CMG Office Web

User Manual
CMG Office Web 7.5

Rev B1 2013-02-05

Aastra Technologies Ltd.

Concord, Ontario, Canada

Contents

Introduction

About CMG Office Web

CMG Office Web is the hub for your company's internal communication. With the software you can find out about your co-workers' phone numbers, organizational belonging and activities. You can also manage how you want to be contacted, manage your voicemail, register visitors, and send SMS messages to colleagues or any mobile number.

By entering your activities in CMG Office Web, the switchboard attendant can handle your incoming calls correctly. CMG Office Web also features the Quick Info directory, which contains company-specific information not found in the user directory.

CMG Office Web is run from your web browser.

The CMG Quick software is included in the CMG Office Web package. With Quick you can easily control your phone and presence from a task bar icon. For information on how to use the Quick software see CMG Quick User Guide.

About this Document

This guide provides a way to get started using CMG Office Web. All functions in the system are not described in this document. For a complete guide to the CMG Office Web system, see the online help which is opened by clicking the *Help* button.

Note: This guide describes a full installation and configuration of CMG Office Web. Your system may be configured differently depending on what licenses your company has purchased and what functions that has been activated in your system by the system administrator.

The system administrator at your company can configure the system in a number of ways, for example the layout of the forms.

Getting Started with CMG Office Web

Start your web browser and enter the address for the CMG Office Web in the address field. The company specific domain is different for different companies, but the last part, CMGOffice, is the same:

http://<company specific domain>/CMGOffice

The start page of CMG Office Web contains a navigation bar with a number of tabs:

Figure 1. The start page of CMG Office Web

You can do the following using the tabs on the start page:

Directory	Search for colleagues in your corporate directory, see page 7.
Organization	View company's organization info, see page 11.
Quick Info	Search in the corporate directory containing for example external phone numbers, web links, etc, see page 12.
Activities	Register your activities, see page 13.
Forwarding	Forward your telephone, see page 17.
Voice	Manage voicemail and interactive voice response, see page 18.
Visit	Register visitors in advance, see page 25.
SMS	Send SMS messages, see page 27.

Directory, Organization, and Quick Info are public within the company. The rest of the functions require that you log in with your own extension and password.

You can manage your personal settings, such as change password or change language, by clicking the link My Settings.

Directory – Find your Colleagues

The *Directory* tab lets you search for colleagues by their name, phone number, keywords or organization belonging.

Name Search

When you want to search for somebody you type the last name and first name separated by space in the *Name/Phone* field. You do not have to type the full name; the search is done on parts of the name. The more letters, the less hits.

Note: If you only search on first name, you must enter a space in the search field before entering the first name, since the system expects the last name first.

The search is phonetic, which means that a search for "Anderson" also will include "Andersson". You can also use "wild cards" in your search string; for example "*son" will list all persons with names including "son". If you check the *Present* checkbox, absent people will be excluded from the search result. Start the search by clicking the *Search* button or press *Enter*.

Name, Phone number and Organization will be shown and if a person is not available you will see when the person is back.

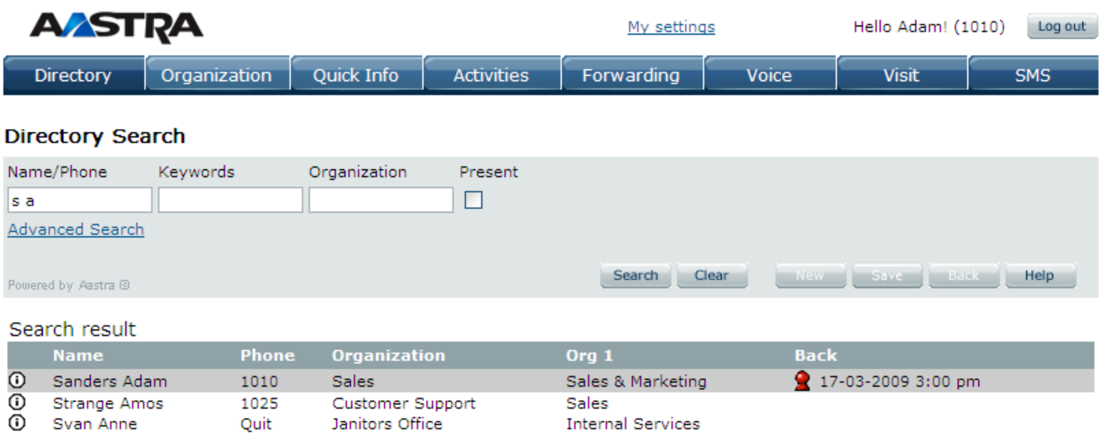


Figure 2. Searching for persons with the initials "S A" (last name first)

Click on a row in the search result list, and you will find more information about a person:

User Information — Click to get more information

Name	Title	Organization	City
Sanders Adam	Art-Director	Sales	Toronto
Phone	**Mobile**	**Alt.extension**	**E-Mail**
1010		801	

Organization — **Back 17-03-2009 3:00 pm**

Activities today — Activity overview

Status	Code	From	To	Information	Sign
	Meeting	17-03-2009 1:06 pm	**17-03-2009 3:00 pm**		/NW Office

Figure 3. Information about a person in the search hits list

To see a list of all people working in the same organization, click the link *Organization*.

If you want a graphical overview of the activities, click the *Activity overview* link.

If you want to see even more information about a person, click the link beside the ⓘ at the top right.

Extended information — Activity list

Header	Information
Name	Sanders Adam
Title	Art-Director
Phone	1010
Mobile	
Alt.ext.	
Organisation	Sales (Sales & Marketing)
City	Toronto
Room	2 Floor
Visiting Address	616 Monarchdale Avenue
Postal Address	Toronto, Ontario CANADA M6G 1R3
Fax	416 555-4545
Information	Newly married. Old lastname: Blomster
Home Phone No.	416 555-8514
Home Address	24 George Henry Blvd. Toronto, Ontario CANADA M2J1E2
Workgroup	Grupp
E-Mail	
SMS	
Keywords	Layouts, Blueprints, Designer, Art-Director, Design, Adverts, Customer Questions, Bowling Club Treasurer

Figure 4. Extended information about a person

Tip: Check your own information so that it is correct. If not, send a change request to the system operator with the *Change User Information* function under *My Settings*, see page 28.

Phone Number Search

If you want to search for an extension, type the number in the *Name/Phone* field. You can type “1” to get all extensions beginning with “1”. Click the *Search* button or press *Enter* to perform the search.

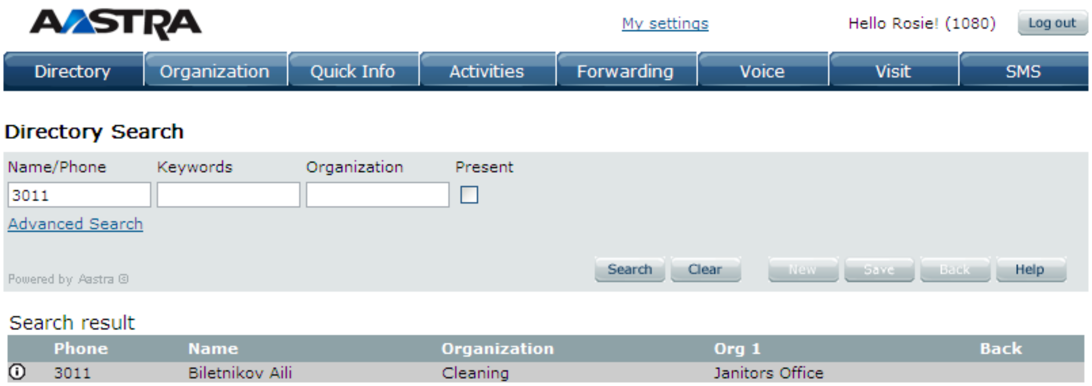


Figure 5. Searching for a person with the extension number “3011”

Keyword Search

In the search field *Keywords* you can search for working titles, tasks or just about anything that people work with. The search is phonetic and you can use wildcards, just like for the name search.

Note: You can only enter one keyword.

