BroadWorks Hosted Thin Receptionist

User Guide

Release 19.0

Document Version 5

9737 Washingtonian Boulevard, Suite 350
Gaithersburg, MD 20878
Tel +1 301.977.9440

WWW.BROADSOFT.COM

BroadWorks® Guide

Copyright Notice

Trademarks

BROADSOFT Innovation calling.

Document Revision History

Release	Version	Reason for Change	Date	Author
17.sp2	1	Created document.	October 14, 2010	Goska Auerbach
17.sp2	1	Edited document.	January 24, 2011	Jessica Boyle
17.sp2	1	Updated document.	January 24, 2011	Goska Auerbach
17.sp2	1	Edited changes and published document.	January 25, 2011	Jessica Boyle
17.sp2	2	Updated sections *6.3.1 Answer Call* and *6.4.2 Resume Held Call* for EV 126902.	February 23, 2011	Goska Auerbach
17.sp2	2	Updated section *13 Configure Receptionist* for EV 126771.	February 24, 2011	Goska Auerbach
17.sp2	2	Updated section 5 *Explore Workspace* for EV 127180.	February 28, 2011	Goska Auerbach
17.sp2	2	Updated section 5 *Explore Workspace* for EV 128936.	March 9, 2011	Goska Auerbach
17.sp2	2	Updated section *13.6 Settings – About* to align document with changes in the interface.	March 15, 2011	Goska Auerbach
17.sp2	2	Updated section 5 *Explore Workspace* for EV 126451.	March 15, 2011	Goska Auerbach
17.sp2	2	Edited changes and published document.	March 17, 2011	Jessica Boyle
17.sp2	3	Updated section *13.1.6 Workspace* for EV 119881.	March 23, 2011	Goska Auerbach
17.sp2	3	Updated sections *6.2.2 View Incoming Call Details* and *13.4.1 Notification* for EV 118621.	March 24, 2011	Goska Auerbach
17.sp2	3	Edited changes and published document	April 7, 2011	Andrea Fitzwilliam
17.sp2	4	Updated document with changes in the application.	April 18, 2011	Goska Auerbach
17.sp2	4	Updated section *12 Manage Queued Calls (Enterprise Edition)* for EV 141300. Updated section *Appendix B: Keyboard Shortcuts* for EV 130778.	May 11, 2011	Goska Auerbach
17.sp2	4	Updated sections *6.2.2 View Incoming Call Details* and *13.4.1 Notification* for EV 131521.	May 17, 2011	Goska Auerbach
17.sp2	4	Edited changes and published document.	May 26, 2011	Jessica Boyle
17.sp2	5	Updated section *12.1 Select Call Centers to Manage* for EV 141300.	June 10, 2011	Goska Auerbach
17.sp2	5	Edited changes.	July 26, 2011	Jessica Boyle
17.sp2	5	Edited changes.	August 9, 2011	Andrea Fitzwilliam
17.sp2	5	Updated document for the usability enhancements.	August 10, 2011	Goska Auerbach

Release	Version	Reason for Change	Date	Author
17.sp2	5	Updated sections *10.5 Contact States* and *14.1 Monitored User States* for EV 146017. Updated sections *9.5 Manage Personal Contacts* and *9.6 Manage Speed Dial Entries* for EV 145992. Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 146214.	August 11, 2011	Goska Auerbach
17.sp2	5	Edited changes.	August 15, 2011	Andrea Fitzwilliam
17.sp2	5	Updated sections *5.3 Contacts Pane* and *9.4 Make Notes About Contact (Enterprise Edition)* with comments from testing. Updated section *9.6 Manage Speed Dial Entries* for EV 145992.	August 18, 2011	Goska Auerbach
17.sp2	5	Edited changes and finalized document.	August 19, 2011	Andrea Fitzwilliam
17.sp2	5	Published document.	September 7, 2011	Patricia Renaud
17.sp2	6	Updated section *12.11 Order Queued Calls* for EV 142502.	September 12, 2011	Goska Auerbach
17.sp2	6	Updated section *10.1 Static Monitoring* for EV 144284.	September 14, 2011	Goska Auerbach
18.0	1	Updated document for Release 18.0	October 20, 2011	Goska Auerbach
18.0	1	Updated sections 4 *Getting Started* and *13.4.2 Microsoft Outlook* for EV 153628.	November 22, 2011	Goska Auerbach
18.0	1	Edited and published document.	December 31, 2011	Patricia Renaud
18.0	2	Updated document to align with changes in the interface.	February 2, 2012	Goska Auerbach
18.0	2	Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 159630.	February 21, 2012	Goska Auerbach
18.0	2	Edited changes and published document.	March 16, 2012	Jessica Boyle
19.0	1	Updated document for Release 19.0.	March 22, 2012	Goska Auerbach
19.0	1	Updated section *4.2 Sign in from Web Browser* for EV 160535.	May 11, 2012	Goska Auerbach
19.0	1	Edited changes.	October 9, 2012	Patricia Renaud
19.0	1	Edited changes and published document.	December 6, 2012	Jessica Boyle
19.0	2	Removed section on theme for EV 194697. Updated sections 5 *Explore Workspace* and *13.1.6 Workspace* for EV 175559.	June 7, 2013	Goska Auerbach
19.0	2	Edited changes and published document.	June 17, 2013	Jessica Boyle
19.0	3	Updated sections *5.5.1 Call Action Buttons* and *10.3 Request Dynamic Monitoring* for EV 196216.	July 8, 2013	Goska Auerbach
19.0	3	Updated document for the *Receptionist Usability Update For Directories Feature Description (EV 172852)* and for the *Diversion Info Availability for Queued Calls Feature Description (187126)*.	July 25, 2013	Goska Auerbach

Release	Version	Reason for Change	Date	Author
19.0	3	Updated section *14.4.5 Call Event Log* for EV 196539.	July 26, 2013	Goska Auerbach
19.0	3	Updated section *6.6 End Call* for EV 198717.	July 29, 2013	Goska Auerbach
19.0	3	Edited changes and published document.	August 27, 2013	Jessica Boyle
19.0	4	Updated sections *6.1 Drag and Drop Call onto Contact* and *14.1.7 Drag and Drop* for the changes in the drag and drop operation.	September 18, 2013	Goska Auerbach
19.0	4	Edited changes and published document.	September 25, 2013	Jessica Boyle
19.0	5	Updated sections *3.2.2 Contact Directories*, *10 Monitor Contacts*, and *10.2 Dynamic Monitoring (Enterprise Edition)* for EV 204600.	October 29, 2013	Goska Auerbach
19.0	5	Edited changes and published document.	January 8, 2014	Jessica Boyle

Table of Contents

1 Summary of Changes 14
1.1 Changes for Release 19.0, Document Version 5 14
1.2 Changes for Release 19.0, Document Version 4 14
1.3 Changes for Release 19.0, Document Version 3 14
1.4 Changes for Release 19.0, Document Version 2 14
1.5 Changes for Release 19.0, Document Version 1 14
1.6 Changes for Release 18.0, Document Version 2 15
1.7 Changes for Release 18.0, Document Version 1 15
1.8 Changes for Release 17.sp2, Document Version 6 15
1.9 Changes for Release 17.sp2, Document Version 5 15
1.10 Changes for Release 17.sp2, Document Version 4 16
1.11 Changes for Release 17.sp2, Document Version 3 16
1.12 Changes for Release 17.sp2, Document Version 2 16
1.13 Changes for Release 17.sp2, Document Version 1 16
2 About This Document 17
2.1 Audience 17
2.2 How This Guide is Organized 17
2.3 Additional Resources 18
3 Introduction to Receptionist 19
3.1 Receptionist Editions 19
3.2 Receptionist Enterprise 19
3.2.1 User Interface 20
3.2.2 Contact Directories 21
3.2.3 Call Management Functions 22
3.3 Receptionist Small Business 23
3.3.1 User Interface 23
3.3.2 Contact Directories 24
3.3.3 Call Management Functionality 24
3.4 Receptionist Office 25
3.4.1 User Interface 26
3.4.2 Contact Directories 26
3.4.3 Call Management Functionality 27
4 Getting Started 29
4.1 Launch Receptionist from Web Portal 29
4.2 Sign in from Web Browser 30
4.3 Sign-in Restrictions 31
4.4 Get Help 32
4.5 Sign Out 32
4.6 Set Up Your Environment (Enterprise Edition) 32

4.7 Change Your IM&P Presence State 33
4.8 Change Your Password 34
5 Explore Workspace 35
5.1 Logo Pane 36
5.1.1 Global Message Area 36
5.1.2 Settings, Help, and Sign Out Links 36
5.1.3 Signed-in User Information 36
5.2 Call Console 37
5.2.1 Header 38
5.2.2 Dialer 38
5.2.3 Current Calls 39
5.2.4 Conference Call Panel 40
5.2.5 Call States and Actions 40
5.3 Contacts Pane 41
5.3.1 Directory Management Bar 42
5.3.2 Directories List 42
5.3.3 Search Tab 43
5.3.4 Favorites Tab 43
5.3.5 Group/Enterprise Tab 44
5.3.6 Group/Enterprise Common Tab 44
5.3.7 Personal Tab 45
5.3.8 Speed Dial Tab 45
5.3.9 Queues Tab (Enterprise Edition) 46
5.3.10 Custom Directories Tab (Enterprise Edition) 46
5.3.11 Instant Message Tab 47
5.3.12 Outlook Tab (Enterprise Edition) 47
5.3.13 Search Results Tabs 47
5.4 Queued Calls Pane (Enterprise Edition) 48
5.5 Controls 49
5.5.1 Call Action Buttons 51
6 Manage Calls 53
6.1 Drag and Drop Call onto Contact 53
6.2 View Call Information 54
6.2.1 View Current Calls 54
6.2.2 View Incoming Call Details 54
6.2.3 Save vCard 55
6.2.4 Open URL 55
6.3 Answering Calls 56
6.3.1 Answer Call 56
6.3.2 Pick Up Call 56
6.4 Hold and Resume Calls 57
6.4.1 Put Call on Hold 57

6.4.2 Resume Held Call 57
6.5 Make and End Calls 57
6.5.1 Dial Ad Hoc Number 57
6.5.2 Redial Number 57
6.5.3 Dial Contact 58
6.5.4 Speed Dial 58
6.5.5 Dial from History 59
6.6 End Call 59
6.7 Transferring Calls 59
6.7.1 Blind Transfer Call 59
6.7.2 Conduct Supervised Transfer 60
6.7.3 Transfer with Consultation 60
6.7.4 Transfer to Voice Mail 60
6.7.5 Transfer to Queue (Enterprise Edition) 61
6.8 Parking and Camping Calls 61
6.8.1 Conduct Busy Camp On (Enterprise and Small Business Editions) 61
6.8.2 Conduct Group Call Park (Enterprise Edition) 62
6.9 Manage Conference Calls 62
6.9.1 Start Three-Way Conference 63
6.9.2 Add Participant to Conference 63
6.9.3 Hold Conference 63
6.9.4 Resume Held Conference 63
6.9.5 Put Conference Participant on Hold 64
6.9.6 Resume Conference Participant 64
6.9.7 Leave Conference 64
6.9.8 Remove Conference Participant 64
6.9.9 End Conference 64
6.9.10 Barge in on Call 64
6.10 Record Calls 65
6.10.1 Manually Record Call 65
6.10.2 Automatically Record Calls 65
7 Message Contacts (Enterprise Edition) 66
7.1 Send E-mail to Contact 66
8 Monitor IM&P Contacts and Chat with Contacts 67
8.1 Monitor IM&P Contacts 67
8.1.1 Subscribe to Contact 67
8.1.2 Add Contact to Instant Message Directory 68
8.1.3 Modify Contact Name 69
8.1.4 Unsubscribe from Contact 69
8.1.5 Accept or Reject Subscription Request 69
8.1.6 View Presence State of Contacts 70
8.2 Chat with IM&P Contacts 71

8.2.1 Start Instant Messaging Session 71
8.2.2 Place Call from Chat Window 72
8.2.3 Establish Multi-User Chat Session 72
8.2.4 Manage Instant Messaging Sessions 74
9 Manage Contacts 75
9.1 Show/Hide Directories 76
9.2 View Directory Content 76
9.3 Search Contacts 77
9.3.1 Perform Quick Search 77
9.3.2 Perform Regular Search 78
9.3.3 Create Directory from Search Results 80
9.3.4 Perform Search on Search Results 81
9.3.5 Order Directory Entries 81
9.4 Make Notes About Contact (Enterprise Edition) 82
9.5 Manage Personal Contacts 84
9.5.1 Add Personal Contact 84
9.5.2 Delete Personal Contact 85
9.6 Manage Speed Dial Entries 85
9.6.1 Add Speed Dial Entry 86
9.6.2 Modify Speed Dial Entry 86
9.6.3 Delete Speed Dial Entry 87
10 Monitor Contacts 88
10.1 Static Monitoring 88
10.2 Dynamic Monitoring (Enterprise Edition) 89
10.3 Request Dynamic Monitoring 89
10.4 Monitored User's Calendar (Enterprise and Small Business Editions) 90
10.5 Contact States 91
11 Manage Call History 92
11.1 View Call History 92
11.2 Delete Call History 92
12 Manage Queued Calls (Enterprise Edition) 93
12.1 Select Call Centers to Manage 93
12.2 Modify Number of Calls to Display 94
12.3 View Queued Calls 94
12.4 Retrieve Call from Queue 94
12.5 Transfer Call to Ad Hoc Number 95
12.6 Transfer Call Between Queues 95
12.7 Change Position of Call in Queue 95
12.8 Transfer Call to Top of Queue (Premium Call Center) 95
12.9 Promote Call in Queue (Premium Call Center) 96
12.10 Group Calls 96

12.11 Order Queued Calls ... 96
13 Configure Web Browser for Receptionist ... 98
13.1 Configure Internet Explorer for Full Screen Mode ... 98
14 Configure Receptionist ... 99
14.1 Settings – General ... 99
14.1.1 Account ... 100
14.1.2 Language ... 100
14.1.3 Screen Pop ... 100
14.1.4 Date Format ... 101
14.1.5 Time Format ... 102
14.1.6 Workspace ... 102
14.1.7 Drag and Drop ... 102
14.2 Settings – Application ... 103
14.2.1 Queue Membership ... 103
14.2.2 Operator Policies ... 103
14.3 Settings – Services ... 104
14.4 Settings – Plug-ins ... 105
14.4.1 Notification ... 105
14.4.2 Microsoft Outlook ... 106
14.4.3 LDAP v3 ... 106
14.4.4 Program Shortcuts ... 107
14.4.5 Call Event Log ... 108
14.5 Settings – Messaging ... 109
14.5.1 E-mail Messaging ... 109
14.5.2 Instant Messaging and Presence ... 110
14.6 Settings – About ... 110
15 Appendix A: Glossary and Definitions ... 111
15.1 Monitored User States ... 111
15.2 Call States ... 111
15.3 Instant Messaging and Presence States ... 112
16 Appendix B: Keyboard Shortcuts ... 113
Index ... 115

Table of Figures

Figure 1 Receptionist Enterprise Main Interface 20
Figure 2 Receptionist Small Business Main Interface 23
Figure 3 Receptionist Office Main Interface 26
Figure 4 BroadWorks Web Portal Logo Pane – Launching Receptionist 29
Figure 5 Receptionist Sign-in Page 30
Figure 6 Receptionist Sign-in Page – Advanced Options 31
Figure 7 Sign-in Dialog Box with Error Message 31
Figure 8 Receptionist Main Interface (Top of Page) with Error Message 32
Figure 9 Main Interface (Top of Page) – Help Link 32
Figure 10 Question Dialog Box 32
Figure 11 Logo Pane – IM&P Presence State Control 33
Figure 12 Set IM Status Dialog Box 33
Figure 13 IM&P Status Message 33
Figure 14 Account – Change Password 34
Figure 15 Receptionist Enterprise Main Interface 35
Figure 16 Receptionist Logo Pane 36
Figure 17 Signed-in User Information 36
Figure 18 Call Console 37
Figure 19 Call Console – Dialer 38
Figure 20 Call Console – Current Calls 39
Figure 21 Call Console – Call with Diversion Information 39
Figure 22 Conference Call Panel 40
Figure 23 Receptionist Enterprise Contacts Pane 41
Figure 24 Group Tab – Contact in Focus with Action Buttons 42
Figure 25 Directories Management Bar 42
Figure 26 Contacts Pane – Search Tab 43
Figure 27 Contacts Pane – Favorites Tab 43
Figure 28 Contacts Pane – Group Tab 44
Figure 29 Contacts Pane – Group Tab with Contacts' IM&P State 44
Figure 30 Contacts Pane – Group Common Tab 45
Figure 31 Contacts Pane – Personal Tab 45
Figure 32 Contacts Pane – Speed Dial Tab 46
Figure 33 Contacts Pane – Queues Tab 46
Figure 34 Contacts Pane – Custom (Directory) Tab 46
Figure 35 Contacts Pane – Instant Message Tab 47
Figure 36 Contacts Pane – Outlook Tab 47
Figure 37 Contacts Pane – Search Results Tab 48
Figure 38 Queued Calls Pane 48
Figure 39 Queued Calls Pane – Call Center Panel (Expanded) 49
Figure 40 Custom Contacts Directory – Contact in Focus with Action Buttons 51
Figure 41 Call Console 53
Figure 42 Dragging Call and Dropping it on Contact 53
Figure 43 Call Notification Pop-up Window for Non-ACD Call 54
Figure 44 Call Notification Pop-up Window − Call from Call Center 54
Figure 45 Call Notification Pop-up Window with Diversion Information 55
Figure 46 Dialer 57
Figure 47 Dialer – Select Recently Dialed Number 57
Figure 48 Dialer – Redialing Number 58
Figure 49 Group Tab – Contact in Focus with Transfer, Call, Extension, and Mobile Buttons 58
Figure 50 Call History Dialog Box 59

Figure 51 Call Console – Conference Call Panel ... 62
Figure 52 Starting Conference ... 63
Figure 53 Call Being Recorded ... 65
Figure 54 Contact (IM) Subscribe Dialog Box ... 67
Figure 55 Contact (IM) Re-Subscribe Dialog Box ... 68
Figure 56 Edit Instant Message Contacts Dialog Box – Add Contact ... 68
Figure 57 Edit Instant Message Contacts Dialog Box – Modify Contact ... 69
Figure 58 Contact (IM) Unsubscribe Dialog Box ... 69
Figure 59 Contact (IM) Request Dialog Box ... 69
Figure 60 IM&P Presence State of Contacts ... 70
Figure 61 IM&P Contact with Chat button ... 71
Figure 62 Chat Window ... 72
Figure 63 Add Participants to a Chat ... 73
Figure 64 Multiuser Chat ... 73
Figure 65 Contacts Pane ... 75
Figure 66 Contacts Pane – Expanded Options Menu ... 76
Figure 67 Contacts Pane – Performing Quick Search ... 77
Figure 68 Contacts Pane – Performing Regular Search ... 78
Figure 69 Contacts Pane – Search Results ... 79
Figure 70 Contacts Pane – Search Results in the Search Tab ... 79
Figure 71 Performing Search Using Search Tab ... 79
Figure 72 Results of Search Performed in Search Tab ... 80
Figure 73 Sort Directory ... 82
Figure 74 Group Directory – Contacts Notes ... 82
Figure 75 Notes for Madoline Wyoming Dialog Box ... 83
Figure 76 Group Directory – Contact Notes ... 83
Figure 77 Personal Tab ... 84
Figure 78 Edit Personal Contacts Dialog Box – Add Entry ... 84
Figure 79 Edit Personal Contacts Dialog Box – Delete Entry ... 85
Figure 80 Speed Dial Tab ... 85
Figure 81 Edit Speed Dials Dialog Box – Add Entry ... 86
Figure 82 Edit Speed Dials Dialog Box – Modify Entry ... 87
Figure 83 Edit Speed Dials Dialog Box – Delete Entry ... 87
Figure 84 Favorites Directory with Monitored Contacts ... 88
Figure 85 Group Directory with Monitored Contacts ... 89
Figure 86 Group Directory – Requesting Contact Monitoring ... 89
Figure 87 Group Directory – Monitored Contacts ... 90
Figure 88 Contacts Pane – Monitored User's Calendar Details ... 90
Figure 89 Call History Dialog Box ... 92
Figure 90 Queued Calls Pane ... 93
Figure 91 Queued Calls – Options – Edit Queue Favorite Dialogue. ... 93
Figure 92 Edit Queue Favorites Dialog Box ... 94
Figure 93 Ad Hoc Queue Transfer ... 95
Figure 94 Reordering Queued Call ... 95
Figure 95 Transferring Call to Top of Queue ... 96
Figure 96 Queued Calls – Options – Group ... 96
Figure 97 Queued Calls – Options – Sort ... 97
Figure 98 Internet Explorer Security Settings – Internet Zone Dialog Box ... 98
Figure 99 Setting – General ... 99
Figure 100 Account – Change Password ... 100
Figure 101 Settings – Application ... 103
Figure 102 Settings – Services ... 104
Figure 103 Settings – Plugins ... 105
Figure 104 Settings – Messaging ... 109

Figure 105 Settings – About Page 110

1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for Release 19.0, Document Version 5

This version of the document includes the following changes:

- Updated sections *3.2.2 Contact Directories*, *10 Monitor Contacts*, and *10.2 Dynamic Monitoring (Enterprise Edition)* for EV 204600.

1.2 Changes for Release 19.0, Document Version 4

This version of the document includes the following changes:

- Updated sections *6.1 Drag and Drop Call onto Contact* and *14.1.7 Drag and Drop* for the changes in the drag and drop operation.

1.3 Changes for Release 19.0, Document Version 3

This version of the document includes the following changes:

- Updated sections *5.5.1 Call Action Buttons* and *10.3 Request Dynamic Monitoring* for EV 196216.
- Updated document for the *Receptionist Usability Update For Directories Feature Description (EV 172852)*.
- Updated sections *5.2.3 Current Calls*, *6.2.2 View Incoming Call Details*, and *13.1.3 Screen Pop* for the *Diversion Info Availability for Queued Calls Feature Description (187126)*.
- Updated section *14.4.5 Call Event Log* for EV 196539.
- Updated section *6.6 End Call* for EV 198717.

1.4 Changes for Release 19.0, Document Version 2

This version of the document includes the following changes:

- Removed section on theme for EV 194697.
- Updated sections 5 *Explore Workspace* and *14.1.6 Workspace* for EV 175559.

1.5 Changes for Release 19.0, Document Version 1

This version of the document includes the following changes:

- Updated document for the *Web Pop URL Enhancement – Call Center and Receptionist Feature Description* (EV 150425).
- Updated the description of the *Unknown* phone state in sections *10.5 Contact States* and *15.1 Monitored User States*.
- Updated document for the *IM&P for Call Center and Receptionist Clients Feature Description* (EV 150369).
- Updated section *4.2 Sign in from Web Browser* for EV 160535.
- Added section *4.3 Sign-in Restrictions* for the *Thin Client Single User Login Restrictions Feature Description* (EV 163737).

- Updated sections *5.1.3 Signed-in User Information*, *10 Monitor Contacts*, and *15 Appendix A: Glossary and Definitions* for the *Calendar Presence Integration Feature Description* (EV 142625).
- Added sections *4.7 Change Your IM&P Presence State* and 8 *Monitor IM&P Contacts and Chat with Contacts* and updated section 9 *Manage Contacts* for the *IM&P for Call Center and Receptionist Clients Feature Description* (EV 150369).
- Updated document for changes *in the user interface and added section 5.3.5 Group/Enterprise Common Tab.*

1.6 Changes for Release 18.0, Document Version 2

This version of the document includes the following changes:

- Updated sections *3.2.1 User Interface*, *3.3.1 User Interface*, *3.4.1 User Interface*, 5 *Explore Workspace*, *5.4 Queued Calls Pane (Enterprise Edition)*, and *12 Manage Queued Calls (Enterprise Edition)* to align document with changes in the application.
- Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 159630. The position of the following information in the *Queued Calls* pane has changed: The name and number of the remote party and the name and number of the DNIS/call center that took the call.

1.7 Changes for Release 18.0, Document Version 1

This version of the document includes the following changes:

- Added section *6.10 Record Calls* for the *Call Recording – Thin Clients Feature Description* (EVs 46939 and 141973).
- Updated sections *5.1.3 Signed-in User Information*, *5.2.3 Current Calls*, *5.2.5 Call States and Actions*, and *10 Monitor Contacts* for the *Call Park and Recall Enhancements – Receptionist Thin Feature Description* (EV 105267).
- Updated sections 4 *Getting Started* and *13.4.2 Microsoft Outlook* for EV 153628.

1.8 Changes for Release 17.sp2, Document Version 6

This version of the document includes the following changes:

- Updated section *12.11 Order Queued Calls* for EV 142502.
- Updated section *10 Monitor Contacts* for EV 144284.

1.9 Changes for Release 17.sp2, Document Version 5

This version of the document includes the following changes:

- Updated section *12.1 Select Call Centers to Manage* for EV 141300.
- Updated document for the usability enhancements.
- Updated sections *10.5 Contact States* and *14.1 Monitored User States* for EV 146017.
- Updated sections *9.5 Manage Personal Contacts* and *9.6 Manage Speed Dial Entries* for EV 145992.
- Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 146214.
- Updated sections *5.3 Contacts Pane* and *9.4 Make Notes About Contact (Enterprise Edition)* with comments from testing.

1.10 Changes for Release 17.sp2, Document Version 4

This version of the document includes the following changes:

- Updated document with changes in the application.
- Updated section *12 Manage Queued Calls (Enterprise Edition)* for EV 141300.
- Updated section *Appendix B: Keyboard Shortcuts* for EV 130778.
- Updated sections *6.2.2 View Incoming Call Details* and *14.4.1 Notification* for EV 131521.

1.11 Changes for Release 17.sp2, Document Version 3

This version of the document includes the following changes:

- Updated section *14.1.6 Workspace* for EV 119881.
- Updated sections *6.2.2 View Incoming Call Details* and *13.4.1 Notification* for EV 118621.

