ALTIGEN
COMMUNICATIONS

AltiSupervisor™

for AltiWare Open Edition (OE) Release 5.0

AltiServ Contact Center (ACC) Release 5.0

and AltiContact Manager (ACM) Release 5.0

Manual

WARNING!

Toll fraud is committed when individuals unlawfully gain access to customer telecommunication systems. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. AltiGen Communications, Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although AltiGen Communications, Inc. has designed security features into its products, it is your sole responsibility to use the security features and to establish security practices within your company, including training, security awareness, and call auditing.

NOTICE

While every effort has been made to ensure accuracy, AltiGen Communications, Inc. will not be liable for technical or editorial errors or omissions contained within the documentation. The information contained in this documentation is subject to change without notice.

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TRADEMARKS

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CHAPTER 4

Warranty

What The Warranty Covers

AltiGen Communications warrants its hardware products to be free from defects in material and workmanship during the warranty period. If a product proves to be defective in material or workmanship during the warranty period, AltiGen Communications will, at its sole option, repair, refund or replace the product with a like product.

How Long the Warranty Is Effective

All AltiGen Communications products are warranted for one (1) year for all parts from the date of the first end user purchase.

Whom the Warranty Protects

This warranty is valid only for the first end user purchaser.

What the Warranty Does Not Cover

1. Any product on which the serial number has been defaced, modified or removed.

2. Damage, deterioration or malfunction resulting from:

    a) Accident, misuse, neglect, fire, water, lightning, or other acts of nature, unauthorized product modification, or failure to follow instructions supplied with the product.

    b) Repair or attempted repair by anyone not authorized by AltiGen Communications.

    c) Any damage of the product due to shipment.

    d) Removal or installation of the product.

    e) Causes external to the product, such as electric power fluctuations or failure.

    f) Use of supplies or parts not meeting AltiGen Communications' specifications.

    g) Normal wear and tear.

    h) Any other cause which does not relate to a product defect.

3. Shipping, installation, set-up and removal service charges.

How to Obtain Service

End user customers should contact your Authorized AltiGen Dealer for service.

Authorized AltiGen Dealers must follow the steps below for service:

1. Take or ship the product (shipment prepaid) to your AltiGen distributor or to AltiGen Communications, Inc.

All materials being returned to AltiGen must have an associated RMA number. RMA numbers are issued by AltiGen Customer Service and can be obtained by calling 1-888-ALTIGEN (258-4436) or faxing an RMA form to 510-252-9738, attention to Customer Service. AltiGen reserves the right to refuse return of any material that does not have an RMA number. The RMA number should be clearly marked on the outside of the box in which the material is being returned. For example:

> Attn.: RMA # 123
> AltiGen Communications, Inc.
> 47427 Fremont Blvd.
> Fremont, CA 94538

Upon authorization of return, AltiGen will decide whether the malfunctioning product will be repaired or replaced.

2. To obtain warranty service, you will be required to provide:

   a) the date and proof of purchase

   b) serial number of the product

   c) your name and company name

   d) your shipping address

   e) a description of the problem.

3. For additional information contact your AltiGen Dealer or AltiGen Communications, Inc. via e-mail at support@altigen.com.

Effect of State Law

This warranty gives you specific legal rights, and you may also have other rights which vary from state to state. Some states do not allow limitations on implied warranties and/or do not allow the exclusion of incidental or consequential damages, so the above limitations and exclusions may not apply to you.

Sales Outside the U.S.A.

For AltiGen Communications products sold outside of the U.S.A., contact your AltiGen Communications dealer for warranty information and services.

Overview

AltiSupervisor is an optional software package that runs with the AltiWare OE or AltiContact Manager system. AltiSupervisor Session licenses must be installed and registered to enable client sessions.

To install the AltiSupervisor client software, you can load AltiSupervisor on a network server and then using your company's distribution software to deliver the AltiSupervisor client software to each desktop PC.

Most frequently, this means loading the software onto a shared network file server and copying the software to each desktop PC. Alternatively, you can use the AltiSupervisor CD ROM to install the program on each desktop.

Installation

The following items are included in the AltiSupervisor 5.0 package:

- AltiSupervisor 5.0 Manual

- AltiSupervisor Session License

If any of these items are missing or damaged, please contact your Authorized AltiGen dealer.

Client System Requirements

The client system must each meet the following minimum requirements. For server system requirements, see the *AltiWare OE System Installation and Administration Manual* or the *AltiContact Manager Administration Manual*.

- IBM/PC AT compatible system

- Intel 300 MHz (or faster) Pentium

- Windows 98 (or higher), or Windows 2000, or Windows NT 4.0 or higher, Server or Workstation.

- 30 MB Hard Drive Disk Space

- <u>128 MB DRAM</u>

- SVGA monitor (800 x 600) with 256 color display, or better

- Keyboard and Mouse

- AltiWare OE/AltiContact Manager 5.0 running on a server accessible to this client.

Session Licensing and License Upgrade Procedures

AltiSupervisor Session License

The AltiSupervisor Session license enables a per concurrent session of AltiSupervisor. It includes a Desktop Connect/SDK client license. Up to 20 concurrent AltiSupervisor sessions are supported.

Upgrading Licenses

To increase the number of simultaneous AltiSupervisor sessions, refer to the license activation and registration procedures in Chapter 2 - Software Installation of the *AltiWare OE System Installation and Administration Manual* or *AltiContact Manager Administration Manual*.

You can verify the licenses when you run AltiAdmin/ACM Admin by selecting About **AltiWare…**/**About ACM Admin...** on the **Help** menu, then clicking the **License Information** button to view a window that displays licenses and session information.

Installation and Setup

Pre-Installation Checklist

Before installing AltiSupervisor, please review the following checklist:

- Make sure that AltiWare OE/AltiContact Manager 4.6 has been installed on the server system.

- Make sure that TCP/IP is enabled on both machines.

- Make sure the client is able to connect to the server on the network.

- Local administrator rights are required to install AltiView and AltiSupervisor.

- Make sure License has been installed and activated.

Installing AltiSupervisor on a Client System

After completing the pre-installation checklist, proceed as follows on the client machine:

1. Exit any/all Windows applications.

2. Insert the AltiWare OE 5.0 CD into the CD ROM drive.

3. Run the **Setup** program under AltiSupervisor\ and follow the step-by-step installation instructions as they appear on the screen.