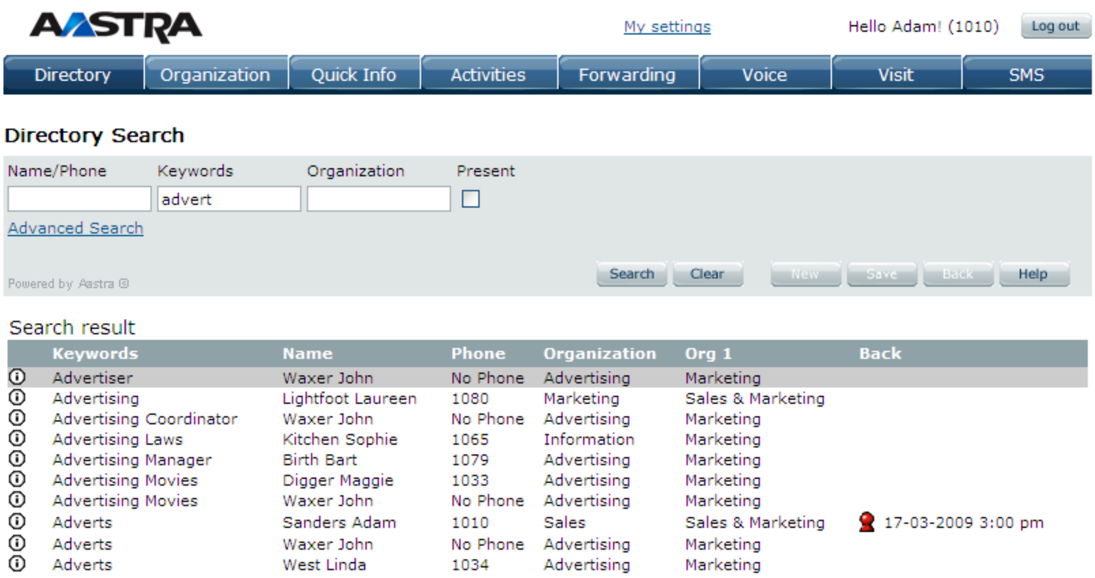


Figure 6. Searching for people with a specific keyword

Organization Search

In the search field Organization you can search in your organization, for example, to see who are working on a specific department. The search includes alternative names for organizations and you can use wildcards, just like for the name search.

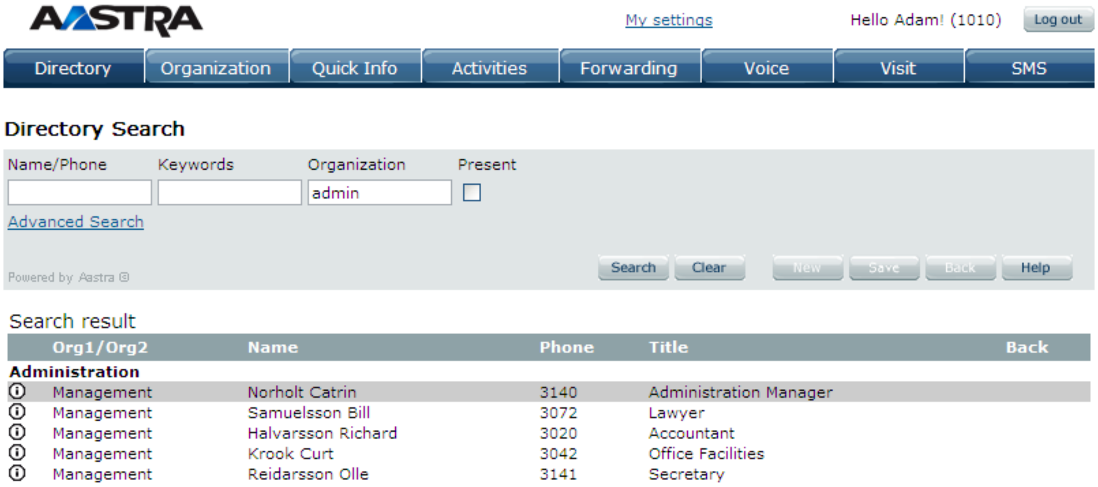


Figure 7. Searching for people in a specific organization unit

Organization – Who is Working With What

Organization

Here you will find an overview of your company's organization, with units and departments. Click on a unit and the sub units and the people working there will be presented with name and phone number. Click on a person if you want more information about that person.