1.12 Changes for Release 17.sp2, Document Version 2

This version of the document includes the following changes:

- Updated sections *6.3.1 Answer Call* and *6.4.2 Resume Held Call* for EV 126902.
- Updated section *14 Configure Receptionist* for EV 126771.
- Updated section 5 *Explore Workspace* for EV 127180 and 128936.
- Updated section *14.6 Settings – About* to align document with changes in the interface.
- Updated section 5 *Explore Workspace* for EV 126451.

1.13 Changes for Release 17.sp2, Document Version 1

This is a new document.

2 About This Document

This guide provides step-by-step procedures and reference information for BroadWorks Hosted Thin Receptionist Release 19.0.

BroadWorks Hosted Thin Receptionist herein is referred to as Receptionist, Receptionist client, or client.

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users. This guide covers all three editions of Receptionist.

2.1 Audience

This document is intended for end users of Hosted Thin Receptionist Enterprise, Small Business, and Office.

2.2 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by Receptionist.

Section	Overview
Introduction to Receptionist	This section provides an overview of Receptionist and its three editions: Enterprise, Small Business, and Office.
Getting Started	This section describes how to sign in and out of Receptionist, perform the initial setup, change password, and obtain help.
Explore Workspace	This section provides an overview of the user interface.
Manage Calls	This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.
Message Contacts (Enterprise Edition)	This section includes information on how to send e-mail messages to contacts.
Monitor IM&P Contacts and Chat with Contacts	This section provides information about monitoring your IM&P contacts and chatting with them.
Manage Contacts	This section provides information on managing contact directories and searching for contacts.
Monitor Contacts	This section describes static and dynamic monitoring and includes information on how to select contacts to monitor.
Manage Call History	This section provides information on managing call logs.
Manage Queued Calls (Enterprise Edition)	This section provides information on managing queued calls.
Configure Receptionist	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
Appendix A: Glossary and Definitions	This appendix contains definitions of call states and phone states used in Receptionist.
Appendix B: Keyboard Shortcuts	This appendix describes keyboard shortcuts available in Receptionist.

2.3 Additional Resources

For more information on Receptionist and on Application Server procedures used by group administrators, department administrators, and users, see the following BroadWorks guides:

- *BroadWorks Hosted Thin Receptionist Configuration and Administration Guide*
- *BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2)*
- *BroadWorks Getting Started Web Interface Administration Guide*
- *BroadWorks CommPilot Call Manager and Attendant Console User Guide*
- *BroadWorks Application Server User Web Interface Administration Guide*

3 Introduction to Receptionist

BroadWorks Receptionist is a carrier-class Internet Protocol (IP) Telephony Attendant Console, specifically developed for hosted environments. It is used by "front-of-house" receptionists or telephone attendants, who screen inbound calls for enterprises. BroadWorks Receptionist realizes the promise of IP telephony by enhancing business processes and delivering rich services in a user-friendly way.

BroadWorks Receptionist delivers the following real benefits to users:

- An elegant design that is aesthetically pleasing
- An ergonomic design that follows the natural work "flow" of a call from the left to the right of the screen
- Improved business processes as only "valid" options are presented to the attendant
- Professional call handling as critical information is available in "real time"
- Accurate delivery of messages through a one-step process when people are unavailable
- Web-based interface, accessible from a web browser

In Release 19.0, BroadWorks Receptionist is offered in one architectural variant:

- **Hosted Thin Receptionist** – Introduced in Release 17.sp2, Hosted Thin Receptionist is a SaaS Rich Internet Application (RIA) hosted on BroadWorks and allows you to manage calls from a web browser.

NOTE: For information about the web browsers supported by Receptionist, see the *BroadWorks Hosted Thin Receptionist Configuration and Administration Guide* or contact your administrator.

This document describes the BroadWorks Hosted Thin Receptionist client.

3.1 Receptionist Editions

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users.

The following sections provide an overview of the Receptionist Enterprise, Small Business, and Office interface and functionality and refer you to other sections of the document for more information.

NOTE: Features available in a specific version are identified and tagged with the edition's name.

3.2 Receptionist Enterprise

The Receptionist Enterprise edition is a BroadWorks full-featured client, designed to support the needs of front-office personnel in any environment. It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options, and views, Outlook integration, and other features required in large or distributed organizations.

3.2.1 User Interface

Figure 1 shows the main interface of Receptionist Enterprise.

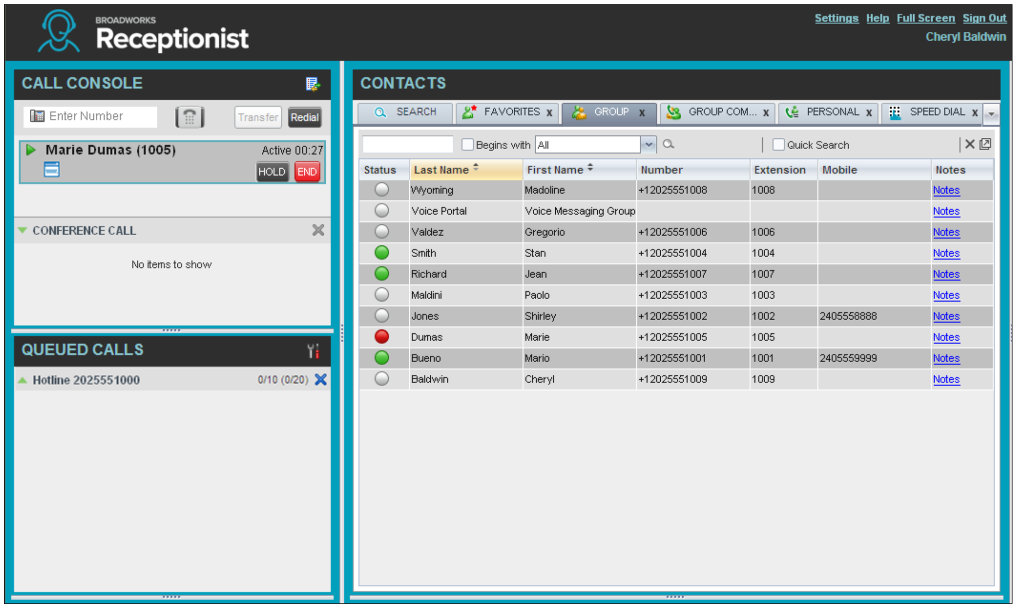


Figure 1 Receptionist Enterprise Main Interface

The interface contains the following main work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Queued Calls pane** – This is where you manage queued calls. You need to have the BroadWorks Supervisor service assigned to have access to this feature.
- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the *Call History* dialog box to view and return your past calls.
- **Chat windows** – You use a *Chat* window to chat with Instant Messaging and Presence (IM&P) contacts.

For more information, see section *5 Explore Workspace*.

3.2.2 Contact Directories

This following table lists the contact directories available in Receptionist Enterprise. The *Comments* column specifies additional settings required to access the directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 200 static contacts enterprise-wide.
Group/Enterprise	This consists of all contacts in your BroadWorks group or enterprise directory. This is the same directory that you can access through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	You can dynamically monitor contacts in your Group/Enterprise directory. The maximum number of contacts you can dynamically monitor is configured by your administrator and cannot exceed 100.
Group/Enterprise Common	This consists of all contacts in your group/enterprise's common phone list configured by your administrator on BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Personal	This consists of all contacts in your personal directory on the BroadWorks web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of the IM&P users that you are subscribed to.	You need to have the Integrated IM&P or Third-Party IM&P service assigned.
Queues	This consists of the call centers and associated DNIS numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues quickly.	You need to have Call Center service assigned.
LDAP (search only)	This consists of all users found in the configured LDAP directory. Receptionist provides you with search access to LDAP and results are displayed in the *Search* tab.	The directory needs to be configured by your system administrator. Otherwise, it is not visible. You also need to have the LDAP Integration service assigned.
Custom: <custom contact directory name>	This consists of all contacts in your custom contact directories configured by your administrator on the web portal. Each custom directory is displayed in a separate tab.	You may not have any contact directories or you may have several.
Outlook	This consists of all your Outlook contacts.	You need to have Outlook Integration service assigned.

For information on managing your contact directories, see section 9 *Manage Contacts*; for information on using your contacts to make and manage calls, see section 6 *Manage Calls*; for information on monitoring contacts, see section *10 Monitor Contacts*.

3.2.3 Call Management Functions

The Receptionist Enterprise provides the following call management functions:

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Transfer to Queue	Transfer to Queue (Enterprise Edition)
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Group Call Park	Conduct Group Call Park (Enterprise Edition)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

For more information, see section 6 *Manage Calls*.

3.3 Receptionist Small Business

The Receptionist Small Business edition is a lower-priced version of the client, targeted at front-office personnel in small and mid-sized organizations that do not require multiple directories, call queuing, or other advanced features. It supports a full set of call control functions and monitoring of up to 30 lines in the directory.

3.3.1 User Interface

Figure 2 shows the main interface of Receptionist Small Business.

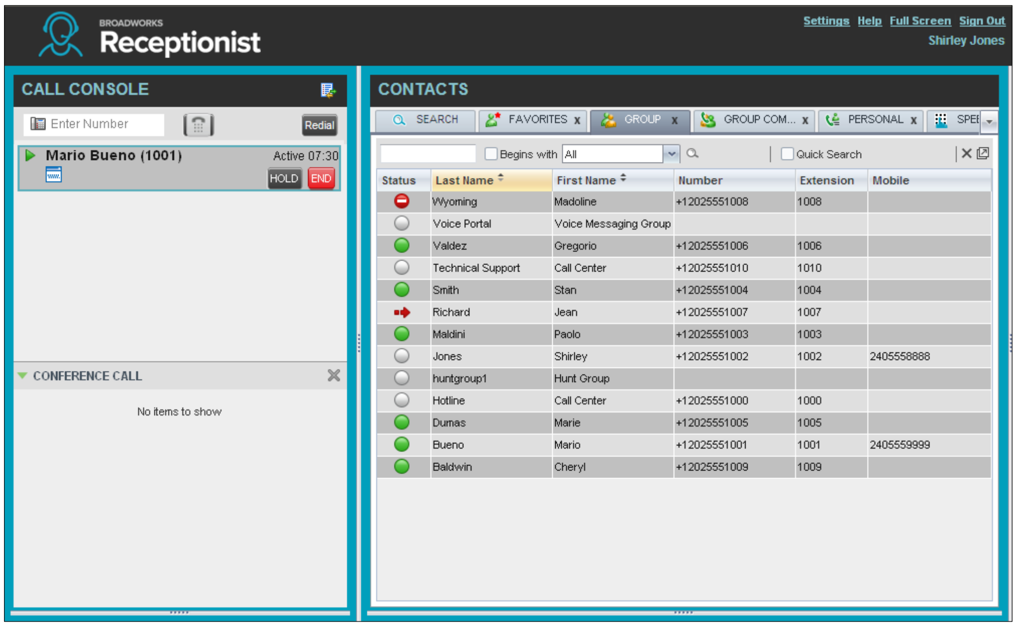


Figure 2 Receptionist Small Business Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. You also use the *Contacts* pane to monitor contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the Call History to view and return your past calls.
- **Chat windows** – You use a chat window to chat with an IM&P contact.

For more information, see section 5 *Explore Workspace*.

3.3.2 Contact Directories

This following table lists the contact directories available in Receptionist Small Business. The *Comments* column specifies additional settings required to access a directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 30 static users company-wide.
Group/Enterprise	This consists of all contacts in your BroadWorks group or enterprise directory. This is the same directory that you can access through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	
Group/Enterprise Common	This consists of all contacts in your group/enterprise's common phone list configured by your administrator on BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Personal	This consists of all contacts in your personal directory on the BroadWorks web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of your IM&P contacts, that is, IM&P users that you subscribed to.	You need to have the Integrated IM&P or Third-Party IM&P service assigned.

For information on managing your contact directories, see section 9 *Manage Contacts*; for information on using your contacts to make and manage calls, see section 6 *Manage Calls*; for information about monitoring contacts, see section *10 Monitor Contacts*.

3.3.3 Call Management Functionality

This section lists call management functions of Receptionist Small Business and provides you with pointers to sections of this document where they are described.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call

Function	Quick Reference
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

3.4 Receptionist Office

The Receptionist Office edition is targeted at a small office environment with a limited number of employees. It supports the standard set of Call Control features and the monitoring of up to eight lines in the directory.

3.4.1 User Interface

Figure 3 shows the main interface of Receptionist Office.

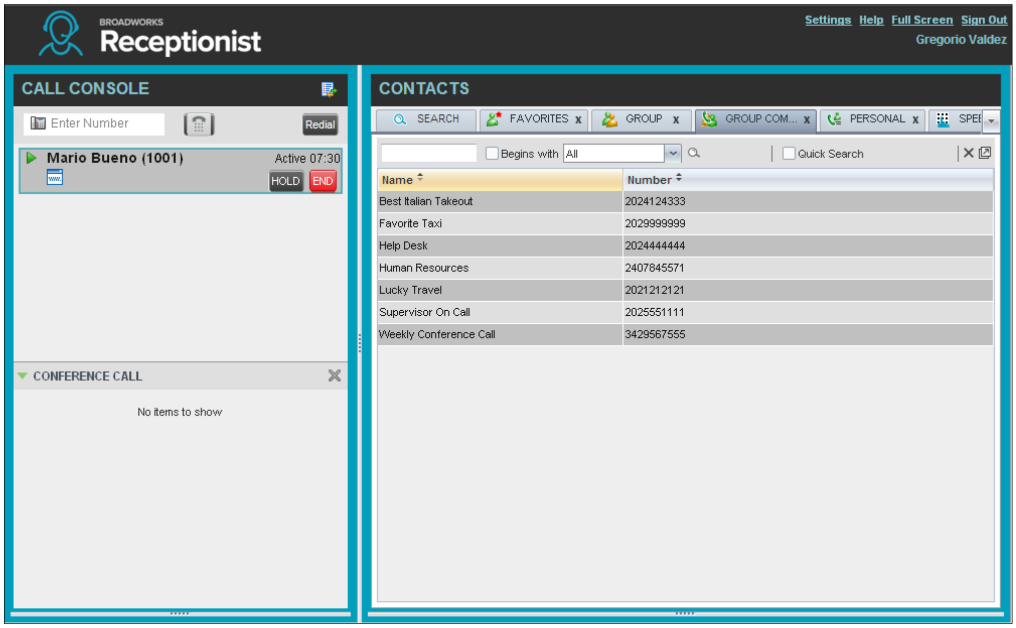


Figure 3 Receptionist Office Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. It also allows you to monitor selected contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the *Call History* dialog box to view and return your past calls.
- **Chat windows** – You use a chat window to chat with an IM&P contact.

For more information, see section 5 *Explore Workspace*.

3.4.2 Contact Directories

This following table lists the contact directories available in Receptionist Office. The *Comments* column specifies any additional settings required to have access to a directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to eight static users group-wide.
Group/Enterprise	This consists of all contacts in your group.	

Directory Name	Contents	Comments
Group/Enterprise Common	This consists of all contacts in your group/enterprise's common phone list configured by your administrator on BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Personal	This consists of all contacts in your personal directory on the BroadWorks web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of your IM&P contacts, that is, IM&P users that you subscribed to.	You need to have the Integrated IM&P or Third-Party IM&P service assigned.

For information on managing your contact directories, see section 9 *Manage Contacts*; for information on using your contacts to make and manage calls, see section 6 *Manage Calls*; for information about monitoring contacts, see section *10 Monitor Contacts*.

3.4.3 Call Management Functionality

The Receptionist Office provides the following call management functions:

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold

Function	Quick Reference
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

4 Getting Started

Receptionist is hosted on BroadWorks and you access it over the network either from your web portal or from a web browser. The sign-in procedure is the same for all Receptionist editions.

For the supported web browsers, see the *BroadWorks Hosted Thin Receptionist Configuration and Administration Guide.*

NOTE 1: The minimum required screen resolution for Receptionist is 1024 x 768 pixels.

NOTE 2: Receptionist does not support signing in as different users from the same machine at the same time.

NOTE 3: When using the Outlook Integration feature with Microsoft Outlook 2010 (32- or 64-bit edition), make sure Outlook is running before Receptionist is launched; otherwise, Outlook Integration functionality does not work.

NOTE 4: To enable the Full Screen link in Internet Explorer, configure Internet Explorer as specified in section *13.1 Configure Internet Explorer for Full Screen Mode*.

4.1 Launch Receptionist from Web Portal

BroadWorks has a Single Sign-On feature. When you access the Receptionist client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

To access Receptionist from the web portal:

1) Log in to your BroadWorks web portal.

2) From the *Launch* drop-down list at the top right-hand side of the BroadWorks *Logo* pane, select the link for your Receptionist service.

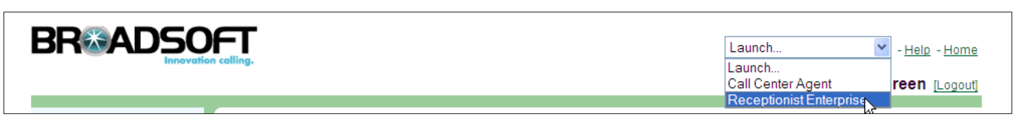


Figure 4 BroadWorks Web Portal Logo Pane – Launching Receptionist

Receptionist starts and you are automatically signed in.

4.2 Sign in from Web Browser

When signing in to the client, use the same credentials you use to connect to the web portal.

To access Receptionist from a web browser:

1) In your web browser, enter the URL of the Receptionist client on BroadWorks. The Receptionist *Sign-in* page appears.

Figure 5 Receptionist Sign-in Page

2) Enter your BroadWorks user ID in *user@domain* format and your password.

   If you are unsure of your user ID and password, contact your company (group or enterprise) administrator.

   If you use the default domain, you can enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. If your domain is different from the default domain, you have to enter your user ID with the domain name.

   Optionally, if your system has been configured to allow it, you can configure your domain name.

3) To configure your domain or the Receptionist language, click **Show options**. The area expands displaying advanced options.

Figure 6 Receptionist Sign-in Page – Advanced Options

4) To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the default domain.

5) To change the language, from the *Language* drop-down list, select a new language.

6) Check *Stay signed in* to instruct the client to automatically connect and sign in to the server when it detects a network connection.

   This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

7) To add a bookmark to the *Receptionist Sign-in* page in your browser, click **Bookmark this page** and follow the instructions of your browser.

8) Click **Sign In**.

   Receptionist starts and you are signed in.

NOTE: In some browser/operating system combinations, when you press ENTER instead of the Sign In button, a blank page appears and not the Receptionist main interface.

4.3 Sign-in Restrictions

You can only have one active Receptionist session at a time. When you sign in from a second location, you are automatically signed out from the original location with the following message: "You have been signed out as you have signed in from another location."

Figure 7 Sign-in Dialog Box with Error Message

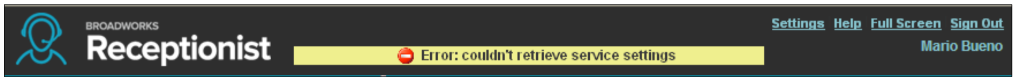


Figure 8 Receptionist Main Interface (Top of Page) with Error Message

4.4 Get Help

Receptionist provides you with online access to a portable document format (PDF) version of this guide.

Figure 9 Main Interface (Top of Page) – Help Link

To access this document:

Click the **Help** link at the top right-hand side of the main interface.

4.5 Sign Out

To sign out of Receptionist:

1) Click the **Sign Out** link at the top right-hand side of the main interface.

   A message appears asking you whether you would like to save your current workspace.

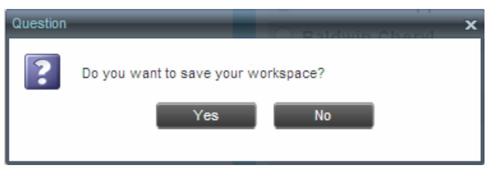
   

   Figure 10 Question Dialog Box

2) Click **Yes** to save your current workspace. This allows you to retain the same setup at your next session.

3) For information on workspace elements that can be customized, see section *14.1.6 Workspace*.

4.6 Set Up Your Environment (Enterprise Edition)

It is recommended that you configure Receptionist as follows when you first log in.

- Select call centers to manage – see section *12.1 Select Call Centers to Manage*.
- Join queues and set your post sign-in ACD state – see section *14.2 Settings – Application*.

For information about other Receptionist configuration options, see section *14 Configure Receptionist*.

4.7 Change Your IM&P Presence State

When you sign in to Receptionist, Receptionist connects to the Instant Messaging and Presence (IM&P) server and sets your presence state to "Available".

You can change your presence state and provide a status message to display to your contacts.

The possible states are: *Available*, *Busy*, *Away*, and *Offline*. When you are in *Available*, *Busy*, or *Away* states you are considered to be online.

IM&P capabilities are only available when you are online. For more information about the IM&P capabilities of Receptionist, see section 8 *Monitor IM&P Contacts and Chat with Contacts*.

To change your presence state:

Click the **Presence** box at the top right-hand side of the main window and select the new state from the drop-down list.

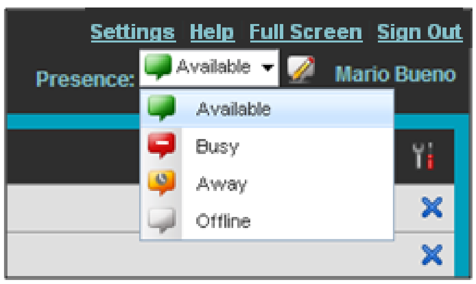


Figure 11 Logo Pane – IM&P Presence State Control

When you are online, you can set a status message to display to your contacts.

To set an IM&P status message:

1) Click the **Edit** button  next to the *Presence* box. The *Set IM Status* dialog box appears.

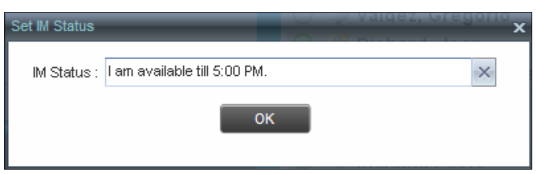


Figure 12 Set IM Status Dialog Box

2) Enter your message and click **OK**.

3) To see your message, move the mouse over the Edit button . A ToolTip with your presence massage appears.

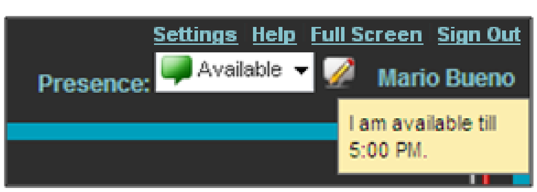


Figure 13 IM&P Status Message

4.8 Change Your Password

Remember that this is your web portal password and that you have to use this new password when accessing your web portal. The password must follow the password rules set on BroadWorks.

To change your password:

1) At the top right-hand side of the main interface, click the **Settings** link. The *Settings – General* page appears.

2) In the *Account* area, click the **Change Password** link. The area expands allowing you to change your password.

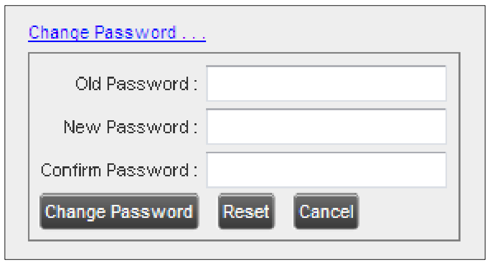


Figure 14 Account – Change Password

3) Enter your current and new password and click **Change Password**.

   Note that the Reset button does not reset your password. It only clears the input boxes.

5 Explore Workspace

When you sign in to Receptionist, the main page appears where you perform most of your call management and monitoring tasks. In addition, the main page provides a link to the *Settings* pages, where you configure various Receptionist settings.

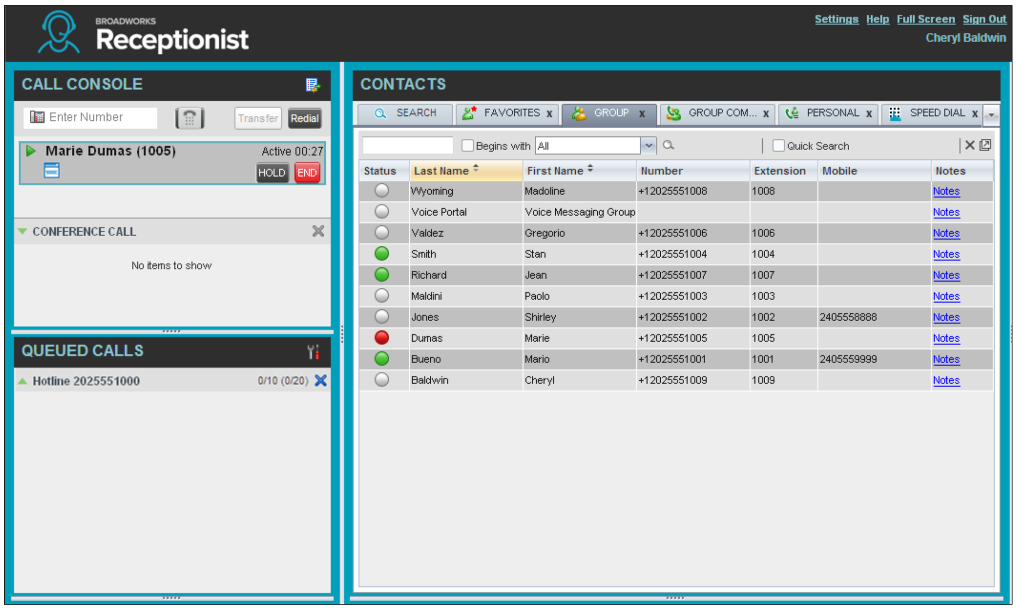


Figure 15 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which elements should be visible and change their size. You can then save your workspace and retrieve it the next time you log in. For more information on saving your settings, see section *13.1.6 Workspace*.

To work in full screen mode, click the *Full Screen* link at the top-right corner of the main window. The link changes to *Exit Full Screen*, which you can click to exit full screen mode.

NOTE 1: To work in full screen mode, you can also click F11 when the main window is in focus.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.

NOTE 3: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

You can also resize the *Call Console* and the *Contacts* panes by moving the bar between the two to the left or to the right. Receptionist remembers the position of the bar at sign-out, and the bar is at the same position the next time you sign in.

Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Receptionist, see section *5.5 Controls*. The action buttons are described in section *5.5.1 Call Action Buttons*.

