IP Office 4.2

IP Office Phone Manager

Chapter 1.
IP Office Phone Manager

IP Office Phone Manager

This guide describes how to receive and make calls using the IP Office Phone Manager application.

IP Office Phone Manager is a single application that can be run in three different versions. The version for each user is set through the IP Office configuration and is also controlled by licences entered into the IP Office configuration. The version is Phone Manager Lite unless suitable licences are entered on the telephone system. If insufficient licences are available Phone Manager operates in Lite mode.

- **Phone Manager Lite**
  No license required.

- **Phone Manager Pro**
  A 'Phone Manager Pro' license key is required for each Phone Manager Pro user. If insufficient licences are available, Phone Manager operates in Lite mode.

  - **Agent Mode**
    This mode is a selectable option available to a Phone Manager Pro user. In this mode the Phone Manager user has access to several agent related functions as toolbar icons.

  - **Login Mode (Hot Desking)**
    This mode is a selectable option available to a Phone Manager Pro user. Starting or stopping Phone Manager logs the user on or off an extension. The extension is specified when starting Phone Manager. While logged on, the Phone Manager extension number overrides the physical extension number.

  - **Telecommuter Mode** *(Phone Manager 4.1+)*
    In this mode, a user running Phone Manager Pro on a PC with a data connection to the IP Office (for example via VPN), is able to have their calls routed to a telephone number they specify when starting Phone Manager. When the user makes a call using Phone Manager, the IP Office will call the user's specified telephone number and when answered, then make the outgoing call for the user. Similarly incoming calls to the user's extension on the IP Office are routed to the remote number. By having the speech part of all calls initiated from the IP Office, the cost for those calls is assigned to the IP Office.

- **Phone Manager Pro PC Softphone**
  Conversations take place through a sound card headset / handset. Both a 'Phone Manager Pro' and a 'Phone Manager Pro IP Audio Enabled' license key are required for each user. Any reference in the guide that indicates a feature is only available for Phone Manager Pro then the feature is also available for Phone Manager PC Softphone.

What's New

This section gives a summary of the main changes made to different releases of IP Office Phone Manager.

Phone Manager 4.2

- **Change Password** [15]
  Your IP Office user password (by default not set) is part of the IP Office configuration. When set, it is used as part of the login to IP Office for the Phone Manager, SoftConsole and IP Office TAPI applications. Previously this password could only be set and changed using the IP Office Manager application. Phone Manager 4.2 (all modes) allows the you to change your own password. The menu is accessed through File | Change Password. If IP Office TAPI is also installed on the PC, the password change will be applied to that application also.

- **Outcalling Configuration** [58]
  Outcalling was added as part of Voicemail Pro 4.0. It allows users of Intuity emulation mode mailboxes to configure a escalating series of telephone numbers at which the Voicemail Pro would attempt to alert them about new messages. For the individual user this was configured and controlled through the mailbox prompts menu. For IP Office 4.2, configuration of Outcalling can be done through Phone Manager Pro. This allows you to view your current outcalling settings and to make changes when necessary.

- **Forward Messages** [27]
  When accessing a voicemail mailbox using Phone Manager Pro, you can now right-click on a message and select to forward it to another mailbox.

- **Version Display** [123]
  The About Phone Manager menu now displays version information for the IP Office phone system and the Voicemail Pro server. This is information that may aid in the resolution of support issues.

Phone Manager 4.1

- **Telecommuter Mode** [10]
  Within the IP Office configuration, a Phone Manager Pro user can be configured as a Telecommuter. In this mode, a user running Phone Manager Pro on a PC with a data connection to the IP Office (for example via VPN), is able to have their calls routed to a telephone number they specify when starting Phone Manager. When the user makes a call using Phone Manager, the IP Office will call the user's specified telephone number and when answered, then make the outgoing call for the user. Similarly incoming calls to the user's extension on the IP Office are routed to the remote number. By having the speech part of all calls initiated from the IP Office, the cost for those calls is assigned to the IP Office.

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- **Advice of Charge** [20]
  If Advice of Charge is supported and enabled for the user within the IP Office configuration, charge details are shown in the Phone Manager Call Details area.

- **Default Skin** [18]
  The default skin of Phone Manager was changed to be in line with other Avaya user applications.

Phone Manager Feature Comparison

The table highlights the differences when running Phone Manager in each version.

Feature	Lite	Pro	PC Softphone
Make and receive calls through the application	✔	✔	✔
Configure telephone preferences	✔	✔	✔
Configure keyboard shortcuts	✔	✔	✔
Show the Caller ID / Name	✔	✔	✔
Create Speed Dials	✔ 15.	✔ 1000.	✔ 1000.
Create Busy Lamp fields using speed dials	✔ 15.	✔ 1000.	✔ 1000.
Create multiple speed dial tabs to group busy lamp field icons	✘	✔ 10 tabs. 100 per tab.	✔ 10 tabs. 100 per tab.
View the application in Compact Mode	✘	✔	✔
Create a local phone directory	✘	✔ 1000.	✔ 1000.
View the call history log for all and missed messages	✔	✔	✔
View a separate incoming and outgoing call log	✘	✔	✔
Collect new voicemail messages	✔	✔	✔
Have voice mailbox control from the application. (Intuity and IP Office modes)	✘	✔	✔
Create a Personal Distribution List (Intuity mode only)	✘	✔	✔
Assign incoming call scripting	✘	✔	✔
Show the length of time spent on a call	✘	✔	✔
Door opening control	✘	✔	✔
Monitor queues	✘	✔	✔
Conference control display	✔	✔	✔
Conferencing Center action buttons	✔	✔	✔
Screen Pop contacts	✘	✔	✔
Simple Outlook contact record creation	✘	✔	✔
Agent mode	✘	✔	✔
Distinctive ringing (.WAV file)	✘	✔	✔
ISDN Advice of Charge (AoC) indication (if configured on the IP Office)	✘	✔	✔
Post connect dial (sending DTMF when connected to another party)	✔	✔	✔
Requires licence key on PBX to operate	✘	✔	✔
Identify a call by giving it a descriptive tag	✔	✔	✘
Amend the audio codec	✘	✘	✔
Set voicemail transfer numbers	✘	✔	✔
Create voicemail greeting messages	✘	✔	✔
Apply PIN restrictions	✘	✔	✔
Use Account Codes	✔	✔	✔
Transfer calls using drag and drop.	✘	✔	✔
Telecommuter mode.	✘	✔	✘
*View the status of an internal user, for example online.	✔	✔	✔
*Send Instant Messages (IM) to an internal user.	✔	✔	✔

* These features are only available when Microsoft Live Communications Server (LCS) is also available.

Logging in to Phone Manager

You must login to Phone Manager before you can use the application. The Login window contains details so that Phone Manager can communicate with the telephone system. If you are unable to login, see your system administrator.

- **Tip:** If you use the **Remember Password** option below, on subsequent Phone Manager restarts the Login menu is not shown if connection to the IP Office is okay.

To start Phone Manager:

1. Click **Start** > **Programs** > **IP Office** > **Phone Manager**. The IP Office Phone Manager Login window opens.

2. If an **Agent Mode** section is also shown, the Phone Manager will allow you to enter the extension number of the physical extension which you want to use whilst logged on. See Logging in as an Agent 9. Do not enter your own extension number in the Agent Mode section.

3. In the User Name\Extn field, type your extension number or user name. The user name is case sensitive. Alternatively, click User List 13 to open the list of users on the currently selected IP Office system.

4. In the Password field, type your password if you have been given one by your system administrator.

5. If you want Phone Manager to automatically login when started in future, select Remember Password. To return to the Login menu in future, start Phone Manager and select File | Login.

6. The field Unit Name\IP Address contains the IP address of the IP Office System. Click Browse 14 to select a different system.

7. Click OK. If the OK button is unavailable, there are several possible reasons:

   · There is an incorrect IP Office IP Address. Click Browse 14 and select the IP Office Control Unit from the list.

   · There is an invalid user name or password. Enter your details again. Remember that both the user name and password are case sensitive. You can select the user name from the User List 13 window.

   · There might be network problems. For more information, see your system administrator.

   · Your telephone might not be connected to or logged on to the telephone system.

8. For Phone Manager Pro users set to telecommuter mode an additional menu will appear asking "Where do you want to work", see Telecommuter Mode 10.

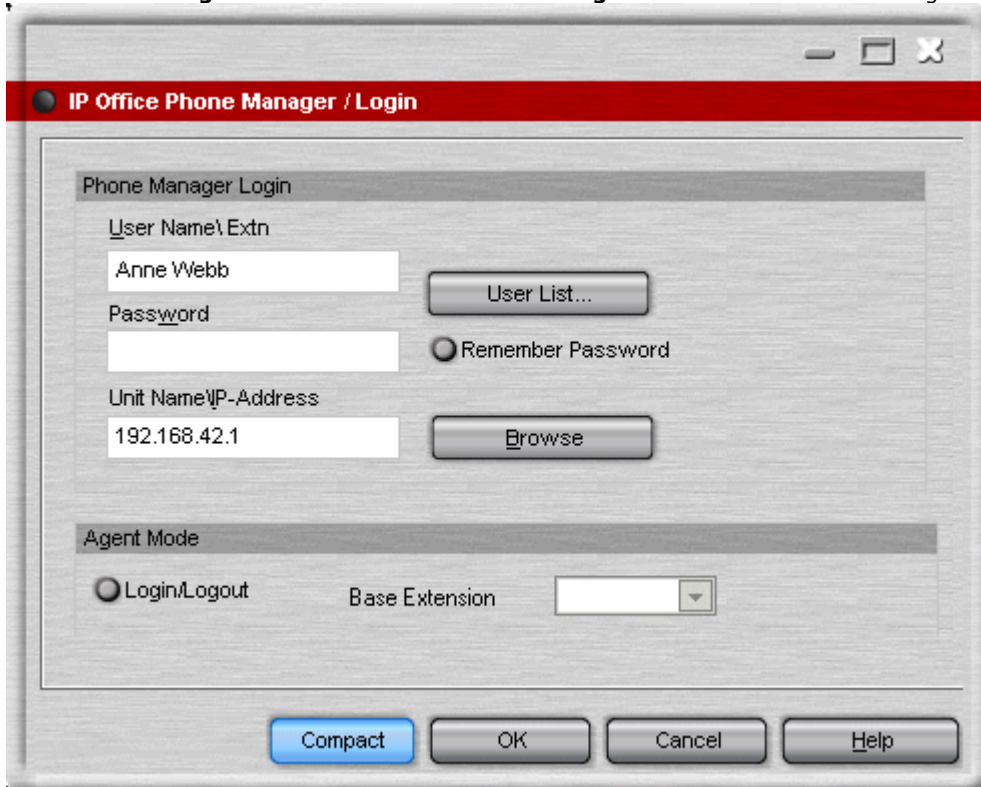9. The Phone Manager will login.

Logging in as an Agent

Agent Mode allows Phone Manager Pro users to login at another extension on the IP Office system, that is one that has a different extension number from your own extension number. While Phone Manager is running, that extension will assume your extension number and can be used to make and receive your calls. When you close Phone Manager you are logged off and the phone used reverts to its default base extension number.

Note: If you have a phone extension, while logged on at another extension, your normal extension shows NoUser and doesn't receive your calls. After logging off, your normal extension should return to operation unless you have been set to forced login by your System Administrator or someone else has logged in at your normal extension.

To start Phone Manager when working in Agent Mode:

1. Click **Start > Programs > IP Office > Phone Manager**. The IP Office Phone Manager Login window opens.

2. In the **User Name\Extn** field, type your extension number or user name. The user name is case sensitive. Alternatively, click User List 13ᐟ to open the list of users on the currently selected IP Office system.

3. In the **Password** field, type your password if you have been given one by your system administrator.

   - When using Phone Manager in agent mode to login at different extensions, we recommend that **Remember Password** is not selected. If selected, when starting Phone Manager it will login using the previously used settings without displaying the Login screen as above. This makes it difficult to access the extension to which you want to log on when starting Phone Manager without first logging on at one base extension and then using **File | Login** to access the settings again and change base extension.

4. The field **Unit Name\IP Address** contains the IP address of the IP Office System. Click Browse 14ᐟ to select a different system.

5. Click **Expand** to show the Agent Mode details.

6. If you want to login at a different extension from your own extension number, select **Login/Logout**.

7. Enter the base extension number of the extension at which you want to login and receive/make your calls.

8. Click **OK**.

Telecommuter Mode

As normal, Phone Manager is used for call control and information over a data connection to the IP Office, with the speech part of those calls being carried on a separate parallel voice call connection. IP Office 4.1 and Phone Manager 4.1 + support Telecommuter mode, which allows the speech connection to be a remote phone location not on the IP Office. Use of this mode is can be assigned to users in the IP Office 4.1+ configuration by the System Administrator.
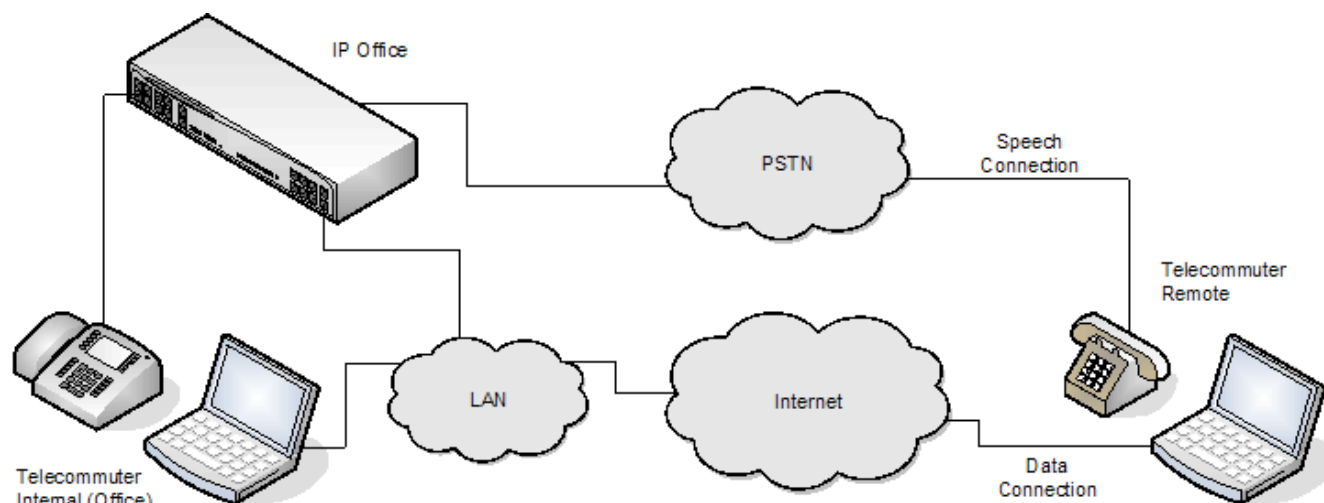
When users of this mode start Phone Manager, they are asked for their location, this is either ***Internal*** or ***Remote***.

- Internal is used when you are at your normal IP Office extension. In this state your extension and Phone Manager operate in the same way as for other internal Phone Manager users.

- Remote is used for when you are at an external location from which they have a data connection for your Phone Manager to the IP Office and a phone on which you can make and receive call. You can specify the remote location number when logging in or use a previously save location number. The remote phone number used must be one that can be dialed directly from the IP Office, for example not via any switch board, receptionist or auto attendant service. Your normal IP Office call restrictions are applied if any and any external dialing prefix must be included if used on the IP Office.

While logged in to Phone Manager as a remote telecommuter:

- Outgoing calls to an internal IP Office number or to collect voicemail are started using Phone Manager. It signals to the IP Office which connects a call to the remote location number and then to the internal number required.

- Outgoing calls to a number external to the IP Office are also started using Phone Manager. It signals the IP Office which connects a call to the remote location number and then a call from the IP Office to the required external number as if it had been dialed from your normal IP Office extension. This will also be subject to your IP Office user dialing restrictions, if any.

- Incoming calls to the user's normal IP Office extension are redirected to the remote location number and accompanied by the caller details in Phone Manager call details display.

- Your normal internal IP Office extension is logged off while in Telecommuter mode. When you close Phone Manager you will be logged back into your extension unless you are set to forced login or another user has logged in at the extension.

- Note that accessing IP Office short code features using dialing digits is not supported.

- The remote location phone is assumed to be a single line phone. If call waiting is enabled in your IP Office configuration it can be used for a single additional call when an existing call via the IP Office is connected.

Starting Phone Manager (Telecommuter Mode)

1. Ensure that your PC has a data connection to the network on which the IP Office is located.

2. Click **Start > Programs > IP Office > Phone Manager**.

3. If necessary complete the normal Phone Manager login details of your user name and extension. See **Logging in to Phone Manager** 8.

4. Once recognised as a telecommuter mode user, the following additional login menu is displayed.
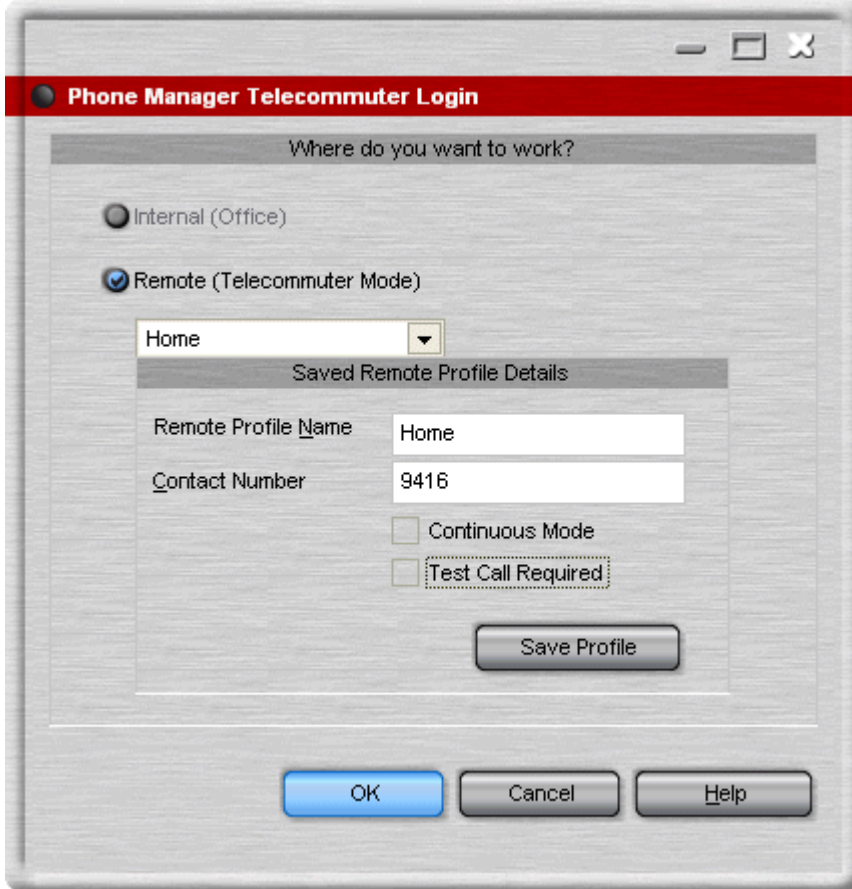
- **Internal**
  Select **Internal** if using your IP Office extension to receive and make calls. Select Remote if at a remote location but have access to a phone with a direct number.

- **Remote**
  Select Remote if you are at an external remote location at which you also have a direct phone number available to use at the same time as a data connection to the IP Office. Use the drop-down list to retrieve previously saved remote location details, otherwise enter a new set of details and then click Save Profile.

  - **Name**
    The Name is just used to identify the settings if you save them.

  - **Number**
    This must be as it would be dialed from your IP Office extension, for example including any external dialing prefix. It must be a number that can be called direct from the IP Office, not via any switch board, receptionist or auto attendant. It will be subject to any call barring and other controls applied to you when dialing from your IP Office extension.

- **Continuous Mode**
  This mode controls how you should use the connection from the IP Office to the remote location.

  - **Off**
    If Continuous Mode is not selected, the IP Office will only call the remote location number when required, that is when making or receiving an IP Office call. For example when making a call using Phone Manager, the IP Office will call the remote location, when answered it will make another call using the number requested in Phone Manager. You can end the call through either Phone Manager or by replacing the handset.

    - In this mode, it is possible for the remote location phone to make and receive non-IP Office calls. IP Office calls can be distinguished by their indication in the Phone Manager call details display.

    - Calls will not succeed if the IP Office detects that a trunk using analog loop start or analog loop start emulation is being used.

    - Pages calls are not redirected. Intercom and dial direct calls are redirected as normal calls.

- **On**
  If Continuous Mode is selected, once you complete the Phone Manager login, the IP Office will call the remote location number and when answered you should leave the connection open (off-hook). This will occur as part of either the test call if requested or after you click OK. Phone Manager is then used exclusively to make and answer calls, with the IP Office connecting the speech path to the remote location phone handset as and when required.

  - This option should be used whenever analog loop start trunks or analog loop start emulation trunks are involved or suspected to be involved. This may include cellular phones connected to cellular gateways on analog trunks.

  - In this mode, if the continuous call is ended while there are parked or held calls, whether a new call is established when using Phone Manager to unhold/unpark the calls depends on a number of factors and may not always work.

- **Request Test Call**
  If selected, the IP Office will attempt to make a test call to the remote location number. This option is greyed out if Continuous Mode is selected.

10.Click **OK**.

- If **Continuous Mode** was selected, the phone should ring and when answered you should be able to hear the IP Office's music on hold. Click ⤵ to end that call from the IP Office. DO NOT REPLACE THE PHONE HANDSET.

- If **Request Test Call** was selected the phone should ring. Answer the call. Phone Manager will show a message asking if the call was received. Click Yes to complete the login, click No to return to the login details. If the IP Office was unable to make the call, Phone Manager will display the possible reason. For example "Call Not answered" or "Outgoing call barred".

11.Once successfully logged in, use Phone Manager to make and answer IP Office calls.

The User List Window

The User Name\Extn field in the Login window can be completed by selecting the details from a list.