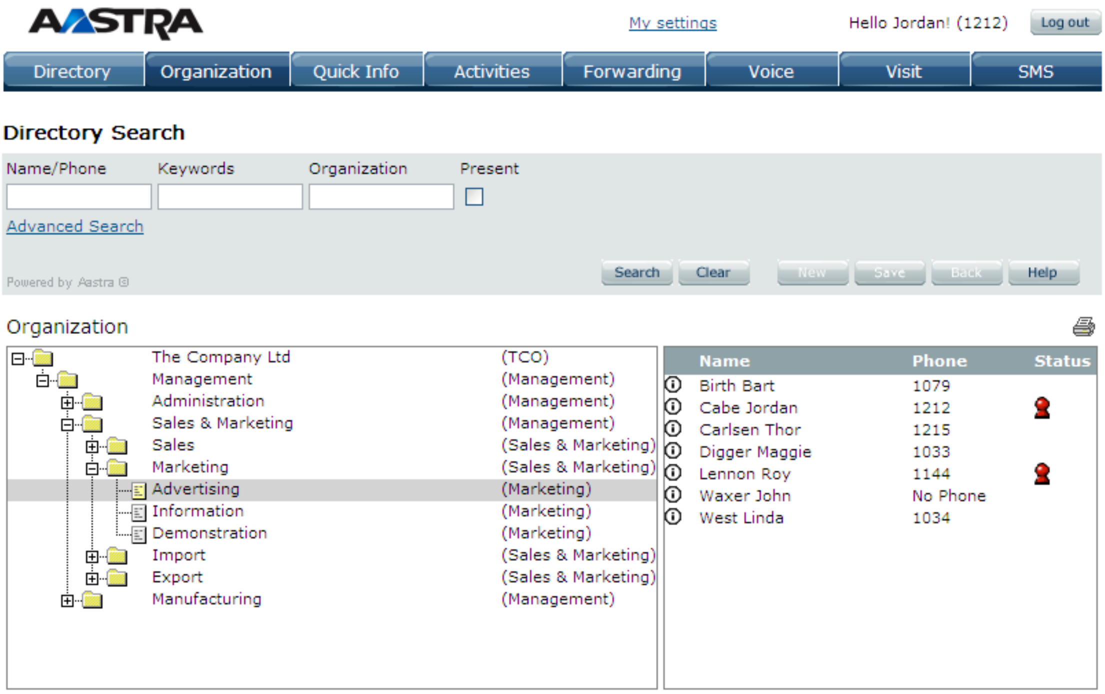


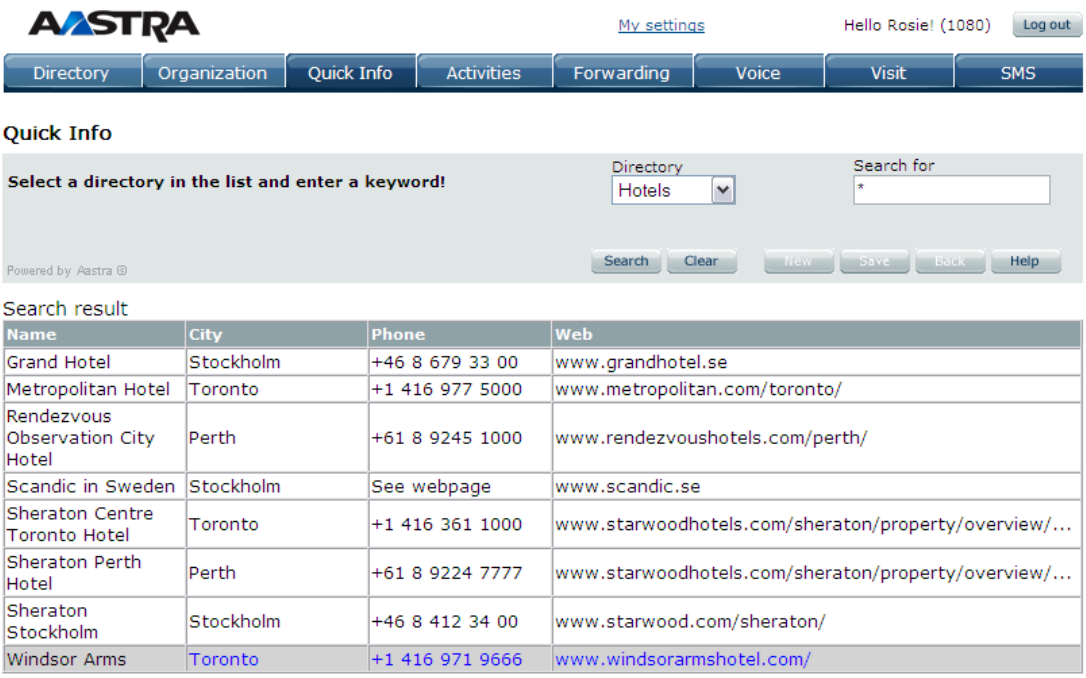
Figure 8. Viewing the organization tree

You can printout the result list by clicking on the symbol on the top right of the list.

Quick Info — Quick Access to Useful Information

In the *Quick Info* tab you can find useful information like web links, addresses and phone numbers to other companies, hotels and taxi companies, or whatever your company finds suitable.

Select the *Directory* you want to search in. You can also specify search criteria in the search field and then click on the *Search* button.



Name	City	Phone	Web
Grand Hotel	Stockholm	+46 8 679 33 00	www.grandhotel.se
Metropolitan Hotel	Toronto	+1 416 977 5000	www.metropolitan.com/toronto/
Rendezvous Observation City Hotel	Perth	+61 8 9245 1000	www.rendezvoushotels.com/perth/
Scandic in Sweden	Stockholm	See webpage	www.scandic.se
Sheraton Centre Toronto Hotel	Toronto	+1 416 361 1000	www.starwoodhotels.com/sheraton/property/overview/...
Sheraton Perth Hotel	Perth	+61 8 9224 7777	www.starwoodhotels.com/sheraton/property/overview/...
Sheraton Stockholm	Stockholm	+46 8 412 34 00	www.starwood.com/sheraton/
Windsor Arms	Toronto	+1 416 971 9666	www.windsorarmshotel.com/

Figure 9. Using Quick Info to get, for example, hotel information

Click on an item in the search result list to obtain more information.

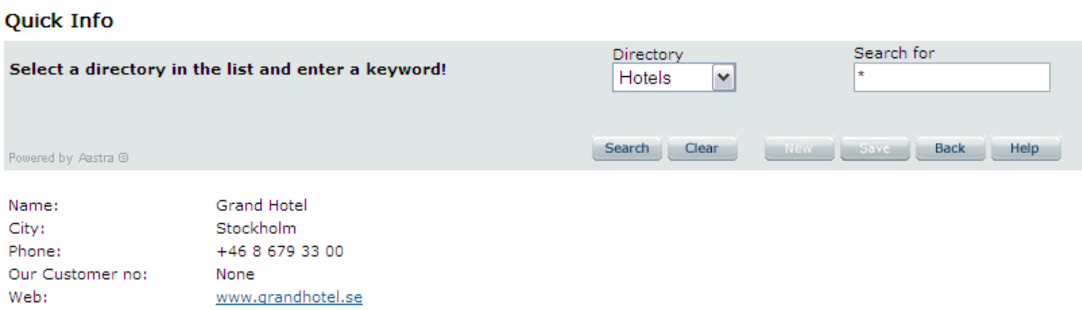


Figure 10. Quick Info with more details after selecting an item in the search result list

Activities – Let your Colleagues Know your Status

With CMG Office Web you can create an activity to inform calling users when you, for example, are in a meeting, on a business trip, or on vacation. You can control how to be contacted during the activity and the attendant and your colleagues can easily see when you will be back.

In addition, activities created in your mail system calendar will be synchronized into CMG Office Web, read more about this on page 32.

When you click the tab *Activities* in the navigation bar, you will get a login page to identify yourself with your extension number and password. The first time you log on to CMG Office Web, the password will be blank. If you want to have a password you can register it yourself by clicking the change password button. After typing your extension and password, click *OK*. Now you will enter the *New Activity* page and you can choose to register a new activity, change a present or future activity, or delete activity.

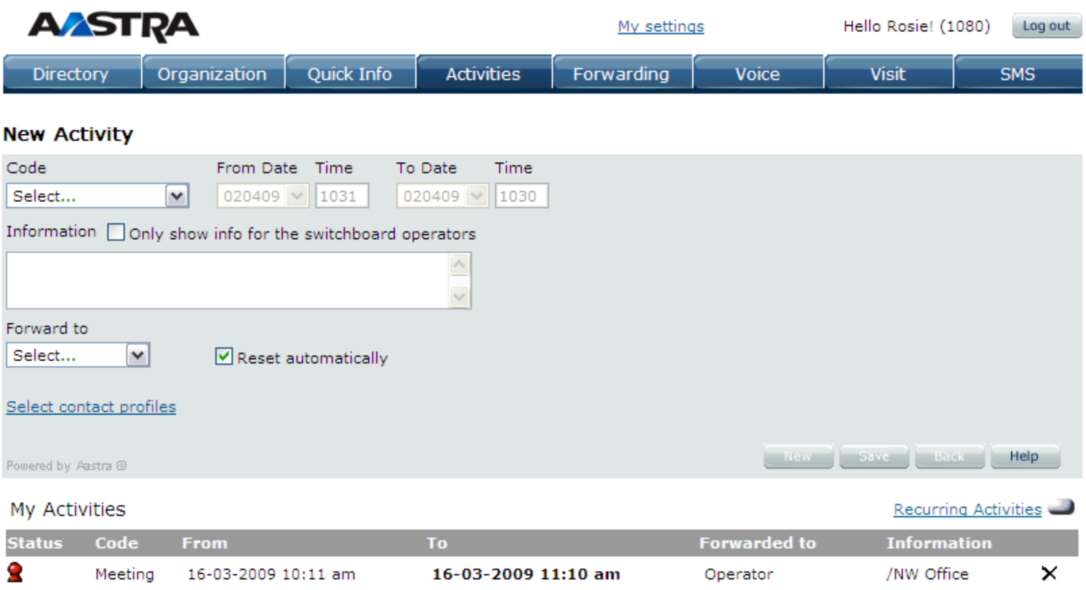


Figure 11. Creating a new activity

Every activity is connected to a contact profile. There are two different types of contact profiles; System Contact Profiles and Personal Contact Profiles. See section Change Contact Profiles on page 29 for a further explanation.

New Activity

Choose an activity code from the *Code* menu, and then select date and time for when your activity starts and ends. You can also write additional information for the attendant and your colleagues in the *Information* field. If you check the box *Only show for operators*, only the attendant will see what you have written in the *Information* field.

Forward to is used if you want to forward your extension to another phone during the activity. If you have created your own personal contact profile in *My Settings,* which is described in section Change Contact Profiles on page 29, the field *Forward to* is automatically set to this profile. *Forward to* can not be used by all exchanges, ask your system administration if you are unsure.

If the checkbox *Reset automatically* is set, your forwarding will be cancelled automatically at the end of the activity.

Save the new activity by clicking the *Save* button.

Change Activity

Click the activity you want to change in the *My Activities* list at the bottom of the page. Register your changes and click the *Save* button.

Delete Activity

If you want to delete an activity, click on the cross to the right of the activity in the *My Activities* list.

New Recurring Activity

You can schedule new recurring activities by clicking the link *Recurring Activities*, see figure below.