Uninstalling AltiSupervisor

1. From the Windows **Start** menu, select **Programs** ⟶ **AltiSupervisor** ⟶ **Uninstall AltiSupervisor.**

2. Click **OK** when the dialog box asks if you want to uninstall the program, and respond to any additional prompts.

Microsoft Outlook and Outlook Express Support

AltiSupervisor supports Microsoft Outlook 97, 98, and 2000, and Outlook Express 5.0, allowing you to obtain phone numbers to dial from a Microsoft Contact list. AltiSupervisor also lets you see the incoming calls that have a matching record in the Contact list.

AltiSupervisor requires that you to set up the Outlook Contacts list prior to using this feature.

A Country Code field can be configured (in **General Info**) by the local user to help convert standard international phone numbers in Outlook to correct digit strings for AltiWare.

ACT!/GoldMine® Support

AltiSupervisor supports ACT! 2000 and GoldMine® 5.0/5.5 contact management software, allowing you to obtain phone numbers to dial from the ACT! or GoldMine® contact database list. AltiSupervisor also lets you see the matching record from the contact database list of the incoming calls.

Getting Started

AltiSupervisor is a version of AltiView designed for supervisors of workgroup agents. Through AltiSupervisor you can monitor the status and performance of a workgroup, including AltiAgent calls, real time workgroup statistics, and agent state. This information can be stored in an internal or external CDR database for future review and analysis.

Logging In

Before you log in

When you launch AltiSupervisor for the first time, you need to know either the server name or the IP address of the server you'll be linking to. If you use the server name and not the IP address, AltiWare/AltiContact Manager replaces the name with the IP address, eliminating the need of a DNS (Domain Naming System) search.

To obtain the AltiWare/AltiContact Manager IP address, ask your IT administrator.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet Service Provider. If you're using a low-speed connection, the login may take some time as a large amount of data is transferred to your desktop.

To log in:

1. Run the AltiSupervisor application and, if this is the first login to this AltiWare/AltiContact Manager system, enter the server's IP address or

name of the system you will be using. If this is not your first login, go on to the next step.
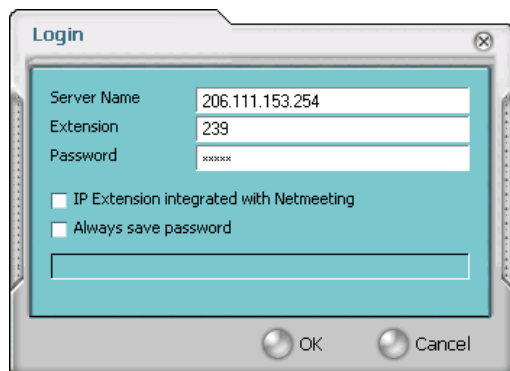

Figure 1. Logging in

2. Enter your **Extension** number and **Password** assigned to your phone.

   ~~Optionally, you can~~ Check the **Always save password** check box to store your login password the next time you access AltiSupervisor.

3. (Optional) **IP Extension Integrated with Netmeeting** option (grayed out if your extension is not set up as an IP extension.)

   If you do *not* have an Internet Phone Jack or an IP phone and you want your AltiSupervisor desktop to access AltiWare/AltiContact Manager as an IP extension, select the **IP Extension Integrated with** check box and set the dropdown list to **NetMeeting**.

   To do this, your extension must be set up as an IP extension by your system administrator and you must have Microsoft NetMeeting 3.01 or higher installed on your desktop.

   Refer to the discussion in the next section for more information on using IP extensions.

4. Select how you want to log in and click **OK**.

Logging In Remotely Using an IP Extension

For agent use or supervisor use, you can access AltiSupervisor from a remote location using an **IP extension**. All the call handling functions are the same as logging in locally, with the exception of the ability to configure One Number Access. You can pick up voice mail, forward local business office phone calls to another site such as a home desktop PC, and even receive the phone calls as you would at the office.

To use an IP extension, you must meet the following requirements:

- Your extension must be configured to use IP extensions by your system administrator.

- You must have AltiGen-certified IP phone/adapter equipment (QuickNet), or you can use Microsoft NetMeeting version 3.01.

Consult your system administrator or authorized AltiGen dealer for details on obtaining and using any of these options. The NetMeeting option is discussed in the next section.

To log in from a remote location using an IP extension:

1. If you connect to the Internet through a modem connection, establish a connection to your Internet Service Provider.

2. Log in using your Extension and Password as usual.

3. (NetMeeting users *only*) Select the **IP Extension Integrated with NetMeeting**.

4. Click **OK.**

IP Extensions Using Microsoft NetMeeting 3.01

To use NetMeeting 3.01 as an IP extension, you need the following:

- **A sound card.**

- **A Plantronics LS1 headset** connected to the sound card. A microphone and speakers should *not* be used since the speaker's output would be fed back to the microphone and cause severe echoes.

- **NetMeeting 3.01,** which is automatically installed with Windows 2000. You can check your system to see if NetMeeting is installed by looking under **Programs>Accessories>Communication** from the Windows **Start** button. If not, it is available for download from the Microsoft website at http://www.microsoft.com/windows/netmeeting/download/default.asp.

- **Additional system requirements** as listed on the Microsoft website at http://www.microsoft.com/windows/NetMeeting/SystemRequirements/default.ASP.

Note: If you run two instances of AltiSupervisor—one for desktop use integrated with NetMeeting and one as a workgroup agent—be sure to launch the AltiSupervisor instance first, and the desktop instance second; otherwise, the NetMeeting launch will fail.

Note also that AltiWare/AltiContact Manager uses conferencing features that require the same data channels as NetMeeting. If NetMeeting is running, you will see a prompt reminding you to close the program.

In addition, processor-intensive applications will affect voice quality.

To make and receive calls using NetMeeting:

- Connect your headset to your PC. Use the AltiSupervisor Dial and call accepting functions as usual to make and receive calls.

Troubleshooting IP Connectivity

If problems occur, they may be due to a failure to connect to your ISP or due to firewalls at your office preventing direct access to the AltiWare/AltiContact Manager server.