This section describes the following elements of the Receptionist main interface:

- Logo Pane
- Call Console
- Contacts Pane
- Queued Calls Pane (Enterprise Edition)
- Controls

The *Settings* pages, accessed via the Settings link and used to configure Receptionist, are described in section *13 Configure Receptionist*.

The *Call History* dialog box is described in section *11 Manage Call History*.

The *Chat* windows are described in section 8 *Monitor IM&P Contacts and Chat with Contacts.*

5.1 Logo Pane

The Receptionist main page and *Settings* pages contain a *Logo* pane, which displays the Receptionist client or company logo, global messages, links to other interface elements or Receptionist functions, and information about the signed-in user.

Figure 16 Receptionist Logo Pane

5.1.1 Global Message Area

The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user. A message is displayed for several seconds and then disappears.

5.1.2 Settings, Help, and Sign Out Links

The *Logo* pane displays links to the *Settings* pages, where you can configure the client, and the Help and Sign Out links.

5.1.3 Signed-in User Information

Information about yourself, such as, your name, your availability to chat and take calls, and your voice mail status, is displayed at the top right-hand side of the main interface, as applicable.

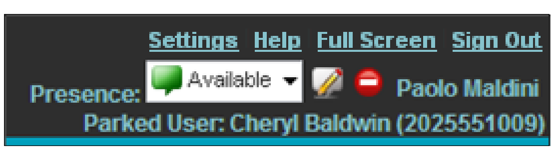


Figure 17 Signed-in User Information

Your current availability icons are displayed to the left of your name as follows:

- Presence – This is your IM&P presence state. The possible states are *Available* ( ), *Busy* ( ), *Away* ( ), or *Offline* ( ). You can change your IM&P presence state by selecting a new state from the drop-down list.

- Information about the following services and features:
  - Calendar Presence Integration
    - In a Meeting – Your Exchange calendar shows that you are currently busy (in a meeting).
    - Away – Your Exchange calendar shows that you are out of the office.
  - Call Forwarding Always (CFA) – You have activated the Call Forwarding Always service.
  - Do Not Disturb (DND) – You have activated the Do Not Disturb service.
  - Voice Messaging .

  The information is presented in the following format:

  <In a Meeting/Away/CFA/DND> <Voice Messaging>

  The *<In a Meeting/Away/CFA/DND>* state is represented by one icon with the *In a Meeting/Away* states having precedence over the CFA and DND states, and the CFA state having precedence over the DND state.

  If your Exchange calendar state is not *In a Meeting* or *Away* and DND and CFA services are not turned on, this icon is not displayed.

  The Voice Messaging icon is present only if you have outstanding voice messages.

  In addition, if a call is parked against your extension, the following information appears:

  Parked User: <First Name> <Last Name> (<Phone Number/Extension>).

5.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section 6 *Manage Calls*.

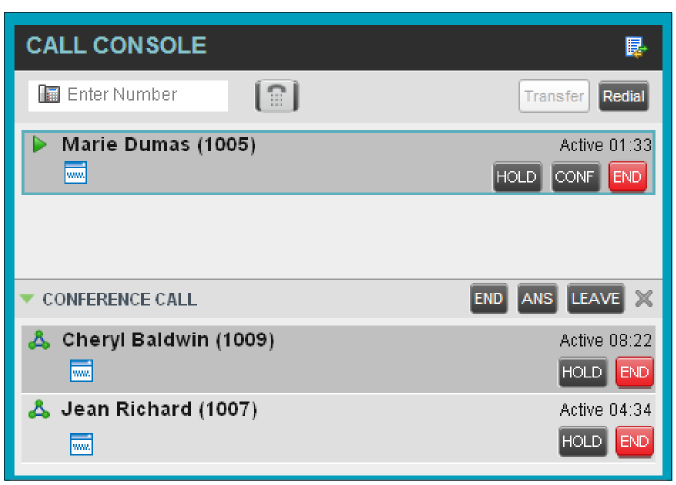


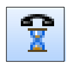
Figure 18 Call Console

The *Call Console* contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

5.2.1 Header

The Call Console header contains the following controls:

- Call History button  – This allows you to access the list of your previous calls.
- Call Waiting button  – This allows you to enable the Call Waiting service.
- Auto Answer button  – This allows you to answer your calls automatically.

5.2.2 Dialer

The *Dialer*, located at the top of the *Call Console*, below the header, allows you to make ad hoc calls.

Figure 19 Call Console – Dialer

- The *Enter Number* text box is where you enter the number to dial.
- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls. For more information, see sections *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons.*

5.2.3 Current Calls

The *Call Console* displays your current calls and allows you to take actions on them.

If you are involved in a conference call, its details are displayed in the *Conference Call* panel at the bottom of the *Call Console*. The *Conference Call* panel is described in the following section.

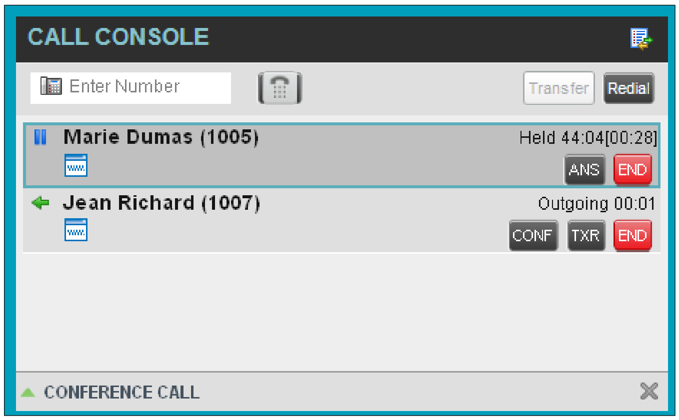


Figure 20 Call Console – Current Calls

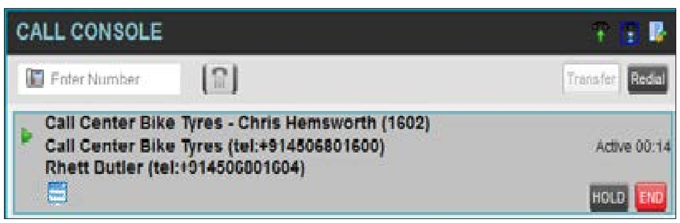


Figure 21 Call Console – Call with Diversion Information

Each call is listed on a separate line with the following information:

- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.
- Diversion CLID – This is the name (if available) of the party who diverted (transferred/forwarded) the call before you received the call and the phone number in parenthesis. If the call was diverted more than once, the last party who diverted the call is listed first; the second-to-last party is listed second; and so on.

  For a recalled call, the following information appears: Recall : <Caller's name>; via: <Call parked against user>.
- Call State icon – This is a visual representation of the current state of the call. For more information, see section *5.2.5 Call States and Actions*.
- Call State name – This is the display name of the state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from BroadWorks and it accurately reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.
- Action buttons – These buttons are for the operations that you can currently take on the call. For more information, see sections *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons*.

5.2.4 Conference Call Panel

The *Conference Call* panel displays your current conference and allows you to manage your conference calls. You can only be involved in one conference call at a time.

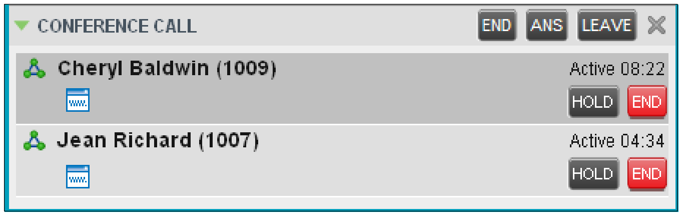


Figure 22 Conference Call Panel

The header bar contains various controls that allow you to manage the conference:

- Hold Conference button HOLD – This allows you to place the conference on hold.
- Resume Conference button ANS – This allows you to resume a held conference.
- Leave Conference button LEAVE – This allows you to leave the conference.
- End Conference button END – This allows you to end the conference.

The panel lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for a two-way call. For information, see section *5.2.3 Current Calls*.

5.2.5 Call States and Actions

The following table lists the possible call states and actions that can be performed in each state.

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, Park, Camp, End, Conference
On Hold	Held		Any	Transfer, Resume, Park, Camp, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Recalled Call)	Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

5.3 Contacts Pane

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section 6 *Manage Calls*. For information about organizing and managing your contact directories, see section 9 *Manage Contacts*.

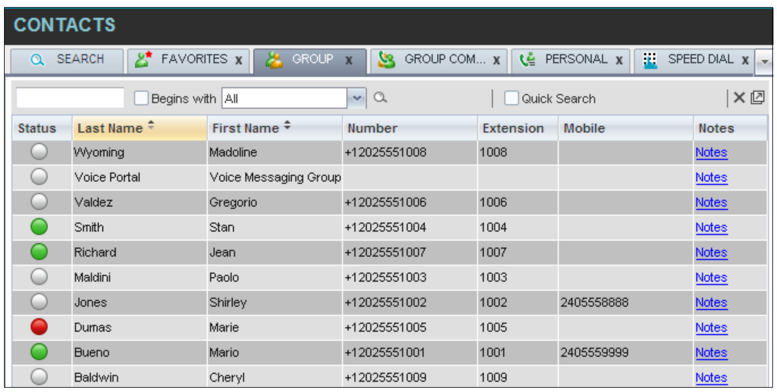


Figure 23 Receptionist Enterprise Contacts Pane

The *Contacts* pane contains the following elements:

- Directory Management Bar
- Directories List
- Search Tab
- Favorites Tab
- Group/Enterprise Tab
- Group/Enterprise Common Tab
- Personal Tab
- Speed Dial Tab
- Queues Tab (Enterprise Edition)
- Custom Directories Tab (Enterprise Edition)
- Instant Message Tab
- Outlook Tab (Enterprise Edition)
- Search Results Tabs

The *directories* tabs available to you depend on your Receptionist edition, system configuration, as well as the services assigned to you. For information, see section 3 *Introduction to Receptionist* or see your administrator.

You can only see the contents of one directory at a time. The information displayed for a contact depends on the directory and is specified in the following subsections.

When you click a contact in any contact directory, the contact expands and information about the contact appears as well as the action buttons for the operations that you can currently perform on that contact.

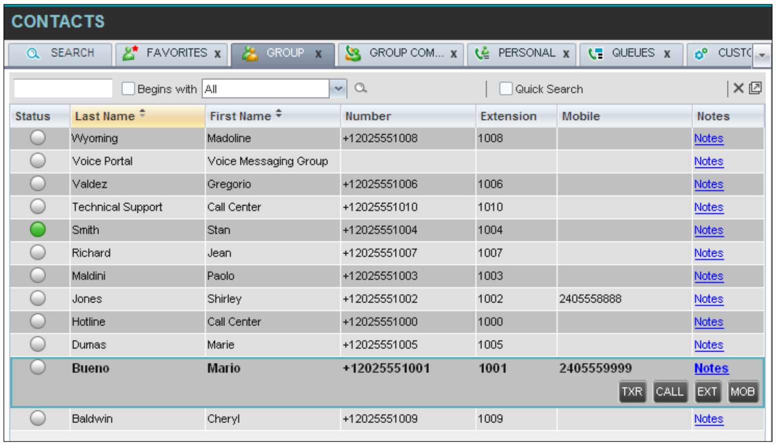


Figure 24 Group Tab – Contact in Focus with Action Buttons

For the list of action buttons available in Receptionist, see section *5.5.1 Call Action Buttons*.

5.3.1 Directory Management Bar

The *Directory Management* bar contains controls that allow you to perform search operations, create new directories from search results, and edit directories, and group queues.

Figure 25 Directories Management Bar

5.3.2 Directories List

The drop-down arrow  to the right of the directories tabs, when clicked, displays the list of directories available to you, and allows you to select directory tabs to display in the *Contacts* pane. For more information, see section *9.1Show/Hide Directories*.

5.3.3 Search Tab

You use the *Search* tab to look for specific contacts in all your contacts directories and, if available, in the configured *LDAP* directory. For information on performing directory searches, see section *9.3 Search Contacts*.

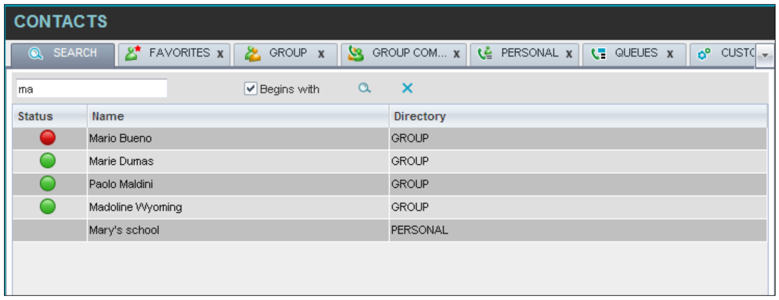


Figure 26 Contacts Pane – Search Tab

5.3.4 Favorites Tab

You use the *Favorites* tab to monitor the phone state of selected contacts. The *Favorites* directory provides the following information for each contact: call state, last and first name, phone number, extension, mobile number, and link to notes. Depending on your services and system settings, a contact's state information may also include the IM&P presence state and the Exchange calendar state.

The contacts to monitor must be configured on the web portal. This is referred to as static monitoring. For more information, see section *10 Monitor Contacts*.

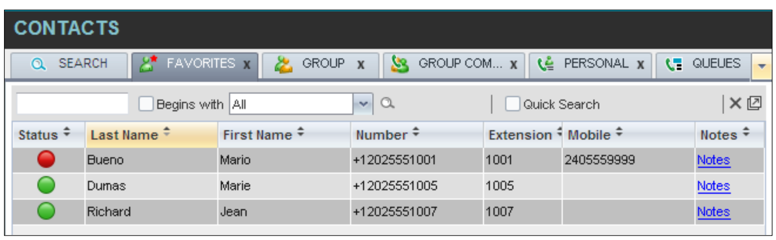


Figure 27 Contacts Pane – Favorites Tab

5.3.5 Group/Enterprise Tab

The *Group/Enterprise* tab contains the contacts in your BroadWorks group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise). However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts from your group directory.

The following information is displayed for each contact: call state, last and first name, phone number, extension, mobile number, and link to notes. Depending on your services and system settings, a contact's state information may also include the IM&P presence state and the Exchange calendar state.

If you have the Receptionist Enterprise edition, you can also monitor selected contacts and view contact details. This is referred to as dynamic monitoring. For information, see section *10.2 Dynamic Monitoring (Enterprise Edition)*.

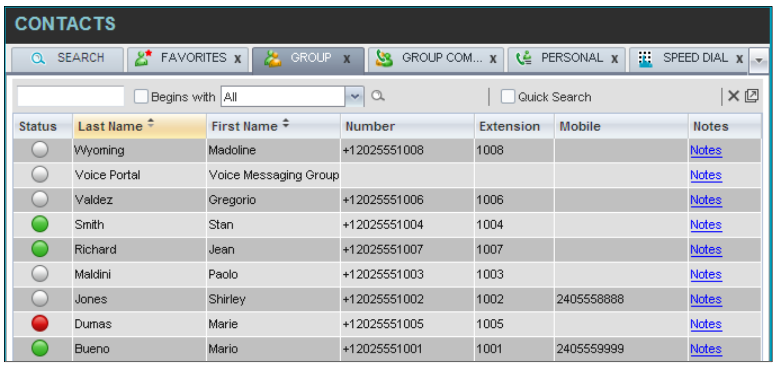


Figure 28 Contacts Pane – Group Tab

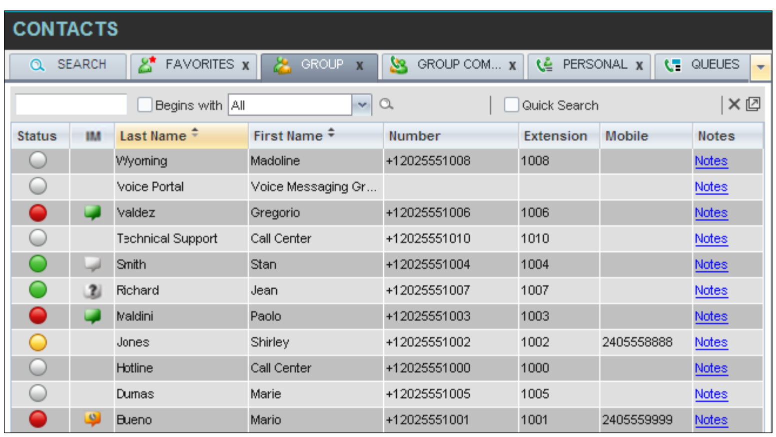


Figure 29 Contacts Pane – Group Tab with Contacts' IM&P State

5.3.6 Group/Enterprise Common Tab

The *Group/Enterprise Common* tab contains the contacts in your group's common phone list (if your group is part of a service provider) or your enterprise's common phone list (if your group is part of an enterprise) configured by your administrator on BroadWorks.

The contact's name and phone number are displayed for each contact.

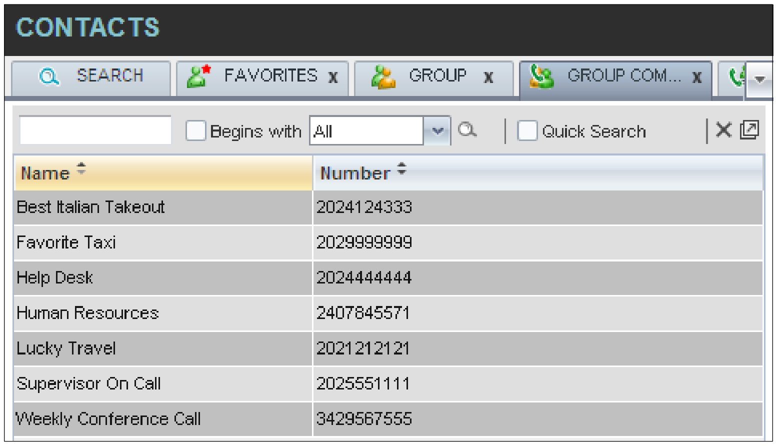


Figure 30 Contacts Pane – Group Common Tab

5.3.7 Personal Tab

The *Personal* tab contains the contacts from your personal phone list on the BroadWorks web portal. The contact's name and phone number are displayed for each contact.

You can edit your personal contacts in Receptionist. For information about managing your personal contacts, see section *9.5 Manage Personal Contacts*

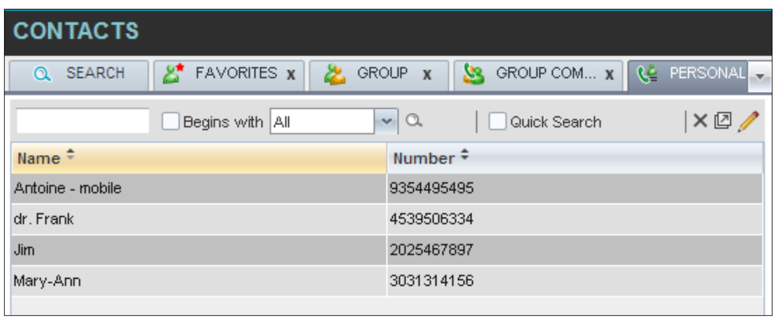


Figure 31 Contacts Pane – Personal Tab

5.3.8 Speed Dial Tab

The *Speed Dial* tab displays your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the contacts for that service in your Speed Dial directory. The speed code, phone number, and description are displayed for each contact.

You can edit your speed dial entries in Receptionist. For information about managing your speed dial entries, see section *9.6 Manage Speed Dial Entries*.

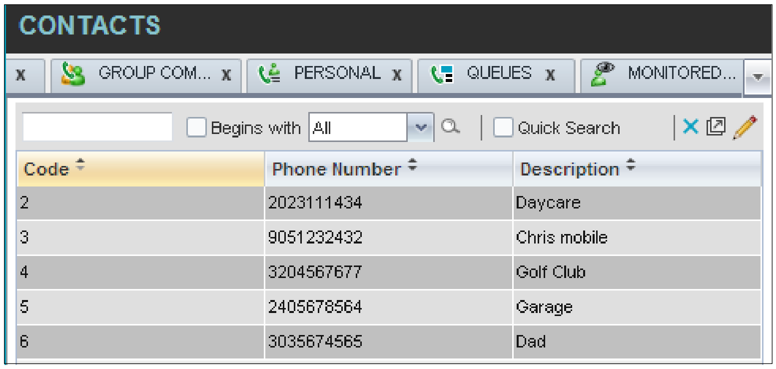


Figure 32 Contacts Pane – Speed Dial Tab

5.3.9 Queues Tab (Enterprise Edition)

The *Queues* tab displays the list of call centers and associated DNIS numbers that a call center agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues. The call center/DNIS name, phone number, and extension are displayed for each contact.

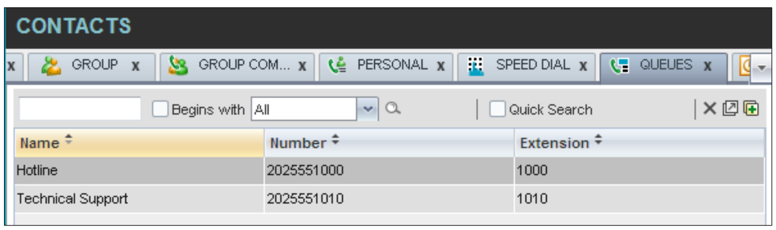


Figure 33 Contacts Pane – Queues Tab

5.3.10 Custom Directories Tab (Enterprise Edition)

If your administrator has configured custom contact directories for your group, you can access them from Receptionist.

NOTE: A custom directory has the same properties as the *Group/Enterprise* directory, and you can perform the same operations on contacts in a custom directory as in the *Group/Enterprise* directory. The exception is that the Exchange calendar is not displayed for monitored users in a custom directory, even if it is available in Group/Enterprise and Favorites directories.

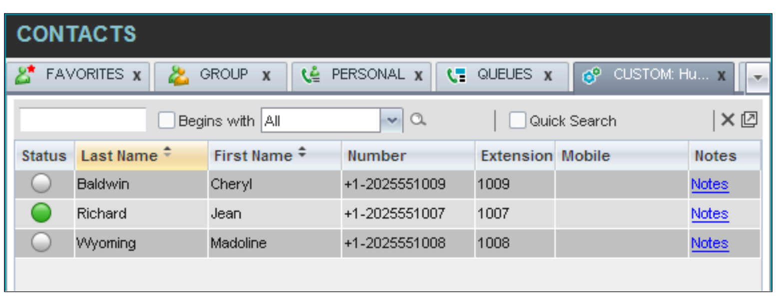


Figure 34 Contacts Pane – Custom (Directory) Tab

5.3.11 Instant Message Tab

The *Instant Message* tab displays IM&P contacts you are subscribed to, with their IM&P ID and presence state. For information on subscribing to and chatting with IM&P contacts, see section 8 *Monitor IM&P Contacts and Chat with Contacts*.

The tab is available if you have been assigned the *Integrated IM&P* or *Third Party IM&P* service.

When your presence state is set to "Offline", the tab is empty. To change your IM&P presence state, see section *4.7 Change Your IM&P Presence State*.

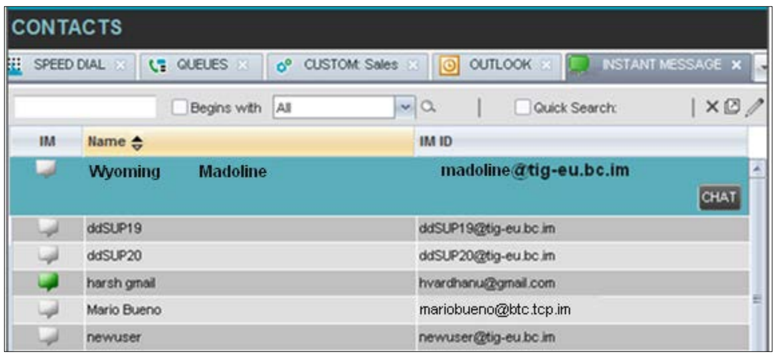


Figure 35 Contacts Pane – Instant Message Tab

5.3.12 Outlook Tab (Enterprise Edition)

The *Outlook* tab contains your Outlook contacts. This tab is available to you if you have the Outlook Integration service enabled and configured. The contact's last and first name, phone number, mobile number, and home phone number are displayed for each contact. For more information, see section *13.4 Settings – Plug-ins*.

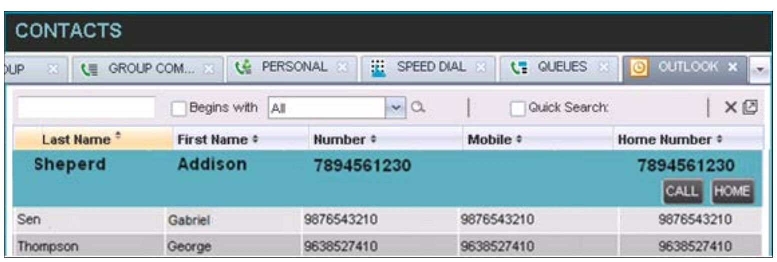
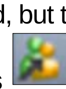


Figure 36 Contacts Pane – Outlook Tab

5.3.13 Search Results Tabs

When you search a directory on a single field, you can pull out the results and save them in a new contacts directory. The name of the new directory is the same as the name of the directory on which the search was performed, but the icon on the directory tab has an arrow similar to the arrow used on shortcut icons . When you place the mouse over the tab for a directory created from search results, a ToolTip appears displaying the name of the original directory, followed by the search string that was used to create the directory, the two separated by a colon ":", for example, "Group:ma".

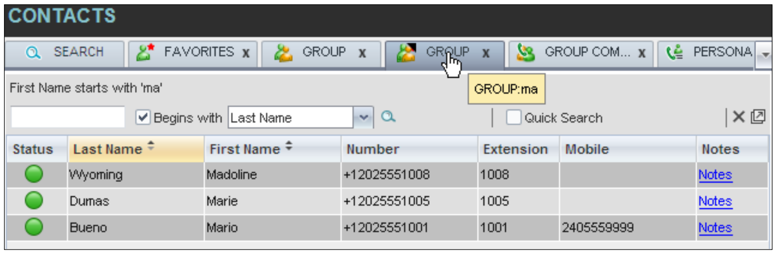


Figure 37 Contacts Pane – Search Results Tab

NOTE: A directory created from search results has the same properties as the original directory, and you can perform the same operations on it as on the original directory.