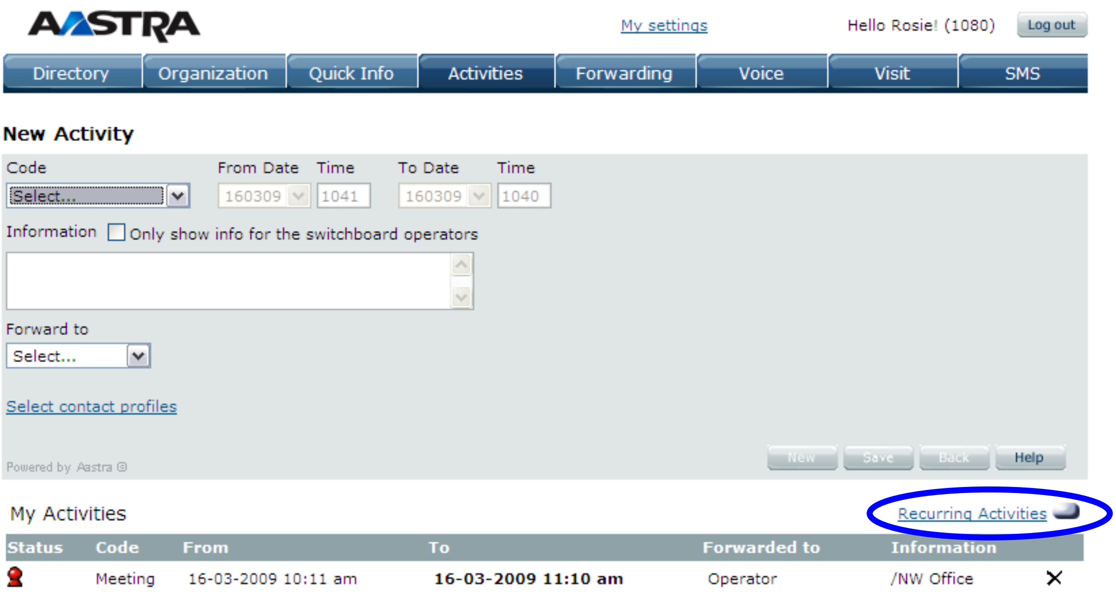


Figure 12. Creating a recurring activity

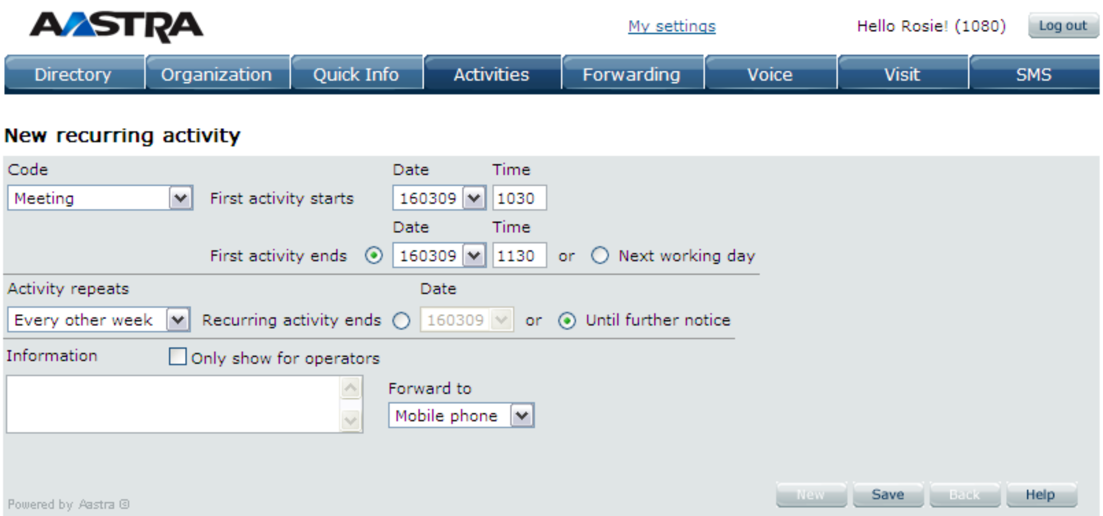


Figure 13. Filling in the information for a new recurring activity

Choose the activity *Code*, start time and end time for the first time of the recurring activity. Select the repeat interval of the activity, every day, every week etc. If you check the box *Only show for operators*, only the attendant can see what you have written in the *Information* field.

Change Recurring Activity

Click the activity you want to change in the *My recurring activities* list. Register your changes and click the *Save* button.

Delete Recurring Activity

If you want to delete an activity, click on the cross to the right of the activity in the *My recurring activities* list.

My recurring activities

Activities

Code	Next time	From	To	Repeats	Forwarded to	
Meeting	23-03-2009	Monday 12:00 pm	Monday 1:00 pm	Every week Monday	IVR	×

Figure 14. Deleting a recurring activity

Forwarding – Control Your Calls

For some exchanges it is possible to forward an extension without registering an activity. A call can be forwarded to a predefined destination, such as voice mail, or to a number that you have defined in a Personal Number profile. To be able to use a Personal Number profile, the function must have been activated, ask your system administrator if you are unsure. See section Change Personal Number on page 30 for information about personal numbers.

Click on the *Forward* tab to forward all your calls.

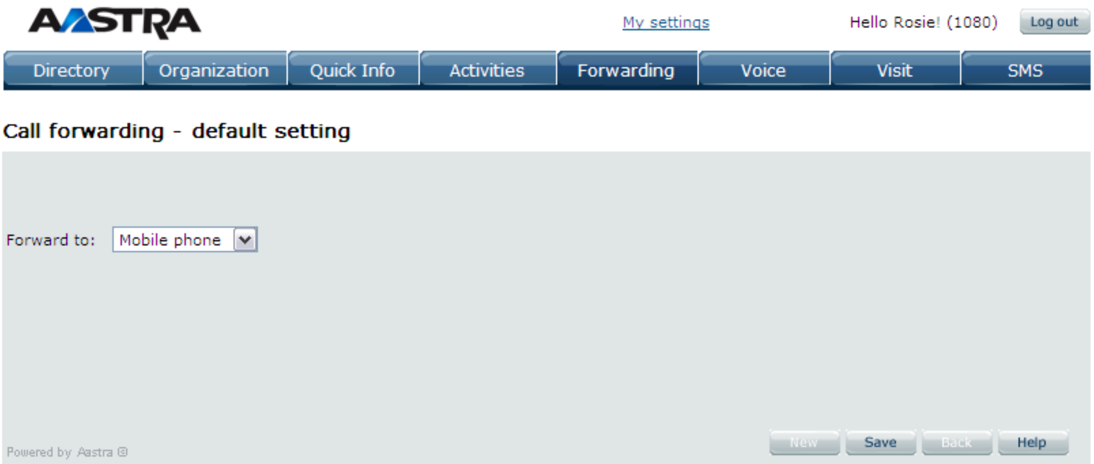


Figure 15. Using *Forwarding* to forward your extension to the mobile phone

In the *Forward to:* drop down menu, select where you want to forward your calls. To cancel your forwarding, select the menu item *No Forwarding*.

Click *Save* when finished.

Voice – Manage Your Voicemail and Voice Response

Click on the *Voice* tab in the main panel to access the voicemail and Interactive Voice Response (IVR) area of CMG Office Web.

The *Voice* function makes it possible to listen to and administer your voicemail and define settings for how you and the caller interact with the voice system. The voice part of CMG Office Web is divided into the following sections:

- Messages
- Phrases
- Menus
- Notifications
- Settings

Managing Voicemail Messages

Click on *Messages* to see and listen to your voicemails. Each voicemail is listed with status, length and a timestamp. New messages are listed first.

Figure 16. Managing voicemail messages in the *Messages* menu

Listen to a message

1. Select a message by clicking on it. The message is shown in the top of the window.
2. Click *Play*. Your phone will start to ring.
3. Answer the ringing phone and then click *OK*. The voicemail you chose to listen to will now be played in the phone. If you want to listen to another message, click on that message in the list followed by *Play*.

Forward a message to a colleague

1. Select a message. The message is shown in the top of the window.
2. In the field *Forward to extension*, enter the extension to which the message should be forwarded. To add a comment to the forwarded message check the box *Attach comment*.
3. Click *Forward*. If you chose to add a comment to the message, your phone will start ringing. Click *OK*, answer the phone and record a comment. The message is forwarded as soon as you hang up the phone. (If you did not choose to add a comment the message is forwarded as soon as you click *Forward*)

Delete a message

To delete a message, click on the cross to the right of the message.

