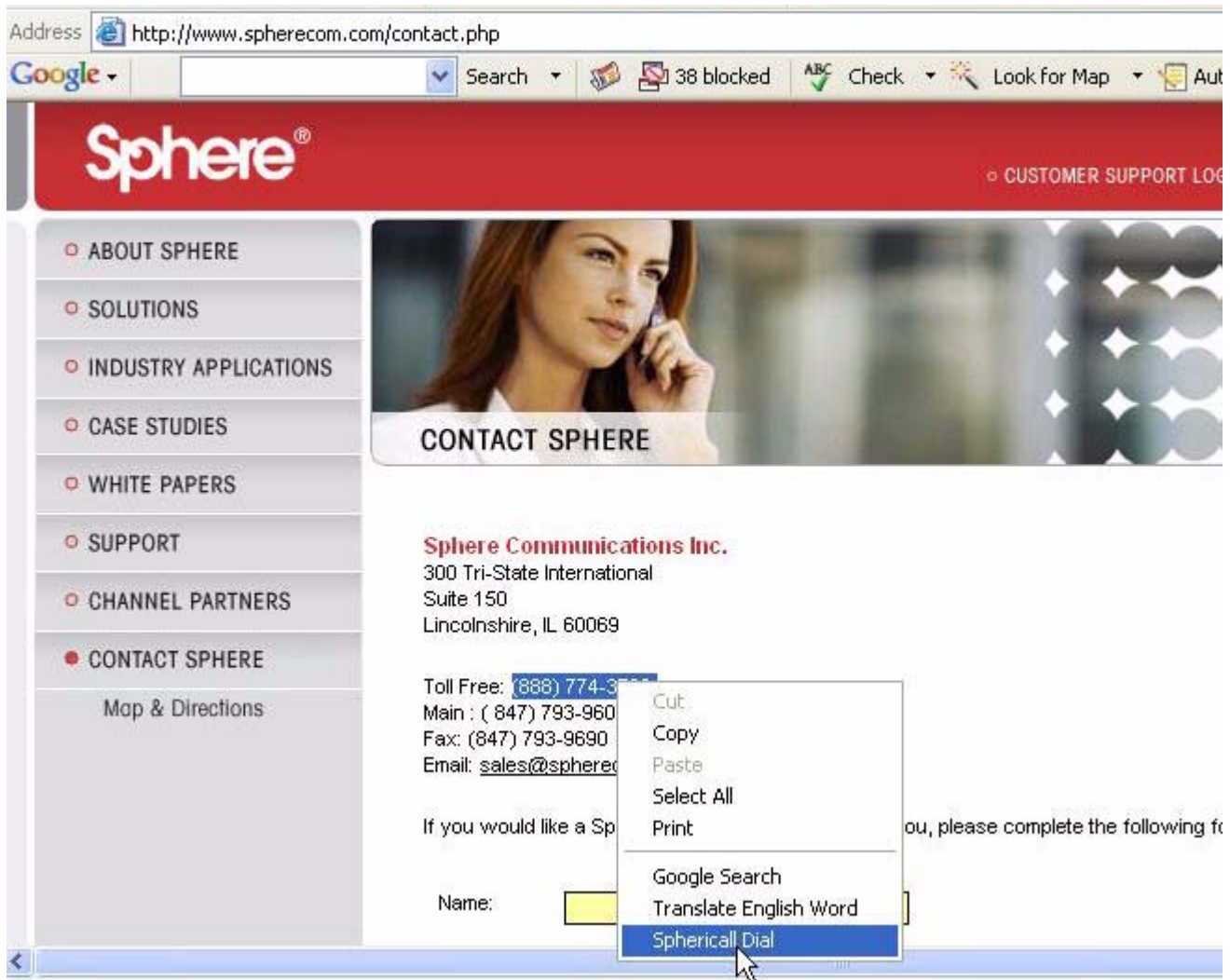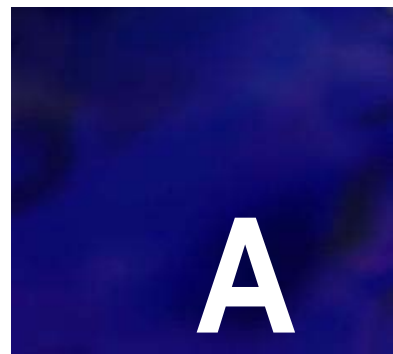
HELP AND ONLINE HANDBOOK

A

ONLINE HELP

Think of your Help files for the Sphericall Deskop as an online handbook. Help is always available from the Help menu or from Help buttons located on some of the command windows.

Figure A.1   Help menu
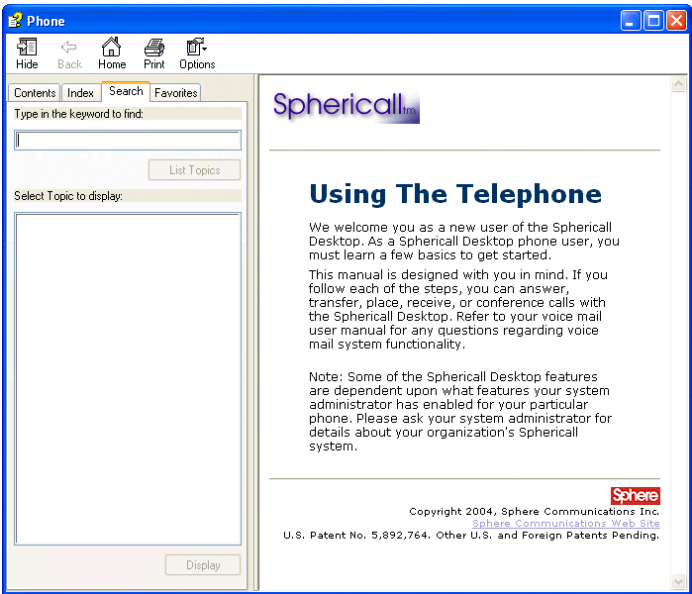
The Help files allow you to answer your own questions on using Sphericall Desktop. Refer to the Sphericall Desktop Phone Keypad Tips card for further instructions on phone set commands. Refer to the voice mail vendor reference guide for voice mail instructions.

CONTACT SPHERE COMMUNICATIONS

●●

MAILING ADDRESS

Sphere Communications Inc.

300 Tri-State International Suite 150

Lincolnshire, IL 60069 USA

Phone 1-847-793-9600; Toll Free Phone 1-888-774-3732; Fax 1-847-793-9690

TECHNICAL SUPPORT TELEPHONE NUMBERS

Note: Your Sphere Certified Partner should be your first point-of-contact.

If you have a support agreement with Sphere Communications, please contact our Technical Assistance Center at the following phone number(s):

- 1-888-774-3732 option 4 (toll-free in the United States)
- 1-847-793-9600 option 4 (outside the United States)

You will need to provide the following information when contacting Sphere Communications Technical Support:

- Your technical support certification level
- The appropriate part number and/or serial number for the device you are referencing
- Your customer site setup information
- The version of Sphericall software your organization is using

Sphere Customer Support Web Site

www.spherecom.com

e-mail

support@spherecom.com

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NOTICES

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For warranty information, see the License Agreement on the Sphericall software DVD media.

U.S. Patent Numbers 5,892,764 and 6,735,208 and related Foreign Patents. Other U.S. and Foreign Patents Pending.

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