You can also perform a search on a directory created from search results and pull out the results into another tab.

Search results directories are only available for the current sign-in session. Also, once closed, they cannot be restored. If required, perform the same search again.

5.4 Queued Calls Pane (Enterprise Edition)

You use the *Queued Calls* pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section *12 Manage Queued Calls (Enterprise Edition)*.

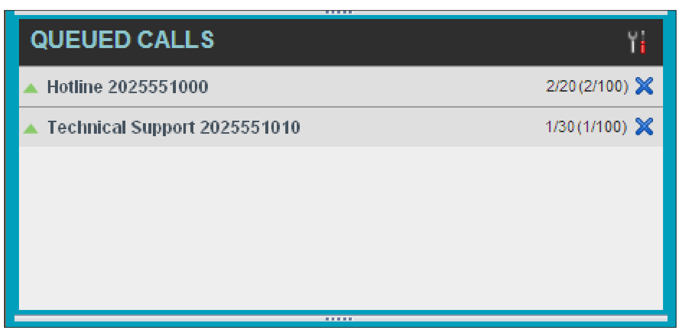


Figure 38 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section *12.1 Select Call Centers to Manage*.

Each call center is displayed in a separate panel. The panel's header displays the following information:

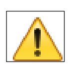
- The name of the call center
- The primary phone number of the call center
- The number of calls currently displayed for the queue against the maximum number of calls that can be displayed for a queue.
- The number of calls in queue against the queue length

A *Message Waiting* icon indicates that there are outstanding messages for the call center.

When you expand the panel for a call center, the list of calls queued in that call center appears, with calls listed according to their position in the queue.

Figure 39 Queued Calls Pane – Call Center Panel (Expanded)

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of the following:
  - *Waiting*  – The call is queued, waiting to be answered.
  - *Announcement*  – An announcement is being played to the caller.
  - *Reordered*  – The position of the call in the queue has been changed.
  - *Bounced*  – The call has been bounced.
- Name (if available) and phone number of the calling party.
- The total call time, including the time in the current priority bucket (in parentheses).

Clicking a call expands the call to show additional data:

- Position of the call in the queue.
- Priority of the call (Premium Call Center).
- The name (if available) and the phone number of the call center (or DNIS, if applicable) that was called.

When you move the mouse over a queued call, the action buttons that can be applied to the call appear. For information, see section *5.5.1 Call Action Buttons*.

5.5 Controls

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons. They are described in section *5.5.1 Call Action Buttons*.

The following table lists the general controls used in Receptionist and the controls displayed on the header bars of windows and panels.

Name	Description
Common Controls	
Options	This allows you to organize items in lists.
Expand/Collapse	This shows or hides the contents of a window or panel.
Close	This closes an interface element, such as window, pane, or panel.
Edit	This allows you to edit contacts in some directories.
Call Console Controls	
Call History	This displays your call logs.
Call Waiting	This allows you to turn Call Waiting on or off.
Auto Answer	This automatically answers your incoming calls.
End Conference	This ends a conference call.
Leave Conference	This allows you to leave the conference while allowing other participants to continue the call.
Hold Conference	This places a conference call on hold.
Resume Conference	This resumes a held conference.
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
Pullout	This places the results of a search performed on a contacts directory in a new tab.
Clear	This clears the search and displays the entire directory.
Group Gueues	This groups queues in the Queues tab by call center.
Call Notification Pop-up Window	
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
vCard	This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook.
Transfer to Voice Mail	This transfers an incoming call to your voice mail.

Name	Description
Chat Window	
Call	This places a call to your chat partner.
Add User to Chat	This allows you to select users to add to the chat.
Invite	This invites selected users to the chat.
Pop-out	This takes a chat window out of the main interface and makes it a free-floating window.
Pop-in	This anchors a free floating chat window inside the main interface.
Minimize	This minimizes the chat window.
Close	This closes the chat window.

5.5.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, a call line, a call history log, or a directory entry.

Action buttons are contextual, that is, they appear on a line/entry when you move the mouse over that entry and when the corresponding action can be performed on that entry.

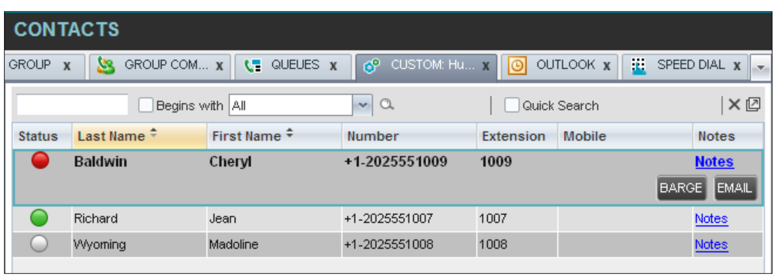


Figure 40 Custom Contacts Directory – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist.

Button	Description
Dial	This dials the number you entered in the *Dialer*.
CALL	This places a call to the selected contact or to a number from Call History.
Redial	This redials the last dialed number.
Extension	This dials the contact's extension.
Mobile	This dials the contact's mobile number.

Button	Description
EMAIL E-mail	This brings up a new e-mail message window with the contact's e-mail address, allowing you to send an e-mail to the contact.
Transfer Transfer	This transfers a call to an ad hoc number entered in the Dialer.
TXR Transfer	This transfers a call to a selected number or contact.
VM Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK Park	This parks a call on a contact.
CHAT Chat	This opens a chat window allowing you to chat with an IM&P contact.
PROMOTE Promote	This promotes a selected call to the next higher priority bucket.
RETRIEVE Retrieve	This retrieves a selected call from the queue to the supervisor's device.
REORDER Reorder	This changes a selected call's position in the queue.
www. Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
Delete Call Log	This deletes a call log from Call History.

6 Manage Calls

This section includes information and procedures on how to manage current calls. You use the *Call Console* to view and manage your current calls.

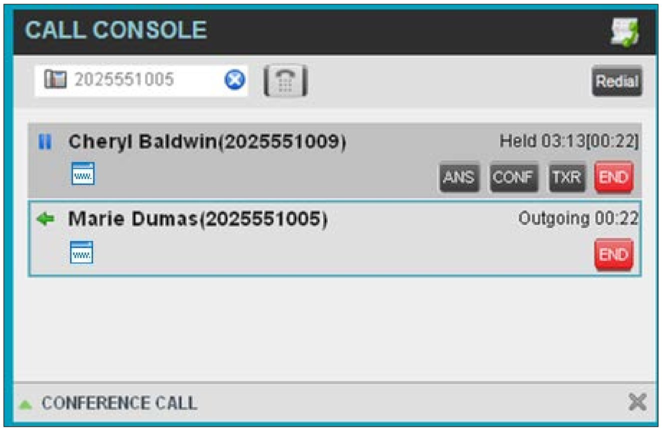


Figure 41 Call Console

6.1 Drag and Drop Call onto Contact

For operations on calls that involve a contact, you can drag a call from the *Call Console* and drop it on a target contact in one of your contacts directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green arrow appears. By default, when the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

However, you can enable automatic call transfer on *Drag and Drop* (if available). If automatic transfer is enabled, the call is transferred to the contact's phone number when you drop the call on the contact. For more information, see section *14.1.7 Drag and Drop*.

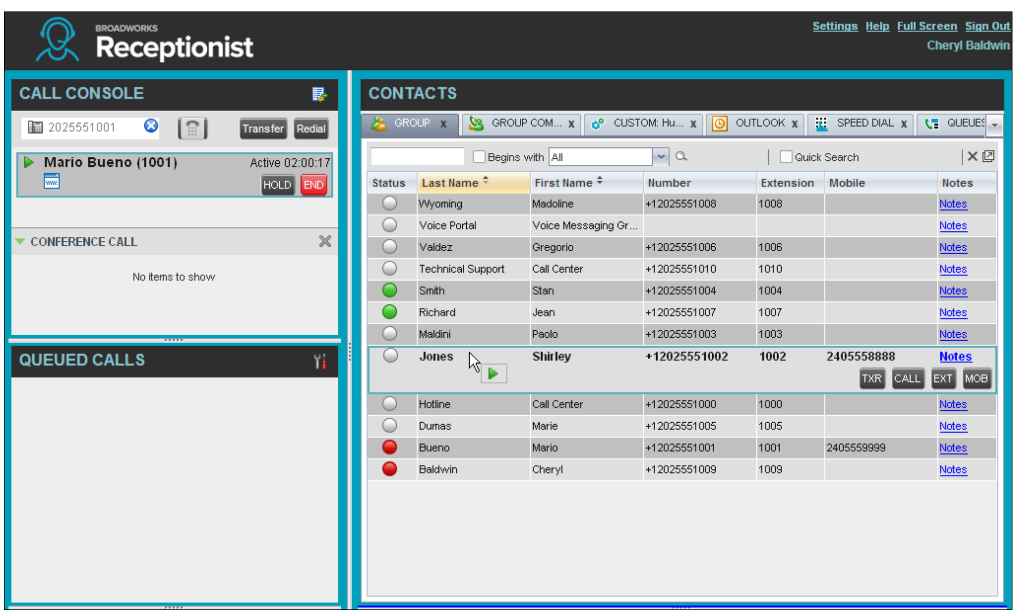


Figure 42 Dragging Call and Dropping it on Contact

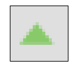
6.2 View Call Information

Call information is provided in the *Call Console* and in the *Call Notification* pop-up window that appears on top of the system tray for incoming calls.

6.2.1 View Current Calls

Your current calls are always visible in the *Call Console*.

To view your conference call:

In the *Conference Call* panel, click the **Expand** button .

6.2.2 View Incoming Call Details

If the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when an inbound call is received.

- *Direct inbound calls* – For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

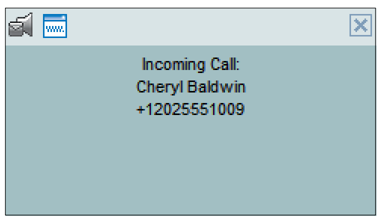


Figure 43 Call Notification Pop-up Window for Non-ACD Call

- *Calls from a call center* (Enterprise Edition) – For calls from a call center, the call center name is displayed in addition to the caller's name and phone number.

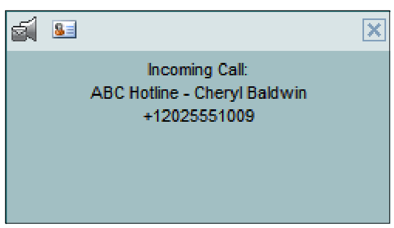


Figure 44 Call Notification Pop-up Window − Call from Call Center

- In addition, for diverted calls, that is, calls that were forwarded or transferred before being delivered to you, the diversion information is displayed.

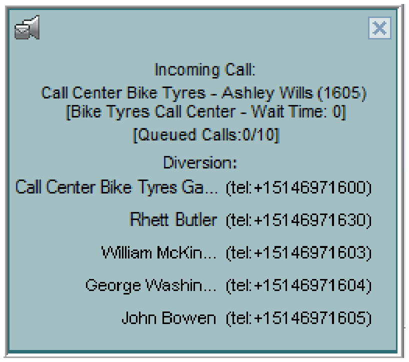


Figure 45 Call Notification Pop-up Window with Diversion Information

NOTE 1: You must have only one tab open in the browser running Receptionist to receive call notifications.

NOTE 2: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

6.2.3 Save vCard

When you receive a call, a *Call Notification* pop-up window is visible on top of the system tray. From this window, you can save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save caller's information as a vCard:

In the *Call Notification* pop-up window, click the **Add vCard** button .

This button is present only when Outlook is running.

6.2.4 Open URL

For any current call, you can open a page in your browser that contains information about the calling party encoded in its URL.

This can be done either from the *Call Notification* pop-up window that appears on top of the system tray for an incoming call or from the *Call Console* for any current call.

This feature is configured on the *Settings – General* configuration page. For more information, see section *14.1 Settings – General*.

To open a URL for the incoming call:

In the *Call Notification* pop-up window, click the **Web Pop URL** button .

To open a URL for any call:

In the *Call Console*, click the **Web Pop URL** button for the target call.

6.3 Answering Calls

You can answer your own incoming calls and calls for other users in your group. If you have the Auto Answer service, you can also answer calls automatically.

6.3.1 Answer Call

Your incoming calls appear in the *Call Console*. To answer a call, the call state must be *Incoming.*

To answer an incoming call:

Move the mouse over the call and click **Answer** . The call state changes to *Active*.

> NOTE: Double-clicking a call, does not answer it.

To answer an incoming call from a Call Notification pop-up window:

Click anywhere on the text in the window.

To answer calls automatically:

In the *Call Console*, click the **Auto Answer** button. The button changes to this to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the client or by the administrator on the server.

> NOTE: If this feature is enabled by your administrator, you must not enable the client-based Auto Answer using the Auto Answer button.

6.3.2 Pick Up Call

The Directed Call Pickup service allows you to answer a call that is incoming on another user. Depending on your setup, you can answer calls for users in your group or in the entire enterprise. This is useful when the user is currently not on hand to answer the call.

> NOTE: To pick up a contact's call, you need to have the Directed Call Pickup service assigned.

To answer a call for a contact:

1) Click your *Group/Enterprise* or *Favorites* tab to display its contents and click the target contact to expand it. The contact's state must be *Ringing*.

2) Move the mouse over the contact and click **Answer** .

   The call appears as *Incoming* in the *Call Console*.

6.4 Hold and Resume Calls

You can only put an active call on hold.

6.4.1 Put Call on Hold

To put a call on hold:

Move the mouse over the call and click **Hold** HOLD.

6.4.2 Resume Held Call

To resume a held call:

Move the mouse over the call and click **Answer** ANS.

NOTE: Double-clicking a call does not take the call off hold.

6.5 Make and End Calls

Receptionist provides you with several ways in which you can make calls. When you dial a number or contact, the call appears in the *Call Console* as *Incoming Local.*

6.5.1 Dial Ad Hoc Number

You use the *Dialer* to place a call to an ad hoc number.

Figure 46 Dialer

To dial an ad hoc number:

1) In the *Dialer*, enter the phone number and click **Dial**. The call appears in the *Call Console* as *Incoming Local* and your phone rings.

2) Click **Answer** ANS for that call. An outbound call is placed and the call state changes to *Outgoing*.

6.5.2 Redial Number

Receptionist keeps up to ten most recently dialed numbers.

To redial one of the recently dialed numbers:

1) In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

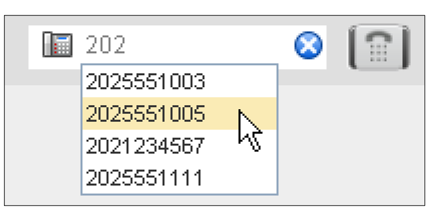


Figure 47 Dialer – Select Recently Dialed Number

2) Select the number to dial and click **Dial** .

The client issues a Click-To-Dial attempt to the selected number.

Alternatively, click the **Redial** Redial button and select the number from the list that appears.

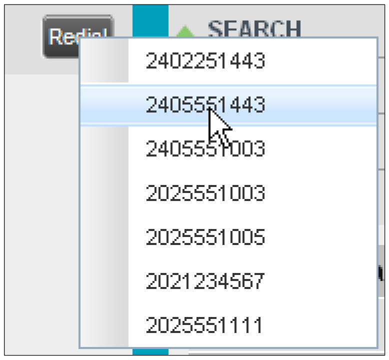


Figure 48 Dialer – Redialing Number

6.5.3 Dial Contact

You can dial contacts from any directory available in Receptionist.

To dial a contact:

1) In the *Contacts* pane, click the tab for the directory from which you want to dial a contact.

2) Click the contact to expand it and click **Call** CALL for that contact. A Click-To-Dial action is initiated and your phone rings.

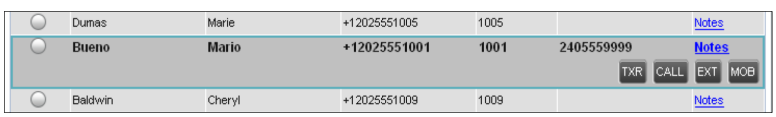


Figure 49 Group Tab – Contact in Focus with Transfer, Call, Extension, and Mobile Buttons

3) Answer the phone. An outbound call is placed.

4) Alternatively, to dial the contact's extension, click **Extension** EXT or to dial the contact's mobile number, click **Mobile** MOB.

6.5.4 Speed Dial

To speed dial a contact:

1) In the *Contacts* pane, click the *Speed Dial* tab to display its contents.

2) Click the contact to expand it and click **Call** CALL**.**

6.5.5 Dial from History

You can dial any number that is available in Call History.

To dial from Call History:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

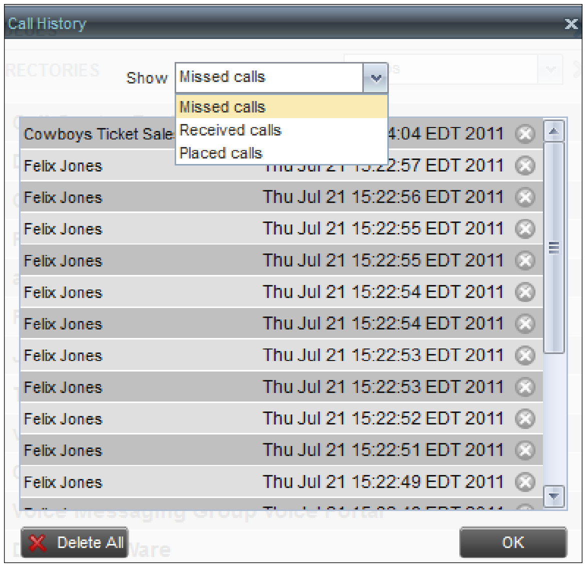


Figure 50 Call History Dialog Box

2) From the *Show* drop-down list, select the grouping you want.

3) Scroll through the list of call logs to find the entry you need.

4) Click the entry to expand it and click **Call** .

6.6 End Call

To end a call:

Click **End**  for that call.

NOTE: If the call has not yet been answered, the calling party continues to ring until no answer or another applicable timer expires or the user hangs up.

6.7 Transferring Calls

There are a number of ways in which you can transfer a call. You can blind transfer calls or transfer calls with consultation or supervision. You can also transfer calls directly to voice mail or to a queue.

6.7.1 Blind Transfer Call

A blind transfer occurs when a call is transferred without an introduction. Calls may be blind transferred while active, held, or ringing (in) on your phone. If a call is ringing (in), blind transfer allows the call to be redirected before it is answered. You can blind transfer a call to an ad hoc number or to a contact.

To blind transfer a call to an ad hoc number:

1) In the *Call Console*, select the call to transfer.
2) In the *Dialer*, enter the destination number and click **Transfer** TXR. The call is transferred and removed from the *Call Console*.

To blind transfer a call to a contact:

1) In the *Call Console*, select the call to transfer.
2) In the *Contacts* pane, click the tab from which you want to select a contact.
3) Click the destination contact to expand it, and click **Transfer** TXR for that contact. The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target contact and click **Transfer** TXR for that contact.

6.7.2 Conduct Supervised Transfer

When you have an active inbound call that you want to transfer, you can follow this procedure.

To conduct a supervised transfer:

1) In the *Call Console*, select the call to transfer.
2) Dial the number or contact to whom you want to transfer the call.
3) If the dialed contact is busy, either retry or dial another contact.
4) Move the mouse over the new, non-selected call and click **Transfer** TXR.

6.7.3 Transfer with Consultation

Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To transfer a call with consultation:

1) Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold. The new call appears in the *Call Console*.
2) Wait until the called party accepts your call and speak to the party.
3) When ready to transfer, in the *Call Console*, select one of the two calls.
4) Move the mouse over the non-selected call and click **Transfer** TXR.

   The calls are connected and removed from the *Call Console*.

6.7.4 Transfer to Voice Mail

You can transfer a call to a monitored contact's voice mail or to your own voice mail. Calls may be transferred while active, held, or ringing (in) on your phone.

To transfer a call to voice mail:

1) In the *Call Console*, select the call to transfer.

2) In the *Contacts* pane, click the *Group/Enterprise* or *Favorites* tab to display its contents and find the target contact. Find yourself if you want to transfer the call to your voice mail.

3) Click the contact and click **Transfer to Voice Mail** for that contact.

Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail** for that contact.

NOTE: This option is only available if the contact has the Voice Messaging service assigned and enabled.

You can also transfer an incoming call to voice mail from the *Call Notification* pop-up window.

To transfer an incoming call to your voice mail:

In the *Call Notification* pop-up window that appears when you receive a call, click **Transfer to Voice Mail**.

6.7.5 Transfer to Queue (Enterprise Edition)

You can transfer a current call to any queue that appears in your *Queues* directory. The call is placed at the bottom of the new queue.

To transfer a call to a queue:

1) In the *Call Console*, select the call to transfer.

2) Click the *Queues* tab to display the available queues.

3) Click the destination queue and click **Transfer**.

   The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target queue and click **Transfer** for that queue.

6.8 Parking and Camping Calls

Call parking or camping allows you to find a temporary parking place for the call. If the parked or camped call is not answered within the predefined time, the call is recalled and reappears in your *Call Console*.

6.8.1 Conduct Busy Camp On (Enterprise and Small Business Editions)

Busy Camp On allows you to place a call at a busy contact. The call is automatically transferred to the destination when the contact becomes available to take the call. A call to camp must be active or held, and the destination contact must be either *Busy* or *Ringing*.

NOTE: To use the feature, you need to have the Busy Camp On service assigned and active.

To camp a call on a busy contact:

1) In the *Call Console*, select the call to camp.
2) In your *Group/Enterprise* or *Favorites* directory, click a *Busy* or *Ringing* contact and click **Camp** CAMP. Once the call is camped, it is removed from the *Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

6.8.2 Conduct Group Call Park (Enterprise Edition)

Group Call Park searches within a predefined hunt group for an available line on which to park a call. After a designated time, the call returns to the originating operator or a specified hunt group (depending on how the service is configured). If the parking attempt fails for any reason, the call remains in your *Call Console*.

To perform a Group Call Park:

In the *Call Console*, move the mouse over an active or held call and click **Park** PARK. The call is parked on an available extension and removed from *the Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call may be recalled to your device and reappear in your *Call Console*.

6.9 Manage Conference Calls

You manage your conferences in the *Call Console*.

- You use the top area of the *Call Console* to establish a conference and add participants to it.
- You use the *Conference Call* panel to manage or end an active conference.

You can only have one active conference at a time.

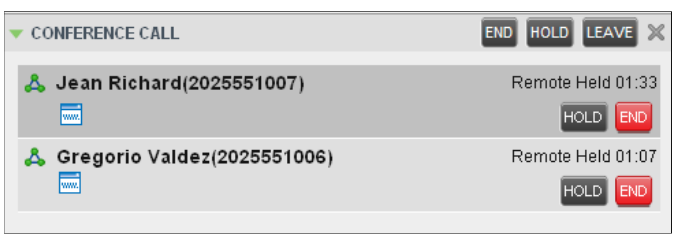


Figure 51 Call Console – Conference Call Panel

To conduct an N-Way conference you must first start a Three-Way conference and then add participants to it.

NOTE: To conduct a conference you must have the Three-Way Call or N-Way Call service assigned.

6.9.1 Start Three-Way Conference

To start a conference you need to have at least two current calls.

To start a conference:

1) If necessary, place calls to participants using any of the methods described in section *6.5 Make and End Calls*.

2) In the *Call Console,* select one of the two calls.

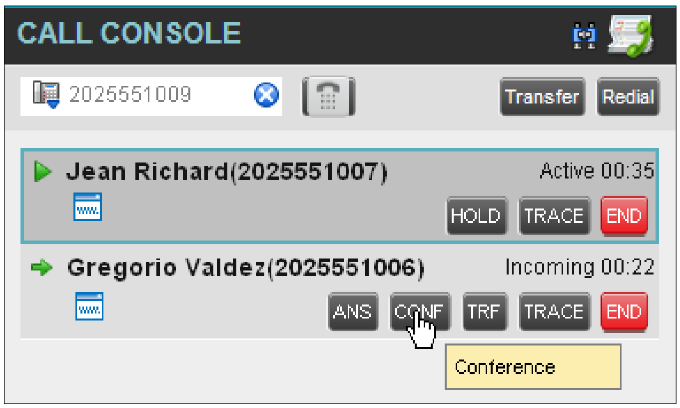


Figure 52 Starting Conference

3) Move the mouse over the non-selected call and click **Conference** CONF. A Three-Way Conference is established and the connected calls are moved to the *Conference Call* panel.

6.9.2 Add Participant to Conference

To perform this operation, you need to have the N-Way Call service assigned.

To add participants to a conference:

1) If the call you want to conference in is not yet established, place the call using any of the methods described in section *6.5 Make and End Calls*.

2) In the *Call Console*, move the mouse over the call to add and click **Conference** CONF. The caller is added to the conference.

6.9.3 Hold Conference

To put an active conference on hold:

In the *Conference Call* panel, click **Hold Conference** HOLD. This allows other conference participants to continue their conversation.

6.9.4 Resume Held Conference

To resume a held conference:

In the *Conference Call* panel, click **Resume Conference** ANS. All the calls in the conference become active.

6.9.5 Put Conference Participant on Hold

To put a specific conference participant on hold:

1) Expand the *Conference Call* panel.
2) Move the mouse over the target call and click **Hold** .

6.9.6 Resume Conference Participant

To resume a conference participant:

1) Expand the *Conference Call* panel.
2) Move the mouse over the target call and click **Answer** .

6.9.7 Leave Conference

To leave the conference:

In the *Conference Call* panel, click the **Leave Conference** button.

> NOTE: This function is only available for Three-Way Conferences.

6.9.8 Remove Conference Participant

To end a selected call in the conference:

1) Expand the *Conference Call* panel.
2) Move the mouse over the call and click **End** .

6.9.9 End Conference

To end the conference:

In the *Conference Call* panel, click **End Conference** . This releases all the calls that participate in the conference.

6.9.10 Barge in on Call

Call Barge-in allows you to barge in on a contact's call. This is useful when you want to enter a call that is already established between two other people.

> NOTE: This functionality is only available if you have been assigned this service by your administrator.

Depending on your setup, you can barge in on contacts in your group or enterprise.