Record Greeting Phrases

In *Phrases* you can record your own greeting phrases for different activities. You can combine your own recorded phrases with system-generated phrases. The system voice can for example tell the caller when you will be back but your own recorded phrase where you are.

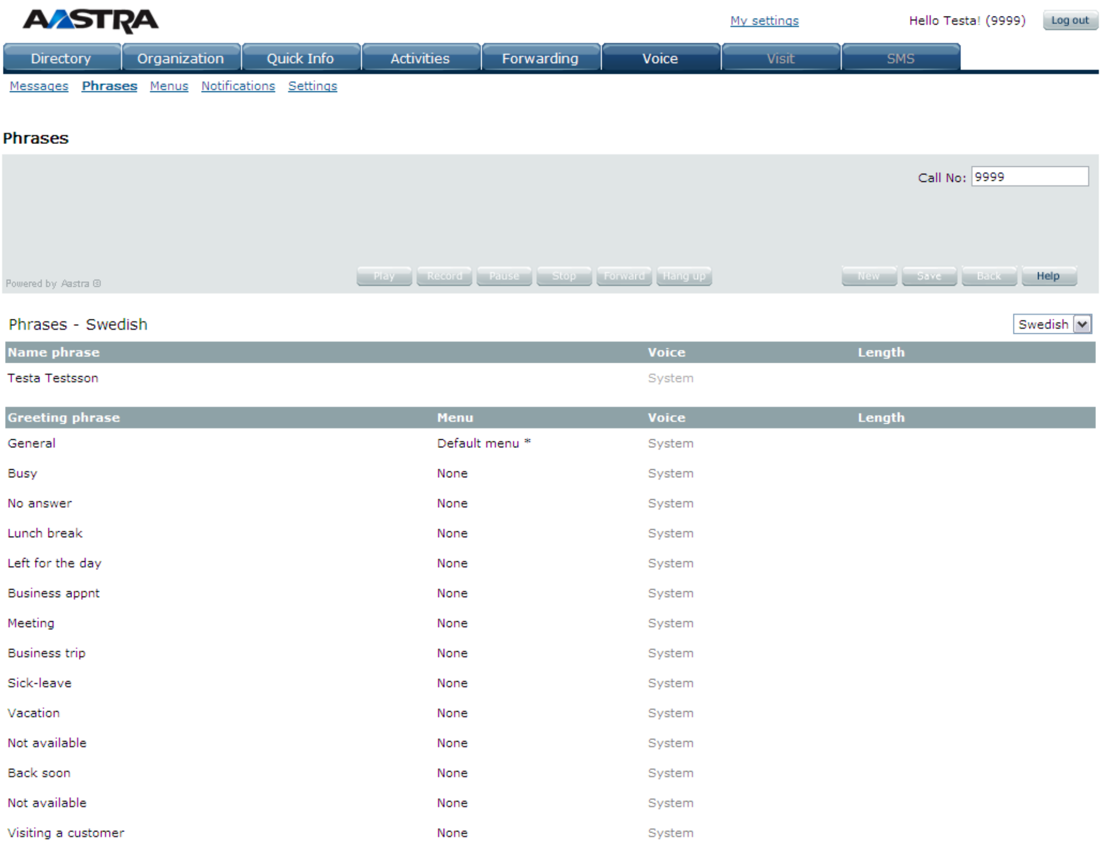


Figure 17. Recording greeting phrases in the *Phrases* menu

Name phrase and greeting phrase

There are two kinds of phrases - name phrase and greeting phrases. The name phrase consists of your name. The greeting phrase is related to a certain activity. You can for example record a special lunch greeting phrase: “Hello, you have reached Anna Anderson. I am at lunch and cannot take your call right now”.

General greeting phrase

You can record a general greeting phrase that will be used for all activities that do not already have a greeting phrase recorded.

Record a Phrase

1. Select a phrase from the list. Information about the phrase is shown in the top of the window.
2. Enter the extension of the phone you want to use when recording your phrase in the *Call no* field. The system always suggests the extension you used for logging in.
3. Click *Record*. The system will dial the extension stated in the *Call no* field.
4. Wait until the phone rings. Answer the phone and click *OK* in the popup window on the computer screen. You will hear a tone in the phone and the recording phase will start. Say your greeting phrase, for example “Hello, you have reached Anna Anderson. I cannot take your call right now”.
5. Click *Stop* to end the recording. Hang up the phone.

You can listen to the recorded phrase by clicking *Play*.

Menu Options for the Interactive Voice Response

Click on *Menus* to define the menu options that will be presented to a caller that reaches your Interactive Voice Response (IVR), for example:

"To record a voicemail, press 2; transfer the call to the mobile phone, press 4; transfer the call to an attendant, press 9".

Each option thus defines an action for the keys 0-9.

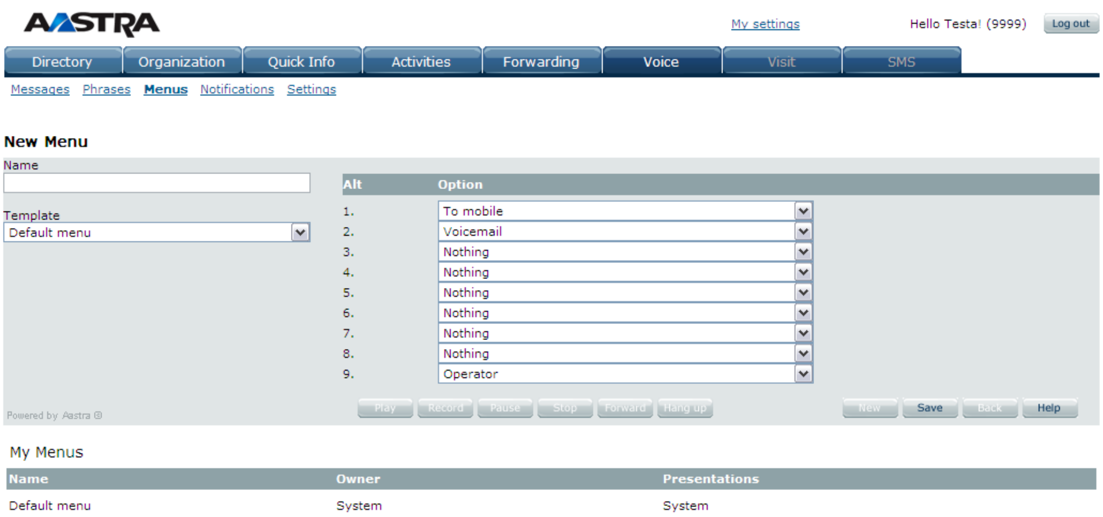


Figure 18. Managing menu options for the IVR in the *Menus* menu

Define a menu

1. Click *New*. A list with all the available options is displayed.
2. Select an option for each key. Options that are gray cannot be changed.
3. Enter a name for the menu and click *Save*. A popup window will now appear asking if you wish to record a menu presentation for the menu you just created. Click *OK* to record it, otherwise *Cancel*.

Notifications of New Voicemail

In *Notifications* you define how the system should handle notifications of new voicemails. Depending on the system configuration you can be notified by e-mail, a message indicator on a phone or by SMS.