As a test, you can choose **Run** from the Windows **Start** menu, then enter

Ping *<IP address>* [ENTER]

where *<IP address>* is the AltiWare/AltiContact Manager system you want to connect to. An example of the IP address format is 123.234.231.143

If you do not get a response, contact your LAN administrator for support.

Next, check to verify if ports are open.

Hiding or Exiting AltiSupervisor

Config ⊟ ? ⊗

When you minimize the AltiSupervisor desktop by clicking the **Minimize** symbol (the dash), it is hidden—it doesn't appear anywhere in the Windows desktop except as a phone icon in the tray in the lower right corner, as discussed below.

To exit AltiSupervisor entirely, right click the phone icon and select **Exit**.

Pop Up when You Get a Call

You can configure to pop up when you have incoming calls. Pop ups work when AltiSupervisor is hidden (minimized) but *not* when you have exited. See "Screen Pop, Audio Beep, and Auto Close" on page 29.

Using the Windows Tray Phone Icon

After you log in, the AltiSupervisor icon (a phone) is displayed on the Windows tray, normally at the bottom right of your screen. When you have new voice mail, the phone grows a small yellow envelope.

9:05 AM

If the AltiSupervisor interface is not on your Windows desktop, but this icon appears in the Windows tray, you double-click it to open the AltiSupervisor main window, or you can right click it to pop up a menu, then select the AltiSupervisor window you want to open.

Resizing the Display

You can resize many AltiSupervisor windows using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.

Also, the field size for any field can be increased or decreased by pointing the cursor to either side of the field's main column. The cursor changes to a movable double bar (||) that can be moved to resize the column.

Call States

AltiWare/AltiContact Manager applications report the status of calls. A list of the states includes the following:

- *AA* - the call is being transferred to an Auto Attendant/IVR
- *Busy* - callee is busy or not available
- *Call Pending* - the call is placed into a workgroup queue
- *Conference* - the call is in conference
- *Connect* - the call is connected
- *Dial Tone* - a dial tone is present, AltiAgent is ready to dial out
- *Error* - receipt of an error tone
- *Hold* - the call is on hold
- *Hold Pending* - the call is being transferred or conferenced
- *Idle* - the extension is not in use
- *Music on Hold* - an extension user placed the call on hold to take another call
- *Park* - the call is parked
- *Play* - playing voice mail
- *Proceeding* - the outgoing call is in progress
- *Record* - recording an introductory message
- *Ringback* - caller receives this state while callee is ringing
- *Ringing* - there is an incoming call
- *Voice mail* - the call is in voice mail

Error Messages

The following errors may be displayed as login or connectivity errors.

Error Message	Description	Solution
AltiWare connection limit has been exceeded.	No AltiSupervisor was found OR more than allowed number of AltiSupervisor users have attempted to log on.	Maintain the number of AltiSupervisor license keys or add additional session licensing.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to AltiWare.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of AltiWare (if using the DNS name in the server field).
Cannot access voice mail list while mail box in use.	Mail box is in use by the AltiGen Voice Mail System and is temporarily unavailable.	Wait a while, then try again.
Mail service is unavailable. Please check with your administrator.	Voice mail service is not enabled on AltiWare.	Make sure voice mail service is started.
NetMeeting is already used by another application, so you cannot enable IP Extension Integrated with NetMeeting.		Check for conf.exe in your computer's memory. If it's there, terminate it. Then retry logging in with the IP extension option.
Please register AlpInterface.dll (regsver32 AlpInterface.dll).	AltiSupervisor uses this dll to communicate with AltiWare. It should be registered in user system.	Re-register this file. Type in DOS command window, **regsver32 AlpInterface.dll** Change directory to AltiSupervisor directory, type **regsver32 AlpInterface.dll**

Error Message	Description	Solution
You have entered an invalid password. Please try again.	The password and confirmation box entries do not match.	Make sure you are entering the password correctly in both boxes.
You need to install NetMeeting to use "IP Extension integrated with NetMeeting."	You tried to log in with the IP extension option without an installed version of NetMeeting.	Install NetMeeting 3.01 or higher from Microsoft's web or FTP sites.
Cannot use "IP Extension integrated with Netmeeting."	You tried to log in with the IP extension option without an installed version of NetMeeting.	Confirm that your extension is set up as an IP extension and that Microsoft NetMeeting 3.01 or higher installed on your desktop
This version is not compatible with the version of AltiWare that is running. This can lead to inconsistent or no functionality. Please install the correct version before proceeding.	The installed version of AltiSupervisor is outdated from AltiWare release.	Upgrade AltiSupervisor to version 5.0 (install matching version of AltiSupervisor).

Using AltiSupervisor

Logging in to AltiSupervisor allows you to view workgroup and agent performance statistics and a history of calls. You can print this statistical data or export it to a CSF (Call Summary Format) file.

Further, you can view call data for calls in queue. You can listen to and, if your system is set up for it, barge in to agent phone calls.

You can also use AltiSupervisor when logging in with the **IP Extension Integrated with...** option.

New in Version 5.0

- Transferring call from workgroup queue
- Workgroup CDR/RTM revamping
- Microsoft Gold Certification
- Automatic version upgrade during startup

Logging In
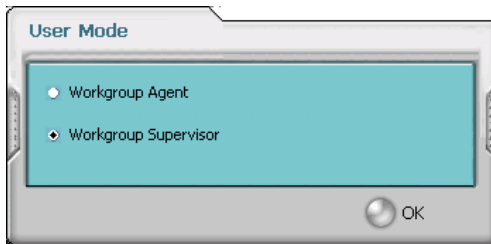
Figure 1.   Workgroup Supervisor login

After initial login as a Supervisor (described in "Logging In" on page 5), you are asked to specify which workgroups you want to monitor.
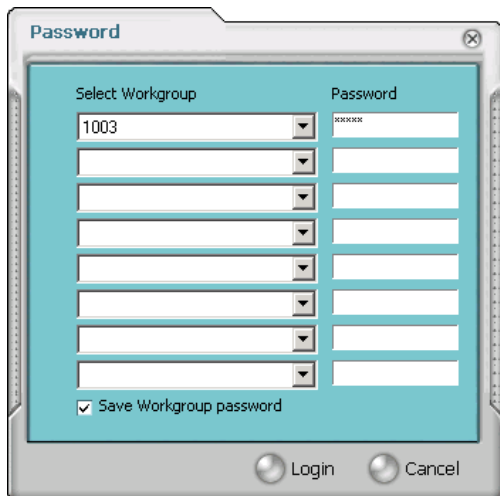
Figure 2.   Password window for workgroup supervisor login

Select the workgroups using the drop-down lists, and type the password for each workgroup pilot extension. If you want the software to remember the passwords, select the **Save workgroup password** check box. When you're ready, click **Login**.