To open the User List window:

1. At the Login window, click **User List**. The User List window opens.
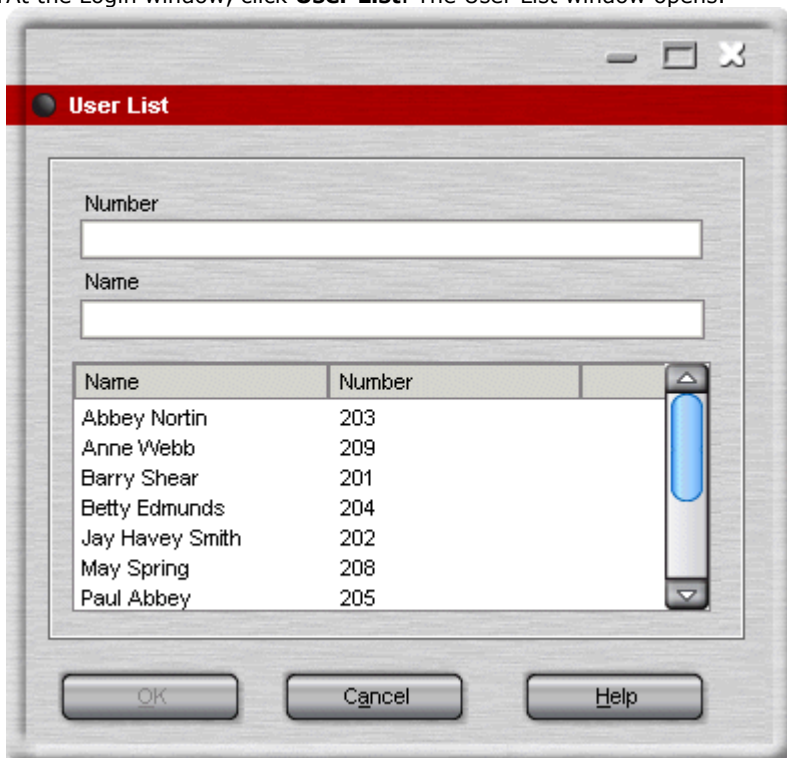
2. Start typing the name or number in the appropriate field. Only the matching entries are listed.

3. Click the required entry. The Name and Number fields are completed.

4. Click OK to return to the Login window. The details you selected are entered in the User Name\Extn field.

Selecting a Different IP Office Control Unit

When the **Browse** button is clicked in the Login window, the IP Office Control Units window opens. If there is more than one IP Office system available you can select the control unit to be used.

To select a different IP Office Control Unit:

1. Click the IP Office Control Unit in the listing.

2. Click **OK**. If the required IP Office system is not listed contact your system administrator.
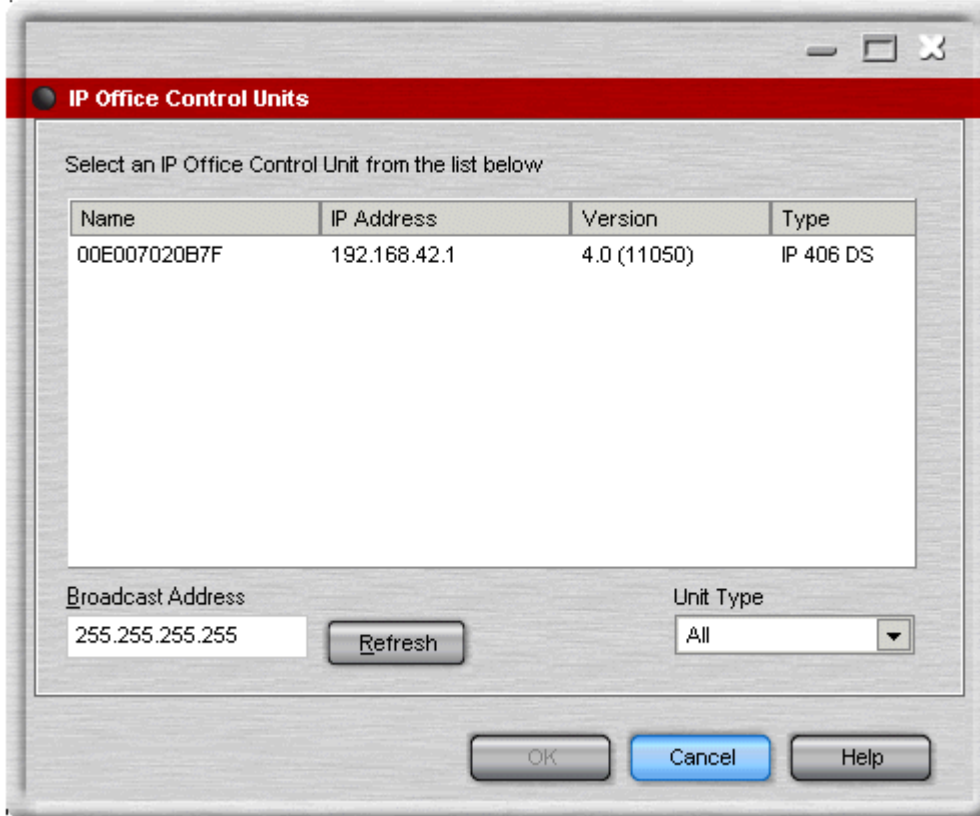
Change Password

Phone Manager 4.2 and higher only.

The **File | Change Password** option allows you to change your IP Office user password. This is the password used by the Phone Manager, SoftConsole and IP Office TAPI applications to connect to the IP Office.

By default this password is blank and cannot be changed. However, if the System Administrator has assigned you a password, you can change it using Phone Manager.

- Note: This is a not the password used for your voicemail mailbox. Nor is it the login code used for phone login or hot desking.

1. Select **File** and then **Change Password**.

2. Enter your current password and then enter and confirm the new password. Passwords can be up to 31 number digits. Other characters cannot be used.

Chapter 2.
Main Window

Main Window

The appearance of the main window depends on the licencing and configuration settings applied. The Title Bar indicates which version of Phone Manager is being used. In the example, the version being used is Phone Manager Pro. In each Phone Manager version the basic areas are the same. For more information, see Phone Manager Feature Comparison 7.
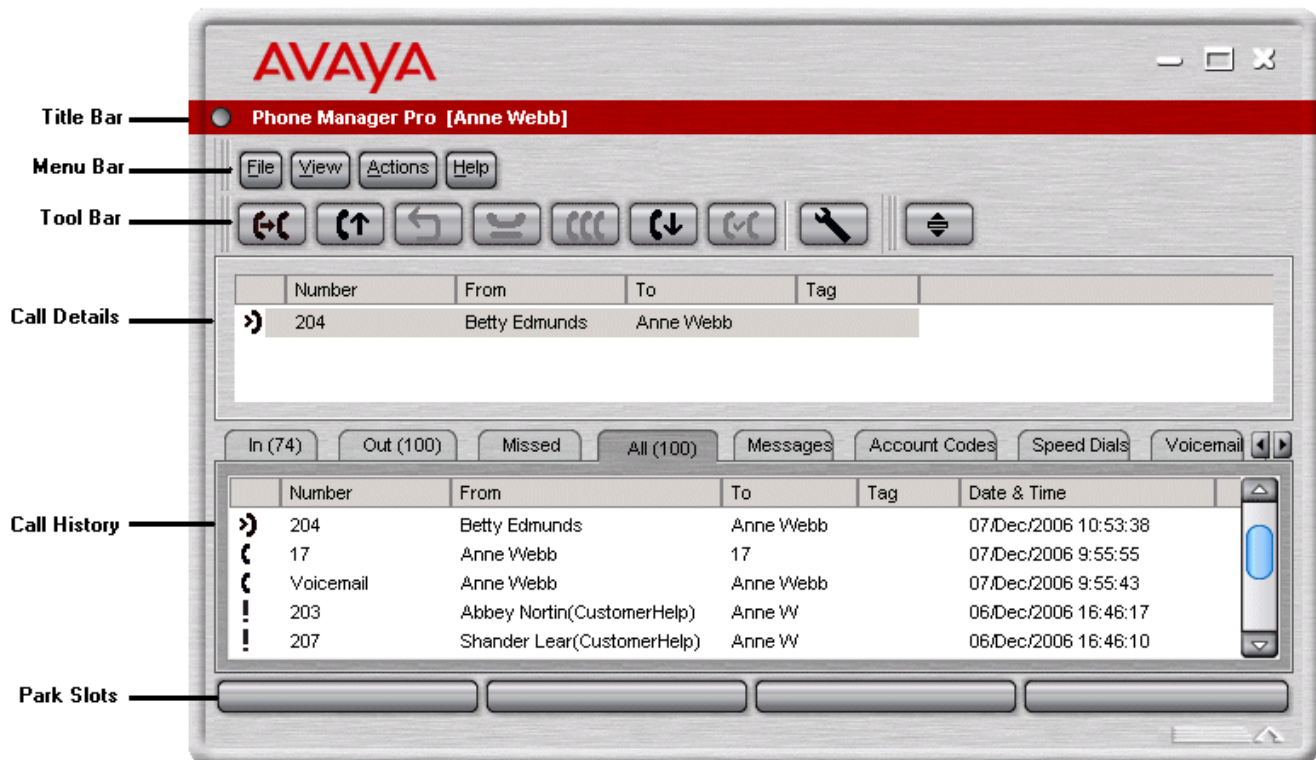
The Phone Manager main screen is divided into the follow areas:

- **Title Bar**
  The Title Bar contains the Phone Manager version. The name of the user is inside a pair of square brackets. If the title bar only contains the words 'Phone Manager' it is not connected to the IP Office.

- **Menu Bar**
  At the top of the screen is the main menu bar. Each menu contains commands and actions, some items are only accessible when the right conditions occur. Each menu can be opened by clicking the menu button. You can also open the menu by pressing ALT and the underlined letter for the required menu. For example, press ALT+A to open the Actions menu.

The options available in each menu are:

- **File**
  From the File menu you can save or load a personal profile, login as a different user, configure your directory or exit Phone Manager.

- **View**
  Select to run Phone Manager in full or compact mode. Also select the display language and whether to show or hide the tool bar. The Phone Manager skin can be changed from this menu and access to the preferences.

- **Actions**
  The Actions menu contains actions for call handling. Those that are unavailable can not be used in the current call situation. Keyboard shortcuts for the functions are also shown.

- **Help** 74
  Access the help system and details about Avaya IP Office Phone Manager.

- **Tool Bar** 12
  The icons on the tool bar provide short cuts for options that are frequently used.

- **Call Details** 20
  The Call Details area shows the current state of all active calls.

- **Call History** 21
  A variety of information is shown in the Call History area. It is divided into different tabs. The tabs that are available depend on the configuration of your Phone Manager.

- **Park Slots** 39
  There are four slots available for parking calls. You might need to temporarily "park" a call to handle some other task, for example, receive a new call or deal with an interruption.

A call from extension 203 is parked in the first park slot

The Call Details Area

The Call Details pane contains details about the current state of all active calls.

The details shown are:

- **Call Status Icon**
  The icons indicate the status of a call at your extension. The Call Status display might not always match the display on the telephone.

  - ◖◗ Your telephone is off hook/Calls you made.

  - ↔ The call that you are currently connected to.

  - ♫ The call is on hold.

  - →| The number you are trying to ring is engaged.

  - ᐅ Indicates an incoming call to your extension.

  - ! Indicates a missed call.

- **Number**
  Either the incoming telephone number or the telephone number being called is shown. In the example, the external telephone number is shown. If the call is an internal call just the extension number is shown.

- **From**
  This column shows the name that is associated with the number in the directory on the main system or your local directory. The local directory is only available in Phone Manager Pro.

- **To**
  This column shows the name that is associated with the called number in the directory on the main system or your local directory. The Local Directory is only available in Phone Manager Pro.

- **Tag**
  Text that was entered to identify the call.

- **Advice of Charge:** *Phone Manager 4.0+*
  The Advice of Charge field is only available in Phone Manager Pro. When there is information about the cost of an external call, the information is detailed in the Advice of Charge column. The heading is only visible when any details are available and is only available during a call. The details are not saved in the Call History area.

The Call History Panel

The Call History area of the Phone Manager can show a variety of information. You can configure what is shown by changing your preferences. For more information, see Changing General Phone Manager Settings 100.
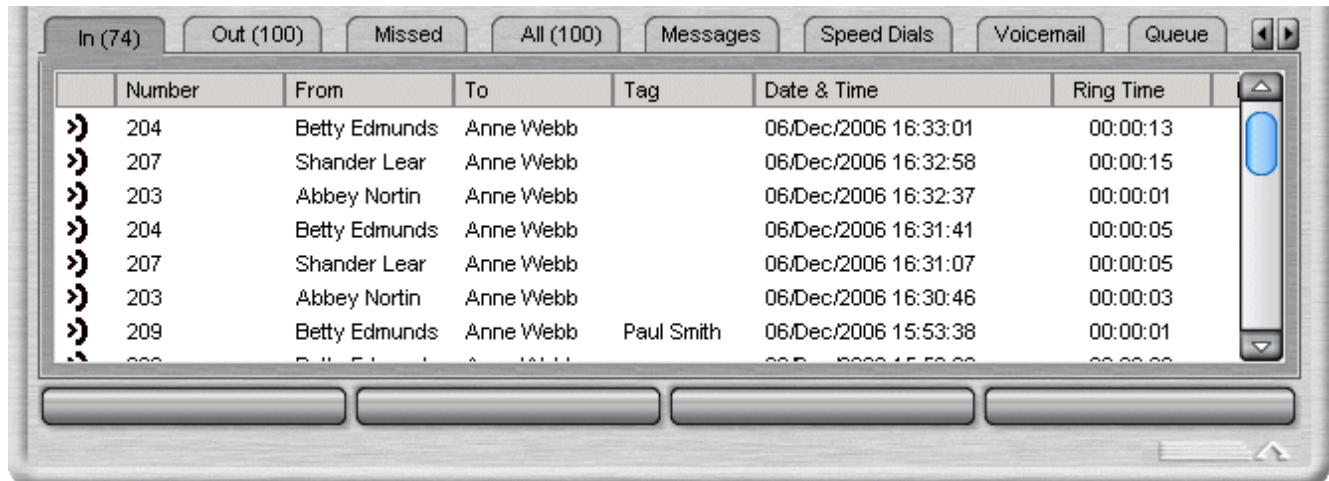
The Call History tabs that are available to all Phone Manager versions are:

- **Missed** 24 **-** Lists unanswered calls to your extension.
- **All** 22 - List of all incoming, outgoing and missed calls.
- **Messages** 24 - Displays the number of new messages in your voicemail box.
- **Speed Dials** 25 - To store and create speed dial icons.
- **Conference** 29 - Lists the members of a conference.

For Phone Manager Pro, the following tabs also appear in the Call History pane:

- **In** 23 - Lists all calls received at your extension.
- **Out** 23 - Lists all calls made from your extension.
- **Status** 30 - The tab appears when a call is in progress or you are in Busy Wrap Up/Busy Not available.
- **Voicemail** 27 - During a call to your voicemail box, a tab shows all your messages.
- **Queue** 29 - Used to monitor hunt group queues.
- **Door** 32 - Used to activate a door release.
- **Script** 31 - Displays the text configured in the script file field in a directory entry.
- **Account Codes** 28 - Displays icons for calls with accounts codes.

The In, Out, Missed and All tabs contain information about calls. The following options are available when you right-click a call:

- **Call Number Back** - Call the selected number. If the outbound prefix, for example 9, is not shown contact your system administrator.
- **Add to Directory** - Automatically create a directory entry from the call information. For more information, see Managing Directories 76.
- **Add to Speed Dial** - Automatically create a speed dial from the call information. For more information, see Viewing Speed Dials 79.
- **Add to Outlook** - Automatically add the call information to the Outlook contacts folder. The 'Add to Outlook' option requires Microsoft Outlook to be installed on your computer and the correct configuration of MAPI. For more information, see your system administrator.
- **Copy** - The 'Number' from the selected call is copied in to the clipboard.
- **Delete Entry** - The currently selected call is deleted from the call history.
- **Clear Tab** - All the call information listed in the current tab is cleared.
- **Clear All tabs** - All the call information listed in the In, Out, Missed and All tabs is cleared.

The All Tab

The All tab is available to all versions of Phone Manager. If the tab is not visible, you need to select to show your calls. For more information, see Changing General Phone Manager Options 100.

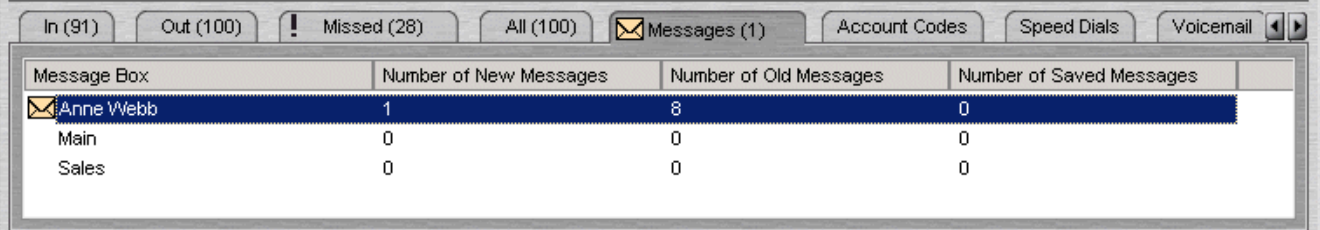The All tab gives a list of all incoming, outgoing and missed calls at your extension. The tab lists information on a maximum of 100 calls. When the maximum capacity is reached the oldest record is deleted when a new record is added. If you are using Phone Manager Pro, the In and Out tabs might contain details about calls that were deleted from the All tab.

Right-click a call to view a list of options. You can double-click a call to make a call to the telephone number listed.

The details that are shown in the All tab are:

Field	Description
Call Status Icon	The icon shows the type of call. For more information, see The Call Details Area 20.
Number	Either the incoming telephone number or the telephone number that was called. If the call was an internal call the extension number is listed.
From	The name that is associated with the number in the directory in the main system or your local directory.
To	The name that is associated with the called number in the directory on the main system or your local directory.
Tag	Text that was entered to identify the call. Any calls that you annotate have the text recorded in this area.
Date & Time	The date and time that the call happened.

The In Tab

Only available in Phone Manager Pro versions.

If the In tab is not visible and you are using Phone Manager Pro, you need to select to show incoming calls. For more information, see Changing General Phone Manager Options [100].

The In tab lists the calls received at your extension. A maximum of a 100 calls can be listed. When the maximum capacity is reached, the oldest record is deleted when a new record is added. Right-click a call to view a list of options. You can double-click a call to re-dial the number.

The details that are shown in the In tab are:

Field	Description
Call Status Icon	The icon shows the type of call. For more information, see The Call Details Area [20].
Number	The incoming telephone number. If the call was an internal call the extension number is listed.
From	The name that is associated with the number in the directory in the main system or your local directory.
To	The name that is associated with the called number in the directory on the main system or your local directory.
Tag	Text that was entered to identify the call. Any calls that you annotate have the text recorded in this area.
Date & Time	The date and time that the call happened.
Ring Time	The length of time that the call rang.
Hold Time	The length of time that the call was on hold.
Call Duration	The total length of time that the call lasted.

The Out Tab

Only available in Phone Manager Pro versions.

If the Out tab is not visible and you are using Phone Manager Pro, you need to select to show outgoing calls. For more information, see Changing General Phone Manager Options [100].

The Out tab lists all the calls made from your extension. This might be a call manually dialed using the handset or dialed using Phone Manager. The Out tab lists a maximum of 100 calls. When the maximum capacity is reached the oldest record is deleted when a new record is added. Right-click a call to view a list of options. You can double-click a call to re-dial the number.

The details that are shown in the Out tab are:

Field	Description
Call Status Icon	The icon shows the type of call. For more information, see The Call Details Area [20].
Number	The telephone number that was dialed. If the call was an internal call the extension number is listed.
From	The name that is associated with the number in the directory in the main system or your local directory.
To	The name that is associated with the called number in the directory on the main system or your local directory.
Tag	Text that was entered to identify the call. Any calls that you annotate have the text recorded in this area.
Date & Time	The date and time that the call happened.
Hold Time	The length of time that the call was on hold.
Call Duration	The total length of time that the call lasted.

The Missed Tab

The Missed tab is available to all versions of Phone Manager. If the tab is not visible you need to select to show missed calls. For more information, see <u>Changing General Phone Manager Options</u> [100].

The Missed tab lists the unanswered incoming calls to your extension. A maximum of 100 calls are listed. When the maximum capacity is reached ,the oldest record is deleted when a new record is added. Right-click a call to view a list of options. You can double-click a call to return a missed call.

The details that are shown in the Missed tab are:

Field	Description
Call Status Icon	The icon shows the type of call. For more information, see <u>The Call Details Area</u> [20].
Number	The incoming telephone number. If the call was an internal call the extension number is listed.
From	The name that is associated with the number in the directory on the main system or your local directory.
To	The name that is associated with the called number in the directory on the main system or your local directory.
Tag	Text that was entered to identify the call. Any calls that you annotate have the text recorded in this area.
Date & Time	The date and time that the call happened.

The Messages Tab

The Messages tab indicates the number of new messages in your voicemail box. The Messages tab also lists messages for any hunt group from which you receive voicemail ringback.

The number of new, old and saved messages for each mailbox is listed. The message boxes listed can be your personal voicemail box and, if available, the voicemail box for the hunt group of which you are a member.

You can open a message box by double-clicking the mailbox name. For more information, see <u>Listening to your Messages</u> [57].

The Speed Dials Tab

The **Speed Dials** tab is used to save regularly used internal and external numbers for future use. For more information, see Using a Speed Dial 81 .

The following options are available when you right-click within the Speed Dial window part of the tab:

- **New**
  Create your own speed dial. For more information, see Creating a Speed Dial 82 .

- **Add user**
  Automatically creates a speed dial from an IP Office Directory on your system. When you select Add User, the Speed Dial Add User window opens. For more information, see Creating a Speed Dial 82 .

- **Delete**
  Removes the selected speed dial.

- **View**
  Allows you to change the size of the speed dial icons.

- **Import**
  Import the speed dial icons.

- **Export**
  Export the speed dials icons. The speed dials are saved in a file called Speeddials.CSV. The file location is My Documents\Avaya\IP 400\PhoneManager. The file name and location can be changed if required.

- **Show Phone Dialer**
  If the Phone Dialer is unavailable you can show the Phone Dialer by selecting this option. To hide the Phone Dialer, right-click in the Phone Dialer part of the tab and select Hide Phone Dialer.

The following options are available when you right-click over a speed dial.

- **Call**
  Select the number from the speed dial entry you want to call. You can select from Work Phone, Home Phone, Mobile or Fax.

- **Edit**
  Amend the details in an existing speed dial. For more information, see Editing a Speed Dial 84 .

- **Default Number**
  Allows you to select the default number called when the speed dial is double-clicked. This icon changes to reflect the default number selected. This option is only available for external speed dials. If the outbound prefix, for example 9, is not shown contact your system administrator.

- **Park For**
  The option only becomes active when an extension dialed is busy. Once the busy speed dial extension dialed is free a callback is made to the Phone Manager and the call is tagged as (free).