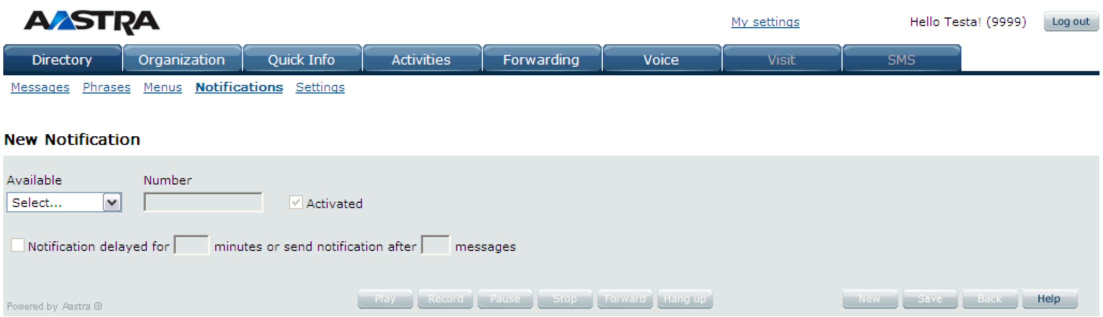


Figure 19. Managing notifications of new voicemails in the *Notifications* menu

New Notification

1. Select one of the available notification options. Your company's message system decides which options are available.
2. Select if the notification should be activated or not.
3. If you want, select *Notification delayed for* and enter after how many minutes or after how many new messages a notification should be sent.
4. Click *Save*.

Change Notification

1. Click on the notification that you wish to change in *My Notifications*.
2. Make the changes.
3. Click *Save*.

Settings

In *Settings* you can define how the system will interact with you and the ones who try to call you, but end up in the IVR.

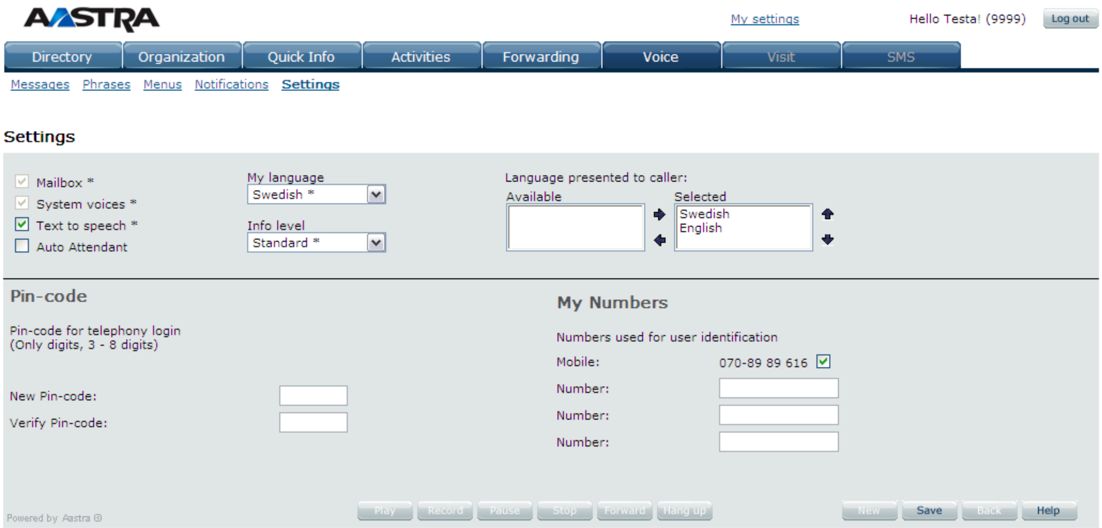


Figure 20. Managing voice settings

You can handle the following settings:

Field	Description
Mailbox	Crossed checkbox enables the voicemail box. If *Mailbox* is unchecked the callers cannot leave any voicemails.
System Voices	Crossed checkbox enables system voices. If *System voices* is unchecked the voice system will act as a regular answering machine with no activity information.
Text to speech	Crossed checkbox enables the system voice to read out your name instead of your extension.
Automatic attendant	Crossed checkbox enables the Automatic attendant (that is, Speech Attendant) to connect calls to your extension.
My language	Lets you choose the language you want to hear when calling the system.
Info level	Options for the level of information the IVR system gives you when interacting with the system: *Detailed*, *Standard* or *Minimized*.
Language presented to the caller	Options for which languages the calling party can use when interacting with the system. The language in the top of the list of chosen languages is the caller's default language. The other languages in the list are presented as optional to the caller. You can change the order of the list by clicking the *up-arrow* and

	down-arrow. To add another language: select the language from the list of available languages and click the *right-arrow*. To remove a language: select the language from the list of chosen languages and click the *left-arrow*.

My Numbers

You have the possibility to provide telephone numbers in order to identify yourself in the system. When you call your voicemail from one of these numbers, the system will recognize it and you will not have to login with your PIN code (see the online help for information about the PIN code).

Checking your Voicemail by Phone

You can listen to your messages and register activities either from the phone numbers you have entered in *My Numbers* or from any other phone. To access your voicemail from other phones than the ones in *My Numbers* you will need to enter your extension and your PIN code.

Visit – Register your Visitors

With the *Visit* tab you can register visitors in advance and view the status of registered visitors. If you register your visitors in advance, you make it easy for the receptionist to check in and provide the visitor with a badge.

New Visitor

Register the visitor's name, company and when he/she will arrive and leave. Also select how you want to be contacted when the visitor arrives. Click *Save*.

The visitor is now visible in the *My Visitors* list at the bottom of the page. The color of the dot before the visitor's name is dependent of its status.

Gray = Registered

Green = Checked in

Red = Visit time is exceeded

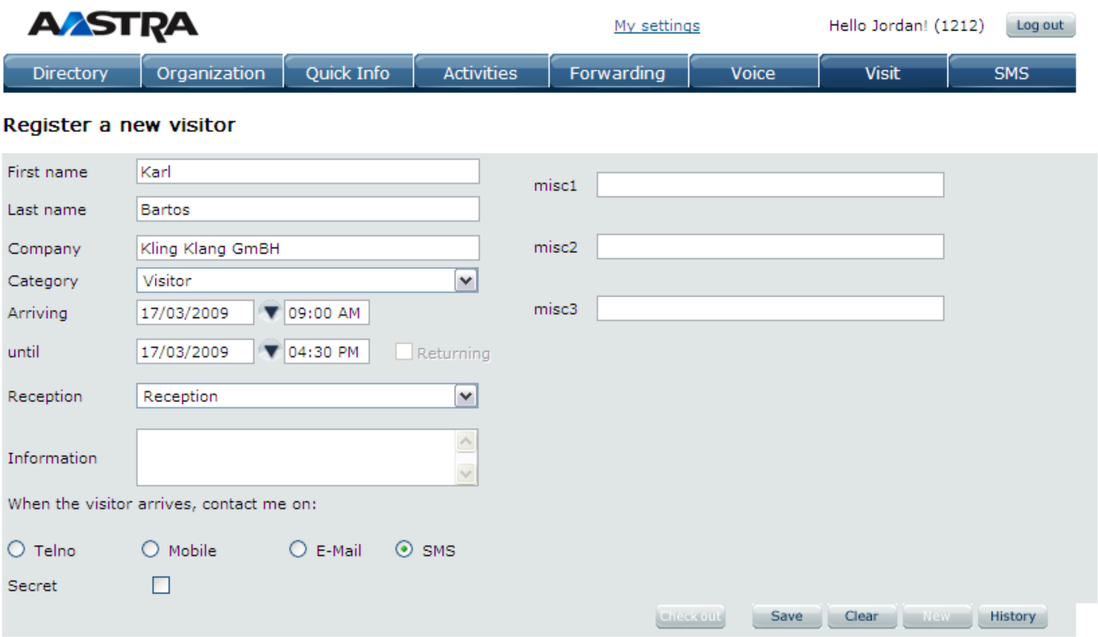


Figure 21. Register a new visitor

Delete Visitor

To delete a visitor, click on the cross to the right of the visitor in the *My visitors* list.

Figure 22. Deleting a visitor

Change Visitor Information

To change information for a visitor, select it in the *My visitors* list. The information is then shown in the top part of the window. Change the information in the form and click *Save*.

SMS — Send Text Messages

Click on the *SMS* tab to send a text message to any mobile number. Type the number and the text message in the respective field and click *Send*.