AltiSupervisor supports logging in on up to eight workgroups simultaneously.

Viewing Group Statistics

Figure 3.   Group Statistics window

The **Group Statistics** window displays—for *each* workgroup—real time workgroup activity and performance, workgroup performance since midnight, and a summary of agent data. The statistics displayed are for workgroup calls only.

These statistics are reset every night at midnight.

Most of the statistics are self-explanatory, but you may wish to note the following:

• **Wrapup**—whether or not to allow wrapup time, and the duration that can be used to wrap up after hanging up a workgroup call, are determined in the AltiWare/AltiContact Manager Administrator. The statistic shows the number of agents that are currently in the wait state. The Agent Statistics window displays the average wrapup time per agent.

- **Calls exceeding service level threshold**—the *service level threshold* is the maximum amount of time that is acceptable for a caller to wait before the call is answered. This statistic represents the number of calls exceeding that time limit.

- **Service level**—the percentage of queued calls exceeding the service level threshold.

- **Average wait time for answered calls**—the average amount of time a caller is in queue before being answered.

- **Average wait time for abandoned calls**—the average amount of time calls were in queue before they were abandoned. *Abandoned* means that the caller has hung up before the call was answered.

- **Calls abandoned**—the number of calls abandoned since midnight.

- **Calls abandoned during ring**—includes calls that were automatically forwarded from the workgroup extension number.

- **Average talk time**—the average amount of time workgroup agents are actually talking to callers. The average time *per agent* is shown in the Agent Statistics window.

- **Busy**—the number of agents whose phones are off hook, or the extension is in the **Forward All Calls** or **Do Not Disturb** state.

Switching Workgroup Views

Click the workgroup extension tab at the bottom of the panel to view statistics for another workgroup.

Exporting or Printing Statistics

Use the **Export** button and then specify a directory and file name to save records to a CSF (Call Summary Format) file, or use the **Print** button to print the records.

Important: These statistics are reset every night at midnight. If you do not exports or print records before the reset, you cannot recover the data.

Viewing Agent Statistics

Figure 4.   Agent Statistics window

The **Agent Statistics** window displays statistics for each agent, including the number of calls answered, the average talk time (average amount of time spent on the phone per call), and the average time spent in wrap up.

The table also displays the login and logout times.

Click the workgroup extension tab at the bottom of the panel to view statistics for agents in another workgroup.

Viewing a History of Agent Activity

Click the **History** button in the Agent Statistics window to view a history of agent activity for the currently selected workgroup's agents.
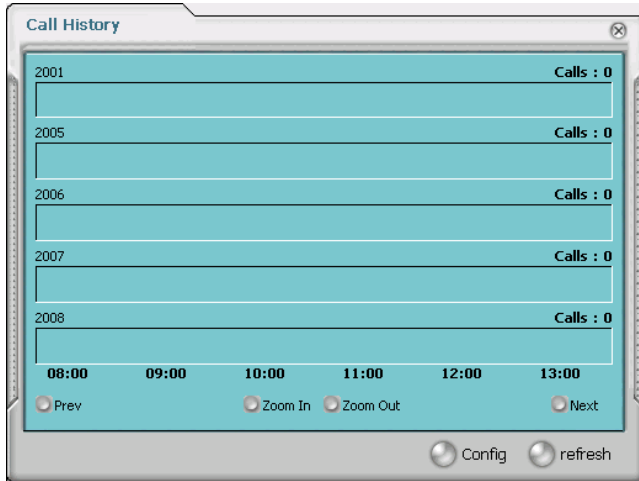
Figure 5.   Agent Call History window

The Call History displays a data panel, showing you the number of calls for each agent in the work group. The default view is for the current two hour period.

The data covered is from midnight to the current time, and the data is cleared and refreshed at midnight.

To change the display:

* Click the **Zoom In** and **Zoom Out** buttons to change the length of time displayed. Zoom In takes the display down to 1/2 hour increments. Zoom Out takes the display up to as much as 4 hour increments.

* Click the **Prev** button to view previous time periods and click the **Next** button to return toward the current time period.

•   Click the **Config** button to enable the auto refresh option; then set the number of seconds to automatically refresh agent data.
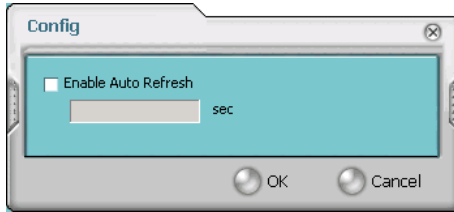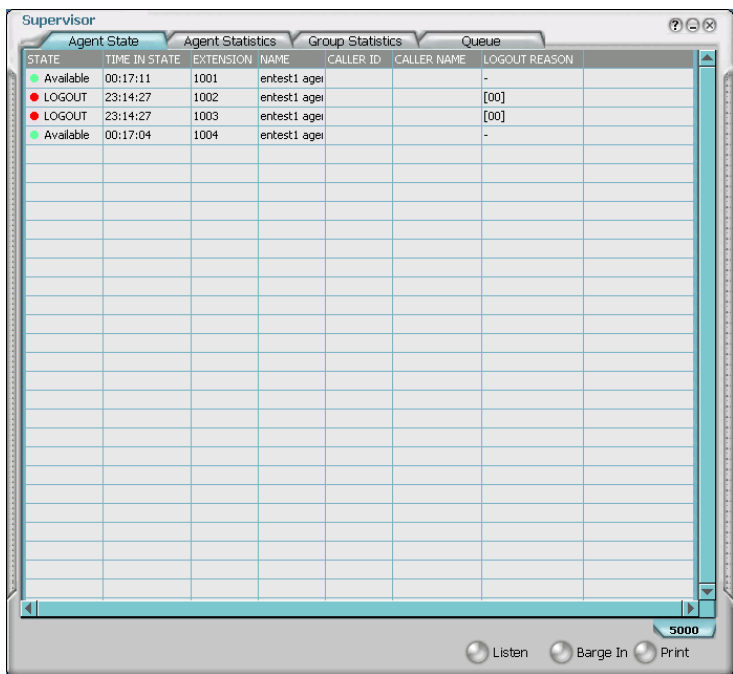
Figure 6.   Agent Call History Config button

•   Click the **Refresh** button to update the window data.