To barge in on a call:

1) Click the *Group/Enterprise* or *Favorites* tab to display its contents.
2) Click the target contact and click **Barge In** . The contact's status must be *Busy*.

You enter an ongoing call, thereby establishing a Three-Way Conference. The calls appear in the *Conference Call* panel.

Alternatively, drag the call onto the target contact and click **Barge In** for that contact.

You can now perform any conference operation on the call.

6.10 Record Calls

You can record calls manually or have the system automatically record your calls. When a call is being recorded, the *Recording* state message appears on the line for the call.

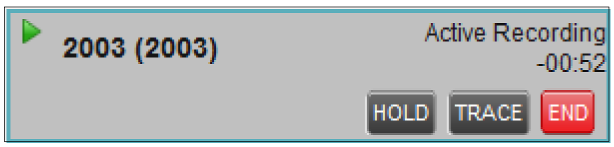


Figure 53 Call Being Recorded

6.10.1 Manually Record Call

To manually record calls, you have to have the Call Recording service assigned and set to "On Demand". For information on configuring your services, see the *BroadWorks Application Server User Web Interface Administration Guide*.

To record a call, select the call in the *Call Console* and click **Record** .

6.10.2 Automatically Record Calls

To automatically record all calls, you have to have the Call Recording service assigned as "Always". For information on configuring your services, see the *BroadWorks Application Server User Web Interface Administration Guide*.

7 Message Contacts (Enterprise Edition)

Receptionist allows you to send e-mail messages to contacts that have messaging configured in the system. You must also have the Messaging feature enabled within Receptionist. For information, see section *14.5 Settings – Messaging*.

7.1 Send E-mail to Contact

To sent an e-mail message to a contact:

1) In the *Group/Enterprise* or *Favorites* directory, click the contact that has an e-mail address configured.
2) Click the **E-mail** button  for the contact. This brings up a new e-mail window for the configured Messaging service.
3) Write your message and click **Send**.

8 Monitor IM&P Contacts and Chat with Contacts

When you have an IM&P service assigned on BroadWorks, you can chat with other IM&P users and see the presence state of selected IM&P users directly from Call Center.

You have to be online to use IM&P capabilities of Receptionist. For information on setting your IM&P presence state, see section *4.7 Change Your IM&P Presence State*.

8.1 Monitor IM&P Contacts

To view the presence state of an IM&P contact, you have to first subscribe to the contact. Otherwise, Receptionist displays the contact's state as *Unsubscribed*. When you send a subscription request to a contact and are waiting for a reply, Receptionist displays the contact's state as *Pending Subscription*.

The following directories display the IM&P state of contacts: *Instant Message, Enterprise/Group*, *Favorites*, *Custom,* and *Search* (for contacts from directories that display in the IM&P state).

> NOTE: The Instant Message directory does not include IM&P contacts in the *Unsubscribed* state.

You can subscribe to a contact either by sending a subscription request to the contact or by adding the contact to the *Instant Message* directory.

For information about the operations related to subscribing to contacts and viewing their presence state, see the following sections:

- Subscribe to Contact
- Add Contact to Instant Message Directory
- Modify Contact
- Unsubscribe from Contact
- Accept or Reject Subscription Request
- View Presence State of Contacts

8.1.1 Subscribe to Contact

To send a subscription request to a contact:

1) Click the IM&P presence icon of an unsubscribed contact in any directory where the presence state of contacts is displayed. The *Contact (IM) Subscribe* dialog box appears.

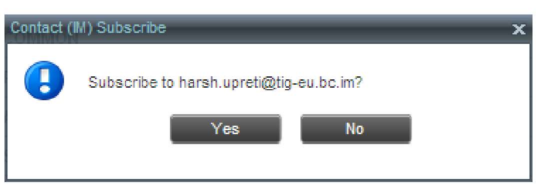


Figure 54 Contact (IM) Subscribe Dialog Box

2) Click **Yes.**

A subscription request is sent to the contact, and the contact is added to the *Instant Message* directory. The contact's state is set to "Pending Subscription" .

When the subscription is accepted, the contact's presence state is updated to their actual presence state.

3) To resend a subscription request at any time, click the contact's presence icon again and click **Resend** in the dialog box that appears.

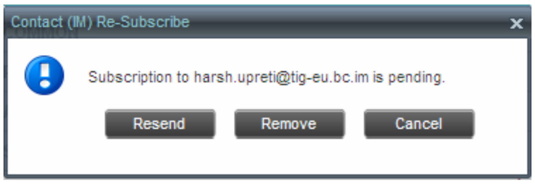


Figure 55 Contact (IM) Re-Subscribe Dialog Box

8.1.2 Add Contact to Instant Message Directory

When you add a contact to the *Instant Message* directory, the system automatically sends a subscription request to the contact.

To add a contact to the Instant Message directory:

1) Click the *Instant Message* tab and then click **Edit** . The *Edit Instant Message Contacts* dialog box appears.

2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

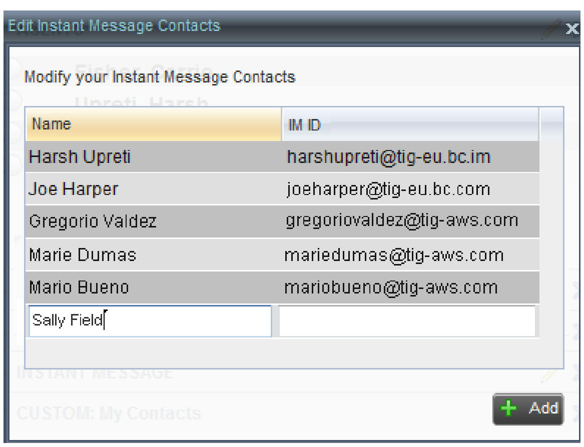


Figure 56 Edit Instant Message Contacts Dialog Box – Add Contact

3) In the *Name* text box, enter the display name of the contact to add.

4) In the *IM ID* text box, enter a valid IM&P ID of the contact.

5) To save the changes, click anywhere in the dialog box outside the entry.

A subscription request is sent to the contact, the contact's presence state is set to "Pending Subscription", and the contact is added to the *Instant Message* tab.

When the contact accepts your request, their state changes to their actual presence state.

8.1.3 Modify Contact Name

You can modify the display name of an existing contact.

To modify the display name of a contact:

1) Click the *Instant Message* tab and then click **Edit** . The *Edit Instant Message Contacts* dialog box appears.

2) Double-click the contact and enter the new name in the *Name* text box.

3) To save your changes, click anywhere in the dialog box outside the entry.

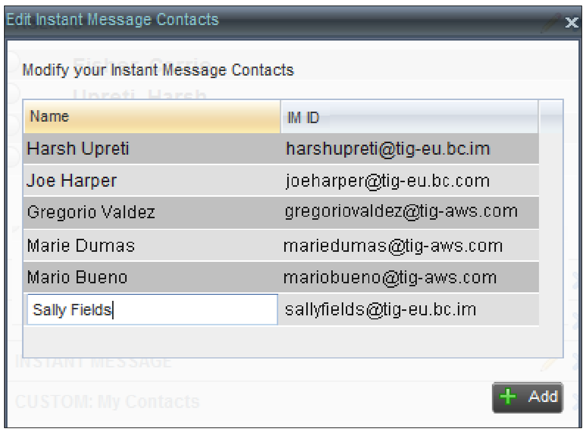


Figure 57 Edit Instant Message Contacts Dialog Box – Modify Contact

8.1.4 Unsubscribe from Contact

To stop monitoring a contact:

1) Click the presence icon of the contact. The *Contact (IM) Unsubscribe* dialog box appears.

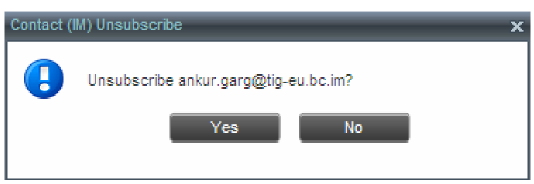


Figure 58 Contact (IM) Unsubscribe Dialog Box

2) Click **Yes**. The contact is removed from the *Instant Message* directory and its presence status changes to *Unsubscribed* in other directories.

8.1.5 Accept or Reject Subscription Request

When you receive a request from another user, a dialog box appears allowing you to accept or deny the request.

Figure 59 Contact (IM) Request Dialog Box

To accept the request, click **Yes**. If the contact is not yet in your *Instant Message* directory, a request is sent to add the user to the directory.

To reject the request, click **No**.

You can also close the dialog box and ignore the request. If you ignore the request, the dialog box will reappear the next time you go online.

8.1.6 View Presence State of Contacts

You can view the presence state of IM&P contacts in the *Instant Message, Enterprise/Group*, *Favorites*, *Custom,* and *Search* tabs. The presence icon is displayed to the left of the contact's name.

The actual IM&P state of a contact is displayed only if you are subscribed to the contact. Otherwise the contact's state is displayed as *Unsubscribed* or *Pending Subscription*.

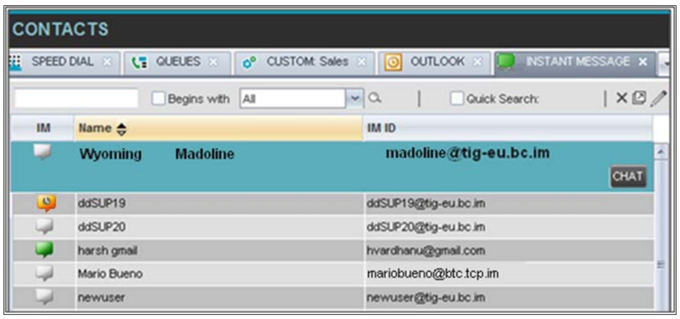
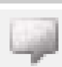


Figure 60 IM&P Presence State of Contacts

The following table lists the possible IM&P presence states in Receptionist:

IM&P State	Icon	Description
Subscribed states		
Available		The contact is online and available to chat. This corresponds to the *Chatty* state on the IM&P server.
Busy		The contact is online, but currently busy. Do not disturb.
Away		The contact is online but away from their computer. This corresponds to the *Extended Away* state on the IM&P server.
Offline		The contact is offline.
Unsubscribed states		
Pending Subscription		You sent a subscription request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
Not subscribed		The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the *Instant Message* pane. Clicking this icon sends a subscription request to the contact.

8.2 Chat with IM&P Contacts

You can chat with more than one contact at the same time, either in one-on-one sessions or by participating in multiuser chats. Each session requires a separate window.

Chat windows appear at the bottom-right hand side of the Receptionist main interface. Subsequent windows open to the left of the latest opened *Chat* window.

Chat windows can be taken out of the main interface and placed elsewhere on the screen.

The number of concurrently open *Chat* windows depends on the browser window size and screen resolution. The oldest *Chat* window is closed when there is no more room for a new *Chat* window to open. This only applies to *Chat* windows that are placed within the main interface.

You can start a chat session with a contact or accept a request from another user. A one-on-one session can be converted into a multiuser chat by inviting more participants. You can also receive an invitation to a multiuser chat from another user.

When your IM&P contact is in your group/enterprise, you can phone them directly from the *Chat* window.

The tasks related to instant messaging are described in the following sections:

- Start Instant Messaging Session
- Place Call from Chat Window
- Establish Multi-User Chat Session
- Manage Instant Messaging Sessions

8.2.1 Start Instant Messaging Session

You can start an instant messaging session with an IM&P contact from any of the following directories: *Instant Message, Enterprise/Group*, *Favorites*, *Custom, and Search*.

To start an instant messaging session with a contact:

1) In the *Contacts* pane, click the target contact. The entry expands displaying available action buttons.

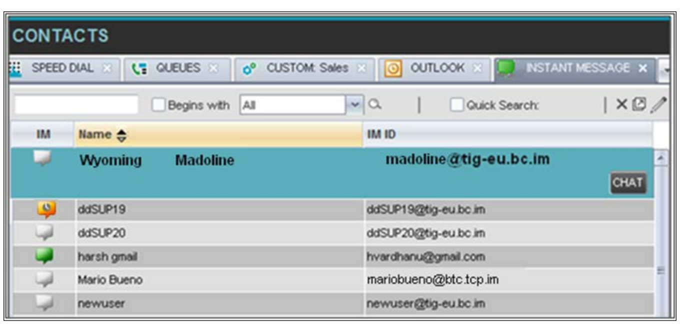


Figure 61 IM&P Contact with Chat button

2) Click **Chat** 

on the line for the contact. A *Chat* window appears, displaying your contact's information on the title bar.

Figure 62 Chat Window

NOTE: A *Chat* window also appears when another IM&P user initiates a chat session with you.

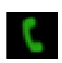
3) Type your message in the text box at the bottom of the window and click ENTER on the keyboard. Your message is sent to your contact.

   The messages you send and receive appear in the *Chat Logs* area at the top of the window, below the title bar. Up to 50 messages per contact are kept in the log for the duration of your IM&P session, even if you close the *Chat* window and later start exchanging messages again with the same contact. The messages are cleared when you go offline.

8.2.2 Place Call from Chat Window

If the user with whom you are chatting is also a contact in your *Group/Enterprise* directory, you can call the contact directly from the *Chat* window.

To place a call from the *Chat* window:

Click the **Call** button  at the top right-hand side of the *Chat* window.

The Receptionist client issues a Click-To-Dial attempt to the contact's phone number and the call appears in the *Call Console*.

8.2.3 Establish Multi-User Chat Session

You can invite other contacts to your chat session, thus converting your one-on-one chat to a multi-user chat. An incoming multi-user chat invitation opens a window for a new multi-user chat.

To add users to a chat:

1) Click the **Add User to Chat** button  in the *Chat* window. A drop-down list of available contacts appears.

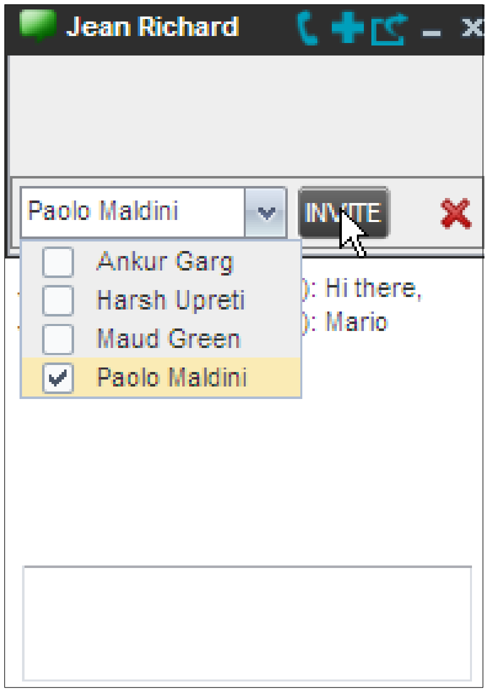


Figure 63 Add Participants to a Chat

2) Select the check box next to each contact to invite and then click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the *Chat* window. The participants (other than you) are also listed at the top of the window.

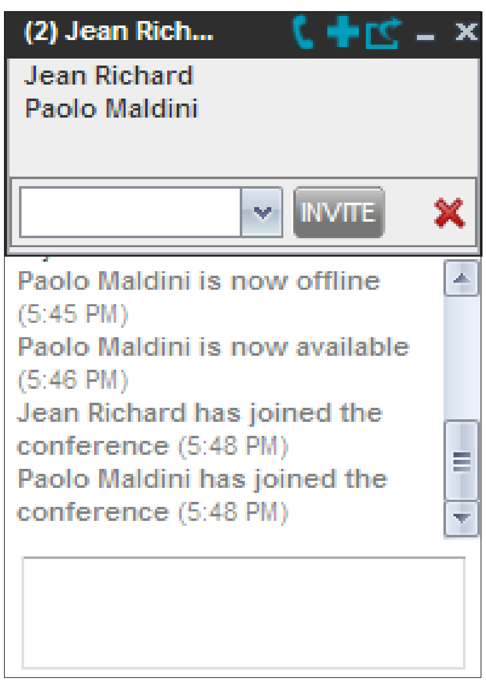
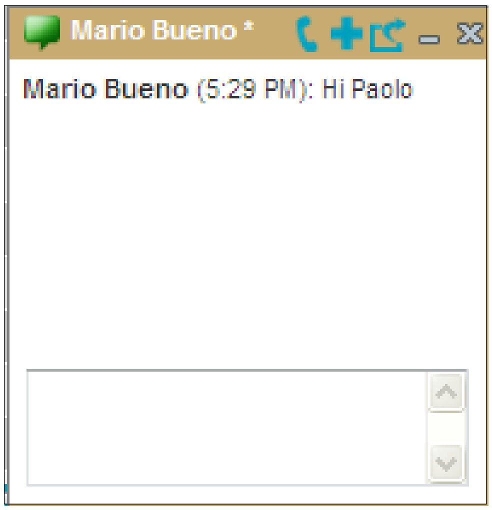


Figure 64 Multiuser Chat

3) To leave the multi-user chat, close the *Chat* window.

8.2.4 Manage Instant Messaging Sessions

If a *Chat* window is not in focus and an incoming message is available for you to read, the color of the window is light brown as shown in the following figure. This changes back to black as soon as the window is in focus.



You can also close, minimize, or pop out a *Chat* window, that is, take the *Chat* window out of the Receptionist main interface and place in elsewhere on the desktop.

To pop out a *Chat* window:

Click the **Pop-out** button  at the top right-hand side of the window.

The window is placed on the desktop outside of Receptionist main interface and the Pop-out button becomes the Pop-in button.

To place the window back within the Receptionist main interface:

Click the **Pop-in** button  at the top right-hand side of the window.

To minimize or close a *Chat* window:

Click the **Minimize** or **Close** button at the top right-hand side of the window. When a window is closed, the windows to the left (if present) shift to the right. This only applies to *Chat* windows that are placed within the Receptionist main interface.

9 Manage Contacts

Receptionist allows you to view, search, and organize your contact directories.

You use the *Contacts* pane to manage your contact directories, to monitor selected contacts, and to use your contacts to make or manage calls.

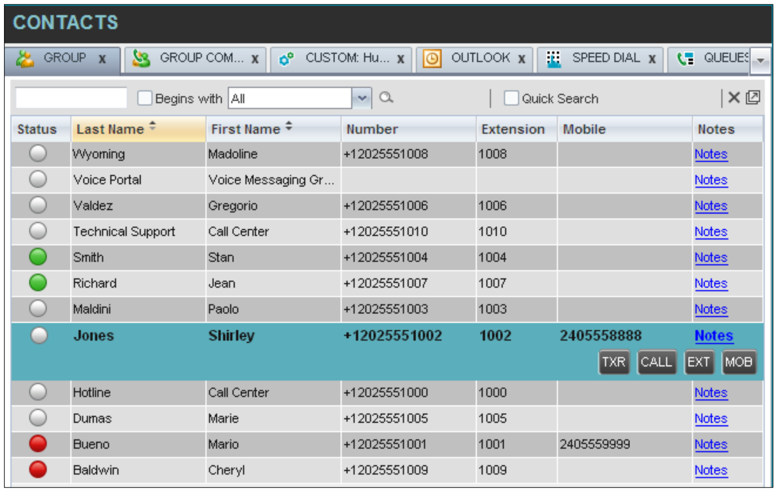


Figure 65 Contacts Pane

Your contact directories are displayed as tabs at the top of the *Contacts* pane, with the details of only one directory visible at any time. The information displayed about each contact depends on the directory you are viewing.

For the list of contact directories available in your version of Receptionist, see section 3 *Introduction to Receptionist*.

For information on monitoring contacts, see section *10 Monitor Contacts*; for information on managing IM&P contacts, see section *8.1 Monitor IM&P Contacts*; for information on call-related functions, see section 6 *Manage Calls*.

This section describes the directories management functions provided by Receptionist.

- Show/Hide Directories
- View Directory Content
- Search Contacts
- Make Notes About Contact (Enterprise Edition)
- Manage Personal Contacts
- Manage Speed Dial Entries

9.1 Show/Hide Directories

Receptionist allows you to specify which directory tabs should be visible in the *Contacts* pane.

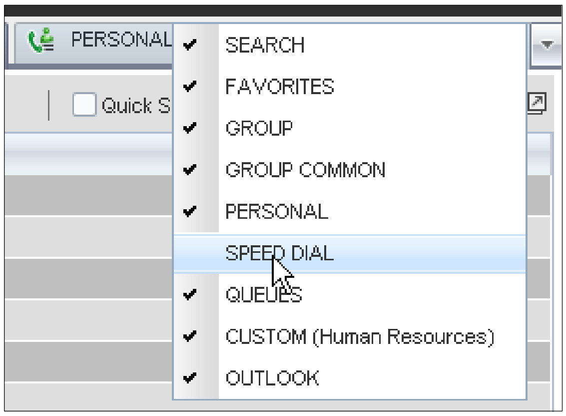


Figure 66 Contacts Pane – Expanded Options Menu

To display a directory tab in the Contacts pane:

1) At the top right-hand side of the *Contacts* pane, click the drop-down arrow .

2) From the list that appears, select the directory to display. The directory tab is displayed at the top of the *Contacts* pane and its contents appear in the *Contacts* pane.

To remove a directory tab from the *Contacts* pane, click the **Close** button on the tab for that directory.

Note that once you close a directory containing search results, you cannot display it again.

9.2 View Directory Content

To view contacts in a directory:

In the *Contacts* pane, click the tab for that directory. The directory listing appears in the *Contacts* pane.

If the tab is not visible, click the drop-down arrow to the right of the directories tabs and select the directory from the list that appears.

To view additional information about a contact:

Click the contact to view. This expands the row for the contact displaying applicable action buttons and in some directories also the contact's calendar. For more information about the action buttons, see section *5.5.1 Call Action Buttons*. For more information about the contact's calendar, see section *10.4 Monitored User's Calendar (Enterprise and Small Business Editions)*.

9.3 Search Contacts

Receptionist allows you to search for contacts several different ways. You can perform a search on a specific directory or on all directories at once. You can perform a quick search or a regular search, you can create a new directory from search results, and you can perform a search on search results.

To search for contacts, use the following procedures:

- Perform Quick Search
- Perform Regular Search
- Create Directory from Search Results
- Perform Search on Search Results

9.3.1 Perform Quick Search

Receptionist allows you to perform a quick search, which searches a specific column for entries that start with a character entered by you. The column on which the search is performed is the column by which the directory is currently ordered.

A quick search can be performed on any directory, except for the *Search* directory.

> NOTE: The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.

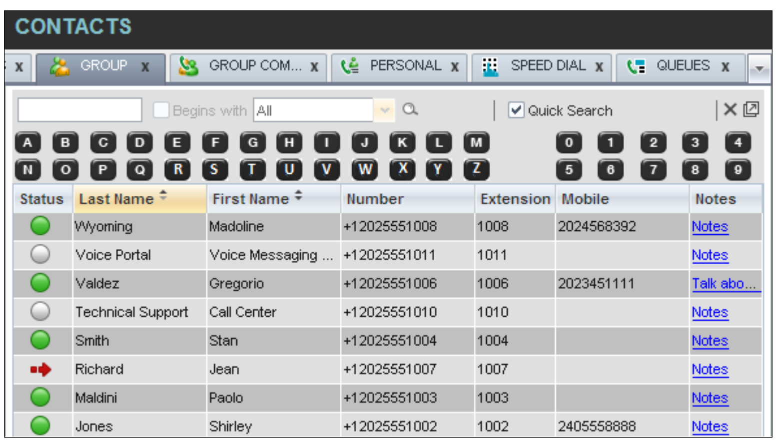


Figure 67 Contacts Pane – Performing Quick Search

To perform a quick search:

1) Click the directory tab where you want to perform the search.
2) Order the directory by the column that you want to search.
3) Check the *Quick Search* box.
4) From the keypad that appears, select a character (a single letter or digit) that you want to perform the search. The contacts that start with the selected character (in the selected column) are displayed in the directory.
5) To perform another search on the same column, select another character. The new search is performed on the original directory and not on the results of the previous search.

9.3.2 Perform Regular Search

You can search for contacts in a specific directory or in all directories at once.

When you search for contacts in a specific directory, you can search on a specific column or on all columns. When you use the Search tab, the search is performed on all directories and columns.

If you perform a second search on the same directory, the search is performed on the entire directory even if only search results are displayed. To search in search results, you first need to create a new directory from the results of the first search.

You use the controls located in the *Contacts* pane below the directories tabs to perform contact searches.

> NOTE: The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.

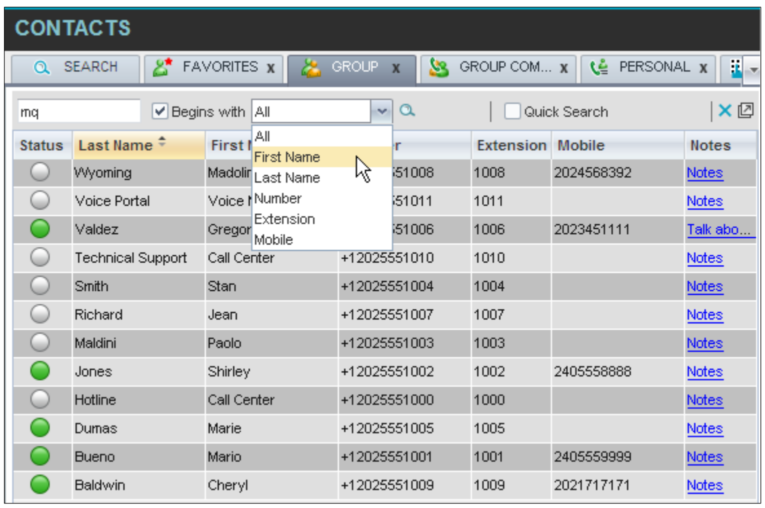


Figure 68 Contacts Pane – Performing Regular Search

To search in a specific directory:

1) Select the directory to search.

2) Make sure that the *Quick Search* box is unchecked.

3) In the *Search* text box, enter the text you want to search for. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

   For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

4) To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise the search results will also include contacts that contain the entered string.

5) From the drop-down list, select the column to search by. You can select a specific column or all columns.

6) Click the **Search** button .

The text you entered is matched against the selected column (or all columns) of every entry of the selected directory. Search results are displayed in the tab where the search was performed.