The Speed Dial tab also contains the Phone Dialer. The Phone Dialer is used to dial from the Phone Manager application.

To turn the Phone Dialer on:

1. Right-click in the Speed Dials window and select **Show Phone Dialer**.

To make a call using the Phone Dialer:

1. Click in the Number field and enter the telephone number by:
    - using your keyboard.
    - clicking the numbered buttons in the Phone Dialer.
2. Click **Dial** and pick up your telephone handset.

The Voicemail Tab

Only available in Phone Manager Pro with Voicemail Pro.

The Voicemail tab lists all new, old and saved messages.
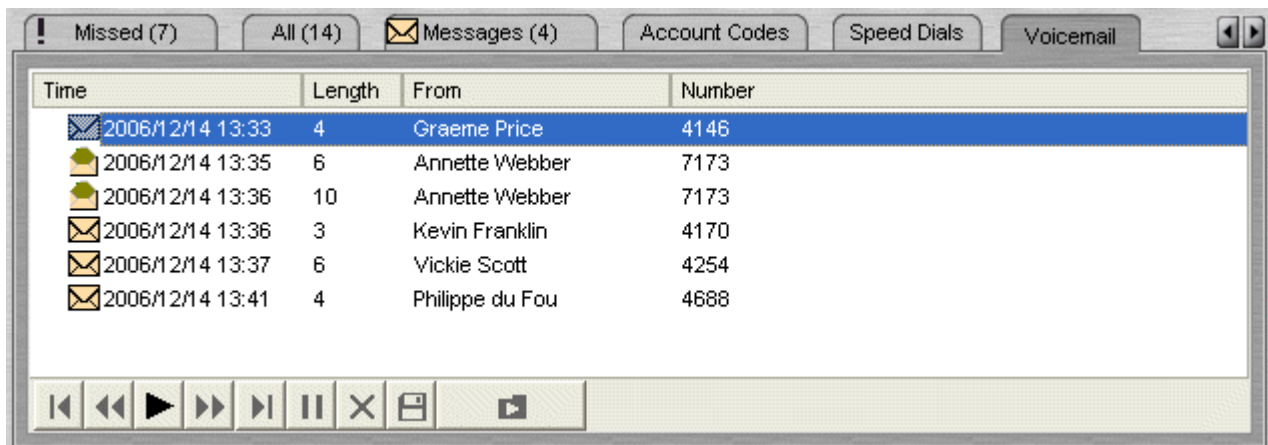
If you are using Phone Manager Pro with Voicemail Pro in IP Office or Intuity mode you can listen to a specific message.

1. Click the **Voicemail** tab. All your messages are listed. The icon indicates whether the message has been read or not. The colour of the icon also indicates the type of voicemail message.

   - ✉ 📁 **Light Brown** = Normal message.

   - ✉ 📁 **Red** = Priority message.

   - ✉ 📁 **Black** = Private message.

   - ✉ 📁 **Blue** = Priority and Private message.

   - 🎵 **Black** = Saved message. Saved messages are not automatically deleted. Other message types may be automatically deleted after a period of time.

2. To listen to a message double-click on it. You can also right-click on a selected message and select an action:

   - **Delete**
     Delete the message from the mailbox. Deleted messages cannot be retrieved.

   - **Call Number Back**
     If the message includes the caller's number, you can call them using that number.

   - **Forward** *(Phone Manager 4.2+)*
     Forward the message to the mailbox of another user or hunt group via a **Select User** menu.

3. The icons at the base of the tab can also be used to control the playback of messages.

⏮ = Previous message.	⏭ = Next message.
⏪ = Go back 5 seconds.	⏩ = Go forwards 5 seconds.
▶ = Play selected message.	⏸ = Pause.
✕ = Delete selected message.	💾 = Marked message as saved.
▶ = Playback saved messages.	

The Account Codes Tab

Only available in Phone Manager Pro versions.

You can assign system account codes to calls, either when making the call or during existing calls. Each icon on the tab can store a name, an account code and an optional telephone number. The account codes are selected from those available on the telephone system.

If the Account Codes tab is not visible and you are using Phone Manager Pro, you need to select to show account codes. For more information, see Changing General Phone Manager Settings 100.
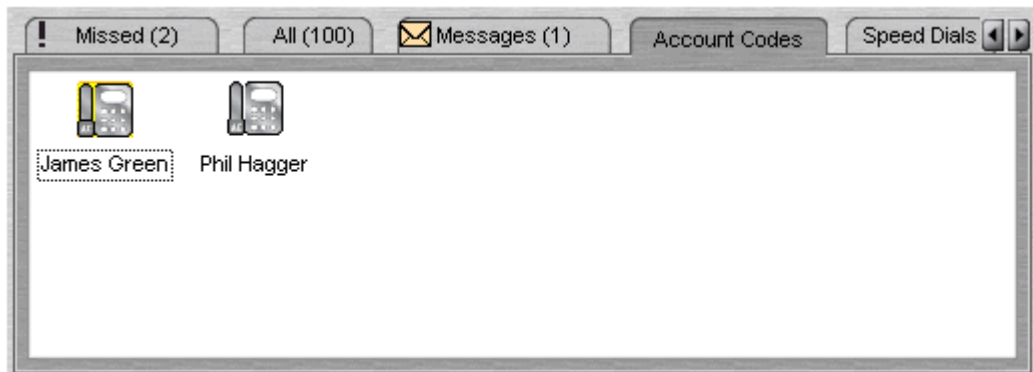
The tab shows two types of icon:

- **Account Code Without Number**
  An account code speed dial without a telephone number. Double-click to apply the associated account code to a call when the call is active. For more information, see Creating an Account Code Speed Dial 50.

- **Account Code With Number**
  An account code speed dial with a telephone number. Double-click to make a call to the stored number or to apply the associated account code to an existing call. For more information, see Creating an Account Code Speed Dial 50.

The following options are then available when you right-click on the tab or over a particular icon:

- **Call** - Call the number stored in the icon.

- **Select** - Apply the account code stored in the icon to the current call. When selected a window opens asking 'Associate Account Code ****' with current call?' If the account code is the correct one, click **Yes** to assign the account code.

- **New** - Create a new icon. For more information, see Creating an Account Code Speed Dial 50.

- **Edit** - Edit an existing icon. The Account Code Speed Dial window opens. Make the required changes and press **OK** to save the changes.

- **Delete** - Delete an existing icon. The delete option is only available when you right-click over an icon. The selected icon is deleted when the delete option is selected.

- **Small -** Display the icons in small or large form.

- **Export** - Export the account code speed dials icons.
  The speed dials are saved in a file called AccountCodeSpeeddials.CSV. The file location is My Documents\Avaya\IP 400 \PhoneManager. The file name and location can be changed if required.

- **Import** - Import the account code speed dial icons.

The Queue Tab

Phone Manager Pro only.
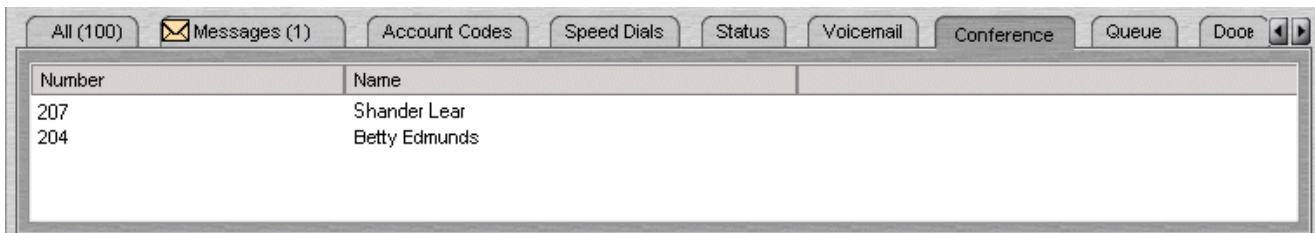
When configured, the Queue tab is available in the Call History area. Up to two queues can be monitored. The monitors indicate the number of calls currently queued for that hunt group. Each call held in a queue is indicated by a blue box. When the mouse pointer is moved over a Queue monitor the number of calls in the queue is displayed in the tool tip. For more information, see Working with Queues 41.
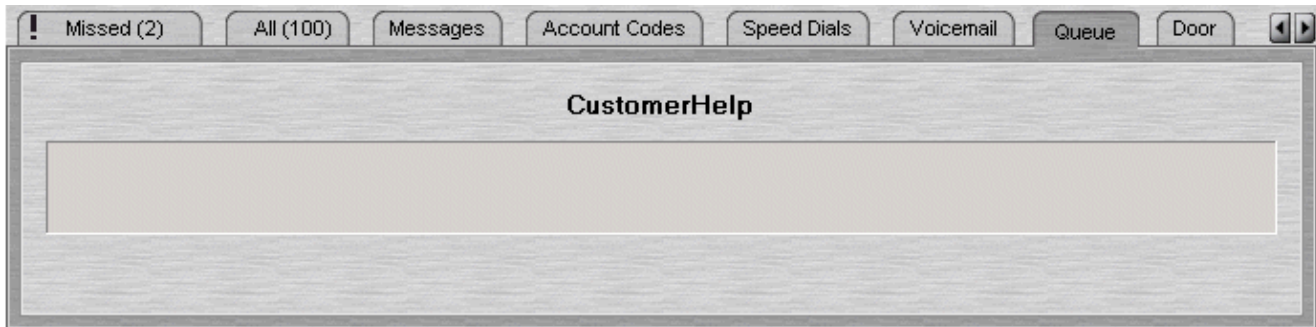
You can select the hunt groups that you want to monitor. The hunt group must already exist on the system and must have queuing enabled. For more information, see Selecting Queues to Monitor 102.

The Conference Tab

After creating a conference from your telephone, the Conference tab is available. The tab contains a listing of all the members of the conference. For more information, see Creating a Conference Call 46.

To remove a member from the conference:

1. Right-click the name and select **Hang Up**.

The Status Tab

Only available in Phone Manager Pro versions.

The Status tab appears when you are on a call. It contains a call timer. When an incoming call has a script file configured the Script tab shows for the first 15 seconds after connection. For more information, see The Script Tab 31. If working in Agent Mode, the Status tab also appears when you go into Busy Wrap Up or Busy Not Available state.
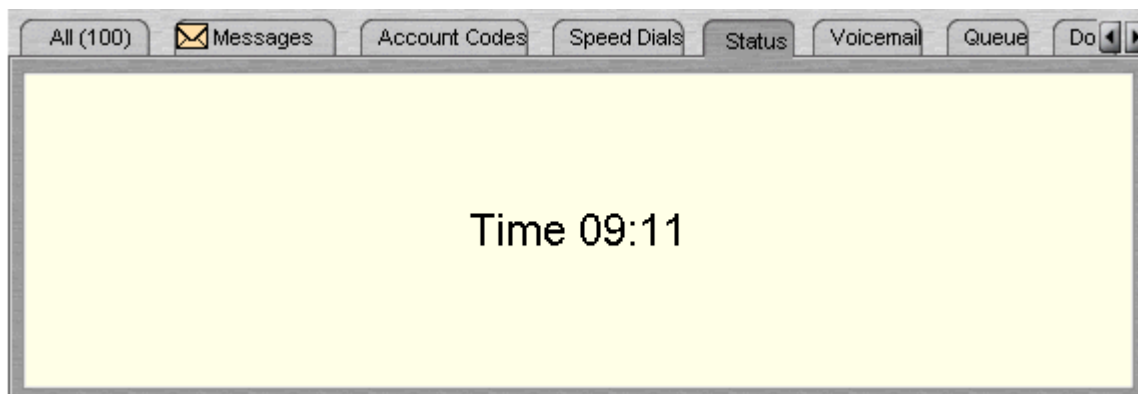
Note

- If the Status tab does not come to the front when a call is answered, the Phone Manager settings need to be changed. For more information, see Changing General Phone Manager Options 100.

The Script Tab

Only available in Phone Manager Pro versions.

The Script tab appears when a Directory Entry matching the called number has a Script file associated.
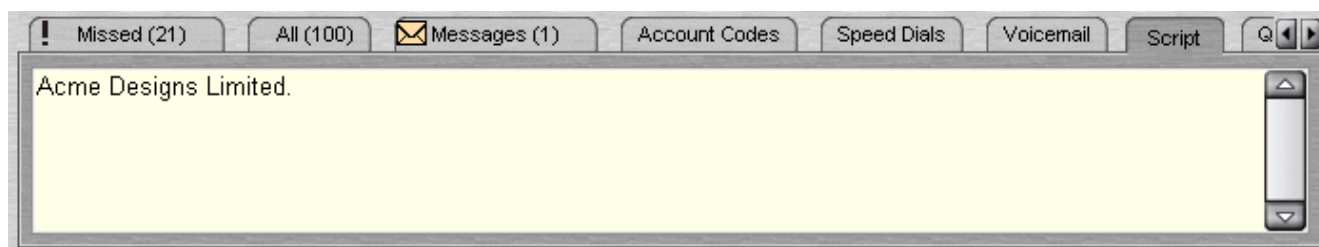
The example shown only contains a company name, more information can be included. For example, a receptionist might be answering calls on behalf of more than one company. To ensure that the call is answered with the correct company name a text file can be created with the company name and details. Phone Manager Pro can be configured to display this text file whenever a call is received for that company.

To associate a script with an incoming number:

1. Create a .TXT file containing the information to be shown when the script is displayed. A script file can be created using the application Notepad.

2. In Phone Manager click **File** > **Directory** > **New**. The Directory Entry window opens.

3. Type the telephone or extension number in the **Number** field.

4. Type the name associated with the number in the **Name** field.

5. Click **Browse for Script**.

6. Select the required .TXT file and click **Open**. The file location is entered in the Script field.

7. Click **OK**.

8. Click **Close**. When a call is received on the number associated with the script, the Script tab opens in the Call History pane. The text within the script is displayed.

Note

- The Status tab automatically comes to the front 15 seconds after displaying the Script tab. If you want the script to remain in view, clear the **Show Status** option. For more information, see [Changing General Phone Manager Settings](#) 100 .

The Door Tab

Only available in Phone Manager Pro versions.

If the **Door** tab is available in the Call History area, you can 'unlock' a door by clicking the relevant door button. The relay is pulsed open for 5 seconds. The door buttons are only available when they have been configured. For more information, see Activating the Door Release Buttons 92 .
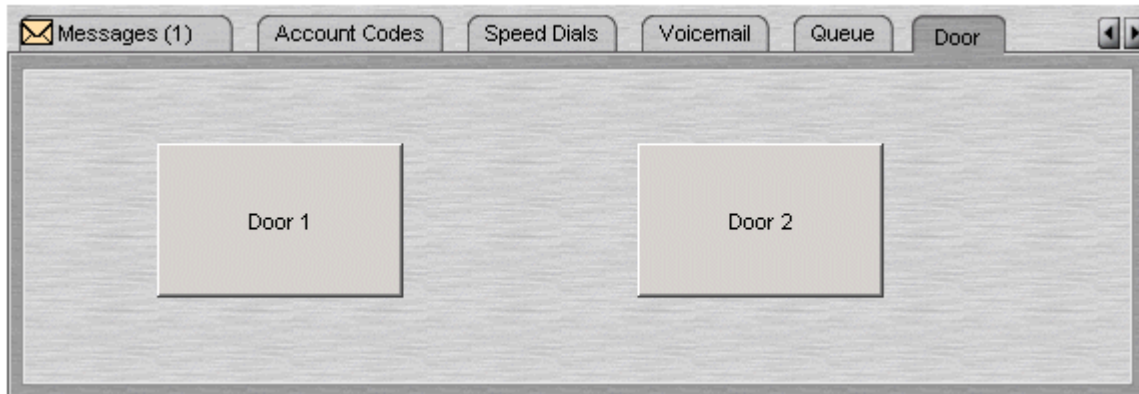
Chapter 3.
Call Handling

Call Handling

You can use Phone Manager to handle incoming and outgoing telephone calls. The call handling areas covered are:

Answering a Call

You are notified that there is an incoming call to be answered by:

- Phone Manager Pro pops to the front of your screen.

- There is a ringing sound from your PC speakers.

- The Phone Manager Pro Task Bar Icon is flashing.

- Your telephone is ringing.

There are several ways to answer the call.
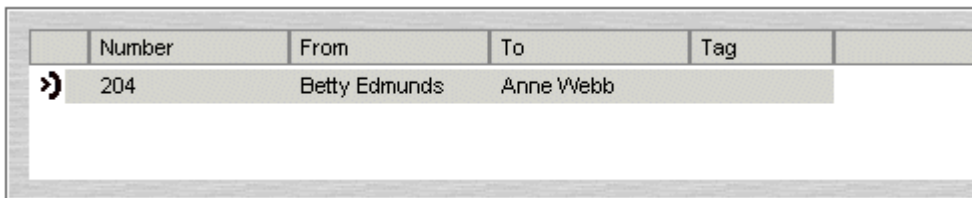
To answer a call:

1. Pick up the handset on your telephone.

The following ways to answer a call are only available if Phone Manager is configured for Off Hook Operation. For more information, see Selecting Telephone Controls 106.

- Click ↰ The button is labeled 'Answer Incoming \ Waiting Call'.

- Press Enter on your keyboard.

- Click **Actions > Answer**.

When a call is answered the call is shown in the Call Details panel. The call status is shown as ⟩.

	Number	From	To	Tag	
⟩	204	Betty Edmunds	Anne Webb		

During a call the Status tab might show. For more information, see The Status Tab 30.

When you are on a call, you are notified that there is a call waiting if the Call Waiting option is active. For more information, see Selecting Telephone Controls 106.

To answer a waiting call:

1. To answer the waiting call, click ↰. You are connected to the new caller. The original caller is put on hold.

2. When you have finished the call, click ↳.

3. Your original call is still being held. To return to the original call, click the call in the Call Details area.

Making a Call

You can make a call from the associated physical telephone. When you use Phone Manager to make a call, there are several methods.

To make a call using Phone Manager:

- Dial the number required using the phone dialer section in the Speed Dial tab. For more information, see The Speed Dials Tab [25].

- Pick up the handset and then double-click a speed dial icon. For more information, see Using a Speed Dial [81].

- Click ⠿↗ and use the Call window. For more information, see Using the Call Window [37].

- Press F1 and use the Call window. For more information, see Using the Call Window [37].

- Click Actions > Call and use the Call window. For more information, see Using the Call Window [37].

Notes

- If a call to an internal user is not answered within the No Answer Time, and the user has voicemail enabled, you are prompted to leave a message. When you have finished the call, the call information is listed in Call History under the Out tab. Double-click the call information to redial the number.

- If you are dialing a busy extension from your handset and your call does not go through to voicemail the Ringback icon is available. Click ↰ to set Ringback When Free. When the destination becomes free your telephone will be called back. If the Ringback call is answered a new call is automatically placed on the destination extension. If the Ringback is not answered the call is cancelled.

- Do not use spaces when typing the telephone number. For example, type 123456 not 123 456.

Ending a Call

When you have finished your conversation or left a voicemail message you need to end the call. There are several ways to end a call.

To end a call:

- Click ↳↲ **Hangup - Current call**.

- Replace the handset.

- Press **End** on your keyboard.

Note

- If a wrong number is dialed, or the unobtainable tone returned, you can not use the Hangup button to end a call, as you are not connected to a call. Use your telephone handset to clear your extension and use either the telephone or Phone Manager to re-dial the number.

Call Back a Missed Call

If a call is not answered within the No Answer Time, the incoming call is shown in Call History under the Missed tab. For more information, see The Missed Tab [24].

To callback a missed call:

1. Click the **Missed** tab.

2. Double-click the call to return the call. If the outbound prefix is not shown contact your system administrator.

If the caller has left a voicemail message, the Messages tab in the Call History pane indicates you have a new message. For more information, see Listening to your Messages [57].

Using the Call Window

When you click ⠿↗, press **F1** or click **Actions** > **Call,** the Call window opens.
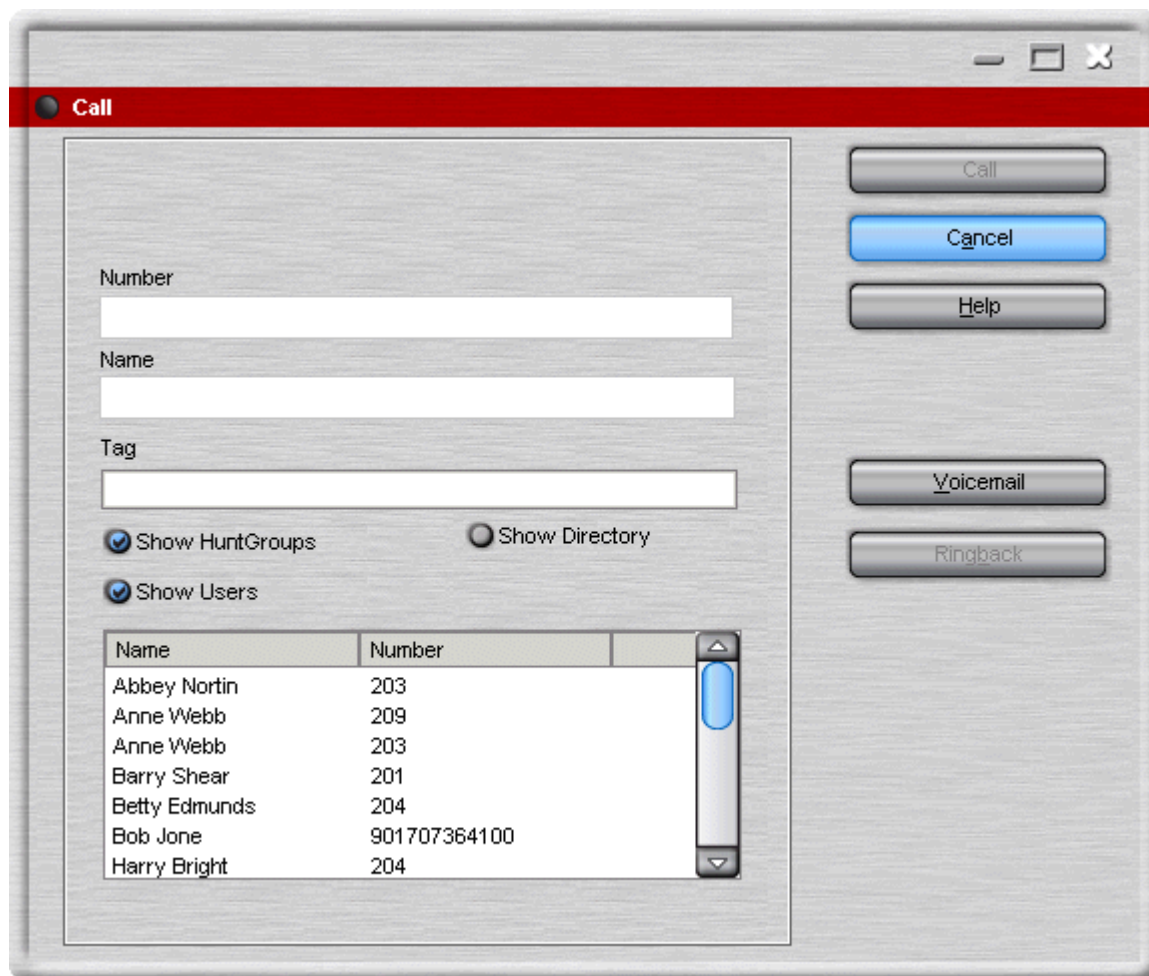
To use the Call screen:

1. Select the directory you want to search.
   You can select more than one directory. The directories are a list of names and numbers configured on the IP Office. If you are using Phone Manager Pro, the directories contain the names and numbers configured in your own personal directory.