Note: Clicking **Refresh** can result in the transfer of a large amount of data and can be time consuming. It is recommended that you do not use this feature frequently.

Viewing Agent Current Status

Click the **Agent State** button to view the current status of the agents for the selected workgroup.

Figure 7.   Agent State window

This window displays information about the agent's logon readiness state and the agent's status (either *idle* or "*busy*"). If the agent is connected to a caller, call data and Caller ID data are displayed, indicating whether the call is incoming or outgoing, Personal or Workgroup.

Notes

*   A Logout Reason of "00" appears in one of two situations:

    — Agents in this workgroup are not required to provide a Logout Reason,

        or

    — "00" is used to indicate a Logout Reason of "other."

*   The green light will turn red if the extension is:

— off hook

— in the **Forward All Calls (FWD)** state

— in the **Do Not Disturb (DND)** state

— in **wait** after a call

• For an agent's outbound workgroup call to another agent in the workgroup, the **Caller ID** field (see Figure 8) will show the direction of the call (=> means an outgoing call, <= means an incoming call) and the caller ID of the incoming caller/outgoing call.

Figure 8.   Caller ID field

• For *outgoing* workgroup calls, the Caller ID field additionally shows the calling agent's workgroup number in parentheses.

• For *incoming* workgroup calls, the Caller ID field additionally shows the workgroup number receiving the call in parentheses.

   Example: For **=>562(WG422)**, this is an outgoing call where *562* is the target extension and *WG422* is the workgroup number that Extension 129 (the caller) is a member of; for **<=129(WG562)**, this is an incoming call where *129* is the incoming call's extension and *WG562* is the workgroup number of the member (Extension 566) receiving the call.

To change views and print data:

Click the workgroup pilot extension tab at the bottom of the panel to view data for agents in another workgroup.

Click **Print** to print the current window data.

Monitoring—Listening in and Barging In

If your system and extension are configured to provide these functions, you can listen to (silent monitor) agent's calls and, if necessary, intervene and enter the conversation in progress, sometimes called barging into the call. Essentially, barging in is to create a conference call with the agent, the caller, and yourself.

Note: These features not only require the appropriate extension permissions, but also a Triton Resource Board to be installed in the AltiWare/AltiContact Manager system. If you attempt to make use of these features when there is no board present, you'll get a fast busy signal.

You can monitor an agent's incoming/outgoing calls for the workgroup which belongs to your supervisor, regardless of the agent's login/logout status.

You can monitor and barge-in on an agent's personal call through AltiSupervisor only; monitoring and barge-in is not supported from the phone interface.

You cannot use listen or barge in on parked calls, calls on hold, or calls in conference.

> **WARNING!**
>
> *Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws*

Listening In

When you listen in to a call, you cannot be heard.

To listen in to a call:

1. In the Agent State window, click to select an agent connected to an incoming workgroup call.

2. Click the **Listen** button to ring your extension, then listen in by phone or headset.

   Alternatively, using the handset, press **# 59** + **<agent extension>** + **<workgroup password> + 1**.

3. When you are finished monitoring, click the **Hang Up** button.

The **Hang Up** button appears in the window after you click **Listen** or **Barge In**.

Barging In

You can barge into a workgroup agent call and enter the conversation in progress.

To barge in to a call:

1. In the Agent State window, click to select an agent connected to an incoming workgroup call.

2. Click the **Barge In** button to ring your extension, then speak to the agent and caller through the handset.

    Alternatively, using the handset, press **# 59** + **<agent extension>** + **<workgroup password>** + **2.**

3. To exit the call, click the **Hang Up** button.

Viewing the Queues

Click the **Queue** button to view the queue for the selected workgroup.
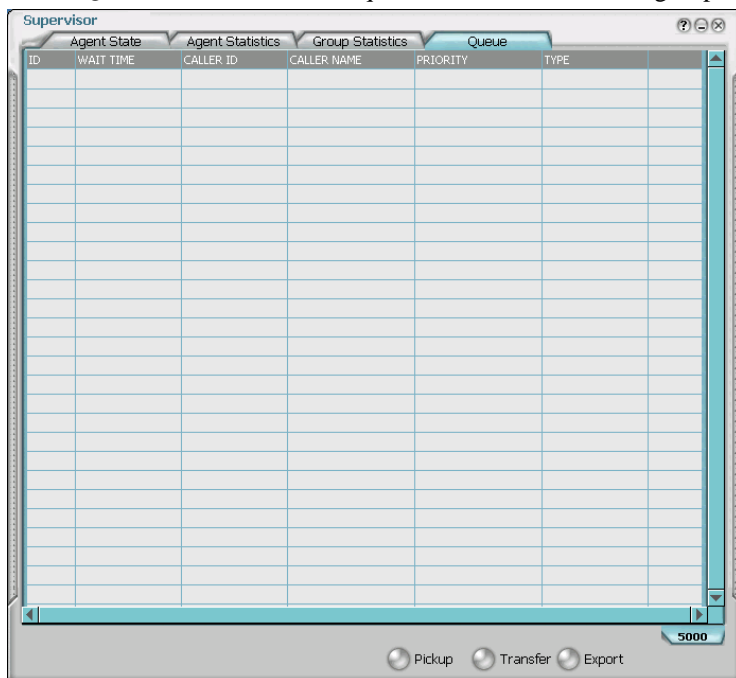
Figure 9. Queue window

For each call in queue, the **Queue** window displays the ID, the wait time, Caller ID, and Caller Name if available.

The maximum number of calls in queue, at any one time, is 34.

Pickup Call from Queue

To pick up a call from queue, click on a queued call from the list, then click the **Pickup** button.

Transfer Call from Queue

To transfer a call from queue, click on a queued call from the list, then click the **Transfer** button.

Exporting or Printing Statistics

Use the **Export** button and then specify a directory and file name to save the queue data to a CSF (Call Summary Format) file, or use the **Print** button to print the records.