Duplicate search results in BroadWorks directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

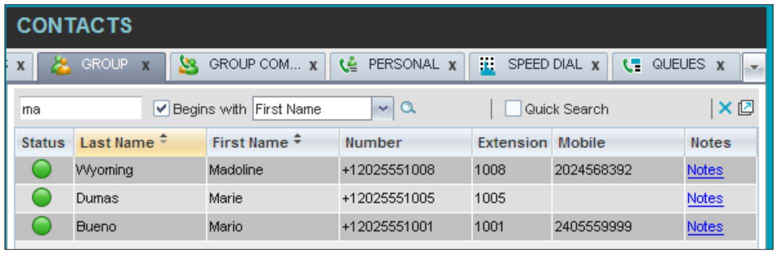


Figure 69 Contacts Pane – Search Results

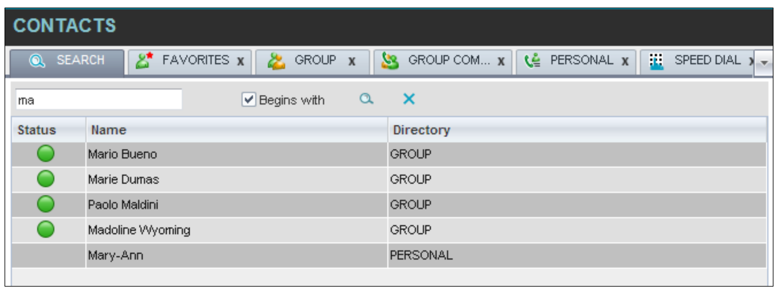


Figure 70 Contacts Pane – Search Results in the Search Tab

The search returns either all the contacts (in the selected directory) that contain the entered keyword or all the contacts that start with the entered keyword.

In the first case (*Begins with* not checked), entering “Ann” returns all contacts with the name “Ann”, but it also returns all contacts with names such as “Anne”, “Marianne”, “Marie Ann”, “Ann Marie”, and so on.

In the second case (*Begins with* checked), entering “Ann” returns all contacts with names such as “Ann”, Anne”, and Ann Marie”, but not “Marianne” or “Mary Ann”.

7) To clear the search results, click **Reset** ✕.

To search in all directories:

1) Click the **Search** tab.

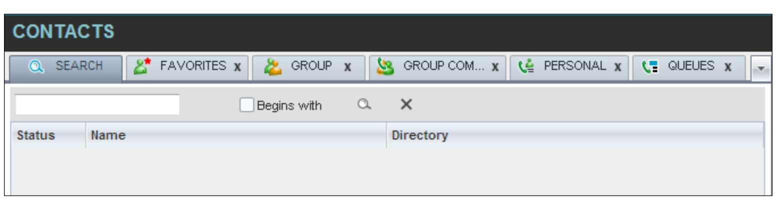


Figure 71 Performing Search Using Search Tab

2) In the *Search* text box, enter the text you want to search for. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

3) To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise, the search results will also include contacts that contain the entered string.

4) Click the **Search** button .

   The text you enter is matched against all columns in all directories (except for the *Notes* column). Search results are displayed in the Search tab.

   Duplicate search results in BroadWorks directories are not displayed; the first match for a given contact is displayed. Duplicate search results in other directories are displayed.

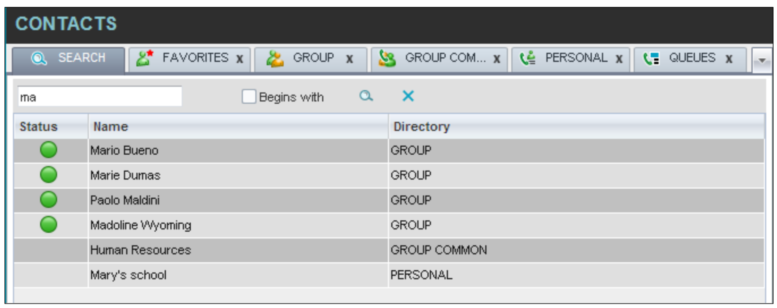


Figure 72 Results of Search Performed in Search Tab

5) When you click a contact, the entry expands displaying contact details. The information depends on the directory that the contact was selected.

NOTE: Contact entries displayed in the Search tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

9.3.3 Create Directory from Search Results

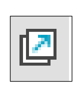
When you perform a search in a specific directory, you can create a new directory from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.

NOTE: The Pullout button is not available in the Search directory.

To create a directory from search results:

1) Select the directory where you want to perform the search.

2) Perform a quick search or a regular search on a single column.

3) When the results are displayed, click the **Pullout** button , which becomes active. A new tab is created containing the results of the search.

NOTE: Contact entries displayed in a search results tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

9.3.4 Perform Search on Search Results

If you perform a search in a specific directory, the search is always performed on the entire directory even if only search results are displayed. To search in search results, you first need to first create a new directory from the search results.

To perform a search on search results:

1) After you perform the original search, create a directory from the search results.
2) Perform a new search in the new directory.

NOTE: Searching within the search results cannot be performed on the same column that the original search was performed.

9.3.5 Order Directory Entries

Receptionist allows you to order directory entries in ascending or descending order. The columns that the directory can be ordered have the sort icon displayed next to their name. The following table lists the directories and the columns by which they can be ordered.

Directory	Sort Columns	Default Sort Column
Enterprise/Group	First Name, Last Name Note that the Enterprise directory can only be sorted in ascending order.	Last Name
Favorites	Status, IM, First Name, Last Name, Number, Extension, Mobile, Notes	Last Name
Group/Enterprise Common	Name, Number	Name
Personal	Name, Number	Name
Speed Dial	Code, Description, Number	Code
Queues	Name, Number, Extension	Name
Custom	First Name, Last Name	Last Name
Outlook	Last Name, First Name, Number, Mobile, Home Phone	Last Name
Instant Message	IM, Name, IM ID	Name

Note that you cannot order the contacts in the Search tab.

The sorting order for the *Status* column is as follows from highest to lowest: Private, On a Call, Ringing, Away, In a Meeting, Call Forwarding Always, Do Not Disturb, and Available. For information on the different states, see section *15.1 Monitored User States*.

The sorting order for the *IM* column is as follows from highest to lowest: *Busy*, *Away*, *Available*, *Offline*, *Pending Subscription*, *Not subscribed*. For information on the different states, see section *15.3 Instant Messaging and Presence States*.

To order a directory:

1) Click the header of the column that you want to order the directory.

2) To reverse the order, click the same column header again.

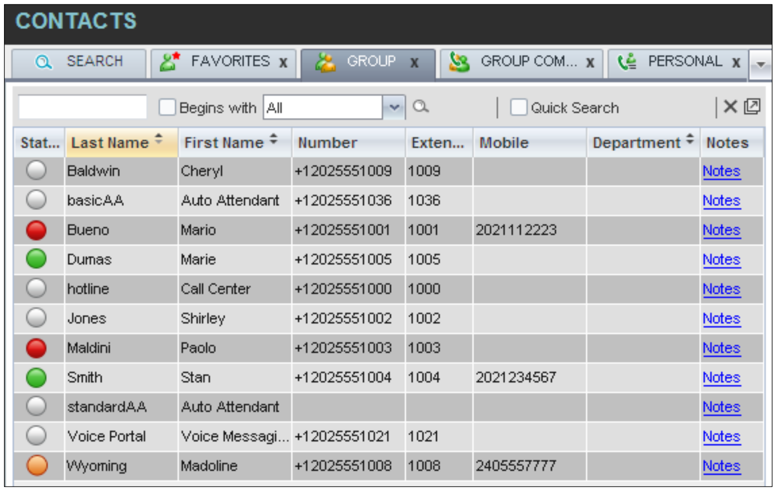


Figure 73 Sort Directory

The contacts in the selected directory are reordered based on the selected column. The sort order is saved on sign-out and preserved between sessions.

9.4 Make Notes About Contact (Enterprise Edition)

Receptionist Enterprise allows you to make notes about the contacts in your *Group/Enterprise* and *Favorites* directories.

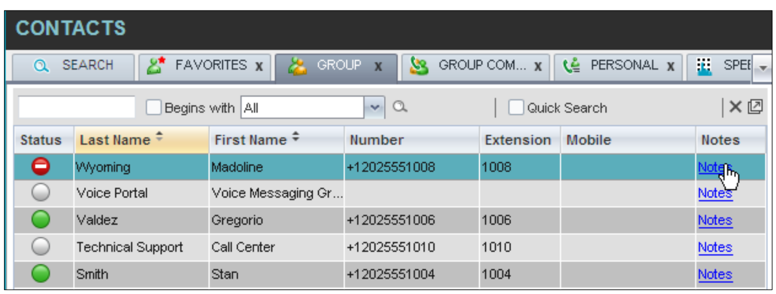


Figure 74 Group Directory – Contacts Notes

To make a note about a contact:

1) In the *Group/Enterprise or Favorites* directory, click the *Notes* link for a selected contact. The *Notes for <Contact Name>* dialog box appears.

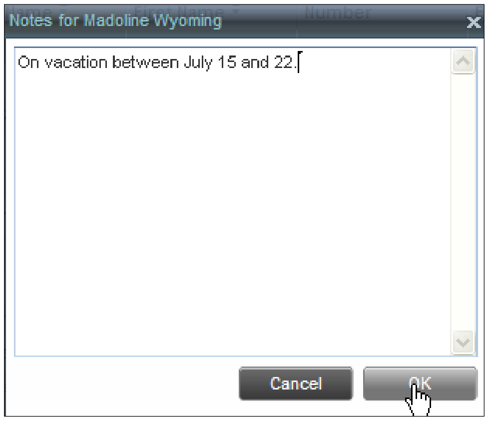


Figure 75 Notes for Madoline Wyoming Dialog Box

2) Enter the desired text, view or modify the existing text in the *Notes* text box.

3) To save your changes and close the dialog box, click **OK**.

   Or to close the dialog box without saving, click **Cancel**.

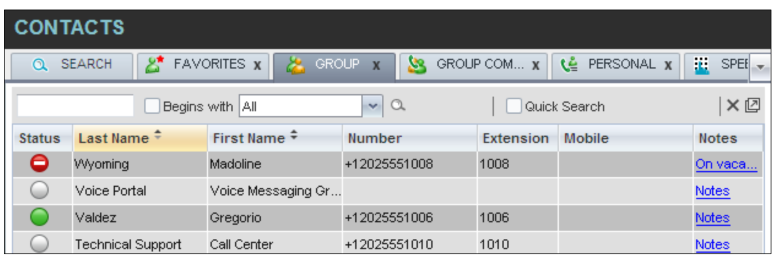


Figure 76 Group Directory – Contact Notes

When there are notes for a contact, the beginning of the text of the notes followed by an ellipsis (...) is displayed for the Notes link instead of the word “Notes”.

9.5 Manage Personal Contacts

You can add or remove personal contacts via the web portal or in Receptionist, and the updates appear in both places. However, the updates that you make via the web portal appear in Receptionist at the next sign-in.

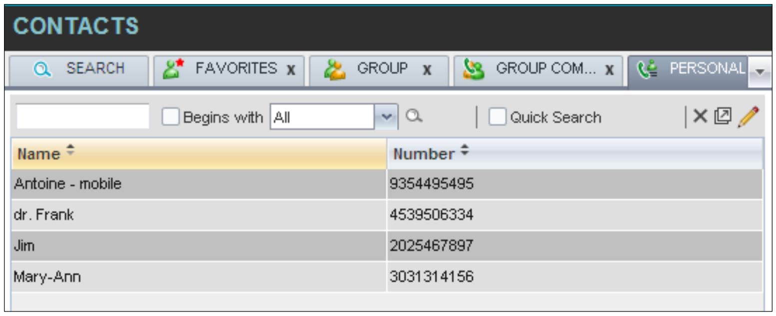


Figure 77 Personal Tab

You can perform the following operations on personal contacts:

- Add Personal Contact
- Delete Personal Contact

You cannot modify a personal contact entry in Receptionist. To modify information for a personal contact, delete the entry and add it again.

9.5.1 Add Personal Contact

To add a personal contact:

1) Click the *Personal* tab and then click **Edit** . The *Edit Personal Contacts* dialog box appears.
2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

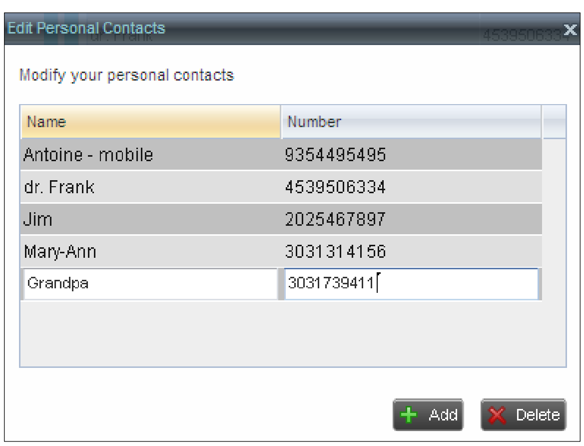


Figure 78 Edit Personal Contacts Dialog Box – Add Entry

3) In the *Name* text box, enter the contact's name or description, as you want it to appear.
4) In the *Number* text box, enter the phone number of the contact.

5) To save the changes, click anywhere in the dialog box outside the entry.

9.5.2 Delete Personal Contact

To delete a speed dial entry:

1) Click the *Personal* tab and then click **Edit** . The *Edit Personal Contacts* dialog box appears.

2) Select the entry to delete and click **Delete**.

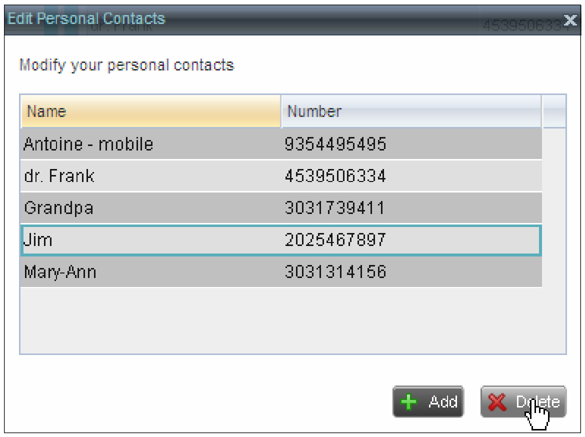


Figure 79 Edit Personal Contacts Dialog Box – Delete Entry

9.6 Manage Speed Dial Entries

This directory allows you to manage and use your Speed Dial 8 and Speed Dial 100 entries. To use this feature, you need to have Speed Dial 8 and/or Speed Dial 100 service assigned. If you only have one of these services, you see the entries for that service only in your *Speed Dial* tab.

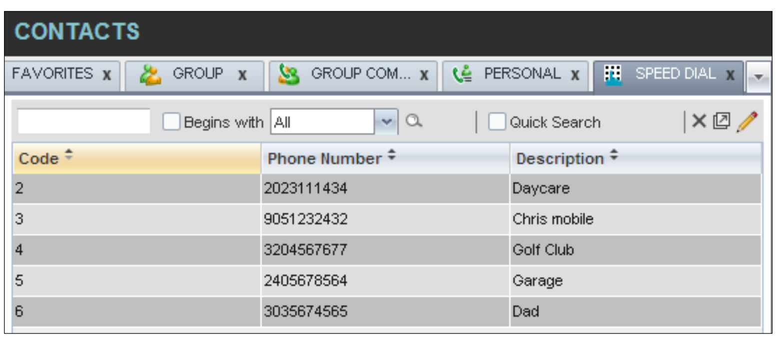


Figure 80 Speed Dial Tab

You can add or remove entries via the web portal or the Receptionist client, and the updates appear in both places. However, the updates that you make via the web portal appear only at the next sign-in to Receptionist.

To update speed dial entries using the client, perform the following operations:

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

9.6.1 Add Speed Dial Entry

To add a speed dial entry:

1) Click the *Speed Dial* tab and then click **Edit** . The *Edit Speed Dials* dialog box appears.
2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

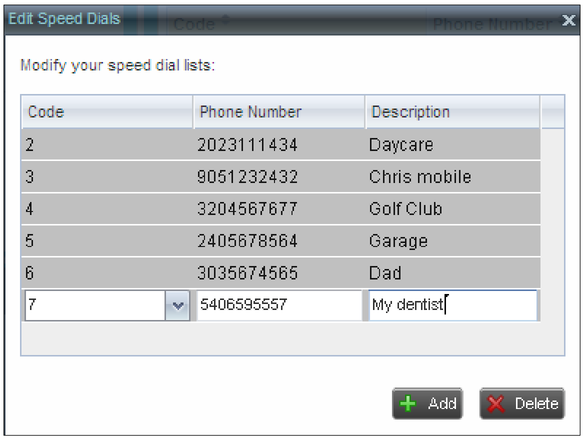


Figure 81 Edit Speed Dials Dialog Box – Add Entry

3) From the *Code* drop-down list on the left, select a speed dial code.
4) In the *Phone Number* text box, enter the phone number to assign to the code.
5) In the *Description* text box, enter a description that allows you to identify the entry.
6) To save the entry, click anywhere in the dialog box outside the entry.

9.6.2 Modify Speed Dial Entry

To modify a speed dial entry:

1) Click the *Speed Dial* tab and then click the **Edit**  button. The *Edit Speed Dials* dialog box appears.
2) Double-click the entry to modify. The entry becomes modifiable.

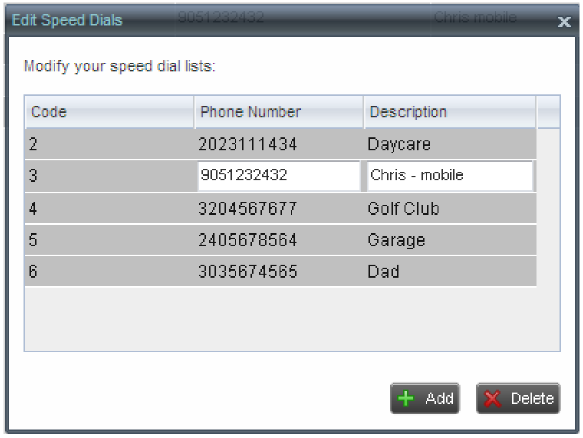


Figure 82 Edit Speed Dials Dialog Box – Modify Entry

3) Modify information as required.

4) To save the changes, click anywhere in the dialog box outside the entry.

9.6.3 Delete Speed Dial Entry

To delete a speed dial entry:

1) Click the *Speed Dial* tab and then click **Edit** . The *Edit Speed Dials* dialog box appears.

2) Select the entry to delete and click **Delete**.

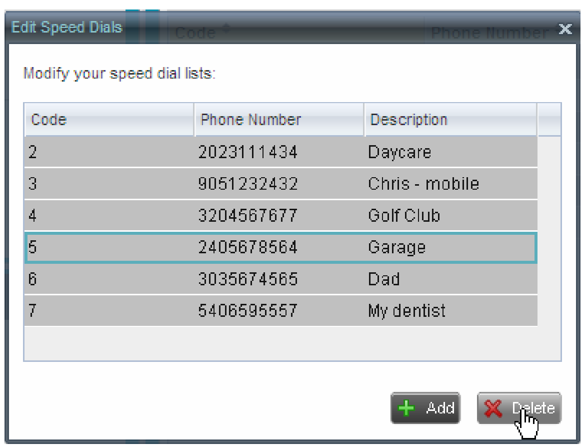


Figure 83 Edit Speed Dials Dialog Box – Delete Entry

10 Monitor Contacts

Receptionist allows you to monitor the call state of selected contacts. All editions of Receptionist allow you to monitor contacts configured through the web portal. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

The following table summarizes the monitoring capabilities of the different editions of Receptionist:

Edition	Description
Enterprise	This is the static monitoring of up to 200 contacts and the dynamic monitoring of a configurable number of contacts enterprise-wide. The maximum number of contacts you can dynamically monitor is configured by your administrator and cannot exceed 100.
Small Business	This is the static monitoring of up to 30 contacts enterprise-wide.
Office	This is the static monitoring of up to 8 contacts group-wide.

You use the *Favorites* directory to view the phone state of statically monitored contacts and the *Group/Enterprise* directory to view the phone state of dynamically monitored contacts.

NOTE: If a call is parked against the contact that you are monitoring, the information about the parked call also appears.

The following sections describe information and procedures related to monitoring contacts:

- Static Monitoring
- Dynamic Monitoring (Enterprise Edition)
- Request Dynamic Monitoring
- Monitored User's Calendar (Enterprise and Small Business Editions)
- Contact States

10.1 Static Monitoring

To statically monitor contacts, the list of contacts to monitor must be configured on your web portal. The selected contacts appear in your *Favorites* directory. However, the updates that you make to the list of contacts to monitor appear in Receptionist at the next sign-in.

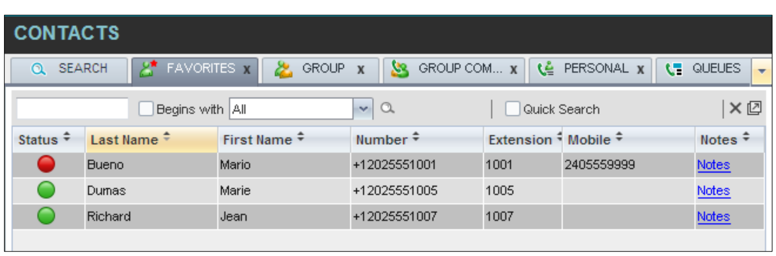
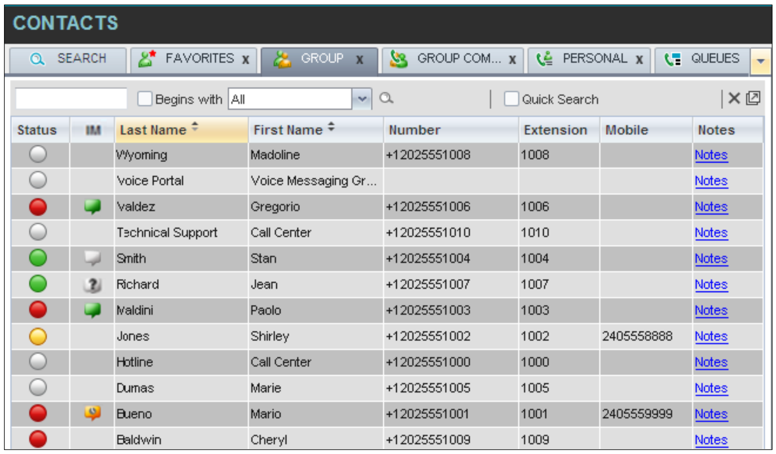


Figure 84 Favorites Directory with Monitored Contacts

10.2 Dynamic Monitoring (Enterprise Edition)

Dynamic Monitoring allows you to view the call state of selected contacts in your *Group/Enterprise* directory. You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit, the first contact that was selected to be monitored is unselected and stops being monitored. The state of a contact that is not monitored is shown as *Unknown* .



Status	IM	Last Name	First Name	Number	Extension	Mobile	Notes
		Wyoming	Madoline	+12025551008	1008		Notes
		Voice Portal	Voice Messaging Gr...				Notes
		Valdez	Gregorio	+12025551006	1006		Notes
		Technical Support	Call Center	+12025551010	1010		Notes
		Smith	Stan	+12025551004	1004		Notes
		Richard	Jean	+12025551007	1007		Notes
		Maldini	Paolo	+12025551003	1003		Notes
		Jones	Shirley	+12025551002	1002	2405558888	Notes
		Hotline	Call Center	+12025551000	1000		Notes
		Dumas	Marie	+12025551005	1005		Notes
		Bueno	Mario	+12025551001	1001	2405559999	Notes
		Baldwin	Cheryl	+12025551009	1009		Notes

Figure 85 Group Directory with Monitored Contacts

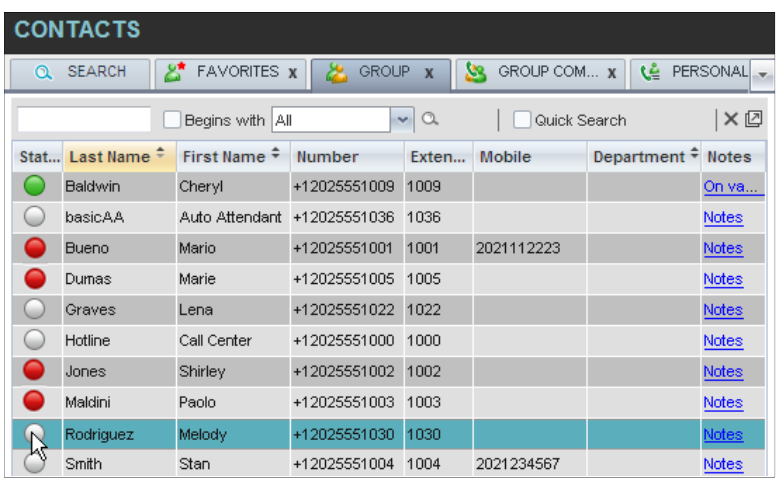
10.3 Request Dynamic Monitoring

The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

To monitor a contact:

In the *Group/Enterprise* directory, click the **Status** icon of the contact to monitor.

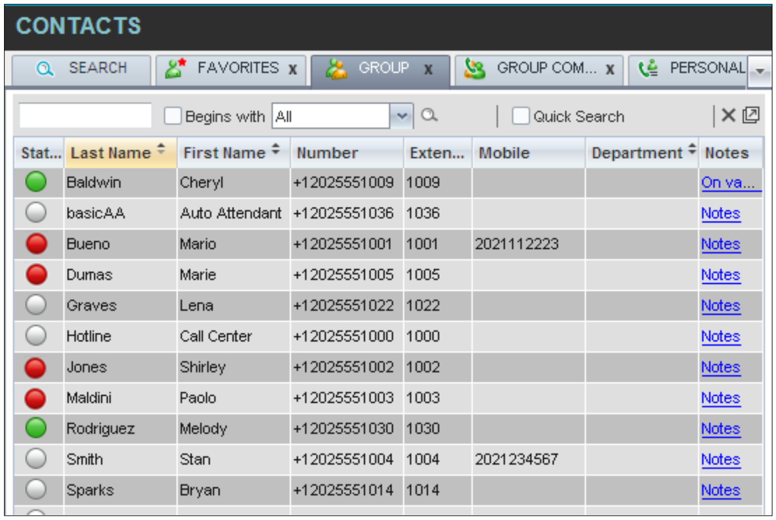
NOTE: You cannot monitor the state of virtual users. Only regular users can be monitored.



Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			On va...
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	Graves	Lena	+12025551022	1022			Notes
	Hotline	Call Center	+12025551000	1000			Notes
	Jones	Shirley	+12025551002	1002			Notes
	Maldini	Paolo	+12025551003	1003			Notes
	Rodriguez	Melody	+12025551030	1030			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes

Figure 86 Group Directory – Requesting Contact Monitoring

This requests state notifications from BroadWorks for this contact; the contact's state is updated in real time.



Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			On va...
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	Graves	Lena	+12025551022	1022			Notes
	Hotline	Call Center	+12025551000	1000			Notes
	Jones	Shirley	+12025551002	1002			Notes
	Maldini	Paolo	+12025551003	1003			Notes
	Rodriguez	Melody	+12025551030	1030			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
	Sparks	Bryan	+12025551014	1014			Notes

Figure 87 Group Directory – Monitored Contacts

10.4 Monitored User's Calendar (Enterprise and Small Business Editions)

When you expand the entry for a monitored contact, the entry displays calendar details for the contact, with information downloaded from the Microsoft Exchange server, if this feature is configured by your administrator.

Figure 88 Contacts Pane – Monitored User's Calendar Details

The calendar is divided into one-hour blocks. Those blocks can be displayed in red (when the user is busy), green (when the user is free), or partly in red and partly in green (when the user is busy only during part of the one hour block). When you move the mouse over a partially busy time block, the ToolTip shows the meeting's start and end time (for example, 9:00 AM to 9:30 AM).

By default the calendar displays the time between 8:00 AM and 6:00 PM for the current day. You can change the date and the time displayed on the calendar, by using the Back and Forward buttons. Clicking the button shifts the displayed time period by one day/hour.

The calendar details are displayed in the time zone of your local machine.

10.5 Contact States

The state of a contact is represented by an icon located to the left of the contact's name. This state integrates the state of the contact's line, the contact's Microsoft Exchange calendar presence, and the state of services such as Call Forwarding Always, Do Not Disturb, and Privacy. The following table lists the possible contact states:

Icon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar State	Call State
	Private	N/A	N/A	On	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	No active calls
	In a Meeting	N/A	N/A	Off	Busy	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	No active calls
	Available	Off	Off	Off	Free or Tentative	No active calls
	Unknown	N/A	N/A	N/A	N/A	N/A

11 Manage Call History

You can organize call logs and delete selected call logs or all call logs from Call History.

11.1 View Call History

Receptionist allows you to view your passed calls. By default, the calls are grouped into placed, received, and missed calls.

To view your call history:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed.

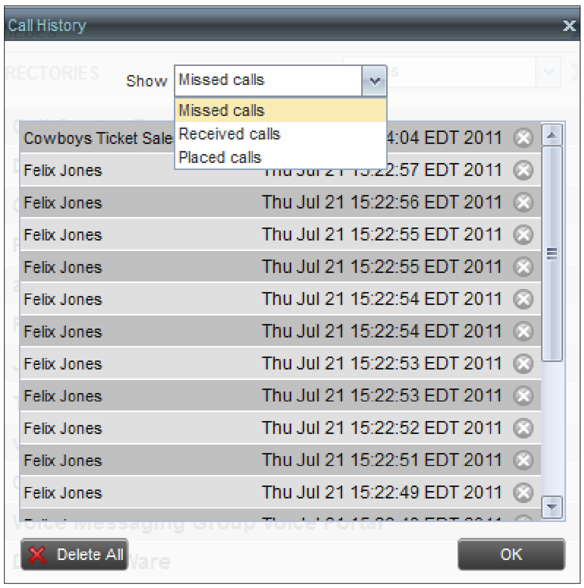


Figure 89 Call History Dialog Box

2) To show calls in a specific group, select that group from the *Show* drop-down list.

11.2 Delete Call History

You can delete a selected call log or all call logs from Call History.

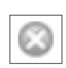
To delete call logs from Call History:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

2) To delete all call logs, click **Delete All** 

.

3) From the *Show* drop-down list, select a grouping.

4) To delete a selected log, click **Delete Call Log**  for that log.

12 Manage Queued Calls (Enterprise Edition)

Receptionist allows you to manage calls in selected call centers (up to five) and monitor calls in real time. You manage queued calls using the *Queued Calls* pane. This functionality is only available if you are supervising call centers or if you have been assigned the BroadWorks Supervisor license.

Figure 90 Queued Calls Pane

This section describes the following procedures you perform to manage queued calls:

- Select Call Centers to Manage
- Modify Number of Calls to Display
- Retrieve Call from Queue
- Transfer Call to Ad Hoc Number
- Transfer Call Between Queues
- Transfer Call to Top of Queue (Premium Call Center)
- Promote Call in Queue (Premium Call Center)
- Group Calls
- Order Queued Calls

12.1 Select Call Centers to Manage

After you sign in to Receptionist, select the call centers you want to manage (up to five).

To select call centers:

1) In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option.

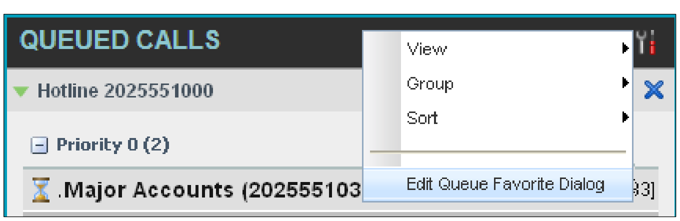


Figure 91 Queued Calls – Options – Edit Queue Favorite Dialogue.

The *Edit Queue Favorites* dialog box appears.

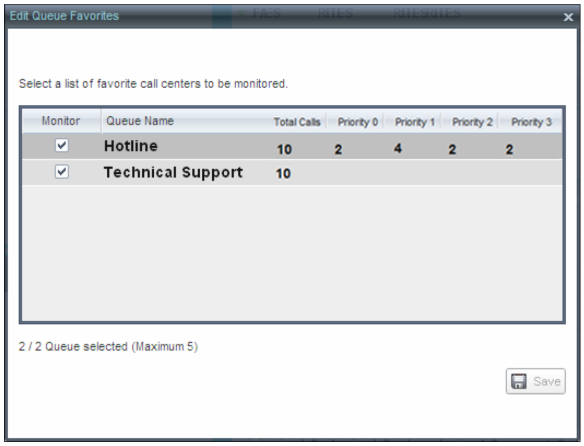


Figure 92 Edit Queue Favorites Dialog Box

2) Select the check boxes for the call centers you want to monitor.

3) Click **Save**.

   The selected call centers appear in your *Queued Calls* pane.

12.2 Modify Number of Calls to Display

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed. For each Premium call center you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

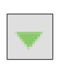
1) In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.

2) For each Standard call center you are monitoring, set the total number of calls to display.

3) For each Premium call center you are monitoring, set the number of calls to display in each priority bucket. The total number of calls in all priority bucket cannot exceed 50.

12.3 View Queued Calls

To view calls in a queue:

Click the **Expand** button  for that queue.

12.4 Retrieve Call from Queue

You can retrieve a call from a queue to your phone device.

To retrieve a call from the queue:

In the *Queued Calls* pane, click the call to expand it and click **Retrieve** 

for that call.

Once you retrieve the call, the call appears in the *Call Console*, and you treat it as any other call.

12.5 Transfer Call to Ad Hoc Number

To transfer a call to an ad hoc number:

1) In the *Queued Calls* pane, select the call.
2) In the *Dialer*, enter the destination number and click **Transfer** 
.

Figure 93 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

12.6 Transfer Call Between Queues

To transfer a call to another queue:

1) In the *Queued Calls* pane, select the call.
2) In the *Contacts* pane, click the *Queues* tab.
3) Click the target queue and click **Transfer** 

for that queue.

   The call is transferred and removed from the original queue.

12.7 Change Position of Call in Queue

To change the position of a call in the queue:

1) In the *Queued Calls* pane, click the call and click **Reorder** 
.

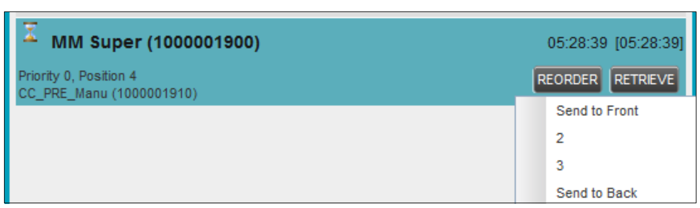


Figure 94 Reordering Queued Call

2) In the drop-down box that appears, select the new position in the queue.

   The call is placed at the new position.

> NOTE: The list can contain a maximum of 24 reorder positions you can choose from to reorder a call in queue, in addition to *Send to Back* and *Sent to Front* options.

12.8 Transfer Call to Top of Queue (Premium Call Center)

If your administrator has configured the call center with the Transfer to Top feature, follow this procedure to transfer the call to the top of the queue.

You can only transfer a call to the top of the highest priority bucket (bucket with priority "0"). There need to be at least two calls in the target queue.

1) In the *Queued Calls* pane, click the target call to expand it.

2) Click **Reorder** 

and select *Send to Front* from the list that appears.

Figure 95 Transferring Call to Top of Queue

12.9 Promote Call in Queue (Premium Call Center)

In Premium call centers, a priority is attached to an incoming call based on the DNIS number on which the call is received. You can manually promote calls from a lower priority bucket to a higher priority bucket. A promoted call ends up as the last call in the higher priority bucket with a wait time of zero seconds.

To promote a call, that is, to change its priority:

In the *Queued Calls* pane, select the call to promote and click **Promote** 

.

The queued call is promoted to the end of the next highest priority bucket.

12.10 Group Calls

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

1) In the *Queued Calls* pane, click **Options** 
, select *Group,* and then select or deselect *Group by priority*. This action applies to all monitored call centers.

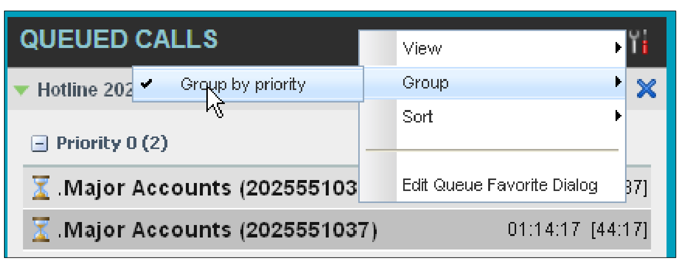


Figure 96 Queued Calls – Options – Group

2) To ungroup calls, unselect the *Group by priority* option.

12.11 Order Queued Calls

Queued calls can be ordered according to their total waiting time or according to their waiting time in the current priority bucket.

To order queued calls:

1) In the *Queued Calls* pane, click **Options** 
.

2) Select *Sort* and then the ordering option you want. This operation applies to all monitored call centers.

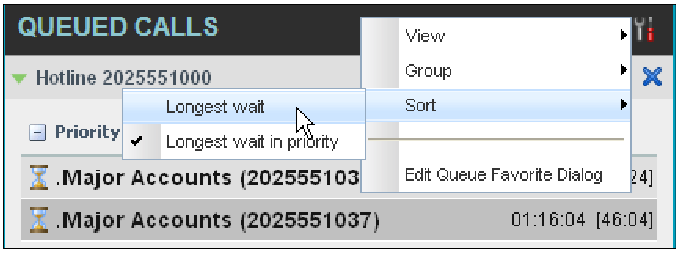


Figure 97 Queued Calls – Options – Sort

NOTE: The ordering does not work when calls are grouped. If required, first ungroup the calls.

13 Configure Web Browser for Receptionist

13.1 Configure Internet Explorer for Full Screen Mode

For the supported versions of Internet Explorer, see the *BroadWorks Hosted Thin Receptionist Configuration and Administration Guide*.

Internet Explorer needs to be configured as follows to enable the Full Screen link in Receptionist; otherwise the Receptionist is not displayed in full screen mode when the Full Screen link is clicked, and no error message is displayed to the user.

1) On the Internet Explorer *Menu* bar, select the *Tools* menu and then click **Internet Options**.

2) In the *Internet Options* dialog box, click the **Security** tab and then click the **Custom level...** button.

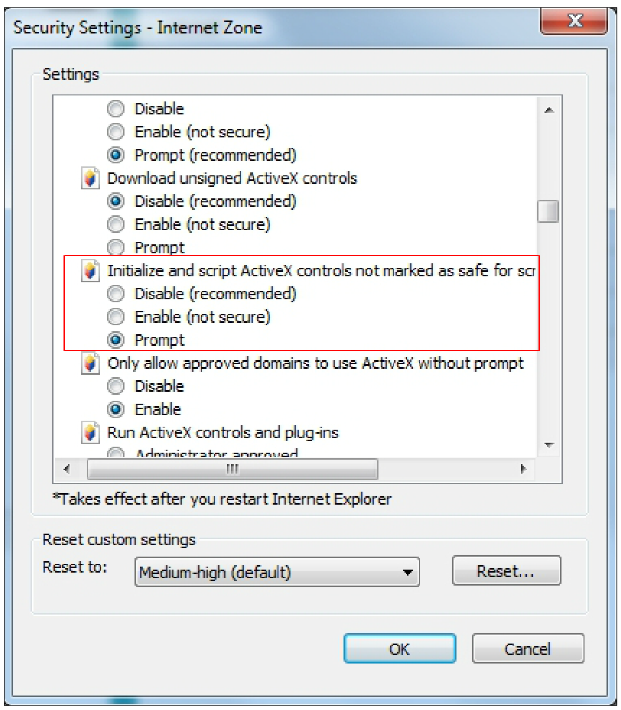


Figure 98 Internet Explorer Security Settings – Internet Zone Dialog Box

3) In the *Security Settings – Internet Zone* dialog box, scroll down to the *ActiveX controls and plug-ins* section, and then to the *Initialize and script ActiveX controls not marked as safe for scripting* settings.

4) Select *Enable* or *Prompt*.

5) Restart Internet Explorer.

14 Configure Receptionist

You use the Settings link at the top right-hand corner of the main page to access the *Settings* page where you can configure various aspects of the Receptionist application.

NOTE: Do **not** use the internet browser's Back button to return to the main interface.

This section describes the *Settings* pages that you use to configure Receptionist:

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – About

NOTE: Depending on your system configuration, some settings may not be available.

14.1 Settings – General

You use the General tab to configure miscellaneous settings that improve the usability of Receptionist.

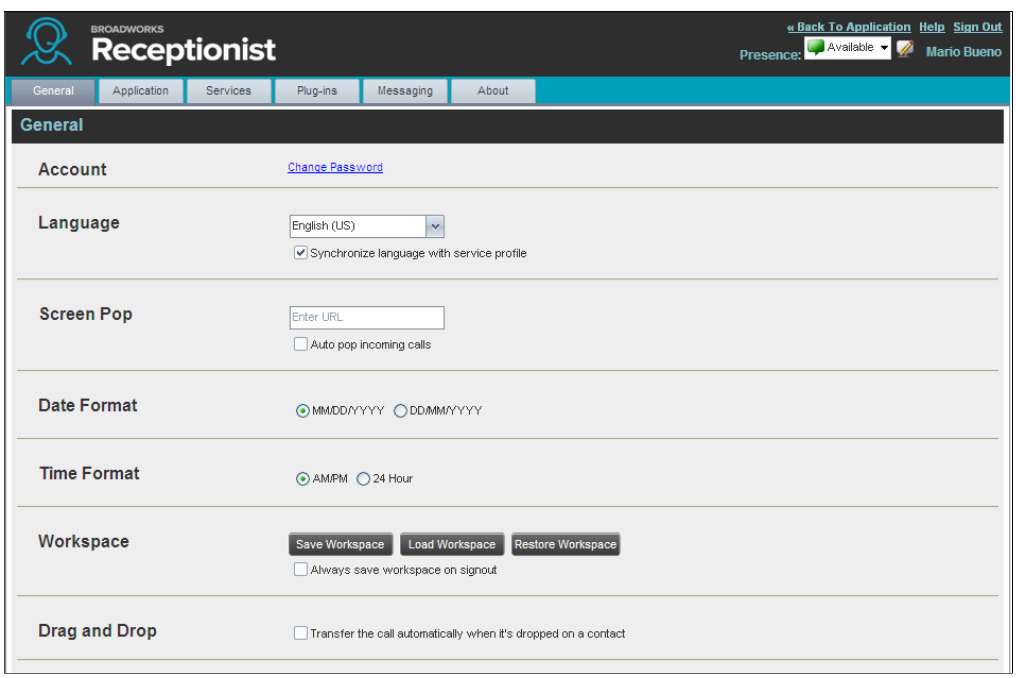


Figure 99 Setting – General

The following subsections describe the settings that can be configured on this page.

14.1.1 Account

You use this area to change your BroadWorks password.

Receptionist shares login credentials with BroadWorks. So when you change your password here, remember to use this new password when accessing your web portal.

NOTE: The password you enter must meet password requirements set on BroadWorks.

To change your password:

1) Click the **Change Password** link. The section expands, allowing you to change your password.

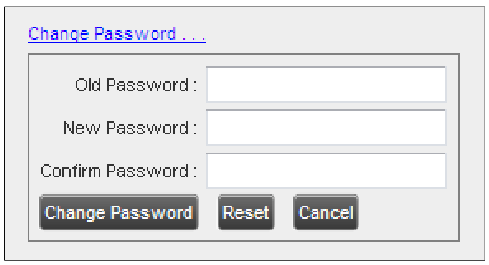


Figure 100 Account – Change Password

2) Enter your current and new password and click **Change Password**.

   Note that the Reset button does not reset your password. It only clears the input boxes.

14.1.2 Language

The *Language* settings allow you to select the language of the user interface.

- The drop-down list identifies the languages available in your edition of Receptionist. To change the language, select a new language from the list.
- *Synchronize language to my profile* – When this option is checked, Receptionist synchronizes the language with your BroadWorks profile and ignores the language selection on this page.

14.1.3 Screen Pop

You use the *Screen Pop* settings to configure the URL that may be launched on incoming calls.

- *Enter URL* – This text box allows you to enter the URL address of the web page that Receptionist opens using the default browser when you click the Web Pop URL button in the *Call Notification* pop-up window.
- *Auto pop for Incoming Calls* – When this option is checked, Receptionist launches the Web Pop URL without your being required to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

BroadSoft Professional Services is available to design web applications that can interface with different databases.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database. For example:

```
http://www.mysite.com/webapp.php?remoteNumber=__REMOTE_PHONE__&sp=__S
ERVICE_PROVIDER__
```

This URL passes the incoming calling number and the service provider ID to the web application at www.mysite.com. The web application formats the data for the applicable database and launches the web page on your PC.

There are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- __USER__: The user's BroadWorks ID (Note that in this case, the "user" is the BroadWorks subscriber.)
- __FIRST__: The first name of the user
- __LAST__: The last name of the user
- __EMAIL__: The e-mail address of the user
- __GROUP__: The name of the BroadWorks group to which the user belongs
- __SERVICE_PROVIDER__: The name of the BroadWorks service provider to which the user belongs
- __PHONE__: The phone number of the user
- __REMOTE_PHONE__: The phone number of the remote party
- __REMOTE_NAME__: The name of the remote party (when available)
- __CALL_TYPE__: "Incoming" or "Outgoing"
- __DNIS_NAME__: The name of the DNIS on which the call was received
- __DNIS_PHONE__: The phone number of the DNIS on which the call was received
- __REDIRECTED_NAME_1__ , __REDIRECTED_NAME_2__, and so on: The name of a party to whom the call was redirected prior to being delivered to you, form the most recent to the least recent
- __REDIRECTED_PHONE_1__, __REDIRECTED_PHONE_2__, and so on: The phone number of a party to whom the call was redirected prior to being delivered to you, form the most recent to the least recent
- __REDIRECTED_USERID_1__, __REDIRECTED_USERID_2__, and so on: The user ID of a party to whom the call was redirected prior to being delivered to you, form the most recent to the least recent

NOTE: The maximum number of redirections that can be displayed on a Web Pop URL page is configured by your administrator.

14.1.4 Date Format

This setting allows you to select the format to use for displaying the date in the calendar details for a contact. The possible options are:

- MM/DD/YYYY
- DD/MM/YYYY

14.1.5 Time Format

This setting allows you to select the format to use for displaying the time in chat windows and in the calendar details for a contact. The possible options are:

- AM/PM
- 24 hours

14.1.6 Workspace

Receptionist allows you to customize elements of your workspace, such as the size and placement of the main window on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed
- The size of the panes (*Call Console, Contacts*, and *Queued Calls*)

NOTE 1: This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

NOTE 2: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Buttons:

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore Workspace* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Receptionist asks you whether you want to save your current workspace. To save your workspace automatically when signing out without being asked, check the *Always save workspace on signout* box.

To customize your workspace:

1) Arrange the windows the way you like.
2) Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore Workspace**.
3) At any time to return to the last saved configuration, click the **Load Workspace** button.

14.1.7 Drag and Drop

You use the *Drag and Drop* setting to configure the drag and drop operation.

- *Transfer the call automatically, when it's dropped on a contact* – This setting allows you to enable or disable automatic call transfer when you drag and drop. When this box is checked, the call is automatically transferred to the contact's phone number when the call is dropped on the contact.

14.2 Settings – Application

You use the Application tab to configure your availability to take calls as well as the policies used to process calls.

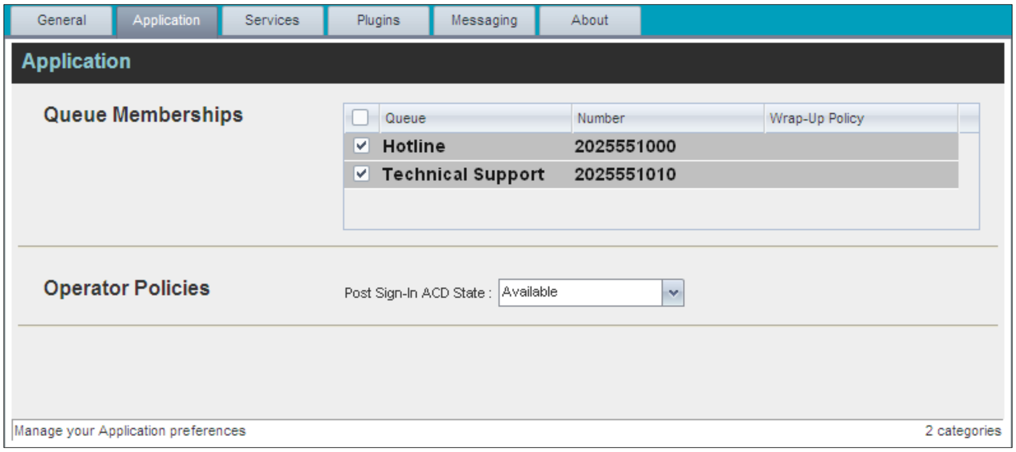


Figure 101 Settings – Application

The settings can be configured on this page and are described in the following subsections.

14.2.1 Queue Membership

These settings allow you to select which queues you want to join.

To join queues:

1) To join a specific queue, select the check box on the line for the queue.
2) To join all queues, select the check box in the column header.

NOTE: If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue if you are not allowed to do it yourself, contact your administrator.

For queues on this page, you can select columns to appear and you can sort and group queues by any column.

14.2.2 Operator Policies

The *Operator Policies* setting allows you to select your post sign-in state in your queues.

Sign-In State – This drop-down list allows you to select your availability to receive calls from queues upon signing in to Receptionist.

14.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on BroadWorks, which are applicable to Receptionist. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

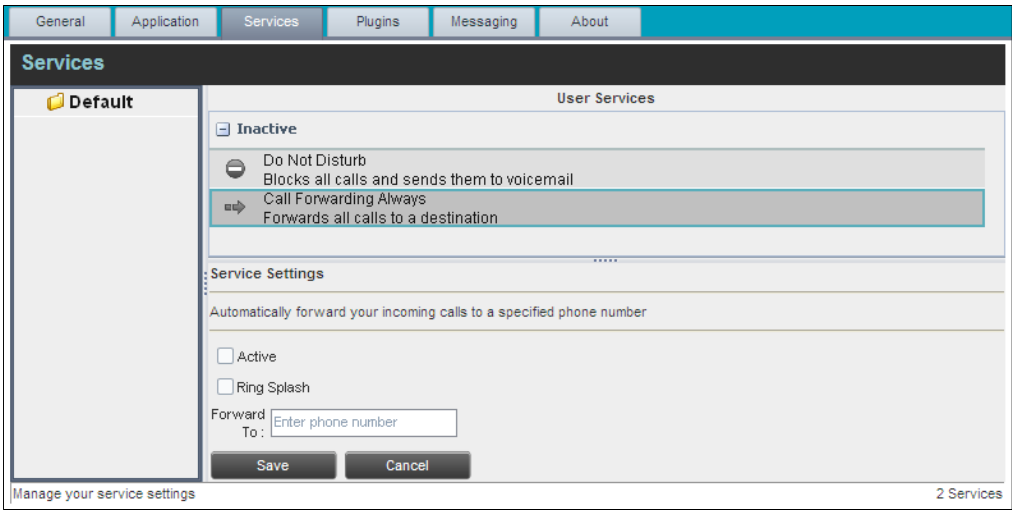


Figure 102 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- Call Forwarding Always – When you activate this service, you need to provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1) Select the service and check the *is Active* box. The service is moved from the *Inactive* to *Active* category.
2) If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to forward the calls to.
3) To generate a ring splash for incoming calls, check the *RingSplash* option.
4) To save your changes, click **Save**.

14.4 Settings – Plug-ins

You use the Plugins tab to configure the plug-in software used by Receptionist to provide functionality such as call notification, LDAP and Outlook directories, program shortcuts, and call logs.