2. Start typing the name in the Name field.
   The entries that match the text entered are shown. When the required number can be seen in the listing, click the number once. The number is transferred to the Number field.

3. (Optional) Type a Tag message.
   Text entered in the Tag Field is added to the outgoing call. The Tag feature is only available for internal calls and is not supported for VoIP extensions.

4. (Optional) Verify that the internal number is available. The Busy icon shows if an internal number is unavailable. If an internal number is unavailable select either:

   - **Cancel**
     The Call screen is closed and you are returned to the main window.

   - **Ringback**
     The Ringback button sets Ring Back When Free on the destination extension. When the destination becomes free your telephone will be called back. If the Ringback call is answered a new call is automatically placed on the destination extension. If the Ringback is not answered the call is cancelled.

   - **Voicemail**
     The Voicemail button calls the voicemail of the user rather than calling the user direct.

5. If the number is available, click **Call**. The telephone number entered is called.

Holding a Call

A call can be put on hold so that you can perform another task.

When a call is on hold the call has the call status icon ♫ next to the number, as shown in the example. The time a call remains on hold if you are free, is controlled by the telephone system. The default setting is 15 seconds. For more information on how to configure this option see your system administrator.

	Number	From	To	Tag
♫	204	Betty Edmunds	Anne Webb	

To place the current connected call on hold:

1. Click ⏬. Alternatively, press **F4**.

To take a call off hold:

1. Click the call in the Call details area.

If you have a call on hold and start to make another call and change your mind, you can use Clear to cancel the outgoing call.

To Clear a Call:

1. Click **Actions > Clear**. Alternatively, press ESC on your keyboard.

Parking a Call

You might need to temporarily "park" a call to handle some other task. For example, an incoming caller needs to speak to someone urgently but they cannot be found. The call can be parked, the person found and the call can then be transferred. To help control this scenario efficiently there are four park slots that can be used by any user on the system. When a caller is "parked" the call is put on hold. Calls remain parked for a specific length of time before being returned to the operator. For more information on the park time, see your system administrator.

You can park a call or you can tag a park slot and then park a call. When a call is parked you can not add a tag to the park slot.

To park a call:

1. Click a vacant park slot button to park the call. The parked call is highlighted and contains information regarding the call, for example the source number of the call.

A call from extension 203 is parked in the first park slot

You can identify a parked call with a text description. The description is shown instead of the call's source number. This is known as tagging.

To tag and park a call:

1. Right-click a vacant park slot button. The Call Tag window opens.
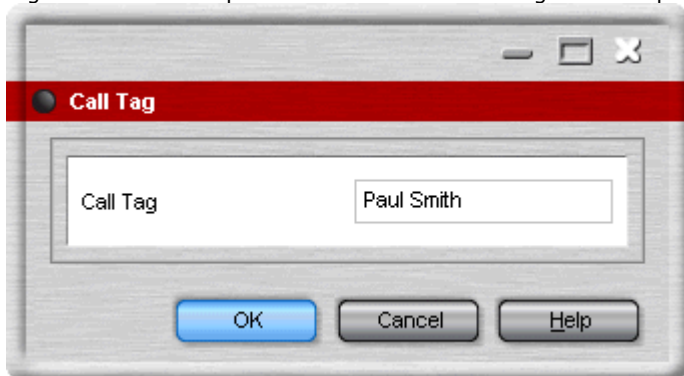
2. Type the description. In the example 'Paul Smith', the name of the caller, is entered.

3. Click **OK**. The call is parked and the description appears on the Park button.
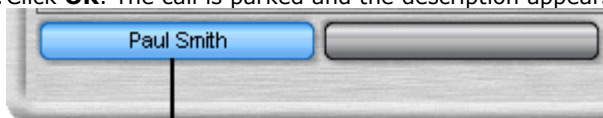
The parked call has been tagged with the callers name

To collect a parked call:

1. Click the park button displaying the parked call in the Call Park area. You are connected to original caller.
   Alternatively, click **Actions** > **Park/Unpark**.

Recording a Call

Recordings are only supported when Voicemail Pro is installed and you are operating in Agent Mode. For more information, see Agent Mode Operation 115.

You can record your calls, either the complete call or just part of the call. When you start to record your conversation a warning that the call is being recorded might be played before the start of the recording. If Advice of Call Recording is required, consult your system administrator.

If you put the call on hold or park the call, the recording will be paused. When you connect to the call again the recording will resume. If you are recording a conference call, the recording is continues when another caller is added to the conference.

Recordings stop when you end the call. Call recordings are saved in a voicemail box. The mailbox can be either your own or one that is specified in IP Office Manager. For more information, see your system administrator.

To record the current call conversation:

1. Click ● **Start Recording**.
   Alternatively, click **Actions** > **Start Recording** or press **F5.**

To finish recording:

1. Click ■ **Stop Recording**.
   Alternatively, click **Actions > Stop Recording** or press **F5.**

⚠️ **Warning** - Refer to your local regulations in relation to recording calls. If Advice of Call Recording (AOCR) is required, see your system administrator.

Working with Queues

Phone Manager Pro only.

Calls to a hunt group are held in a queue when all available extensions that are members of the hunt group are busy or ringing. If you are a member of a hunt group you are automatically presented with calls to the group. The name of the hunt group is shown in the To field in Call Status.

For example, a company provides a customer query number. There are 4 people who answer customer queries. A hunt group is created called 'CustomerHelp' containing the 4 extension numbers. All calls to the customer query number are presented to the CustomerHelp hunt group. A caller using the customer query number rings any free extension in the hunt group. If all 4 extensions are already ringing or on a call, the incoming call is put into a queue. When any extension in the CustomerHelp hunt group becomes free, the longest held queued call is presented to the free extension.

In Phone Manager Pro, you can also monitor the number of calls being held in a queue for a particular hunt group. You do not have to be a member of the hunt group to monitor the number of calls being held in a queue. You can select two hunt groups to monitor. The hunt group must already exist on the System and must have queuing enabled. For more information, see Selecting Queues to Monitor 102 .

When you have selected the queues that you want to monitor the Queue tab appears in the Call History panel. The monitors are used to indicate the number of calls currently queued for the configured hunt groups. Each call held in a queue is indicated by a blue box. When the mouse pointer is moved over a Queue monitor the number of calls in the queue is displayed in the tool tip. In the example there are 3 calls in a queue for the hunt group called CustomerHelp.

If you are a member of a Hunt Group a queued call is automatically presented in Call Status. The name of the Hunt Group is shown in the To field. The call can be answered in the normal way.

To answer a call in a specific queue:

1. Click the **Queue** tab in the Call History panel. The queues that you are monitoring are visible.

2. Click the Queue Name. The details of the call in the queue is presented to you

3. Answer the call in the normal way.

You can also answer a queued call by selecting either PickupQueue1 or PickupQueue2 from the **Actions** menu.

To refuse a queued call:

1. If you click on the wrong Queue or are presented with a queued call that you cannot deal with you can use the Clear (Esc) function to refuse the call and return it to the queue.

Transferring Calls

When you are connected to a call and you click ⟵⟪ or press **F2**, the Transfer window opens.
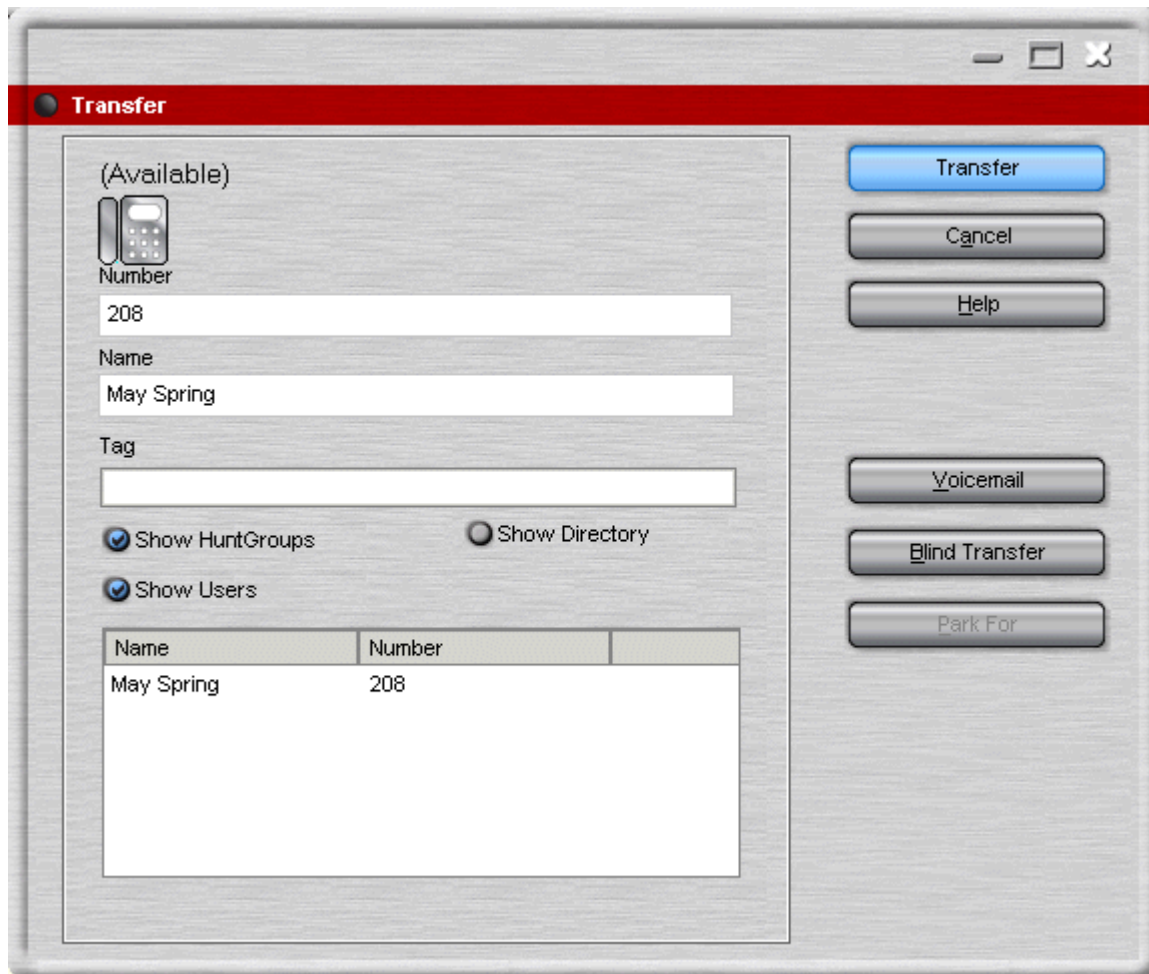
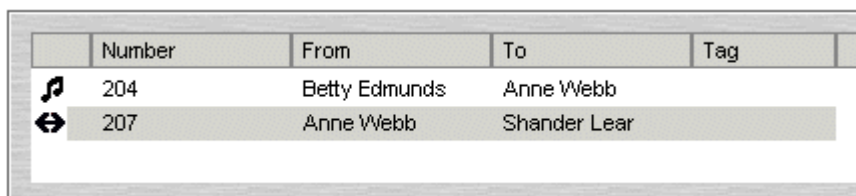**To use the Transfer screen:**

1. Select the directory you want to search.
   You can select more than one directory. The directories are a list of names and numbers configured on the IP Office. If you are using Phone Manager Pro the directories contain the names and numbers configured in your own personal directory.

2. Start typing the name in the Name field.
   The entries that match the text entered are shown. When the required number can be seen in the listing, click the number once. The number is transferred to the Number field.

3. (Optional) Type a Tag message.
   Text entered in the Tag Field is added to the outgoing call. The Tag feature is only available for internal calls and is not supported for VoIP extensions.

4. Click Blind Transfer.
   The Blind Transfer button transfers the call to the destination entered in the Number field without waiting for the destination to be answered.

Making a Consultation Call

You can transfer a call to an internal or external telephone number. When you need to talk to a user to verify that they are free to accept a transferred call, you need to make a consultation call. This is called a supervised transfer. You can only use this method to transfer calls you have answered.

To make a consultation call:

1. Click ☎ or press **F2**. The Transfer window opens. For more information, see .

2. Type the transfer number into the **Number** box.

3. Click **Transfer** or press **Enter**. The original call is put on hold. Once the call is answered you can talk with the transfer target.

   · You can toggle between the two calls.
   In the Call Details area of the main window both calls can be seen, as shown in the example. The ⬌ call status icon shows the call that you are currently connected to. To talk to the other caller, double-click their extension number.

   Their call status changes from being ♫ on hold to ⬌ being your current call.

	Number	From	To	Tag	
♫	204	Betty Edmunds	Anne Webb		
⬌	207	Anne Webb	Shander Lear		

4. To transfer the call, click ☎ or press **Home**.

Transferring a Call Unsupervised

You can transfer a call without waiting for a response from the destination number. Calls can be answered and then transferred or you can transfer a call without answering it. You can only transfer a call without answering the call if you are using Phone Manager Pro.

To transfer a call unsupervised:

1. Answer the incoming call.

2. Click ![icon]. Alternatively, press **F2** or click **Actions** > **Transfer**. The Transfer window opens. For more information, see The Transfer Window 42.

3. Type the transfer number into the **Number** box.

4. Click the **Blind Transfer** button before the call is answered.

If you use Phone Manager Pro you can use the Drag and Drop feature to transfer calls. You can answer the call and then transfer it or you can transfer the call without answering it. You must have a speed dial associated with the destination number before you can use either method to transfer a call. For more information, see Creating a Speed Dial 82.

To transfer a call using drag and drop:

1. Answer the incoming call.

2. Click the **Speed Dial Tab** in the Call History area.

3. Drag the call from the Call Details area and drop it on the destination speed dial.

If you recognize a calling name or number of an incoming call you can transfer the call without answering the call. You must have a speed dial associated with the destination number. For more information, see Creating a Speed Dial 82.

To transfer a call without answering the call:

1. Click the **Speed Dial** tab.

2. Drag and drop the speed dial associated with the destination number over the incoming call. In the example the incoming call from extension 210 has not been answered. The speed dial associated with extension 280 is dragged over the incoming call. When the speed dial is dropped, extension 210 is connected to extension 280.
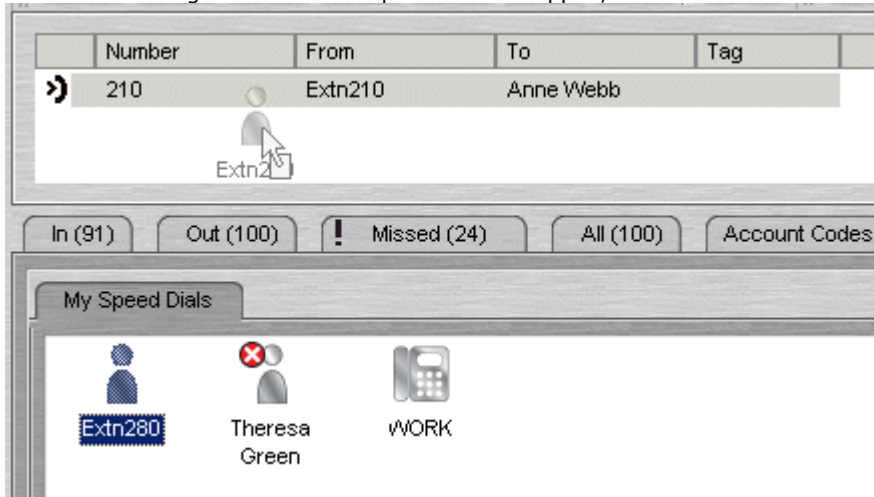
Transferring a Caller to Voicemail

If a caller wants to leave a message for a user, you can transfer the caller directly to voicemail.

To transfer a call to Voicemail:

1. Click ↩️.
   Alternatively, press **F2** or click **Actions > Transfer**. The Transfer window opens. For more information, see

2. Type the transfer number or select from the directory.

3. Click the **Voicemail** button. The caller is transferred to voicemail.

Reclaiming a Call

After you have transferred a call to another number you can reclaim the call back to your own telephone. You can only reclaim a call that has not been answered.

To reclaim a call:

1. Click **Actions** > **Reclaim.** Alternatively, press Subtract on your keyboard.

Creating a Conference Call

As a Phone Manager user, you can create conferences. If you have access to IP Office Conferencing Center you can start Conferencing Scheduler from within Phone Manger. For more information, see Phone Manager and Conferencing Center 47.

You can create a conference call between callers and yourself.

To create a conference call:

1. Make an outgoing call or answer an incoming call.

2. Click ⏚ to place the call on hold.

3. Make a call to a third party or answer another incoming call.

4. Place the current caller on hold.

5. Repeat steps 3 and 4 until all people that are to join the conference are on hold.

6. Click CCC. The Conference tab appears in the Call History pane. For more information, see The Conference Tab 29. Alternatively, select **Actions** > **Conference**.

To create a conference call using Drag and drop:

1. Make an outgoing call or answer an incoming call.

2. Select the **Speed Dial** user you want to create a conference with.

3. Drag the **Speed Dial** to the **Call Status** area of Phone Manager. The Conference tab appears in the Call History pane and all parties are connected together. For more information, see The Conference Tab 29.

During a conference call you might want to include another person in the conference.

To add a caller to a conference:

1. When in a conference, click ⏚ to put the conference on hold.

2. Make a call to the person who you want to include in the conference.

3. When the call is answered, click ⏚ to place the caller on hold.

4. Click CCC to re-join the conference and add the new person to the conference call.

To remove a member from a conference:

1. Click the **Conference** tab in the Call History area.

2. Right-click the conference member.

3. Select **Hang-up**.

Phone Manager and Conferencing Center

Phone Manager can be integrated with IP Office Conferencing Center. You can book a conference and join a web conference when the applications are integrated.

To use the IP Office Conferencing Center system Internet Explorer 6.0 or above is required. It is only available if permission is specified by your system administrator.

To book a Conferencing Center conference:

1. Click ▆. This automatically opens Internet Explorer.

2. Type your **User ID** and **Password**.

3. Click **Login**.

To join a Conferencing Center conference:

1. To join a conference click ₵₵₵₊. This automatically opens Internet Explorer.

2. Type the **Conference ID** and **PIN No** as supplied by the host who booked the conference.

3. Click **Login**.

Using Account Codes

Account codes can be used to track calls to specific external numbers. For example, a solicitor's office might want to record the amount of time spent on calls to a client for billing purposes. Each client is given an account code and that code is used when making a call. For a list of valid account codes see your system administrator.

- A key feature of Phone Manager is that you can use text account codes rather than just numbers.

Account codes entered with calls are only recorded by the system if they match an account code already configured on the system. If the call is recorded the recording is stored in the users automatic mailbox setting. If the call is transferred to another user, the call recording is stopped.

To make a call using an account code:

1. Click **Actions** > **Account Code**. The Call window opens.
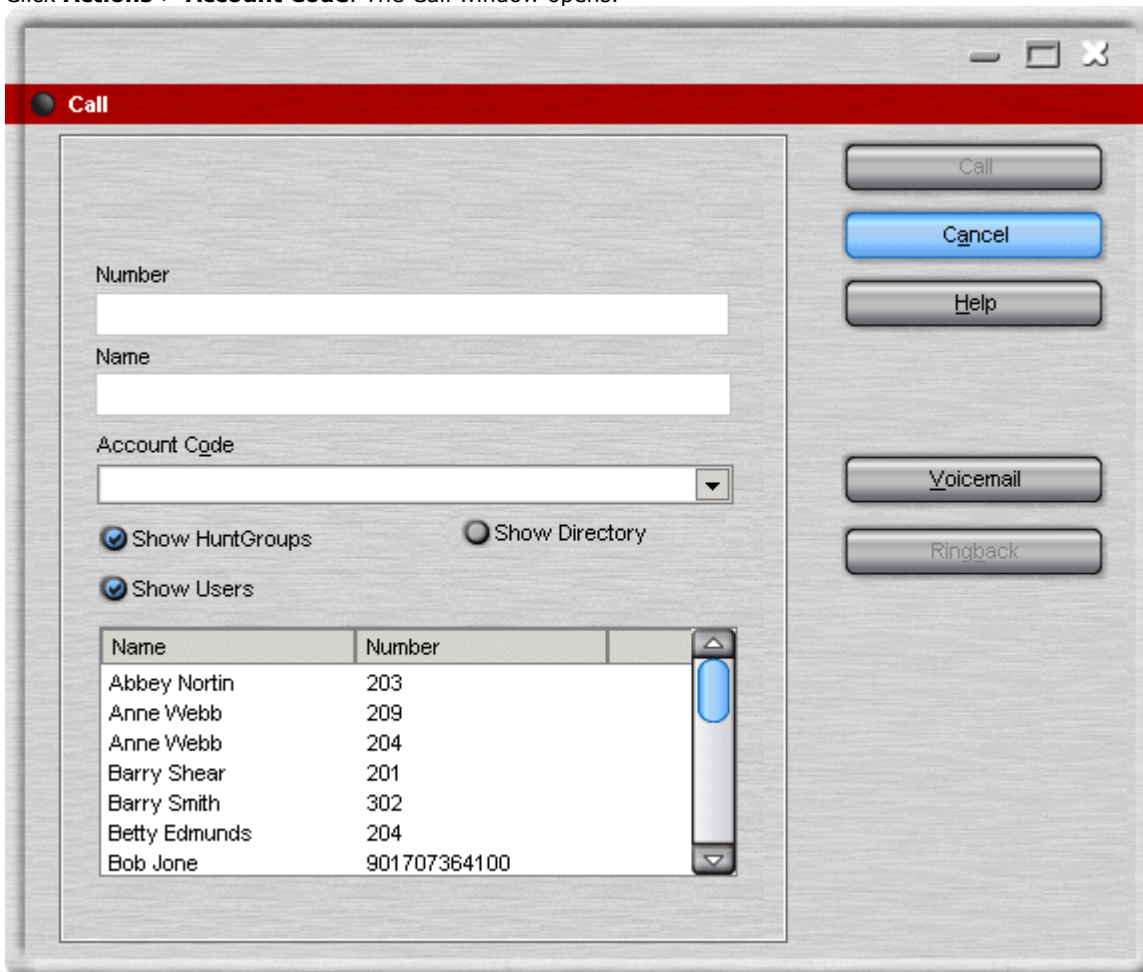
2. In the Account Code field select the code from the list to be assigned to the call. See your system administrator for a list of valid account codes.