Operation Notes

- When using silent monitoring to monitor a workgroup's conversation, the Agent state of AltiSupervisor shows the caller ID of the extension that is being monitored, instead of leaving the caller ID blank.

Using AltiSupervisor

Configuring Your Station Settings

You can configure the following settings and options by clicking the
Config button in the main window to open the Config window.

- **General Info**—password, default trunk access, and other settings.
- **One Number Access (ONA)**—forwarding of specific incoming calls.
  This is available only when your extension configuration is set up to
  allow ONA.
- **Call Handling**—forwarding, busy call, and no-answer call handling.
- **Message Notify**—how and when to notify yourself about incoming
  voice messages.
- **Station Speed**—your personal speed dial numbers.
- **System Speed**—you can view and edit the name and comments, but
  not the number itself, of system speed dial numbers.

Note: Options are disabled if they are not available. For example, One
Number Access must be enabled in the AltiAdmin application.
Further, if you don't enable ONA as a Call Handling option, you
can't set up and use ONA.

Apply Button and OK Button

In the Configuration windows, you'll see two buttons that save your
changes:

- The **Apply** button saves your changes and *lets you continue* in the
  current window.
- The **OK** button saves your changes and *closes* the current window.

Configuration

General Information
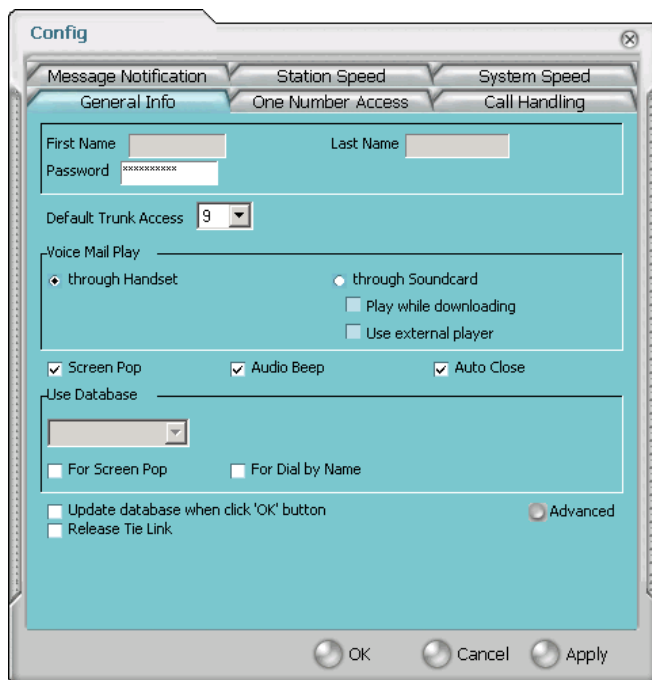
Figure 10.   General Info configuration

The General Info tab is the window you see when you first click the **Config** button in the AltiAgent main window to open the Config window.

In this window, you can edit your password, the default trunk access code, voice mail settings, AltiAgent audio and video behavior, and external database access options.

Default Trunk Access

The trunk access codes are defined in the AltiWare/ACM Administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.

~~Record Type~~

~~You can select the type of speech coding method to be used when recording conversations:~~

- ~~**ADPCM** - (recommended) Adaptive Differential Pulse Code Modulation, allows an analog voice conversation to be carried within a 32-Kbps digital channel, encodes voice signals in half the space PCM allows.~~

- ~~**PCM** - Pulse Code Modulation, the most common method of encoding an analog voice signal into a digital bit stream; the amplitude of the voice conversation is sampled, then conded into a binary number, which can then be switched, transmitted and stored digitally.~~

Voice Mail Play Options

You can choose to play your messages on your phone set, or play them on your sound card and speakers. If you choose to play them on your sound card, you have another choice: you can choose to play the message as it downloads, or to download it completely and play it on an external media player.

Screen Pop, Audio Beep, and Auto Close

Select the **Screen Pop** check box if you want an AltiAgent window to pop up on your screen when you have a call. You can then click a call to take it or perform other AltiAgent actions. For AltiAgent to pop up, you cannot have closed the application entirely, but it can be minimized.

Note: The Screen Pop and Audio Beep selections on this screen differ from the Alert option you can select in the Advanced window, which alerts you when a call goes into your workgroup's queue. See "Advanced Options for Web-based and Workgroup Calls" on page 30 for details.

Select the **Auto Close** check box to have AltiAgent close the pop up window once you have finished with the call.

Accessing Databases

AltiAgent can access phone numbers from your Microsoft Outlook, Outlook Express, ACT!, or GoldMine® database. During installation, the install program reads which applications you have installed on your PC.

In the drop down list under **Use Database**, select the database you want to use—either **Outlook** or **Outlook Express**.

Note: If you select Outlook, AltiWare will load all the subfolders and data in your main Contacts folder, which will take a few moments. Once the data is loaded, you can close the Configuration window, reopen it, and click the **Select Folder** button that now appears to choose which Contacts subfolders you want to use.

You also have these additional options:

- Select the **For Screen Pop** check box to have a database contact window pop up when you receive a call from someone for whom you have a record in the database contact directory.

- Select the **For Dial-by-Name** check box enable access to the names in the database directory when you dial. With this option enabled, the names and their associated numbers in your Outlook, ACT!, or GoldMine® directory are added to the contact list in the dial pad window.

- Select the **Update database** check box to refresh the data AltiAgent accesses from the database.

- **Country Code** - for international use. Enter the country code of the local AltiAgent user; US country code is "i". This field helps to convert the standard international phone numbers used in Outlook to correct digit strings for AltiWare.

Release Tie Link

When enabled, the **Release Tie Link** option will automatically have the **Transfer** button send "FLASH *" to release a tie trunk if the incoming call is through an IP trunk.

Advanced Options for Web-based and Workgroup Calls

This option is available if you are logged in as a workgroup agent but not as a desktop user. Click the **Advanced** button to select advanced options.
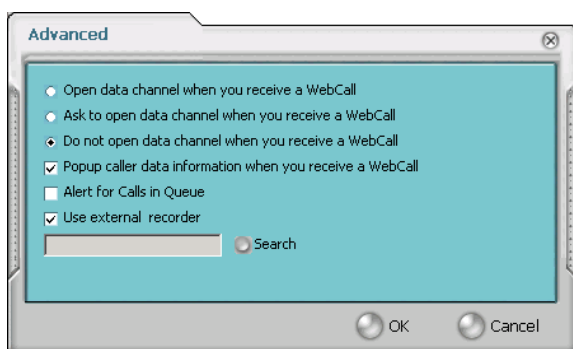
Figure 11.   Advanced database options

- The first three radio buttons provide choices for when to open a text chat session during web-based calls—that is, whether to open NetMeeting in coordination with the calls. You can choose always, never, or to have AltiAgent query you on each webcall as to whether to open a chat session.