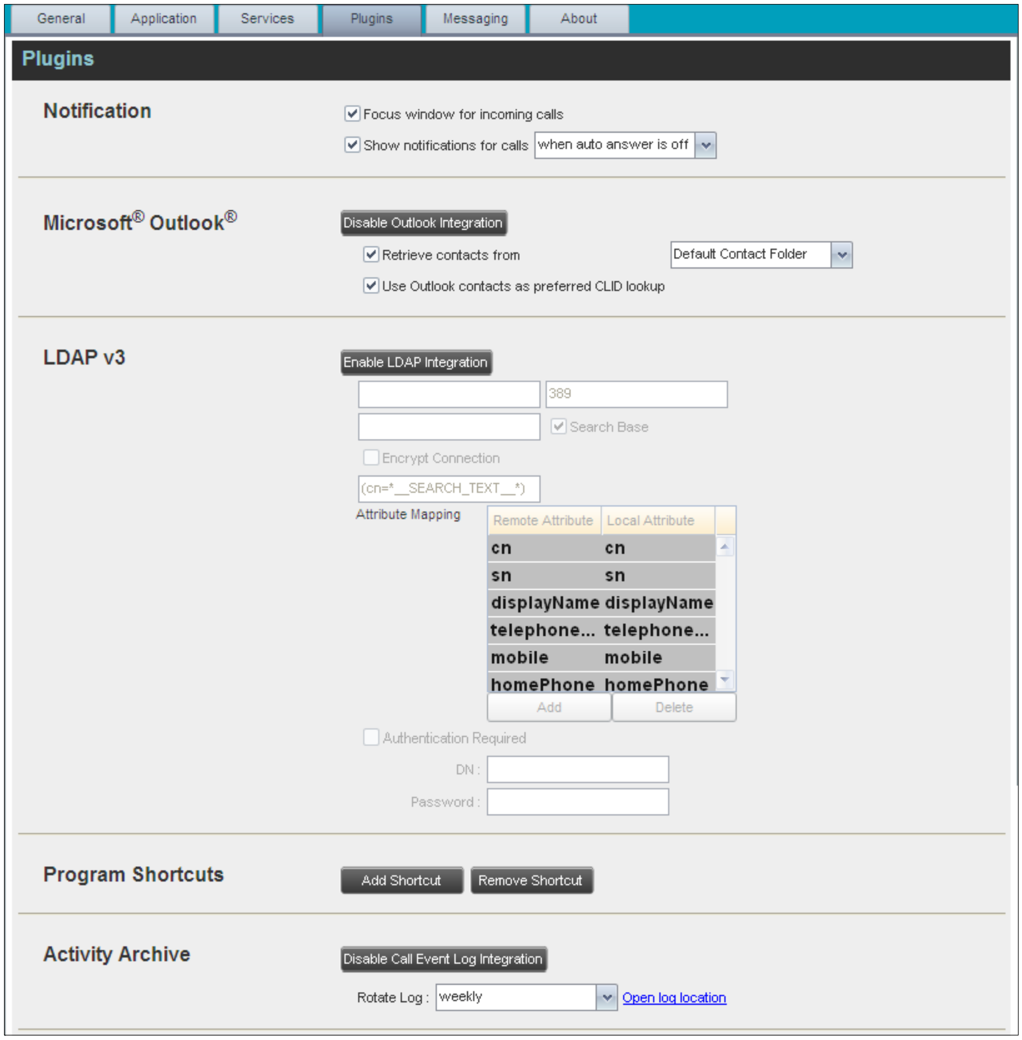


Figure 103 Settings – Plugins

14.4.1 Notification

These options control when and how incoming call notification "pop-up toasts" are displayed. The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window on incoming calls.

  This does not work in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist.

- *Show notifications for calls* – When this option is checked, Receptionist displays the *Call Notification* pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

  This does not work if there are other tabs open in the same web browser window as Receptionist. In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

14.4.2 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Receptionist. They are only visible if Outlook integration is enabled in Receptionist.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from BroadWorks.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

> NOTE: The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 (32- or 64-bit edition), Outlook has to be running before Receptionist is launched for these functions to work.

14.4.3 LDAP v3

LDAP settings allow you integrate an *LDAP* directory with Receptionist. These options are only visible if LDAP integration is enabled in Receptionist. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

To import a certificate:

1) Click **Start** and then select *Run…*
2) Type "cmd" and click **OK**.
3) Type "<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts".

To verify the certificate:

1) Click **Start** and select *Run…*
2) Type "cmd" and click **OK**.
3) Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

The *LDAP* directory options are as follows:

- *Enable/Disable LDAP Integration* – This determines whether Receptionist provides *LDAP* directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.
- *LDAP Hostname* – This is the network address of the LDAP server.
- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* – The text box determines the location in the LDAP server tree that Receptionist looks in when executing a search. The check box, when checked, searches all sub-trees within the search base until the specifications are found.
- *Encrypt Connection* – This option determines whether Receptionist uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.
- *("cn=_ _Search_ _Text")* – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively, in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Attribute Mapping* – This table controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.

  In each row of the table, enter an LDAP attribute in the *Remote Attribute* column. Enter a corresponding local attribute in the *Local Attribute* column. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".
- *Authentication Required* – When this box is checked, Receptionist must provide a user name and password to the directory server to conduct searches.
- *DN* – This is the user name Receptionist uses when connecting to the LDAP server when *Authentication Required* is checked.
- *Password* – This is the password that corresponds to the authentication *DN*.

14.4.4 Program Shortcuts

You use the *Program Shortcuts* settings to create Receptionist shortcuts on your desktop for convenient access to Receptionist.

The program shortcuts plug-in allows for the creation of a desktop shortcut on a Windows platform, which when clicked, launches Receptionist in your default web browser.

- *Add Shortcut* – This button, when clicked, creates a Receptionist shortcut on your desktop.
- *Remove Shortcut* – This button, when clicked, removes the previously created Receptionist shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

14.4.5 Call Event Log

This plug-in software provides the ability to store call event statistics locally on your computer.

- Enable/Disable Call Event Log Integration – This double-action button allows you to enable or disable log archival on your computer.
- Rotate Log – This parameter allows you to specify the frequency with which the log is rotated. You select the frequency from the drop-down list.
- Open Log Location – This link, when clicked, goes to the location on your computer where the log is stored.

The log is saved at the desired interval as a comma-separated value (CSV) file in the following path:

```
<Drive>:\Documents and Settings\<Windows_Username>\Application
Data\BroadSoft\BW Receptionist\profiles\<BW_UserID>\statistics
```

where:

- *Drive* is the name of the drive where your profile is stored (typically C).
- *Windows_Username* is your Windows user name.
- *BW_User_ID* is your BroadWorks user ID.

The following events are captured based on activity that occurs on the Receptionist client:

Statistic	Description	Allowed Values	Example Value
BroadWorks User ID	BroadWorks user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound queued calls only	String, null	ABCSales
Availability	Operator's *joined* state	Joined, Not Joined, null	Joined
ACD State	Operator's *ACD* state. Typically, operators should always be Available. This value is not changeable in Receptionist.	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	null
Call ID	ID of the call	String, null	192.168.1.5:1
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2) 0 = BroadWorks Originator 1 = Originator 2 = Terminator	0
Remote Name	External caller name	String or null	null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe

Statistic	Description	Allowed Values	Example Value
Last Redirected Number	Last redirected number	String or null	null
Time	Date stamp of record	Long Date/Time Format	2008-04-03 12:08:17.859

NOTE: Each row in the archive file records a *single* event change. Columns such as, *Availability*, *ACD State*, and *Call State* may contain null values since an alternate column value caused the event change. For example, Incoming is stored in *Call State* while *Availability* (and other columns) store null.

14.5 Settings – Messaging

The Messaging tab allows you to configure various messaging options for Receptionist. Currently, e-mail messaging and instant messaging are supported.

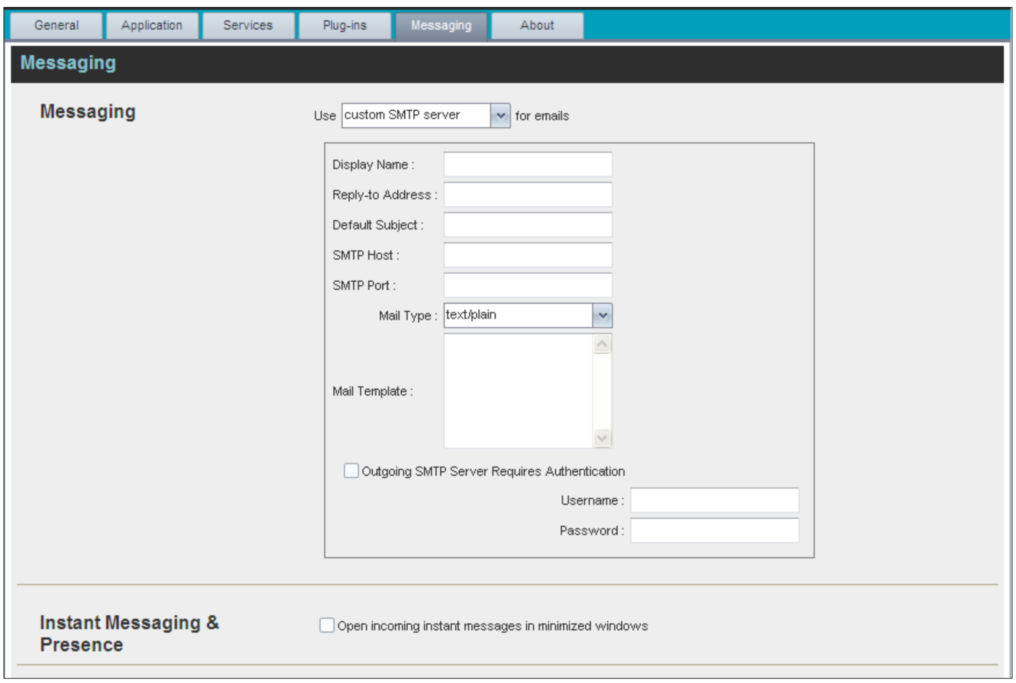


Figure 104 Settings – Messaging

14.5.1 E-mail Messaging

These options allow you to specify the mail client to use for sending e-mail messages.

From the drop-down list, select the mail client to use for e-mails.

If you selected the *custom SMTP server* option, you also need to configure the following options:

- *Display Name* – This is the name that is displayed in the *From* field.
- *Reply-to Address* – This is the address where reply messages can be sent.
- *Default Subject* – This is the subject that appears when you generate an e-mail message in Receptionist.

- *SMTP Host* – This is the IP address of the SMTP host.
- *SMTP Port* – This is the port of the SMTP host.
- *Mail Template* – This is the mail template to use.
- *Outgoing SMTP Server Requires Authentication* – When this option is set, authentication is required to send e-mails.
- *Username* – This is the name you must enter to authenticate yourself.
- *Password* – This is the password part of your authentication credentials.

14.5.2 Instant Messaging and Presence

Check the *Open incoming instant messages in minimized windows* check box if you want the chat windows that appear when you receive an instant message to be displayed in minimized format.

14.6 Settings – About

Use the About tab to view the information about Receptionist.

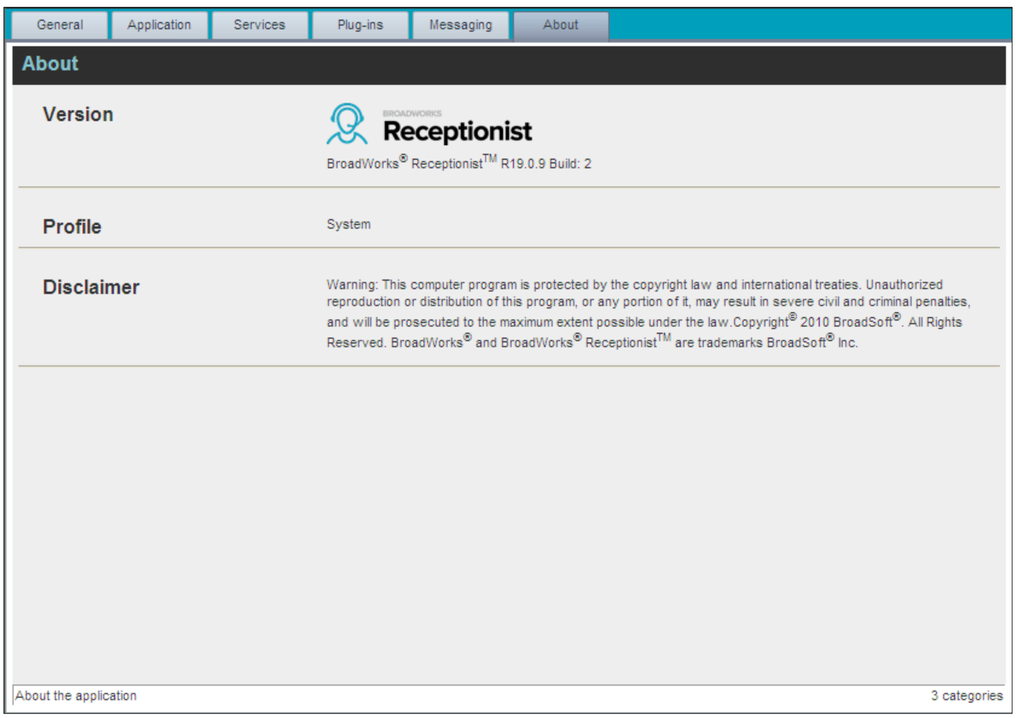


Figure 105 Settings – About Page

The following information is provided on this page:

- Version – This is the software version of the BroadWorks Receptionist client.
- Profile – This is the Receptionist client profile used.
- Disclaimer – This is the Receptionist copyright Information.

15 Appendix A: Glossary and Definitions

15.1 Monitored User States

The following table lists the possible states for monitored users.

Icon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar State	Call State
	Private	N/A	N/A	On	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	No active calls
	In a Meeting	N/A	N/A	Off	Busy	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	No active calls
	Available	Off	Off	Off	Free or Tentative	No active calls

15.2 Call States

Call states are the states that your current calls can be in. They are as follows:

Call State	Display Name	Icon	Description
Ringing In (Local)	Incoming Local		This represents a Click-To-Dial call ringing on your phone.
Ringing In (Remote)	Incoming		The call is coming in and ringing on your phone.
Ringing In (Recalled Call)	Call Recalled		The call was parked or camped and is being recalled because its timer has expired.
Ringing Out	Outgoing		The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.
Active	Active		The call is an active call.
On Hold	Held		The call is on hold.
On Hold (Remote Held)	Remote Held		The call is held by the remote party.
Active (In Conference)	Active		The call is in a conference and active.
Held (In Conference)	Held		The call is in a conference and on hold.

15.3 Instant Messaging and Presence States

IM&P states indicate you or your contacts' availability to communicate using the IM&P client. The possible states are as follows:

IM&P State	Icon	Description
Subscribed states		
Available		The contact is online and available.
Busy		The contact is online, but currently busy. Do not disturb.
Away		The contact is connected but away from the computer.
Offline		The contact if offline. If you are offline, you do not receive any presence updates or instant messages. Also, your Instant Message directory; is empty and the IM&P state of your contacts in other directories is set to "Offline".
Unsubscribed states		
Pending Subscription		You sent a subscription request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
Not subscribed		The contact has an IM&P service but you are not subscribed to monitor their state and the contact is not listed in the *Instant Message* directory. Clicking this icon sends a subscription request to the contact.

16 Appendix B: Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

Key	Equivalent Mouse Action	Description
ESC	Click the **Close** button in a dialog box.	This closes the open dialog box.
ESC	Cancel the changes.	This exits the currently selected editable item, such as a text box.
/	Click the *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item in a list.	This selects the next item in the *Call Console* or *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or *Queued Calls* pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing "1" selects the first call, pressing "2" selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click **End** on a selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor in placed in the *Dialer* text box, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and places the first active call on hold, pressing **SHIFT+2** selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.

Key	Equivalent Mouse Action	Description
S or s	Click on **Settings** link.	This opens the *Settings* page if main window is in focus.
B or b	Click on **Back to Application** link.	This goes back to the main page from the *Settings* page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.

Index

About Receptionist, 113
Accept IM&P subscription request, 71
Action buttons, 51
Actions, in call states, 40
Ad hoc number
    Dialing, 58
    Transferring queued call to, 98
Adding
    Conference participant, 65
    Instant Message contact, 70
    Personal contact, 87
    Speed dial entry, 89
    Users to chat, 75
Additional resources, 18
Answering call, 57
Application settings, configuring, 106
Auto Answer, 57
Barge in on call, 66
Blind transfer, 61
Busy Camp On, 63
Buttons, action, 51
Calendar presence of contact, 94
Call center, selecting to manage, 96
Call Console, 38, 39
    Conference Call panel, 40
    Current calls, 39
    Dialer, 38
    Header, 38
Call event log, configuring, 111
Call History
    Deleting, 95
    Dialing from, 60
    Managing, 95
    Viewing, 95
Call information, viewing, 55
Call management functionality
    Enterprise edition, 22
    Office edition, 27
    Small Business edition, 24
Call states, 40, 114
Calls
    Answering, 57
    Answering automatically, 57
    Barging in, 66
    Busy Camp On, 63
    Current, 55
    Dialing
        Ad hoc number, 58
        Contact, 59
        History, 60
        Speed dial, 60
    Dragging and dropping, 54
    Ending, 61
    Holding and resuming, 58
    Incoming, 55
    Managing, 54
    Number to modify, 97
    Opening URL for, 56
    Parking, 63
    Picking up, 58
    Recording, 66
    Redialing number, 59
    Saving vCard for, 56
    Speed dial, 60
    Transferring, 61
    Transferring to queue, 62
    Transferring to top of queue, 99
    Transferring to voice mail, 62
    Transferring with consultation, 62
    Transferring with supervision, 61
    Transferring, blind, 61
Camping calls, 63
Changing
    IM&P presence state, 33
    Password, 34, 103
Chatting
    Managing sessions, 76
    Starting multiuser session, 75
    Starting one-on-one session, 73
Common tab, 44
Conference
    Adding participant to, 65
    Ending, 66
    Ending participant, 66
    Holding, 65
    Holding participant, 65
    Leaving, 65
    Managing, 64
    Resuming, 65
    Resuming participant, 65
    Starting Three-Way Conference, 64
Conference Call, panel, 40
Configuring
    Application settings, 106
    Call event log, 111
    Call notification settings, 108
    E-mail messaging, 112
    General settings, 102
    IM&P messaging, 113
    Language, 103
    LDAP v3 settings, 109
    Messaging, 112
    Operator policies, 107
    Outlook integration, 109
    Plug-ins, 108
    Program shortcuts, 110
    Queue membership, 106
    Receptionist client, 102
    Screen Pop, 103
    Services, 107
    Workspace settings, 105

Consultative transfer of calls, 62
Contact directories
    Enterprise edition, 21
    Office edition, 26
    Small Business edition, 24
Contacts
    Dialing, 59
    IM&P, accept subscription request, 71
    IM&P, chatting with, 73
    IM&P, subscribe to, 69
    IM&P, unsubscribe from, 71
    IM&P, viewing presence state, 72
    Making notes about, 86
    Managing, 78
    Monitoring, 91
        Dynamically, 92
        Statically, 92
    Phone states of, 94
    Searching for, 80
    Sending e-mail to, 68
    Viewing details, 86
Contacts pane, 41, 78
    Common tab, 44
    Custom directories tabs, 46
    Enterprise/Group tab, 44
    Favorites tab, 43
    Instant Message tab, 47
    Outlook tab, 47
    Personal tab, 45
    Queues tab, 46
    Search tab, 43
    Speed Dial tab, 45
Controls, 50
Current calls, Call Console, 39
Custom directories tab, 46
Definitions
    IM&P states, 115
Deleting
    Call History, 95
    Personal contact, 88
    Speed dial entry, 90
Dial
    Ad hoc number, 58
    Call History, 60
    Contact, 59
Dialer, 38
Dialing
    From chat window, 74
Directories
    Common, 44
    Custom, 46
    Enterprise edition, 21
    Favorites, 43
    Group/Enterprise, 44
    Instant Message, 47
    Office edition, 26
    Ordering, 84
    Outlook, 47
    Personal, 45
    Queues, 46
    Searching, 80
    Showing or hiding, 79
    Small Business edition, 24
    Speed Dial, 45
Dragging and dropping calls, 54
Dynamic monitoring, 92
    Requesting contact monitoring, 92
Editing, Instant Message contact, 71
Editing, Speed Dial entry, 89
E-mail
    Configuring options for, 112
    sending to contact, 68
Ending
    Call, 61
    Conference, 66
    Conference participant, 66
Enterprise edition
    Call management functionality, 22
    Directories, 21
    User interface, 20
Enterprise tab, 44
Enterprise, Receptionist, 19
Exploring workspace, 35
Favorites tab, 43
General settings, configuring, 102
Getting
    Help, 32
    Started, 29
Global Message Area, 36
Group Call Park, 63
Group tab, 44
Grouping, queued calls, 99
Header in Call Console, 38
Help, 36
    Getting, 32
Holding
    Call, 58
    Conference, 65
    Conference participant, 65
IM&P
    Accepting subscription requests, 71
    Changing presence state, 33
    Configuring options for, 113
    Contacts, chatting with, 73
    States, 115
    Subscribing to contact, 69
    Unsubscribing from contact, 71
    Viewing presence state of contacts, 72
Initial setup, 32
Instant Message tab
    Adding contacts, 70
    Editing contacts, 71
Instant Messaging and Presence
    Configuring options for, 113
Keyboard shortcuts, 116
Language, configuring, 103

Launch Receptionist
Web browser, 30
Web portal, 29
LDAP v3, configuring, 109
Leaving conference, 65
Logo pane, 36
Global Message Area, 36
Settings, Help, and Sign Out links, 36
Signed-in user information, 36
Making notes about contact, 86
Managing
Call History, 95
Calls, 54
Chat sessions, 76
Conference calls, 64
Contacts, 78
Personal contacts, 87
Queued calls, 96
Messaging, configuring, 112
Modifying number of calls to display, 97
Modifying, Instant Message contact, 71
Modifying, Speed Dial entry, 89
Monitored user states, 114
Monitoring
Contacts, 91
Dynamically, 92
Statically, 92
Contact's IM&P presence, 69
Phone states, 94
Multiuser chat, starting, 75
Office edition
Call management functionality, 27
Directories, 26
User interface, 26
Office, Receptionist, 25
Operator policies, configuring, 107
Ordering
Contact directories, 84
Queued calls, 100
Outlook integration, configuring, 109
Outlook tab, 47
Pane
Call Console, 38
Contacts, 41
Logo, 36
Queued Calls, 48
Parking calls, 63
Participant
Adding to conference, 65
Ending in conference, 66
Holding in conference, 65
Resuming in conference, 65
Password, changing, 34, 103
Personal contacts, managing, 87
Personal tab, 45
Adding contacts, 87
Deleting contacts, 88
Phone states, 94
Picking up call, 58
Plug-ins settings, configuring, 108
Position, changing call in queue, 98
Presence state of IM&P contacts, 72
Presence states, 115
Program shortcuts, configuring, 110
Promoting calls in queue, 99
Queue
Membership, configuring, 106
Transferring calls to, 62
Transferring calls to top, 99
Queued calls
Grouping, 99
Managing, 96
Ordering, 100
Promoting, 99
Reordering, 98
Retrieving, 98
Transferring between queues, 98
Transferring to ad hoc number, 98
Viewing, 97
Queued Calls pane, 48, 96
Queues tab, 46
Receptionist
Configuring, 102
Editions, 19
Enterprise, 19
Introduction, 19
Office, 25
Small Business, 23
Recording Calls, 66
Redialing number, 59
Reordering, calls in queue, 98
Requesting contact monitoring, 92
Resuming
Conference participant, 65
Held call, 58
Held conference, 65
Retrieving calls from queue, 98
Screen Pop, configuring, 103
Search tab, 43
Searching for contacts, 80
Selecting call centers to manage, 96
Sending e-mail to contact, 68
Services settings, configuring, 107
Settings
About, 113
Application, 106
Queue membership, 106
General, 102
Account, 103
Language, 103
Screen Pop, 103
Workspace, 105
Messaging, 112
E-mail messaging, 112

        IM&P, 113
    Operator policies, 107
    Plug-ins, 108
        Call event log, 111
        LDAP v3, 109
        Notification, 108
        Outlook, 109
        Program shortcuts, 110
    Services, 107
Settings, Help, and Sign Out links, 36
Setup, initial, 32
Shortcuts, keyboard, 116
Showing or hiding directories, 79
Sign In, 30
    Restrictions, 31
Sign Out, 32
    Links, 36
Signed-in user information, 36
Small Business edition
    Call management functionality, 24
    Directories, 24
    User interface, 23
Small Business, Receptionist, 23
Speed Dial, 60
Speed Dial tab, 45
    Adding entries, 89
    Deleting entries, 90
    Editing entries, 89
    Managing entries, 88
Starting
    Chat session, 73
    Multiuser chat, 75
Starting Three-Way Conference, 64
States
    Call, 114
    Monitored user, 114
    Phone, 94
    User's presence states, 115
Static monitoring, 92
Subscribe to IM&P contact, 69
Subscription request, accept from IM&P contacts, 71
Supervised transfer of calls, 61
Tab
    Instant Message, 47
Transferring calls, 61
    Between queues, 98
    Blind, 61
    Consultation, 62
    Queue, 62
    Queue to ad hoc number, 98
    Supervision, 61
    To top of queue, 99
    To voice mail, 62
Unholding call, 58
Unsubscribe from IM&P contact, 71
URL, opening for a call, 56
User interface
    Action buttons, 51
    Call Console, 38, 39
    Call Console header, 38
    Common tab, 44
    Conference Call panel, 40
    Contacts pane, 41
    Controls, 50
    Custom directories tabs, 46
    Dialer, 38
    Enterprise edition, 20
    Enterprise/Group tab, 44
    Favorites tab, 43
    Global Message Area, 36
    Information about signed-in user, 36
    Instant Message tab, 47
    Logo pane, 36
    Office edition, 26
    Outlook tab, 47
    Personal tab, 45
    Queued Calls pane, 48
    Queues tab, 46
    Search tab, 43
    Small Business edition, 23
    Speed Dial tab, 45
vCard, saving, 56
View
    Call History, 95
    Call information, 55
    Contact details, 86
    Current calls, 55
    Incoming calls, 55
    Queued calls, 97
    vCard, 56
Viewing
    Contact's Calendar presence, 94
Viewing IM&P presence state, 72
Voice mail, transferring calls to, 62
Web browser, launching Receptionist from, 30
Web portal, launching Receptionist from, 29
Workspace
    Configuring settings, 105
    Exploring, 35