3. Select the external number to call.

4. Click **Call**. The call is made.

If you receive the "Call Failed - Account Code Required" message whenever you make an outgoing call without an Account Code this means your user account is configured to ensure that you always assign an account code to an outgoing call. For more information, see your system administrator.

If the wrong account code is entered a warning message is given. The call continues to be processed without an account code. You can assign an account code during a call.

To assign an account code during a call:

1. During the call, click **Actions** > **Account Code**. The Account Code window opens.

2. Select the appropriate account code.

3. Click **OK**.
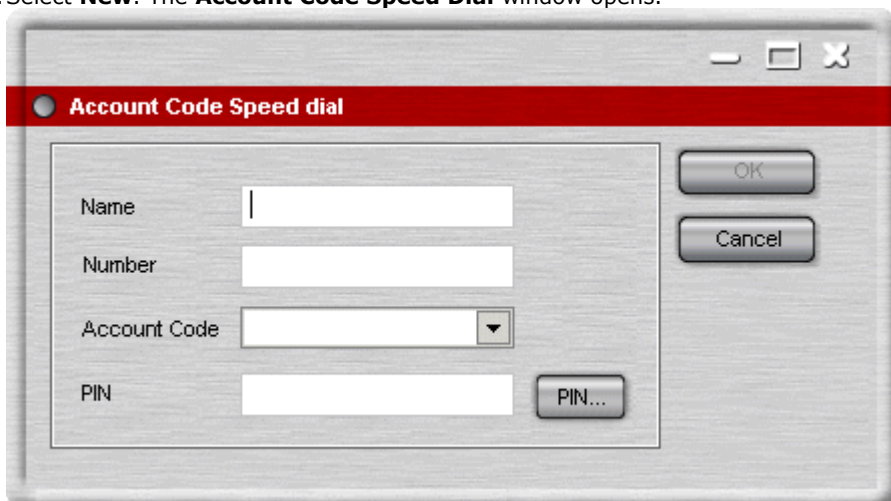
Creating an Account Code Speed Dial

Only available in Phone Manager Pro versions.

Account code speed dials are grouped in the Call History panel in the Account Codes tab. For more information, see The Account Codes Tab 28ᐎ. If the Account Code tab is not visible, Phone Manager needs to be configured. For more information, see Changing General Phone Manager Settings 100ᐎ.

To create an Account Code Speed Dial:

1. Click the **Account Codes** tab in the Call History area.

2. Right-click within the window.

3. Select **New**. The **Account Code Speed Dial** window opens.

4. Type the **Name**

5. (Optional) Type the telephone **Number** to be stored in the speed dial. If a telephone number is not entered you can use the icon to apply the account code during a call.

6. Select the **Account Code** to be associated with the telephone number from the list. This option is unavailable if PIN restrictions are used.

7. Click **OK**.

Working with PIN Restrictions

Phone Manager contains a feature called PIN Restrictions (Personal Identification Number). PIN restrictions work by making the caller enter a PIN before the call is connected. PIN restrictions can be associated with types of numbers being dialed, for example international numbers. PIN restrictions are set by the system administrator through IP Office Manager. If PIN restrictions are applied, the account code features are unavailable.

PIN restrictions are performed when:

- Making a call.

- Using speed dials.

- Using account code speed dials.

To make a call:

1. Click ⠿➔ .
   Alternatively, click **Actions** > **Call**.

2. Type the telephone number or extension in the Call screen.

3. Click the **Call** button. The PIN window opens.
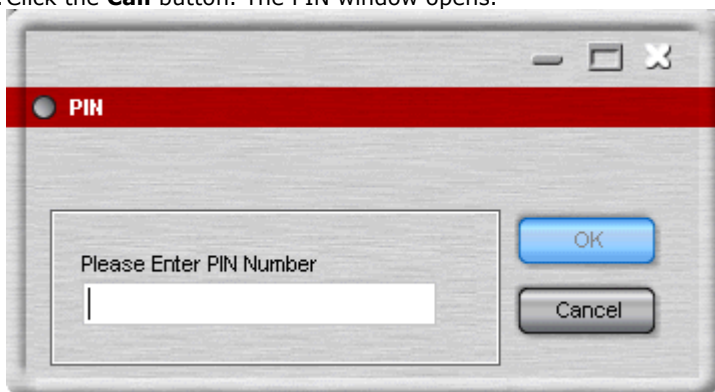
4. Type your PIN. When a valid PIN is entered the call is connected. If an invalid PIN is entered an error message is shown. Re-enter the PIN as prompted. If the problem persists, contact your system administrator.

Note

- If you need to re-dial the number, you need to re-enter the valid PIN.

Speed Dial with PIN Restrictions.

You can create a speed dial with a PIN. When the speed dial is used if the PIN is valid the call is connected. When an invalid PIN is entered an error message is shown and you are prompted to re-enter the PIN.

To create a Speed Dial:

1. Click the **Speed Dials** tab in the Call History area.

2. Select the **Speed Dial Group** to add the Speed Dial to.

3. Right-click within the selected Speed Dial Group window.

4. Select **New** > **Speed Dial Group Member**. The Speed Dial window opens.

5. Type the **Name** and required telephone numbers.

6. Click **PIN**. The PIN window opens.

7. Type the PIN to be associated with the telephone number. Confirm the PIN then click **OK**. The speed dial type is set as External.

8. Click **OK**.

9. Test the speed dial. If an invalid PIN was entered the message 'Call Failed - Account Code Required' is shown.

Chapter 4.
Voicemail

Voicemail

The Message 24 tab lists the mailboxes for which you have been configured to receive message waiting notification to. The number of new, old and saved messages is shown for each mailbox. You can initiate a call to the mailbox by double-clicking on it or right-clicking and selecting **Call Voicemail**.

For Phone Manager Pro users, the Voicemail 27 tab can be used to display the voicemail messages in a mailbox and to control the playback of messages. You can select a specific message to be played. For more information, see Listening to your Messages 57.

You can give a caller to your voicemail a choice of transferring to another telephone number or to leave a message. Callers can be given up to 3 transfer locations. For example, you might record a message saying that if the caller presses 2 they are transferred to your mobile number.

In Phone Manager you can record up to 9 Voicemail greetings. Specific greetings can be played depending on the call type. For example, when your extension is busy a caller can hear a specific message that you have recorded. For more information, see Using Personal Greetings Overview.

Note

- If voicemail is unavailable on your extension, ensure that the voicemail option is selected. For more information, see Configuring the Voicemail Options 107.

Listening to your Messages

You can listen to your messages using Phone Manager. Each message starts with a header, which contains details about who the message is from and when it was left.

To collect your messages:

1. Click the **Messages** tab in the Call History pane.
   The number of new, old and saved messages for each mailbox is listed. The message boxes listed can be your personal voicemail box and, if available, the voicemail box for the hunt group of which you are a member. For more information, see The Messages Tab 24.

2. Double-click on the message box you want to access. Alternatively, right-click the message box and select **Call Voicemail**.

   - If your telephone is on-hook it rings when the voicemail server is contacted. Pick up your telephone handset. Depending on how your telephone is configured the speaker phone might automatically come on.

   - If your telephone is in the Off-Hook state you are connected to the Voicemail server as soon as it is located.

3. If you are using your own extension, press #. Otherwise enter your extension number and press #.

4. Enter your voicemail password and press #.
   The Voicemail tab might come to the front of the Call History pane when you connect to your mailbox. For more information, see The Voicemail Tab 27.

5. When you have successfully logged in to your mailbox, you hear an announcement to tell you about the messages that you have. Press 2 to receive your messages. Follow the voice prompts to listen, save or delete your messages.

Note

- You might not need to enter your voicemail password. Your user details in IP Office Manager can be configured so you do not have to enter a voicemail password when opening your mailbox using Phone Manager. For more information, see your system administrator.

- If you are using Phone Manager Pro with VoiceMail Pro in IP Office or Intuity mode you can use the control buttons to navigate through the messages. The control buttons are on the Voicemail Tab. The Voicemail tab comes to the front of the Call History pane when you connect to your mailbox. For more information, see The Voicemail Tab 27.

Outcalling Configuration

Phone Manager Pro 4.2+ in conjunction with Voicemail Pro 4.2+.

Outcalling is supported by IP Office Voicemail Pro 4.0+ running in Intuity emulation mode. It allows the voicemail server to make calls to alert you when your mailbox contains new messages.

You can configure your outcalling settings through your voicemail mailbox (select 6 and follow the spoken prompts). However Phone Manager Pro 4.2+ and Voicemail Pro 4.2+ allows you to visually configure the outcalling options used by your mailbox.

Through Phone Manager you can define the following:

- **Outcalling Destinations**
  You can define up to 5 numbers as your possible destinations for outcalling. These are named **Desk**, **Home**, **Mobile**, **Delegate** and **Other**. You can then also combine those destinations into an **Escalation List**, a sequence of destinations.

- **How Long to Ring**
  For each destination you can also set how long outcalling calls should ring. If the outcalling attempting isn't answered (see below for the definition of answered) within that time the outcalling call is disconnected.

- **When to Use Outcalling**
  You can use the times defined by your System Administrator, select continuous operation or select your own times during which different destination settings can be applied.

- **What Messages to use Outcalling For**
  You can select whether outcalling should be used for all your new messages or only those that have been marked as priority messages by the caller.

- **How Often to Try Outcalling**
  The System Administrator will have defined how often outcalling should be attempted until answered and the time delay before each outcalling attempt. You can override this with your own retry settings if required.

If there is still no response to the outcalling notification after all the retries, the voicemail server will not try outcalling again until another new message is received in the mailbox. Note that if another new message arrives while the voicemail server is already going through a sequence of outcalling notification retires, that new message does not trigger another series of outcalling attempts.

Answering Outcalling Calls

When you receive an outcalling call from the voicemail server you will hear:

*"This is IP Office. <your name>, you have new messages. To access your messages, please enter your extension number and press hash. To avoid further notification of these messages, press * #".*

If the mailbox is successfully accessed or *# is pressed, outcalling is completed and no further outcalling attempts are made until the next new message arrives

Enabling Simple Outcalling

1. Click on ➘ or select **View | Preferences**.

2. Select the **Voicemail** tab.

3. Click on the **Outcalling** button. This button will be greyed out if your IP Office voicemail server is not a Voicemail Pro 4.2+ server running in Intuity emulation mode.

4. The four drop-down list boxes next to Outcalling can be used to configure simple outcalling. Use these from left to right as follows:

5. In the drop-down next to **Outcalling** select *Enabled*.

6. **When**
   In the next drop-down select when you want outcalling used. The options are:

   - **Any Time**

   - **Prime Time**, **Peak Time**
     These are time periods configured on the voicemail server by the System Administrator. When selected, the configured times are shown by Phone Manager.

   - **Own Time**
     Configure you own times. See **Setting Variable Outcalling Times and Destinations** 59 below.

7. **Where**
   In the next drop-down select the destination for the outcalling call from *Desk*, *Home*, *Mobile*, *Delegate* or *Other*. If you have not already entered a number for the selected destination Phone Manager will prompt you to enter the destination numbers.

   - **Number**
     For external numbers remember to include any external dialing prefix used by your IP Office system. Typically the number should be the same as your would dial from your own extension.

   - **Timeout (minutes)**
     For each number you can set how long the outcalling call should ring. For internal numbers the call outcalling call will not be diverted to voicemail. On external numbers, if the number diverts to voicemail or similar after a period of ringing, ensure that the Timeout is set to a period shorter than that period of ringing.

   - **Escalation List**
     See Using an **Escalation List** 60 below.

8. **Why**
   In the final drop-down list select the type of new message for which you want outcalling used. The options are **For All New Messages** or just **For New Priority Messages**.

Setting Variable Outcalling Times and Destinations
You can configure outcalling to only be used at specific times for specific types of messages and to different destinations at each time.

1. After enabling outcalling, select Own Time.

2. Using the rows A, B and C you can define different outcalling behaviour for each period.

3. For each period, configure the time when the period should start and then what outcalling should be used after that time.

Adjusting the Outcalling Retry Times
Once the voicemail server has started the outcalling process for a new message, it can repeat the outcalling until answered. You can use the Retry Times settings to adjust how many retries are attempted and the delay between each retry attempt.

- **System**
  Use the retry settings as configured on the voicemail server by the System Administrator. Those settings are shown in the Number of Retires and Retry Times for information but cannot be changed.

- **Personalized**
  Replace the System values with your own retry times.

- **Number of Retries**
  When *Personalized* is selected, up to 10 retries can be chosen.

- **Retry Times**
  These values set the interval between one notification attempt and the next (not including the actual outcalling ringing time for the outcalling destination). The first 5 retries can be given varying intervals between 0 and 10 minutes. To change a value click on it and enter the new value. When more than 5 retries are selected, the Default value is used for all retries after the fifth retry.

Using an Escalation List

Instead of a single number as a destination you can select a combination of the numbers you have defined as a sequence to be called on each outcalling attempt and retry. You can include up to 9 numbers in the escalation list and you can repeat the same numbers several times. For each entry in the list you can set a delay in minutes before outcalling call is attempted.

If multiple retries have been configured, the full escalation list must be completed before the delay before the next retry begins.

Using Personal Greetings

Only available in Phone Manager Pro versions with IP Office Voicemail Pro.

By default, callers who are directed to your mailbox hear the system greeting - "Your call is being answered by IP Office. <Name> is not available. To leave a message wait for the tone, ...". You can replace the default system greeting with a greeting that you have recorded.

You can record up to nine personal greetings. These are the greeting messages heard by callers when they are directed to your voicemail. You can assign a different greeting for specific call situations. For example, you can assign different voicemail messages for calls received internally to those received from outside the company.

- **Temporary Greeting** 65
  A temporary greeting can be created and played for all call types. For example, a temporary greeting might be used when you are away from the office, giving the caller an alternative contact person. If you are using a temporary greeting, no other greetings are active.

- **Personal Greetings** 66
  Personal greetings are played when the temporary is not being used. If no personal greetings are applied callers who are directed to your mailbox hear the default system greeting - "Your call is being answered by IP Office. <Name> is not available. To leave a message wait for the tone, ...". Personal greetings can be created for certain call types. For example, if you are busy on a call anyone calling your extension can hear a personalised greeting stating that you are on a call, but are in the office. Personal greetings can be created for the call types:

  - **All Calls.**

  - **Internal.**

  - **External.**

  - **No Answer.**

  - **Busy.**

When you assign a personal greeting for more than one call type, the greeting used for any call is decided using an order of priority. The priority order is shown in the flow chart.
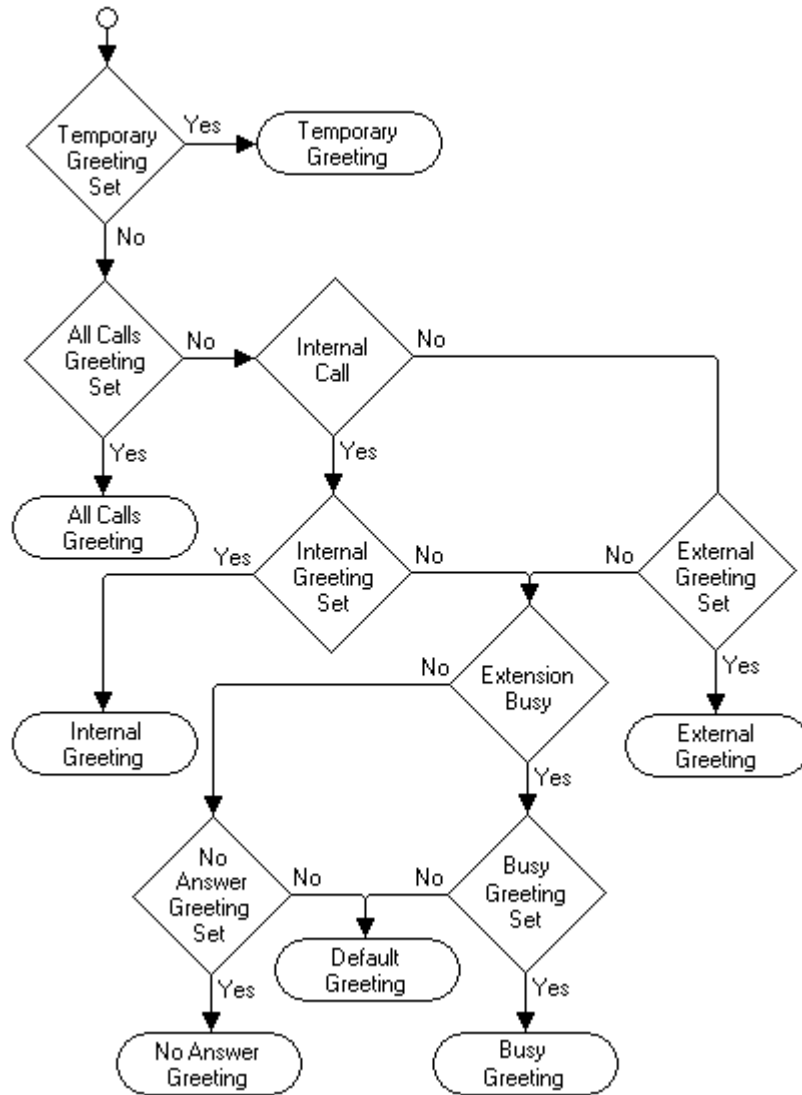
There are two steps in using personal greetings:

1. Record the personal greeting. For more information, see Recording Greetings ⌈63⌉.

2. Assign the greeting. For more information, see Using Personal Greetings ⌈61⌉.

Note

- Not all options are configurable by all users. For more information, see your system administrator.

Recording Greetings

You can record a library of up to 9 of your own personal greetings. These are the greeting messages heard by callers when they are directed to your voicemail. You can then select which greeting to apply to different call types. You can listen to a greeting message that you have recorded and re-record the message at any time.

- A greeting must be longer than 3 seconds. The maximum length of a greeting is 120 seconds by default.

- Any greetings recorded using the telephone user interface are shown in the available greetings list. There is a duration length of time shown, but no description. You can add a description to the recording, assign the greeting to a call type, or re-record the greeting.

To record a new personal greeting:

1. Click ✎ > **Voicemail**.
   Alternatively, click **View > Preferences > Voicemail**.

2. Click **Configure Personal Greetings**. The Configure Personal Greetings window opens.

3. The greetings are listed in the Available Greetings section.
   Click any greeting button where there is no description or duration. The Record/Playback Greeting window opens.
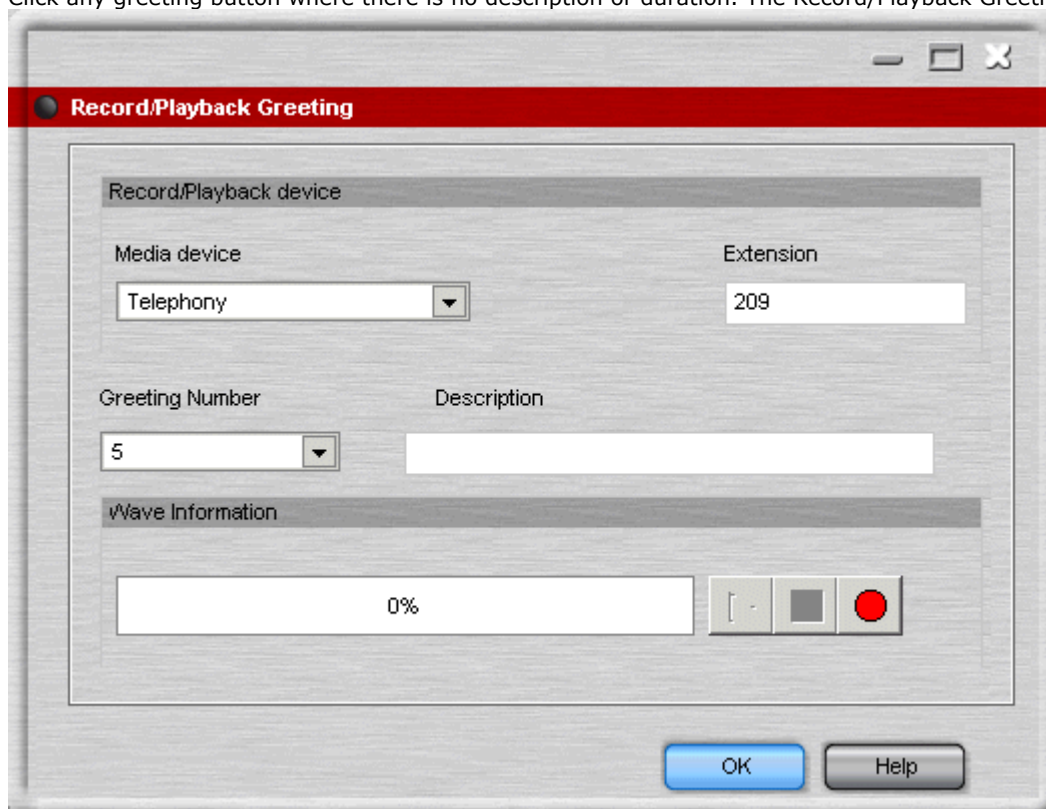
4. You will record your message using your telephone handset. The extension field is automatically entered with the extension number that you used to log in to Phone Manager. Select the media type Telephony.

5. The greeting number is the greeting number you selected in the Personal Greetings window. Type a name for the recording in the Description field.

   · A maximum of 20 characters can be entered as a description. If more characters are entered the description is truncated to 20 characters when shown in Configure Personal Greetings window.

6. Click 🔴 to start recording your greeting. Your telephone rings once.

7. Pick up your telephone handset. A message is played 'record at the tone'. Start speaking your greeting at the tone.

8. Replace your handset or click ■ when you have finished recording.

When you have recorded a greeting you can listen to the recording and re-recorded the greeting.