- Select the **Popup extra call information…** check box to have the Caller Data window pop up automatically when you connect to a web-based call.

- Select **Alert when new calls come into queue** to have AltiAgent alert you via a screen pop and audio beep when a new call enters the workgroup queue.

- Select **Use external recorder** to use any client voice recording system you have installed. Use the **Search** button to browse to the .exe file.

One Number Access (ONA)

If you are expecting calls that you want to receive regardless of where you are, you can have the system forward those calls to you. You must enter the Caller IDs for the calls you want forwarded, and the numbers where you can be reached.

If the system is unable to connect the call (i.e., can't identify a Caller ID or can't reach you at *any* of the numbers you specify), the call is sent to your voice mail.

Before You Set Up ONA

- ONA must be enabled by your system administrator.

Configuration

- Your Call Handling settings must not conflict with ONA. Specifically:

    — **Do Not Disturb** must be disabled. Otherwise, if your line is busy, all calls will go into voice mail and not to the ONA forwarding numbers you specify.

    — **Enable Call Forward** must be disabled. Otherwise, all calls will be forwarded according to this setting.

    See "Call Handling" on page 34 for details on these settings.

Accessing One Number Access Setup

After you set the call handling options, click the **One Number Access** tab in the Config window to open the One Number Access window.

Figure 12.   One Number Access window

1. Select the times you want to be available to ONA callers.

    If you choose **Enable based on the following schedule,** you can set up to four different schedules in the dialog that pops up.
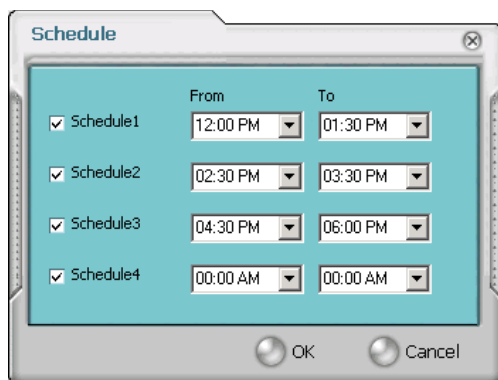
Figure 13.   Enable Schedule Based Access dialog box

2. Enable the **Call Screening** check box to have the system prompt the ONA caller to record a caller name to continue ONA.

3. Enable the **Caller ID Verification** check box and then specify the incoming phone numbers for ONA. If ONA finds one of these numbers on an incoming call, it will forward the call to you.

    You can enter up to ten phone numbers in the **Caller ID Verification** fields. For local numbers, use 7 digits (5555555). For long distance numbers, use 10 digits—area code + local number.

    Note: If you enter no numbers in the Caller ID Verification fields and ONA is enabled, ONA is made available to every caller.

Using a Password

You can use a Caller ID Verification field to enter a password number such as "5555" so that *a caller who knows this password can use ONA to find you*, *regardless of where they are calling from.* Tell the caller to dial **1** during your personal greeting and then enter the password.

4. Select the **Forwarding Numbers** to be used by the system to find you when ONA is active. You can set up to four different numbers— extensions or outside numbers. For outside numbers, use the drop-down list to select the trunk access code you want to use.

    When ONA is active, the system dials the forwarding number(s) in

the order from Forwarding Number 1 through Forwarding Number 4. Note that this number order does *not* correspond to the Schedule order—Forward Number 2 is *not* used first during Schedule Number 2.

Note: If your system administrator has disabled the Check Password option for your ONA settings, a call forwarded via ONA that is picked up by a voice mail box, fax machine, or answering machine will connect, and will not try any subsequent Forwarding Numbers. Therefore, if you want ONA to use such an option as a "last resort," it should be Forwarding Number 4.

Call Handling

Click the **Call Handling** tab in the Config window to configure incoming call handling for your extension.

Figure 14.   Call Handling configuration

Forwarding All Calls

If you want to forward calls to an external number, select a trunk access code in the drop-down list, then begin with the outside trunk or route access digit and any long distance prefix digits such as **1** and area code.

Forwarding to a Pager Not Recommended

Forwarding calls to a pager is possible but **not recommended** since callers will only hear what is heard when calling a pager and might not know to enter a return phone number unless instructed.

Do Not Disturb

If you select **Enable Do Not Disturb**, all incoming calls are forwarded according to your "Enable Busy Call Handling" settings, described immediately below.

Note: Selecting **Enable Do Not Disturb** here has the same effect as clicking the **DND** button on the dial pad.

Busy Call Handling and No Answer Handling

You can use these options to specify how you want to handle incoming calls when you're already on the phone or when you can't answer the phone, for example, when you've enabled Do Not Disturb.

If you want to use the Auto Attendant/IVR and you don't know the number of the phrase or menu you want to use, check with your system administrator.

Place call in queue is available only if your system administrator has enabled queueing for you or your workgroup.

Number of Rings Before Forwarding

This setting pertains to almost all the options in this window: the number of times the phone should ring before the system decides to forward the call to an extension, voice mail, or the Auto Attendant.

Message Notification

Message Notification lets you set up how you'd like to be alerted to new messages when you're away from your desk. You can also set up Message Notification through the AltiGen Voice Mail System. See the *AltiServ User Guide* for more information on this feature.