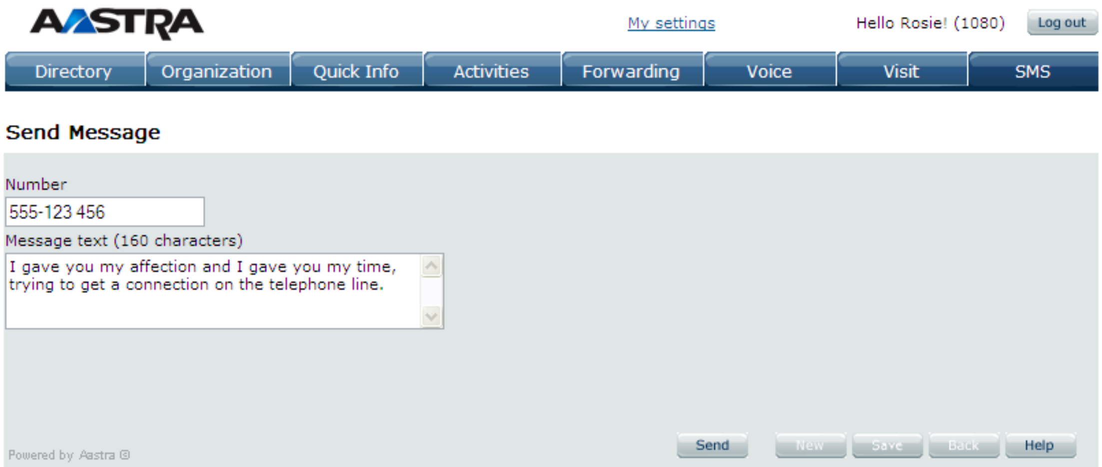


Figure 23. Sending an SMS

Log Out

Click the *Log out* button log out from the personal part of CMG Office Web.

Help — Online Help for Extended Information

Click the *Help* button to get online help. The online help includes more detailed information than this manual.

My Settings – Edit your Settings

Click *My settings* to view or change your password, language and other personal settings.

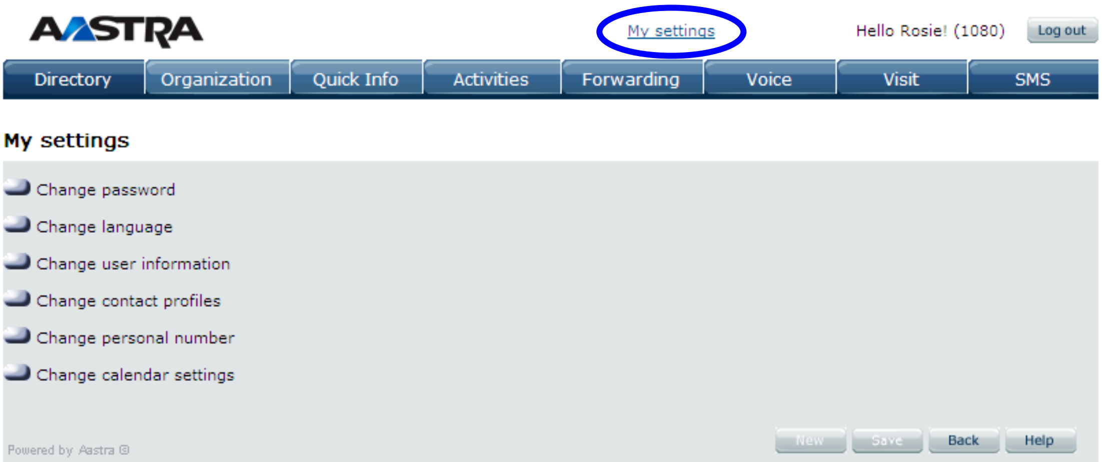


Figure 24. The personal settings page

Change Password

Click on the *Change Password* button. Write the old password (if you have any) and then write the new password and confirm it. Click *OK*.

It is defined in the system how many characters a password has to consist of, and whether it is case sensitive.

Change Language

Click on the *Change Language* button. Select the language you want to use and click on *Save*.

Change User Information

If you want to change some of your information visible for others, click *Change user information*. Then log in with your extension number and password. Register your changes and click *Change request*. A request will then be sent to the system operator to change the information.

Change Contact Profiles

With a contact profile you can control how an incoming call shall be handled for a certain type of activity. The profile that is connected to the activity type will be used automatically when you create the new activity, see page 13 for how to manage activities.

There are two different types of contact profiles:

- **System Contact Profile** – A profile that has been pre-defined by the system administrator.

- **Personal Contact Profile** – A profile that you can create to suit your needs, for example to include specific information to the operator and to colleagues. In addition to a Personal Contact Profile, you can use a *Personal Number* which is used to forward your calls to another phone, or to “a chain” of phones. See next section for more information about Personal Number Profiles.

System Contact Profiles are always available in CMG Office Web, while the possibility to create Personal Contact Profiles and Personal Numbers must be enabled in the system. Check with your system administrator if you are unsure.

The following figure shows the dialog where a contact profile is mapped to an activity. **Note** that a System Contact Profile has **(System)** attached to the profile name.

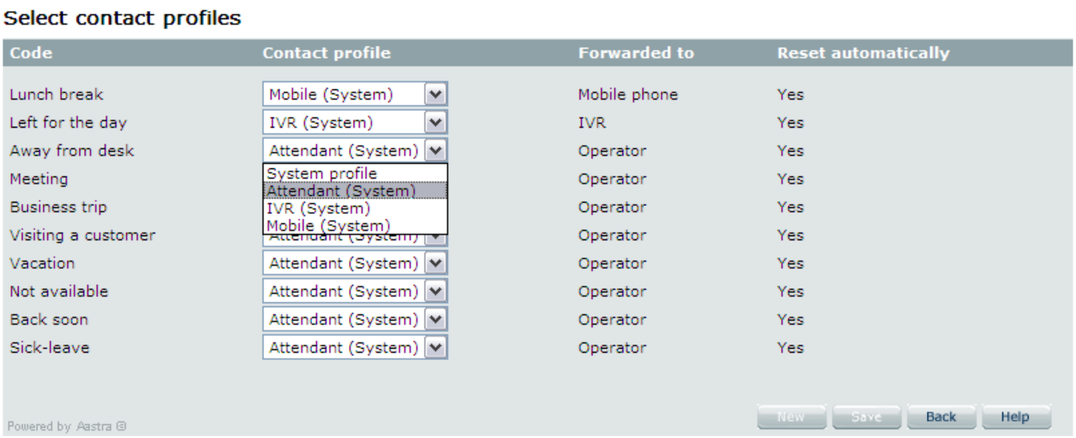


Figure 25. Use contact profiles to manage your absence and the forwarding of your phone

By selecting *New Profile…* in the *Contact profile* list, it is possible to create a new Personal Contact Profile for a certain activity:

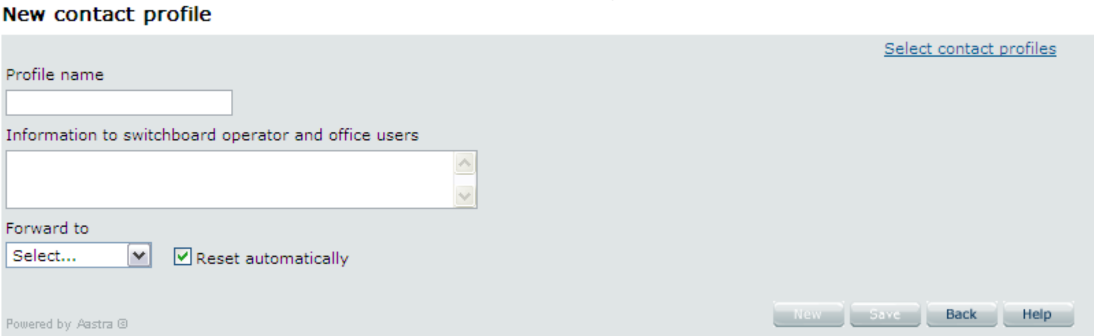
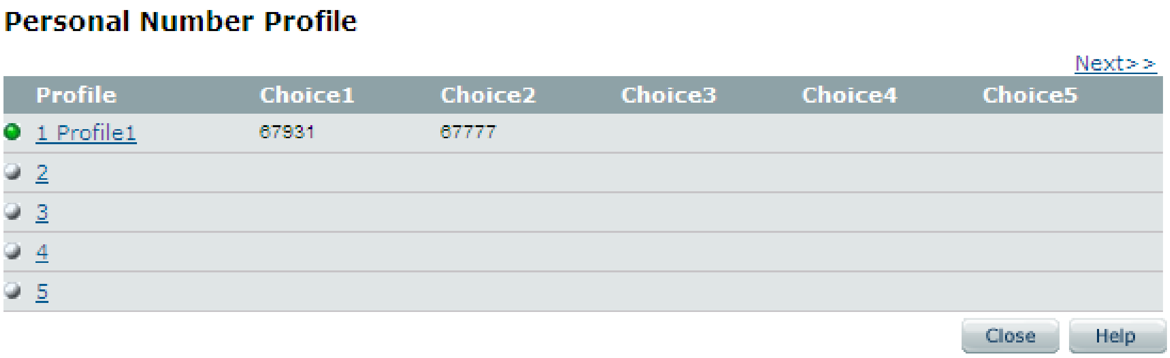