To listen to a greeting:

1. Open the Configure Personal Greetings window.

2. Click the Greeting button for the greeting that you want to listen to. The Record/Playback Greeting window opens.

3. Click ▶ to start playing the greeting.

4. Pick up your telephone handset when it rings. The greeting that you selected is played.

5. Replace your telephone handset when the greeting message finishes.

To re-record a greeting:

1. Open the Configure Personal Greetings window.

2. Click the Greeting button for the greeting that you want to re-record.

3. Click ⬤ to start recording. Your telephone rings once.

4. Pick up your telephone handset. A message is played 'record at the tone'. Start speaking your new greeting at the tone.

5. Replace your handset or click ■ when you have finished recording.

6. To listen to your new greeting click ▶ to play the recording.

7. Pick up your telephone handset when it rings. The greeting that you selected is played.

8. Replace your telephone handset when the greeting message finishes.

Assigning a Temporary Greeting

If you have recorded a greeting you can assign the greeting as a temporary voicemail greeting. For example, a temporary greeting might be used when you are away from the office, giving the caller an alternative contact person. For more information, see Recording Greetings 63.
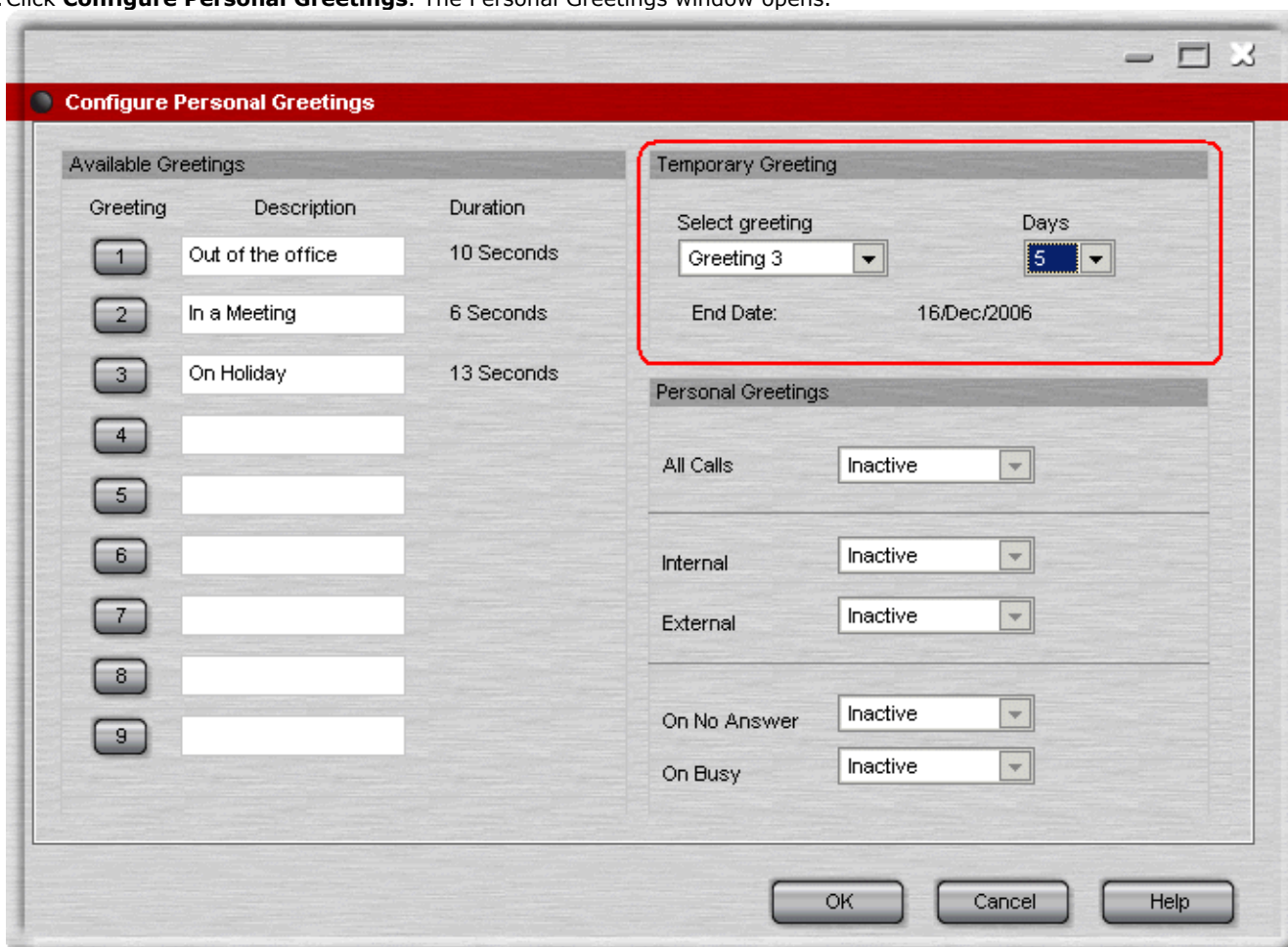
When a temporary greeting is being used, no other greetings are active.

A temporary greeting can be selected for a certain number of days, the maximum number of days being 30. When you enter the number of days the end date is calculated and shown.

- If the number of days selected is between 1 and 30, the greeting is active for the selected number of days. When the number of days has expired your temporary greeting no longer works.

- If the number of days selected is 0, the selected greeting is your permanent greeting for all voicemail calls. The temporary greeting replaces the system default greeting.

To set a temporary greeting:

1. Click ![wrench icon] > **Voicemail**.
   Alternatively, click **View > Preferences > Voicemail**.

2. Click **Configure Personal Greetings**. The Personal Greetings window opens.
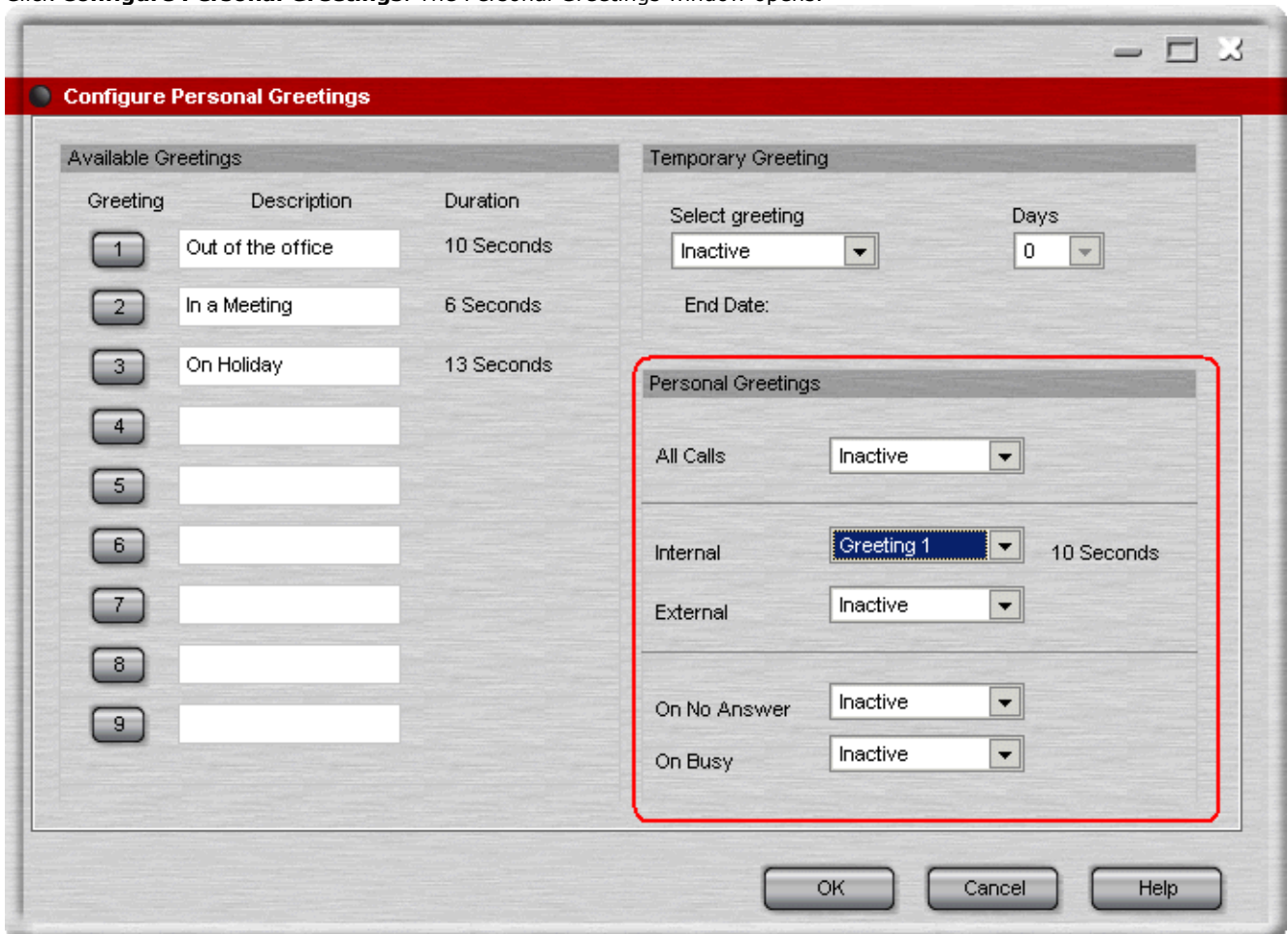
3. In the Temporary Greeting section, select the required greeting from the list.

   · If you have recorded any greetings from an IP Office Intuity mode mailbox the greetings are listed with their duration but no description.

4. Select the number of days that the greeting is to be used. The end date is automatically calculated.

5. Click **OK** to save your changes.

Assigning Personal Greetings

When you assign a personal greeting for more than one call type, the greeting used for any call is decided using an order of priority. For more information, see Using Personal Greetings 61 .

To assign your personal greetings:

1. Click ⬧ > **Voicemail**.
   Alternatively, click **View > Preferences > Voicemail**.

2. Click **Configure Personal Greetings**. The Personal Greetings window opens.

3. Select the required greeting from the list for the different call types.

   · If you have recorded any greetings from an IP Office Intuity mode mailbox the greetings are listed with their duration but no description.

4. Click **OK** to save your changes.

Personal Distribution Lists

A Personal Distribution List or PDL can only be used if your voicemail is in Intuity mode. A PDL is also known as a mailing list.

A Personal Distribution list is used to store a set of mailbox numbers so that you can send a voice message to several recipients at the same time. This is useful if you often send messages to the same people, for example the members of your team. For more information, see Using a Personal Distribution list 71 .

Your mailbox can have up to 20 PDLs associated with it. Each list can contain up to 360 mailbox numbers. Lists can be private or public. Private lists can be used only by you. Public lists can be used by other mailbox users when they forward a message. However, public lists can not be modified by other users. For more information, see Creating a Personal Distribution List 69 .
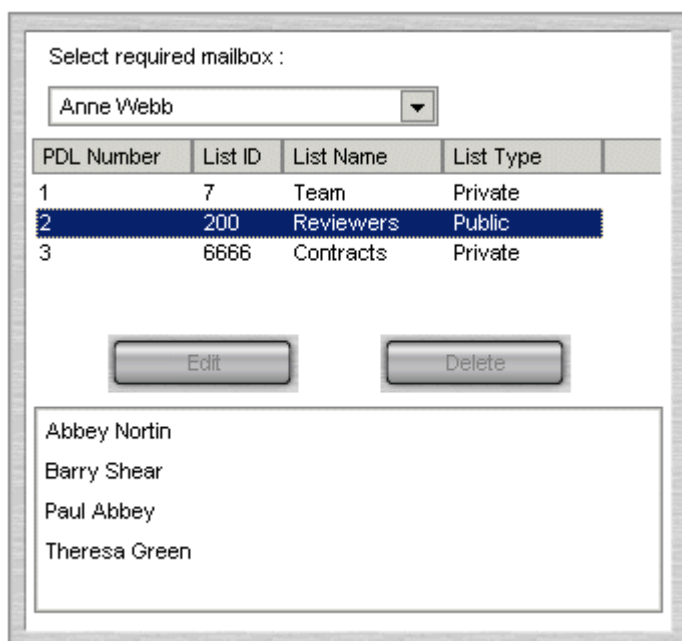
You can view your PDLs and check how many members (mailbox numbers) each contains. You can modify your own lists by deleting or adding members. For more information, see Editing a Personal Distribution List 68 . You can also create your own list by importing the contents of a public list from another mailbox. For more information, see Creating a Personal Distribution List 69 .

Viewing a Personal Distribution List

When a PDL is created you can view the members of the list. You can view your own PDLs and any public lists that were created by other people.

To view the members of a PDL:

1. Click ![wrench icon] > **Voicemail** tab.

2. Click **Configure Personal Distribution List** button.

3. In the **Select required mailbox** field, click the mailbox that you want to view.

4. Click the PDL that you want to see the members of. The extension numbers are shown in the panel under the lists of PDLs.
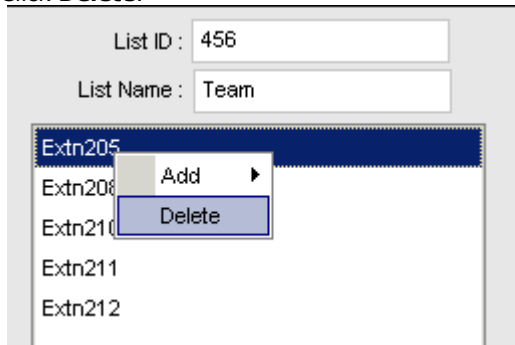
Editing a Personal Distribution List

When you have created a PDL you can amend it at any time. New members can be added and members can be removed from the list. A public list created by someone else can only be changed by the person who created the list.

To amend the members of a PDL:

1. View the members of the PDL. For more information, see

2. Click **Edit**. The PDL members are copied to the panel on the right.

3. Members can be removed from the list.

   - Right-click the extension number that you want to remove.

   - Click **Delete**.

4. Members can be added to the list.

   - Right-click in the blank area beneath the List name.

   - Click **Add**.

   - Click an extension number or name.

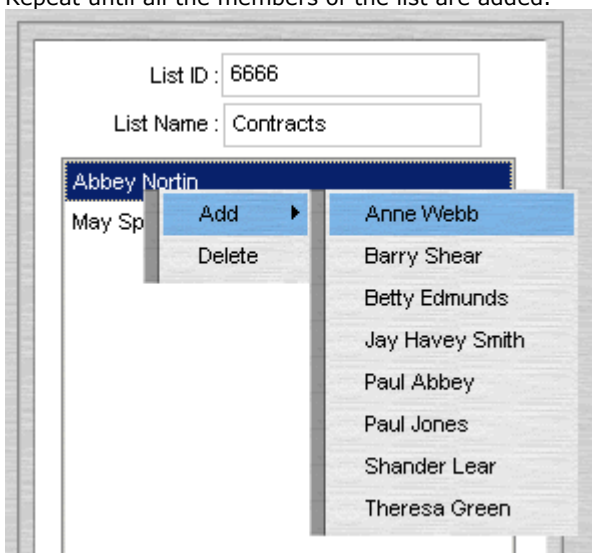5. Click **Update** to save all your changes.

Creating a Personal Distribution List

Phone Manager Pro Only.

A Personal Distribution List (PDL) is a list of mailbox numbers that you can use to distribute messages to groups of mailboxes. You can create a private list or create a list that is available to other users by making the list Public. Up to 20 lists can be created with a maximum of 360 members per list.

To create a PDL:

1. Click ![wrench icon] > **Voicemail** tab.

2. Click **Configure Personal Distribution List** button.

3. From the list at the top left in the window, select your mailbox.

4. Type a **List ID**. The List ID is a number that you choose. The List ID is used to identify the PDL when sending a message. For more information, see <u>Using a Personal Distribution List</u> 71.

5. Type a **List Name**. A descriptive name that will help you to identify the members of the PDL.

6. The mailbox extension numbers need to be added to the list.

   · Right-click in the blank area beneath the List Name.

   · Click Add.

   · Click an extension number or name.

   · Repeat until all the members of the list are added.

![Screenshot showing List ID: 6666, List Name: Contracts, with a context menu showing Add and Delete options, and a submenu listing names: Anne Webb, Barry Shear, Betty Edmunds, Jay Havey Smith, Paul Abbey, Paul Jones, Shander Lear, Theresa Green. The list shows Abbey Nortin and May Sp...]

7. (Optional) Click **Public**.
   Check this box to make the selected list public. A public list can be viewed and used by any other Phone Manager user.

8. Click **Create**.
   Details of your PDL are shown in the left panel.

   · If the message 'You can only create your own lists' is shown, click **OK**. Select your mailbox from the drop down list in the top left of the window and click **Create**.

You can add members from an existing list. This can either be all members from an existing list or individual members mailboxes. You can use a private PDL or a public PDL to create a new list.

To create a new PDL from an existing PDL:

1. Click ⚲ > **Voicemail tab**.

2. Click **Configure Personal Distribution List** button.

3. Select your mailbox from the drop down list at the top left in the window if you are using a private PDL. If you are using a Public PDL, select the mailbox associated with the required PDL.

4. Click the PDL to be used. The members of the PDL are listed in the panel beneath the PDL lists.

5. Type a number in the **List ID** field for the PDL.

6. Type a name in the **List Name** field for the PDL.

7. Click ----≯ to copy all the mailbox extension numbers to your new list

   · Individual members from an existing list can be added to the new list. Select the member from the existing list and use the ----≯ adjacent to the member list window.

8. (Optional) Click **Public**.
   A public list can be viewed and used by any other (PDL) user. Select to make the list public.

9. Click **Create**.
   Your PDL is shown in the left panel.

   · If the message 'You can only create your own lists' is shown, click **OK**. Select your mailbox from the list in the top left of the window and click **Create**.

Using a Personal Distribution List

When you have created a Personal Distribution List (PDL) you can use it to send a voice message to several recipients at the same time. Before you send the message make a note of the list ID number that you want to use. If you are using a public PDL make a note of the extension number of the PDL owner and the List ID.

To use a PDL you need to log in to your mailbox using your telephone.

To log in to your mailbox:

1. Pick up your telephone handset and dial ***17** or use an alternative short code that is configured for your telephone system.

2. If you are dialing from your extension, press **#**. Otherwise enter your extension number and press **#**.

3. Enter your voicemail password and press **#**.

When you are logged in to your mailbox you can record a message and send it to the mailboxes that are listed in the PDL.

Login → 1 Record → \<tone>, record message, # → *5 Use mailing list → \<extn no.>, # → \<list no.>, # → # Confirm → # Send
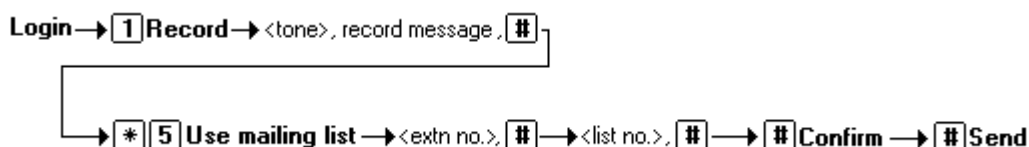
To send a message to the members of a private PDL:

1. Press **1** to record the message that you want sent to every one in the list.

2. After the tone, start recording your message.

3. Press **#** to finish recording. You are prompted to enter the extensions to send the message to. You are going to use a PDL that contains all the extensions.

4. Press ***5**. You are going to use a private PDL that you created.

5. Press **#**. Your name is announced and you are asked to enter the list identification.

6. Enter the List ID and press **#**. You are told the list number and the number of members in the list. You are prompted to enter the extension numbers. You are using a PDL that contains all the extensions.

7. Press **#**.

8. Press **#** to send the message. You hear a confirmation message that the delivery is scheduled. Your message is sent to all the extensions in the PDL.

To send a message to the members of a public PDL:

1. Press **1** to record the message that you want sent to every one in the list.

2. After the tone, start recording your message.

3. Press **#** to finish recording. You are prompted to enter the extensions to send the message to. You are going to use a PDL that contains all the extensions.

4. Press ***5**. You are going to use a public PDL that you did not created.

5. Enter the extension number of the Public PDL owner and press **#**. You hear the name of the mailbox owner and you are asked to enter the list identification.

6. Enter the list ID and press **#**. You are told the list number and the number of members in the list. You are prompted to enter the extension numbers. You are using a PDL that contains all the extensions.

7. Press **#**.

8. Press **#** to send the message. You hear a confirmation message that the delivery is scheduled. Your message is sent to all the extensions in the PDL.

You can forward a message to the several mailboxes at the same time using a PDL. Messages marked as private by the sender cannot be forwarded.
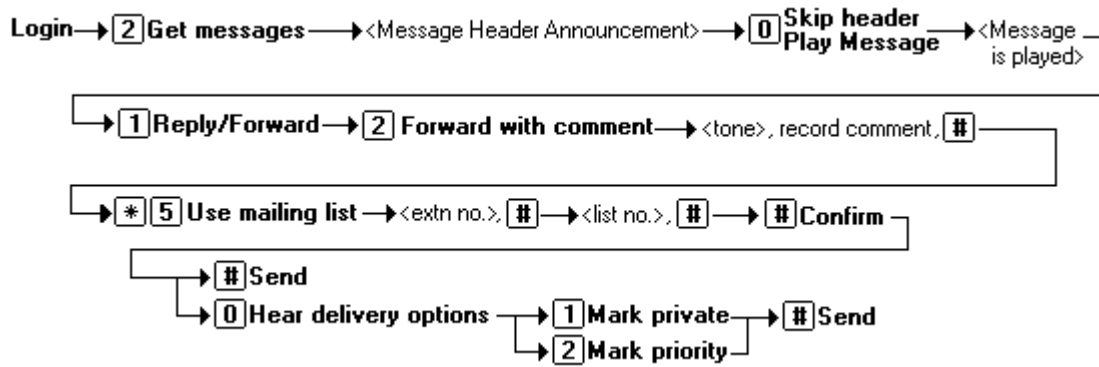
To forward a message to the members of a PDL:

1. While you listen to the message, press **1**.

2. Press **2** to forward the message with a comment. You are prompted to record your comment after the tone. Record your comment and press **#** to finish recording.

3. You are prompted to enter the extensions to send the message to. You are going to use a mailing list that contains all the extensions. Press ***5**. You are going to use a mailing list that you created.

4. Press **#**. Your name is announced and you are asked to enter the list identification.

5. Enter the List ID and press **#**. You are told the list number and the number of members in the list. You are prompted to enter the extension numbers. You are using a PDL that contains all the extensions.