Configuration

Click the **Message Notification** tab in the Config window to establish how
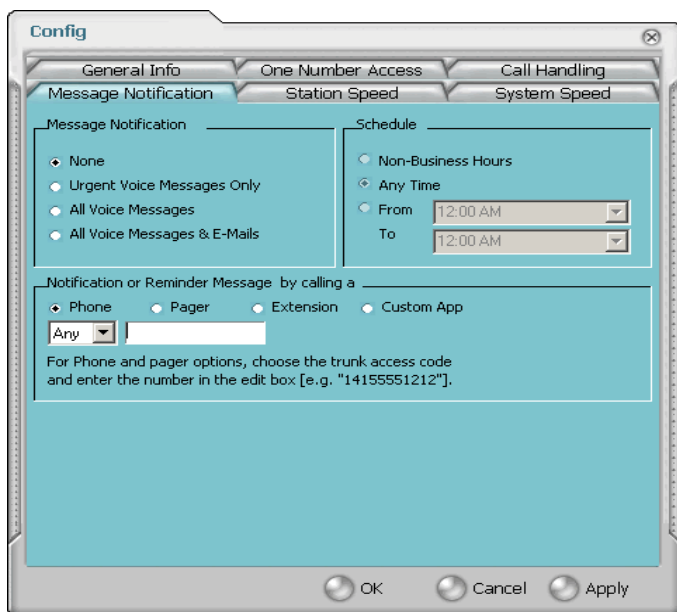and when you want to be notified about incoming voice messages.

Figure 15.   Message Notification options

Use this window to set the notification options:

- **The types of messages** on which you want to be alerted: N/A, urgent
  voice messages only, all voice messages, or all voice messages and
  email too.

- **How and where to notify you**—in the **Message Notification or
  Reminder Message by calling a…** options, if you want to use an
  outside number, use the drop-down list to select the trunk access you
  want to use.

- **Schedule**—during what hours you want to be alerted.

Station Speed Dialing Setup

The Speed Dial Setup page, accessed by clicking **Station Speed** on the main menu, lets you set up to 20 station speed dial numbers. When you add an outside number, all *relevant* prefix digits such as trunk or route access number, the long distance prefix **1** and area codes must precede the phone number. Station speed dial numbers are also set up by using the **#25** feature code on your phone set, as described in the *AltiServ User Guide*.

Click the **Station Speed** tab in the Config window.
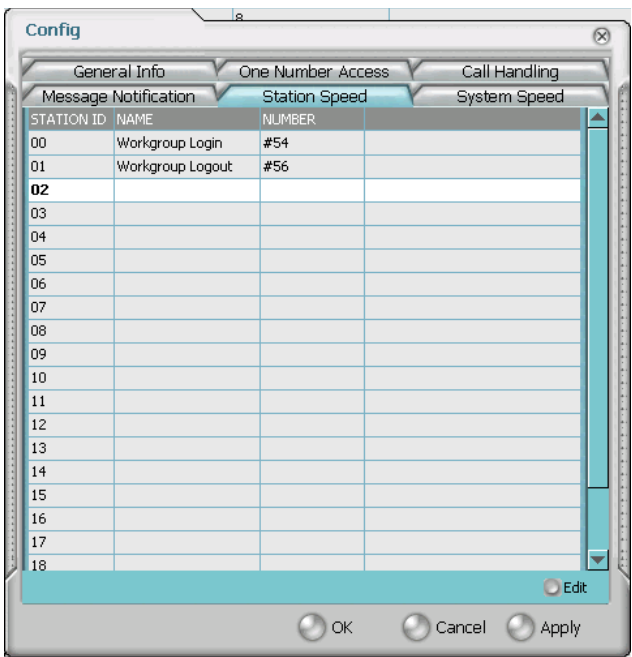
Figure 16. Station Speed Dialing setup

Adding or Editing Station Speed Entries

1. Click a **Station ID** to select it.

2. Click the **Edit** button.

3. When the Dial Setting dialog box appears, add or edit the **Number**.

Optionally, to aid your memory, add or edit the **Name** and **Comment**.
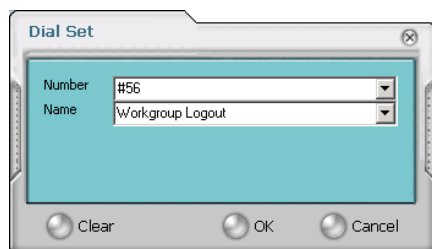
Figure 17.   Dial Setting dialog box, for Speed Dial Numbers

4.   Click **OK**.

After you have entered and saved the speed dial number, the number is also displayed and can be used in the Dialing Pad window in the Station Speed panel.

Deleting Station Speed Entries

To delete a speed dial number, click the **Station ID** and click **Edit** to open the Dial Setting dialog box. Click **Clear** and then click **OK**.

System Speed Dialing

Click the **System Speed** tab in the Config window to view the System Speed Dial entries. System speed dial numbers are set up in ~~AltiAdmin, the~~ AltiWare/ACM Administrator. In AltiAgent,, you cannot edit speed dial numbers or name entries. ~~and comments in order to make the numbers more familiar, but not the number itself.~~
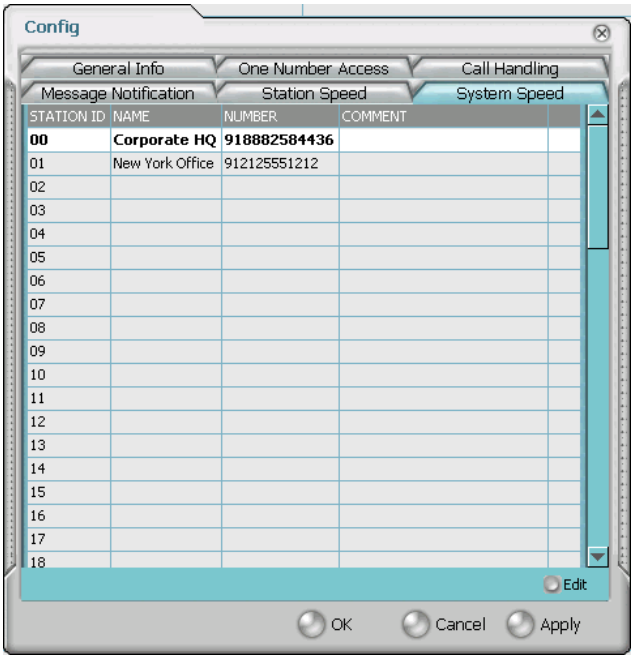
Figure 18.   System Speed

~~To edit the name or comment, select the **Station ID** and click **Edit** to open a Dial Setting dialog box (see Figure 17 on page 38). Modify the **Name** or **Comment**, then click OK.~~

~~The number is also displayed and can be used in the Dialing Pad window in the System Speed panel.~~

Configuration

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