Figure 26. Creating a new contact profile

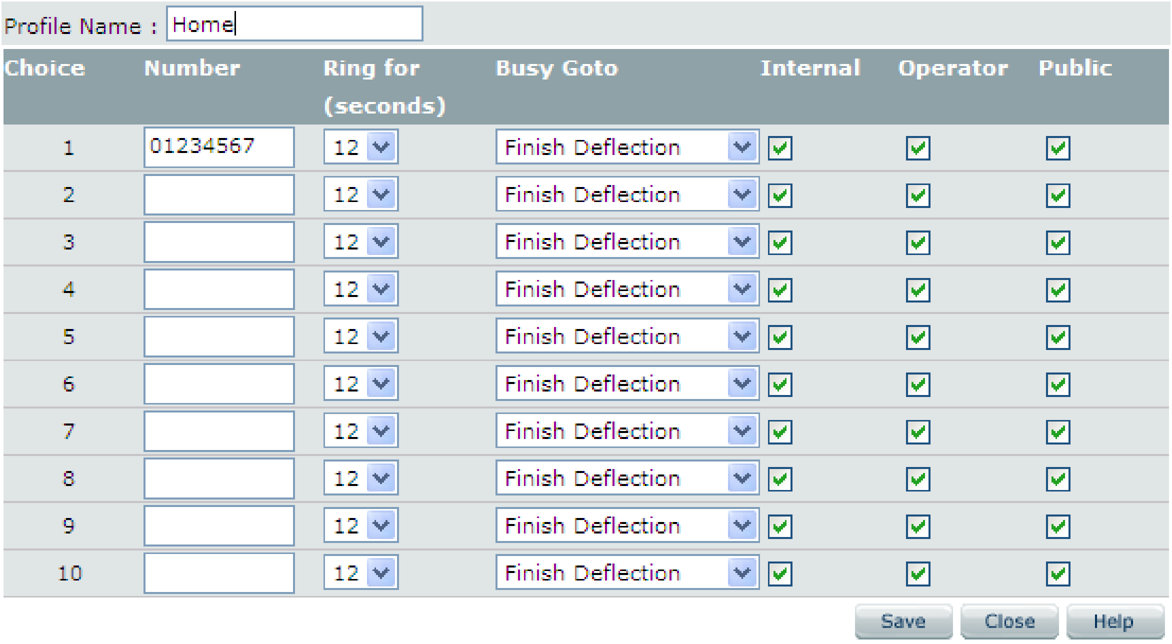
Change Personal Number

The Personal Number function can be used to forward your phone to an external number, or to a “chain” of internal and external numbers, to be called in any order when you do not answer or have entered a certain activity. For example, you can tell CMG Office Web that you first want to be called at your home phone. If there is no answer at home it may then call your mobile, and so on.

The possibility to create a Personal Number must have been enabled in the system, for this to work. Check with your system administrator if you are unsure.



Click the next available number in the *Profile* column and this dialog will appear:



Profile Name : Home

Choice	Number	Ring for (seconds)	Busy Goto	Internal	Operator	Public
1	01234567	12	Finish Deflection	☑	☑	☑
2		12	Finish Deflection	☑	☑	☑
3		12	Finish Deflection	☑	☑	☑
4		12	Finish Deflection	☑	☑	☑
5		12	Finish Deflection	☑	☑	☑
6		12	Finish Deflection	☑	☑	☑
7		12	Finish Deflection	☑	☑	☑
8		12	Finish Deflection	☑	☑	☑
9		12	Finish Deflection	☑	☑	☑
10		12	Finish Deflection	☑	☑	☑

Save Close Help

For *Choice* 1, add the phone number in the *Number* field, select for how many seconds the phone shall ring, fill in the *Profile Name* field, and then click *Save*. If you like to add another number, select "2" in the *Busy Goto* list and then add a new number for *Choice* 2. Click *Close* when finished.

Change Calendar Settings

Here you can set how activities in your calendar shall be managed. It is described on page 32.

About Calendar Synchronization

Calendar Connection

It is very simple to manage your incoming calls through your mail system calendar. When you have scheduled meetings, trips or holidays your calendar synchronizes with CMG Office Web. Your calls will then be forwarded according to the settings in CMG Office Web, for example to the attendant, voicemail or your mobile phone. You can do a number of settings to control the behavior of this function, see the Calendar Settings section below.

How Activities are Handled by the CMG System

When you schedule an activity in your calendar, it is transferred to the CMG system which closes your extension when the start time of the activity has been reached. CMG will read what you entered in the subject field and try to correlate this to what is defined in the system. For example, if you entered “Meeting with sales team” as subject in your calendar, the CMG system will close the extension with the code “Meeting”. If CMG cannot find a matching code, your extension will be closed with your defined standard code.

Note! If you change or delete the activity in your calendar, the change will be transferred to CMG. But if you change or delete the activity in CMG Office Web, the change will not be transferred to your calendar.

Calendar Settings

In CMG Office Web you can adjust your settings for the automatic calendar synchronization. Click *My settings* and then *Change calendar settings.*

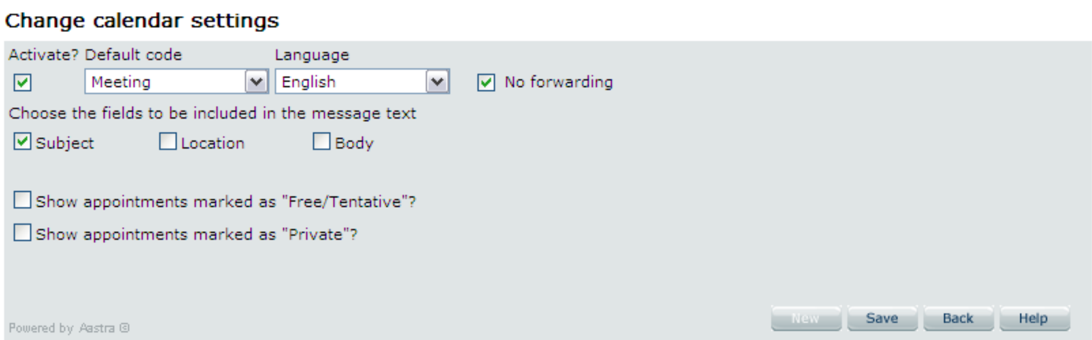


Figure 27. Changing your calendar settings

Activate?
This checkbox indicates whether appointments should be synchronized or not.

Default code
This reason will be used if the system cannot find an appointment reason by trying to match keywords in the subject, location or free text fields in the appointment.

Language
When the system matches appointment reason it will search for keywords in this language.

No forwarding
Whether or not an activity means that the extension is forwarded.

Choose the field to be included in the message text
The fields in the appointment that is checked will be transferred to CMG and be visible in CMG Office Web and for the attendant.

Show appointments marked as *Free/Tentative*?
If checked, appointments where the *Show time as Free* field (in your calendar) has been set to will be synchronized but the phone will not be forwarded during the appointment.

Show appointments marked as *Private*?
If cleared, appointments marked as *Private* will be not be synchronized to CMG. If checked, the appointments will be synchronized but no text fields will be transferred and no reason matching will occur. The default reason will be used.