6. Press **#**.

7. Press **#** to send the message. You hear a confirmation message that the delivery is scheduled. Your message is sent to all the extensions in the PDL.

Deleting a Personal Distribution List

A Personal Distribution List might no longer be used and needs to be removed from the listing.

To delete a PDL:

1. Click 🔧 > **Voicemail tab**.

2. Click **Configure Personal Distribution List** button.

3. Select your mailbox from the list at the top left in the window.

4. Select the PDL to be deleted.

5. Click **Delete**.

Chapter 5.
Features

Features

This section of the guide explains:

- **Managing directories**
  Directory Entries store regularly dialed internal or external numbers. Directory Entries appear in the Call screen for quick dialing. For more information, see Managing Directories 76 .

- **Creating and using speed dials**
  You can use speed dials to save regularly dialed internal and external numbers for future use. There are two types of Speed Dials: Internal where Tool Tips are shown and External. For more information, see Viewing Speed Dials 79 .

- **Setting an absent message**
  The Absent Status feature assists internal callers when you are not at your desk. The information entered is shown on their Call screen when a call is made to your extension. For more information, see Setting an Absent Message 75 .

- **Finding out more about Phone Manager**
  You can use the help files and learn more about using Phone Manager by viewing the tutorials. For more information, see Getting Help 74 .

Getting Help

The Help menu gives access to several help options:

- **Contents**
  This function opens the Phone Manager help system at the contents page.

- **Index**
  This function opens the search tool within the Phone Manager help system.

- **About Phone Manager**
  This displays the version of the Phone Manager application.

- **Product Tour**
  This option starts an interactive product tour. You can investigate and learn more about the Phone Manager application.

- **Video Tutorials**
  This function lists several video tutorials. Each tutorial provides an interactive demonstration of the capabilities of the Phone Manager application.

- **Check for Updates**
  This option is used to check for the latest updates for Phone Manager. The Check for Updates option is only available if configured by your system maintainer. For more information, see your system administrator.


Further information about Avaya IP Office is available from www.avaya.com/support and also from www.avaya.com/ipoffice/knowledgebase.

Setting an Absent Message

The Absent Status feature assists internal callers when you are not at your desk. The information you enter appears on their screen in the tag field when they make a call to your extension.

For telephones with suitable displays, the text is shown on the display of your telephone and on an internal caller's telephone.

- If you have selected any of the forwarding options, the absent text is displayed to an internal caller. If the destination extension also has absent text set your message is displayed unless the option Forward on Busy is selected. If Forward on Busy is selected the absent text set for the destination extension is shown. The call is forwarded as set in your forwarding options. For more information, see Setting your Forwarding Options 93ᐟ.
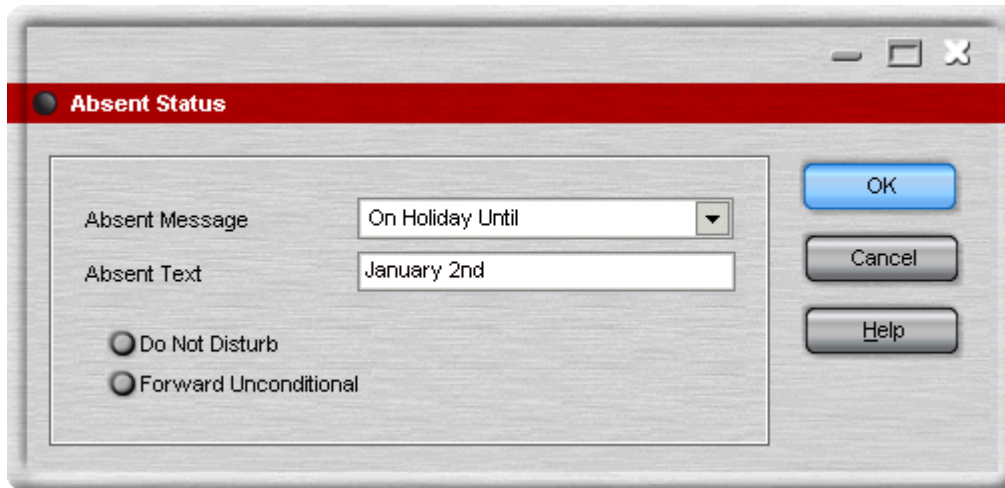
To set an Absent Status:

1. Click **Actions** > **Absent**.
   Alternatively, press **F6**. The Absent Status window opens.

2. Select an **Absent Message** from the list. The options are:

   - On Holiday until / On Vacation Until

   - Will be back

   - At lunch until

   - Meeting until

   - Please call

   - Dont disturb

   - With visitors until

   - With Cust. til

   - Back soon

   - Back tomorrow

   - Custom

3. With the exception of Back soon and Back tomorrow, additional text is required. For example, if the absent message "On Holiday until" is selected you must add when you are back from holiday. Enter the text in the **Absent Text** field.

4. (Optional) Select the option **Do Not Disturb** or **Forward Unconditional**.
   If either of the options are selected the number that your calls are forwarded to must be configured. For more information, see Setting you Forwarding Options 93ᐟ.

5. Click **OK**.
   The Absent Message appears in the title bar of your Phone Manager. The message is also shown in the Call screen when a call is made to your extension.

Managing Directories

Only available in Phone Manager Pro versions.

Directory Entries store regularly dialed internal or external numbers for quick dialling. When you use the Call window you can select to show the directory entries. For more information, see Using the Call Window 37.

Directory Entries can be used to match the Caller ID or DID of incoming calls to a name. When there is a match a media file can be played or a text file displayed. A text file is shown in the script Tab. Phone Manager attempts to match the incoming Caller ID first. If no match exists Phone Manager looks for a match to the DID. For more information, see The Script Tab 31.

Any call you receive can be added to your personal directory. For more information, see Creating a Directory Entry from an Existing Call 78.

Creating a Personal Directory

You can create a personal directory of frequently used numbers. Each directory entry appears in the Call window for quick dialing. A maximum of 1000 entries can be added to the directory.

To open the Directory Configuration:

1. Click **File > Directory**.
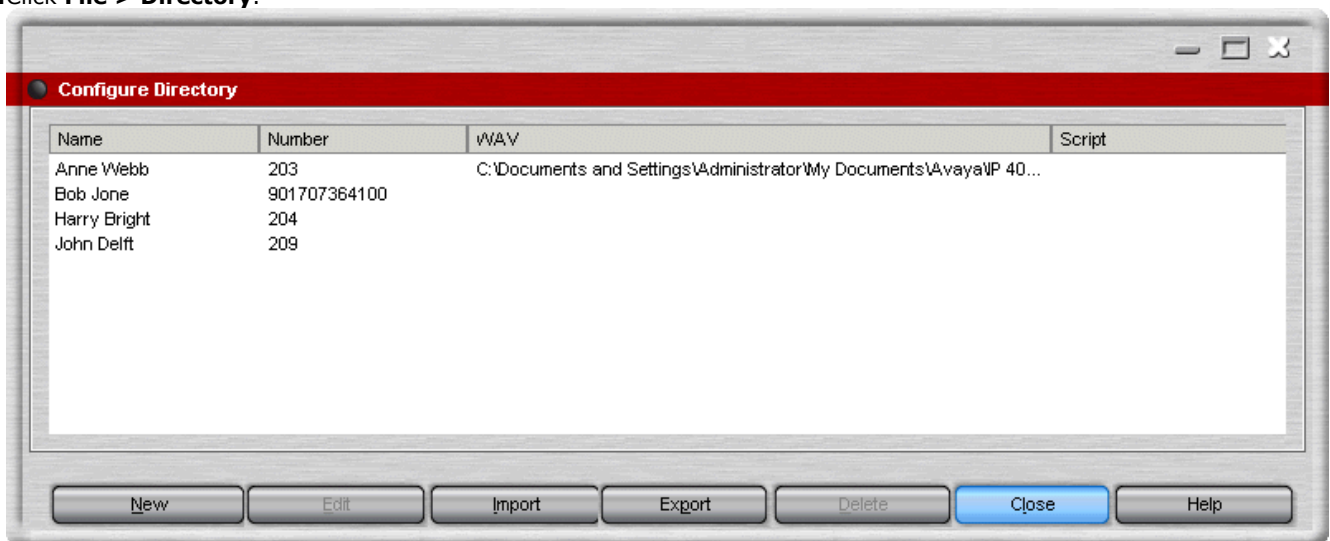
These fields control the PBX Configuration.

- **New** - Click to create a new directory entry. For more information, see Adding a Directory Entry 77.

- **Edit** - Click to edit the selected directory entry.

- **Import** - Click this option to import an exported directory entry or correctly formatted CSV file.

- **Export** - Click this option to export your directory.

- **Delete** - Click a directory entry then click **Delete**. The directory entry selected is removed.

- **Close** - The Configure Directory Window is closed. Any changes made since the Configure Directory Window was opened are saved.

Adding a Directory Entry

A new directory entry can be created. The entry is shown in the Call window when the Show Directory option is selected. For more information, see Using the Call Window 37.

To create a new directory entry:

1. Click **File > Directory > New**. The Directory Entry window opens.

2. Enter the telephone or extension number into the **Number** box.

3. Enter the name to be associated with the number into the **Name** box.

4. (Optional) Click **Browse For Script** to select a .txt or .rtf file. The file is shown when a call is made to the number entered in the Number field. The text file shows in the Script tab when the Caller ID matches an incoming caller name. For more information, see The Script Tab 31.

5. (Optional) Click **Browse for Media** to select a media file. The file is played when a call is received from the number entered. Phone Manager must be configured to play sounds. For more information, see Changing General Phone Manager Settings 100.

6. (Optional) Click **Add to Speed** to create a speed dial entry. Creating a speed dial with this method always adds the speed dial to the My Speed Dial Group. For more information, see Creating a Speed Dial 82.

7. (Optional) Click **New WAV** to create a .WAV file in the Phone Manager Pro default directory. You need to have multi media configured for your PC complete with a sound card installed complete with speakers and a microphone to record a media file.

8. Click **OK**.

9. Click **Close** to exit the Configure Directory window. A new entry is not saved until you exit the Configure Directory window.

Creating a Directory Entry from an Existing Call

Any call that is shown in the Call History area can be used to create a directory entry. Calls in the In, Out, Missed and All panes all contain information about calls.

To create a directory entry from an existing call:

1. Right-click the call in the Call History pane.

2. Click **Add to** Directory. The Directory Entry window opens.

3. (Optional) Make any changes required. You can also associate a script or media file to the directory entry.

4. Click **OK**.

5. Click **Close** to exit the Configure Directory window and save your changes.

Editing a Directory Entry

A directory entry can be changed.

To edit a directory entry:

1. Click **File > Directory > Edit**. The Directory Entry window opens.

2. Edit the directory entry as required.

3. Click **OK**.

4. Click **Close** to exit the Configure Directory window.

Speed Dials

Speed dials save regularly used internal and external numbers for future use. For more information, see [Using a Speed Dial](#) .

There are two types of speed dials:

- [Internal](#) where [Tool Tips](#) are shown

- [External](#) .

Internal Speed Dials
An internal speed dial can also act as a busy lamp field, allowing you to see the status of your speed dial user.

An internal speed dial icon.

An internal speed dial icon where the user/extension is configured for Instant Messaging.

An internal speed dial icon where the user/extension is **Busy**. The icon has a red circle with a white cross on it in the top left corner.

An internal speed dial icon where the user/extension has **Do Not Disturb** set. The icon has a blue circle with a white cross on it in the bottom right corner.

An internal speed dial icon where the user/extension has **Divert** set. The speed dial has a green circle with a white arrow on the top right corner.

An internal speed dial icon where the user/extension has a **Voicemail** message. The icon has an envelope in the bottom left corner.

A Speed Dial icon can show multiple busy messages. The examples show 2 instances, although more are possible.

An internal speed dial where the user/extension is **Busy** and has a **Voicemail** message.

An internal speed dial where the user/extension is **Busy**, **Do Not Disturb** is on and the user/extension has a **Voicemail** message.

Internal Speed Dial Tool Tips

In addition to speed dials being used as busy lamp fields, internal speed dials have tool tips that provide status information about a speed dial user. The information displayed changes automatically depending on the status of the user/extension.

- **Name -** The name of the user associated with the speed dial.

- **Number** - The number of the user associated with the speed dial. If an internal user is added from the IP Office Directory a name is shown.

- **Status -** The current status of the user. The status can be Idle, New Voicemail, Busy, DND, or Forward All. Multiple statuses can be shown.

- **Presence** - The presence of a user in relation to a connection to the Instant Messaging. The status changes between Online and Offline to reflect the user's state and settings on the Microsoft Live Server.

- **New Voicemail** - The number of new messages received by the speed dial user.

Notes

- If more than one speed dial is created for the same internal user, only one speed dial acts as a busy lamp field.

- In order for the busy lamp field feature to operate, your PC must be on the same physical LAN as the PBX. For more information, see your system administrator.

External Speed Dials

There are four types of external speed dials - Work Phone, Home Phone, Mobile and Fax. The speed dial shown changes based on the default number selected.

 This icon is shown if the **Work Phone** is recognized as an external speed dial and is set as the default number.

 This icon is shown if the **Home Phone** is selected as the default number.

 This icon is shown if the **Mobile** is selected as the default number.

 This icon is shown if the **Fax** is selected as the default number.

Using a Speed Dial

You can use a speed dial to make a call to both internal and external numbers.

To use a Speed Dial to make a call:

1. Click the **Speed Dials** tab in the Call History area.

2. Make a call by double-clicking the required speed dial.
   Alternatively, drag the speed dial icon onto the call status area.

3. The call shows in the call status area of the screen.

You can use a speed dial to make a call to a telephone number which is not the default speed dial number.

To select an alternative number:

1. Click the **Speed Dials** tab in the Call History area.

2. Right-click the speed dial.

3. Click **Call**

4. Select the alternative number required - **Work Phone**, **Home Phone**, **Mobile** or **Fax.** Internal numbers cannot dial a fax number.

Creating a Speed Dial Group

Only available in Phone Manager Pro versions.

Speed dials can be organized into groups. There can be a maximum of 10 speed dial groups. Each group can contain a maximum of 100 speed dials.

To create a Speed Dial group:

1. Click the **Speed Dials** tab in the Call History area.

2. Right-click in a speed dial tab.

3. Select **New** > **Speed Dial Group**.

4. Enter a name for the group in the Speed Dial Group window.
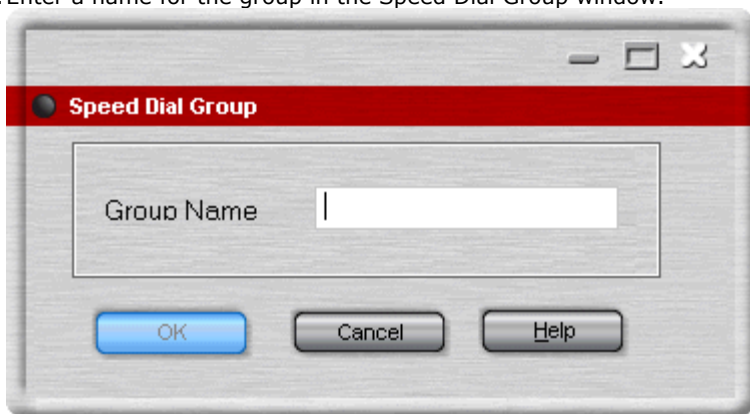
5. Click **OK**. A new speed dial group tab is created.

Creating a Speed Dial

There are several ways to create a speed dial in Phone Manager. You can add a new Speed Dial Group member 82 or add an internal user 83 from the IP Office Directory. The directory lists all users connected to your IP Office telephone system.

To create a Speed Dial Group Member:

1. Click **Speed Dials** tab in the Call History area and select the **Speed Dial Group** to add the speed dial to.

2. Right-click within the selected speed dial group window.

3. Select **New** > **Speed Dial Group Member**. The Speed Dial window opens.

4. Enter a name into the **Name** field.

5. Enter the required telephone number in the **Work Phone, Home Phone**, **Mobile** and **Fax** fields. The fax field is only available when the speed dial type is external.

6. Check the **Type** of speed dial is correct.
   When Phone Manager recognizes a number as being internal, the speed dial type is automatically set as internal. If the number is recognized as external the speed dial is set as external. For example, the number would be recognized as being an external number if a 9 for external access was entered.

7. Select the **Default Number** for the speed dial.
   The option is only available if the type is external. The default number is the number dialed when the speed dial is double-clicked.

8. (Optional) Enter a **PIN**. For more information, see Working with Pin Restrictions 51 .

9. Click **OK**.
   The new speed dial icon is added to the speed dial group tab selected.

To add an internal user to a speed dial:

1. Click **Speed Dials** tab in the Call History area and select the **Speed Dial Group** to add the speed dial to.

2. Right-click within the selected speed dial group window.

3. Select **New** > **Add user**. The Speed Dial Add user window opens.
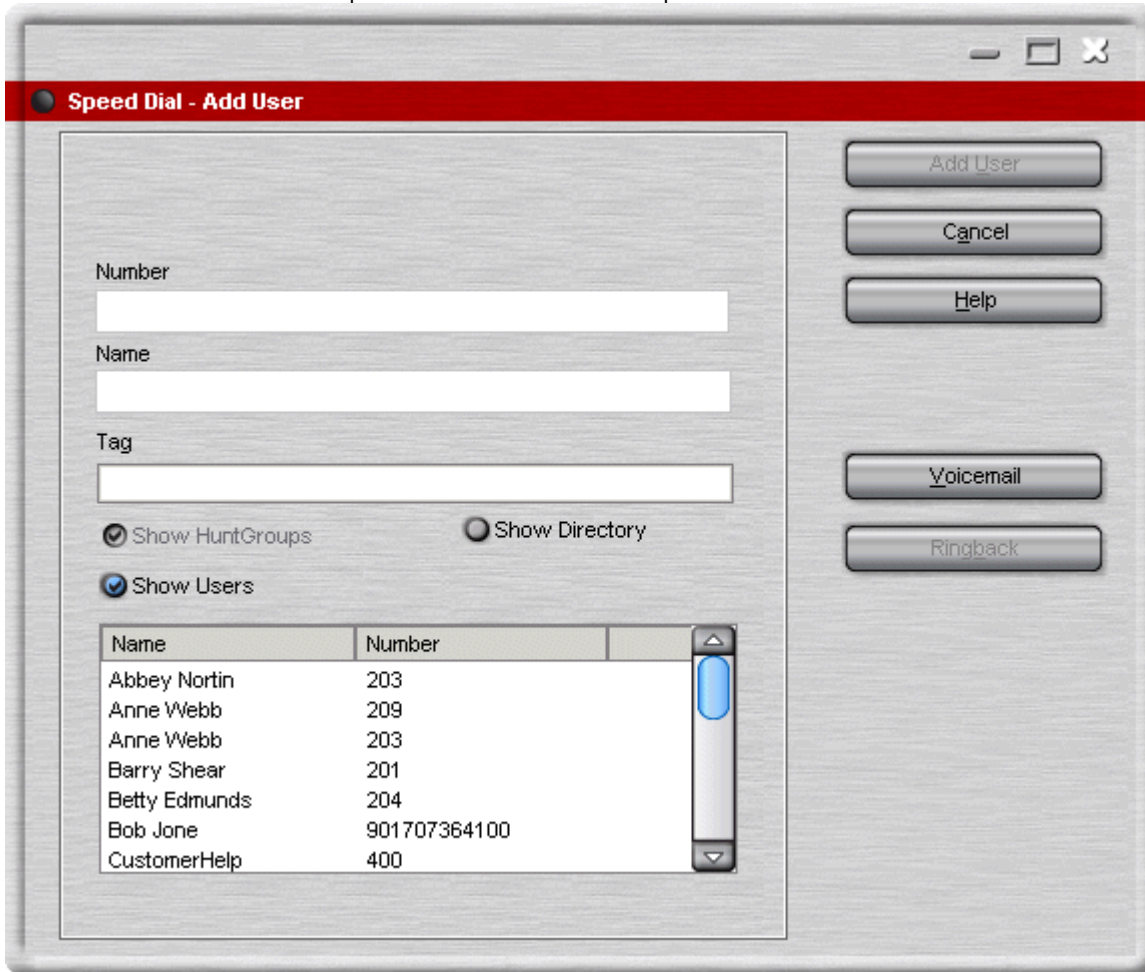
4. Start entering either the user name or extension number in the relevant field. Only the entries in the in the IP Office directory that match your input are shown. When you can see the user required, click the name. The name and number fields are completed.

5. Click **Add User**.
   The new speed dial icon is added to the speed dial group tab you selected. The speed dial icon uses the name rather than the extension number.

Note

- If the user is configured for Instant Messaging, the speed dial icon is green. You have to restart Phone Manager for the Instant Messenger Speed Dial to take effect.

Editing a Speed Dial

Speed dial details can be edited.

To edit a Speed Dial:

1. Click the **Speed Dials** tab in the Call History area.

2. Select the **Speed Dial Group** that contains the speed dial.

3. Right-click the speed dial icon and select **Edit.** The Speed Dial window opens.

4. Make the changes as required.

5. Click **OK**.

Changing a Default Number

For external speed dial icons you can change the default number. The speed dial icon changes to indicate the new default number type.

To change the default number:

1. Click **Speed Dials** tab in the Call History area.

2. Right-click the speed dial containing the default number that you want to change.

3. Select **Default Number**. The current default number type is ticked. Select the new default number type for the Speed Dial.
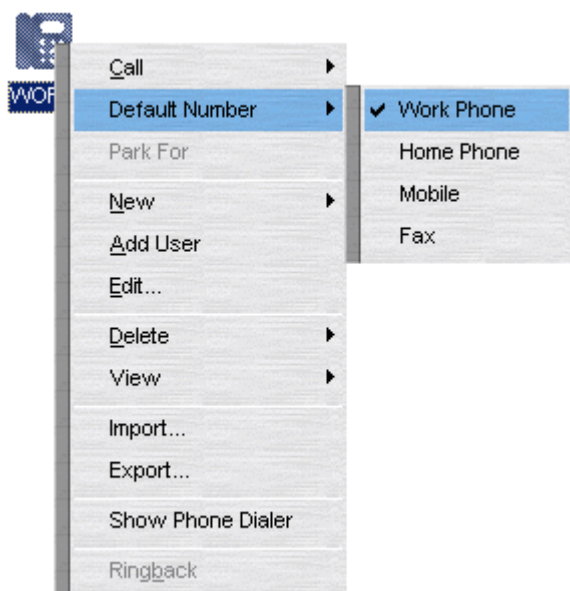
4. The speed dial icon changes. The speed dial uses the default number associated with the number selected. For more information, see Viewing Speed Dials 79 .

Deleting a Speed Dial

Speed dials that are no longer required can be removed.

To delete a Speed Dial:

1. Click the **Speed Dials** tab in the Call History area.

2. Select the **Speed Dial Group** that contains the speed dial.

3. Right-click the speed dial icon.

4. Select **Delete**.

Chapter 6.
Configuring Phone Manager

Configuring Phone Manager
Changing Phone Manager Settings

The Configuring Preference windows are used to change your personal settings. The preference tabs that are available depend on the Phone Manager version that you are using.

- **Phone Manager Options**
  Some Phone Manager options can be configured by the system administrator through the IP Office configuration. The system administrator can select whether those options can be changed by the Phone Manager user. For more information, see your system administrator.

Preference tabs that are available to all users of all versions are:

- **Forwarding**. For more information, see Setting your Forwarding Options 93.

- **Do Not Disturb**. For more information, see Setting Do Not Disturb 91.

- **Voicemail**. For more information, see Configuring the Voicemail Options 107.

- **Telephone**. For more information, Selecting Telephone Controls 106.

- **Phone Manager**. For more information, see Changing General Phone Manager Settings 100.

- **Park ID**. For more information, see Creating Personal Park Slots 99.

- **Short Cut Keys**. For more information, see Changing Short Cut Keys 103.

- **Instant Messaging**. For more information, see Enabling Instant Messaging 98.

The extra preference tabs available for users of Phone Manager Pro are:

- **Compact Mode**. For more information, see Viewing Phone Manager in Compact Mode 89.

- **Date and Time Setting**. For more information, see Changing the Date Settings 90.

- **Clock Type**. For more information, see Changing the Clock Format 88.

- **Queue ID**. For more information, see Selecting Queues to Monitor 102.

- **Door Release**. For more information, see Activating the Door Release Buttons 92.

- **Agent Mode**. For more information, see Configuring Agent Mode 87.

- **Screen Pop**. For more information, see Configuring Screen Pop 104.

Configuring Agent Mode

The Agent Mode settings are only available in Phone Manager Pro.

Agent Mode preferences control the operation of Phone Manager when Agent Mode operation is used. If the **Agent Mode** check box is selected you are in Agent Mode. When in Agent Mode additional icons are shown in the Phone Manager toolbar. For more information, see Agent Mode Operation 115.

The list shows the groups of which you are a member. The checked groups are those for which you receive calls when you are not in a Busy Wrap Up or Busy Not Available state. The unchecked groups are those for which your membership is currently disabled.

- If the Agent Mode options are unavailable, you are unable to change the settings. For more information, see your system administrator.

To configure the Agent Mode settings:

1. Click ⬦ > **Agent Mode**.
   Alternatively, click **View > Preferences > Agent Mode**. The Agent Mode window opens.
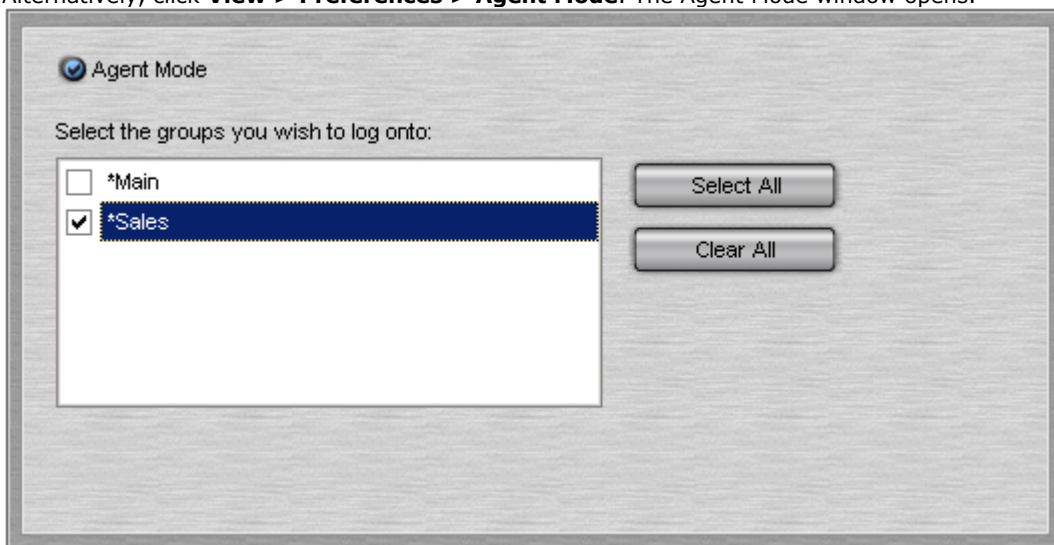
2. Check or un-check the required options.

   - **Select All -** This selects all the groups in the list.

   - **Clear All -** This clears you from all groups in the list.

3. Click **OK** to save your changes.

Notes

- If you use a group key or function on your telephone to go in or out of group, it will do so for all groups of which you are a member rather than just those selected in the **Agent Mode** tab.

- In Agent Mode, the functions of the **F1** and **F3** keys are swapped. **F1** becomes 'account code' and **F3** becomes 'call'.

Changing the Clock Format
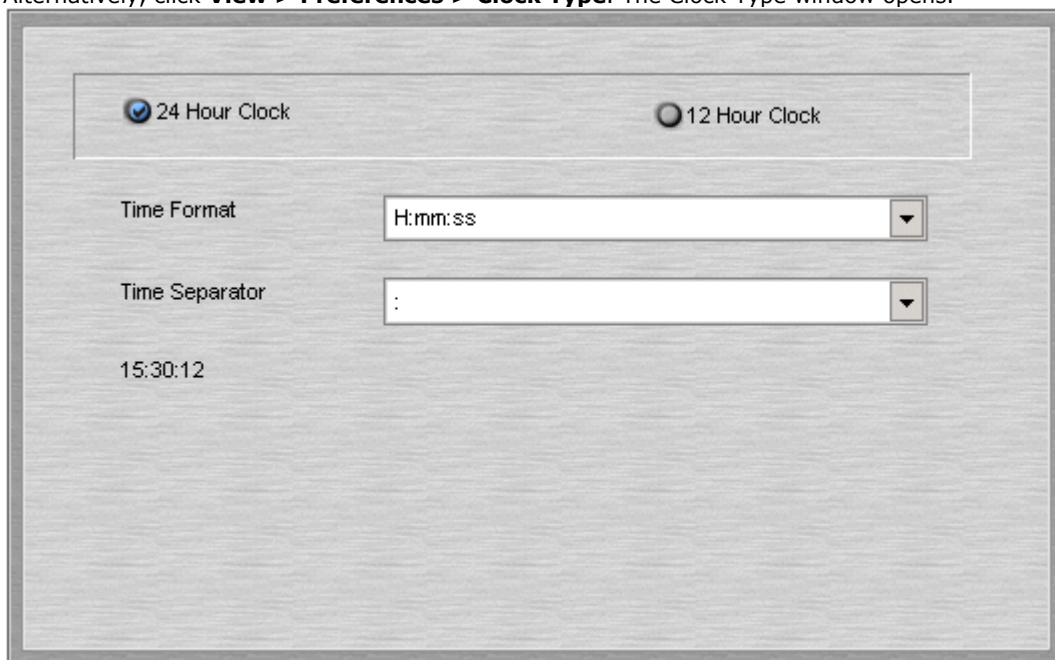
The clock type settings are only available in Phone Manager Pro.

You can customize the time shown in the Phone Manager Call History pane. Formats can be specified to alter the presentation for all calls listed in the Call History pane. A visual representation of the time can be seen in the bottom left of the **Clock Type** tab.

To change the clock settings:

1. Click > **Clock Type**.
   Alternatively, click **View > Preferences > Clock Type**. The Clock Type window opens.

2. Select **12 Hour Clock** or **24 Hour Clock**.

3. Select the **Time Format**. The options in this drop down box alter depending on the time format (12/24 hour) and the time separator (: / - .) selected.

4. Select the **Time Separator**.

5. After making your selection you can see an example in the bottom left side of the **Clock Type** tab.

6. Click **OK** to save your changes. The Phone Manager Call History pane updates all the calls listed.

Viewing Phone Manager in Compact Mode

The Compact Mode settings are only available in Phone Manager Pro.

You can configure several options in relation to compact mode. For more information, see [Using Phone Manager in Compact Mode](#) 116.

- If the Compact Mode options are unavailable, see your system administrator.

To configure Compact Mode:

1. Click ✎ **> Compact Mode**.
   Alternatively, click **View > Preferences > Compact Mode**. The Compact Mode configuration window opens.
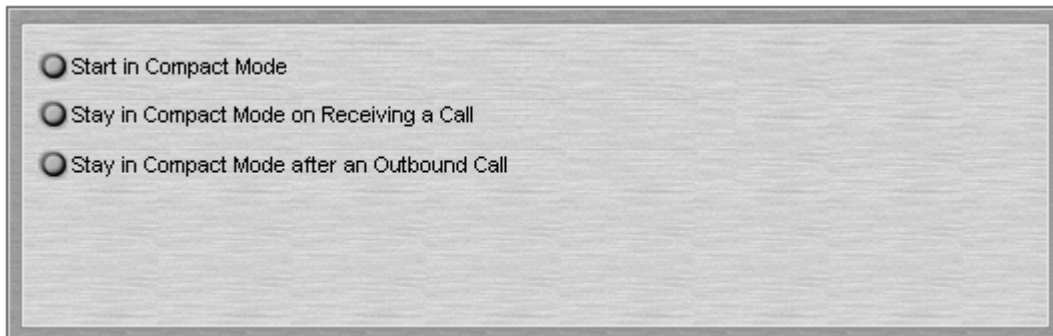
2. (Optional) **Start in Compact Mode** - Check to start Phone Manager in Compact mode by default.

3. (Optional) **Stay in Compact Mode on Receiving a Call** - Check to enable the Phone Manager to remain in Compact mode when receiving a call. If not checked when a call is received, Phone Manager reverts to full Phone Manager mode.

4. (Optional) **Stay in Compact Mode after an Outbound Call** - Check to enable the Phone Manager to remain in Compact mode when making a call.

5. Click **OK** to save the changes.

Changing the Date Settings

The date and time settings are only available in Phone Manager Pro.

The date shown in the Phone Manager Call History pane can be customized. You can specify between the Windows Default Format for your operating system and region or choose a Custom Date Formats.

- **Windows Default Format**
  Phone Manager gets the date format from your computer operating system if this box is checked.

To change the date settings:

1. Click ⬥ > **Date & Time Setting**
   Alternatively, click **View > Preferences > Date & Time Setting**. The Date and Time settings window opens.
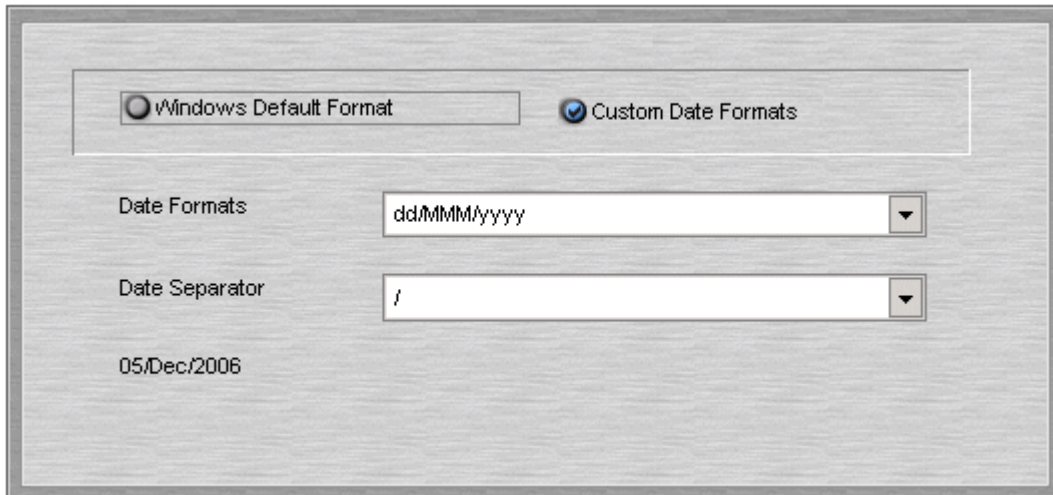
2. Check **Custom Date Formats** to configure your date format.

3. In the **Date Formats** field, click the type of format that you want the date to be shown in.

4. In the **Date Separator** field, click the type of separator to be used between the date denominations. After making your selection you can see an example in the bottom left of the window.

5. Click **OK** to save your changes. The Phone Manager Call History pane updates all the calls listed.

Setting Do Not Disturb

The Do Not Disturb (DND) function forces the telephone system to think that your extension is busy. There might be times when you want to receive calls from specific users. To receive calls, the user's telephone number must be added to the Do Not Disturb Exception List.

The DND exception number can be an internal extension or an external number. If you want to allow a range of numbers through the DND wall, you can either enter each number separately or make use of the variables "N" or "X" in the number. For example, to allow all numbers from 01923699000 to 01923699099 the DND Exception number can be entered as either 019236990XX or 019236990N.

- If the DND options are unavailable, see your system administrator.

To set DND:

1. Click ➘ **> Do Not Disturb**.
   Alternatively, click **View > Preferences > Do Not Disturb**. The Do Not Disturb window opens.

2. To activate DND, check **Do Not Disturb**.

3. (Optional). To receive calls from a specific extension:

- Enter the extension number in the **DND Exception Number** field.

- Click **Add**. The extension number is added to the DND Exception List.

4. Click **OK** to save your changes.

Note

- Any extension number in the DND Exception List can be removed. Select the extension number to be removed and click **Remove**. The selected extension number is deleted from the list.

Activating the Door Release Buttons
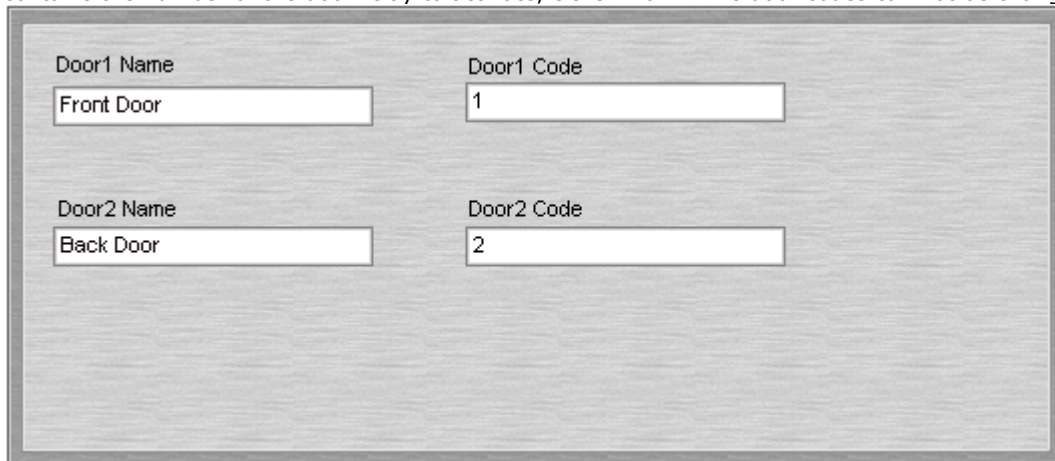
The Door Release settings are only available in Phone Manager Pro.

The Door names must be entered before you can use Phone Manager Pro to control a door. When the names have been entered, you can control the door using Phone Manager. You can release a door using the Door tab in the Call History pane. For more information, see The Door Tab 32.

To enter the door names:

1. Click ➘ **> Door Release**.
   Alternatively, click **View > Preferences > Door Release**. The Door Release window opens. The Door Code field contains the number of the door relay to activate, either 1 or 2. The door codes can not be changed.

Door1 Name	Door1 Code
Front Door	1
Door2 Name	Door2 Code
Back Door	2

2. In the **Door Name** field, enter the name you want to appear on the door button. For example, the door for the Loading Bay might be entered as 'Loading Bay'.

3. Click **OK** to save your changes. The Door Tab is available in the Call History pane with door buttons labeled with the door names you entered.

Setting your Forwarding Options

Calls to your extension can be diverted to a different telephone number either internal or external. You can enter the destination telephone number and select whether all calls are redirected or only external calls.

You can set Mobile Twinning 97 which will send internal or external calls to an external telephone number. The call will ring at your extension and the specified external number. If you do not answer the call at either telephone, the caller is able to leave a message when they are transferred to voicemail.

The types of forwarding that can be selected are:

- Follow Me 93 .
- Forward Unconditional 94 .
- Forward on Busy 95 .
- Forward on 95 No Answer. 95

Follow Me

When selected, ALL your calls are forwarded to the entered 'Follow Me' extension number. This is used for temporary redirection when you are away from your own extension but are available on another extension. You must enter an internal extension number as the Follow Me destination.

- Calls can be made from your original extension. The only calls that can be received at your original extension are calls made from the Follow Me destination extension.
- Any Speed Dial associated with your original extension number does not indicate that the calls are being forwarded to another number.
- If the Follow Me destination extension is busy or there is no answer, the call is transferred to your voicemail.
- If you have set an absent message, the text is displayed to callers. If Absent text is active at the destination extension it will not be displayed as your absent message has priority. For more information, see Setting an Absent Message.

If you have forwarding options selected, the Follow Me behaviour can change.

Forwarding Options Selected	Follow Me Behaviour
Forward Unconditional	Setting is ignored when Follow Me is selected.
Forward on Busy	If the Follow Me destination extension is busy, the call is forwarded to your Forward on Busy destination. If there is no answer at the Forward on busy extension then the call is transferred to your voicemail, if available.
Forward on No Answer.	If there is no answer at the Follow Me destination extension the Forward on no answer setting is ignored and the call is transferred to your voicemail. if available.

Note

- If an option is selected, but there is no destination entered the option is ignored.
  For example, Anne Webb (ext 206) diverts all her calls to extension 207 using Follow Me. There is an incoming call for Anne.

Scenario	Forward on Busy/No Answer options selected	No Forward options selected
Extension 207 is busy.	Caller is transferred to Anne's Forward on Busy number specified.	Caller is transferred to Anne's voicemail.
There is no answer at extension 207.	Caller is transferred to Anne's voicemail.	Caller is transferred to Anne's voicemail.

Forward Unconditional

If Forward Unconditional is selected and a destination number entered, ALL your calls can be re-directed. The destination can be an extension number or if enabled and external number. For more information, see your system administrator.

- The Forward Unconditional option is ignored when the Follow Me option is selected.

- If the option Forward Hunt Group Calls is selected it only applies to hunt groups that are configured for sequential or rotary ringing mode. For more information, see your system administrator.

- The options 'Forward on Busy' and 'Forward On No Answer' are unavailable.

- You can still make outgoing calls from your extension. The only calls that you can receive when all your calls are forwarded are calls made from the Forward unconditional destination number.

- If you have set an absent message, the text is displayed to callers. If Absent text is active at the destination extension it will not be displayed as your absent message has priority. For more information, see Setting an Absent Message.

Forward Unconditional	Forward Hunt Group Calls	Forward Internal Calls	Call Behaviour
✔	✔	✔	All calls are redirected to the Forward Unconditional destination number.
✔	✔	✘	External calls and hunt group calls received by your extension are redirected to the Forward Unconditional destination number. Internal calls are presented to your extension.
✔	✘	✘	External calls are redirected to the Forward Unconditional destination number. Internal calls, including any hunt group calls, are presented to your extension.

Forward on Busy / No Answer
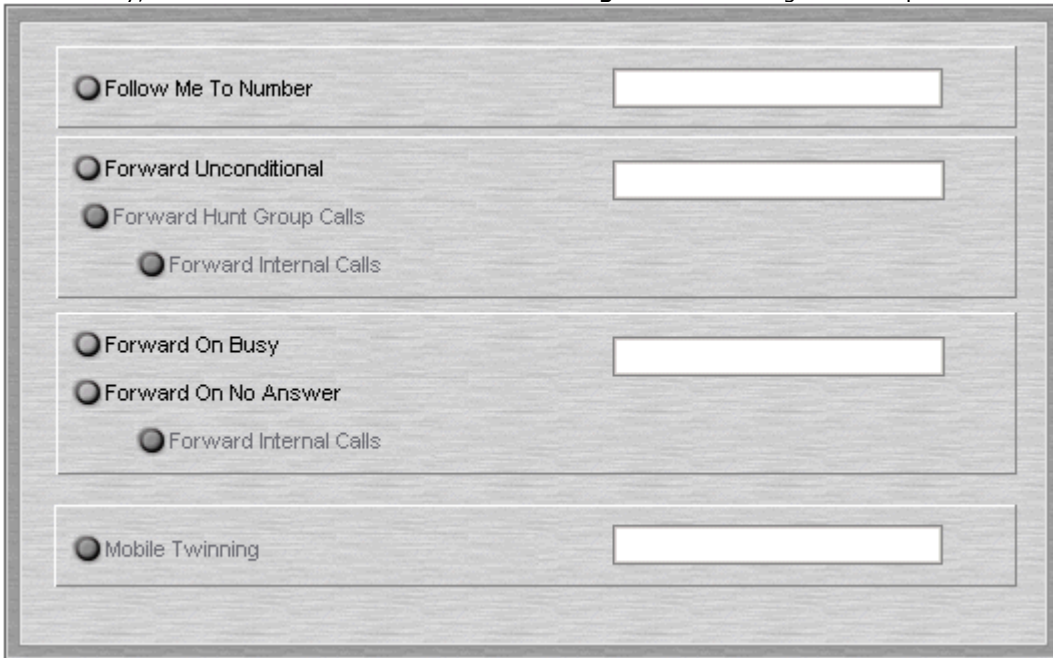
When selected your calls are redirected to the number entered in the forward on Busy/No Answer field. The same number is used for calls forwarded when your extension is busy or not answered.

- If either the Forward on Busy or Forward on No Answer options are selected and no forward number entered, the calls are forwarded to the number set in the forward unconditional section.

- The first time Forward on No Answer is selected, the option Forward Internal Calls is automatically selected. If Forward Internal Calls and Forward On No Answer are de-selected, the next time Forward On No Answer is selected, the option Forward Internal Calls is not automatically selected.

- If you have set an absent message, the text is displayed to callers when the Forward on No Answer forwarding option is selected. If Absent text is active at the destination extension it will not be displayed as your absent text has priority. For more information, see Setting an Absent Message.

- If you have set an absent message, the text is displayed to callers when the Forward on Busy forwarding option is selected. If Absent text is active at the destination extension your absent text will not be shown. The destination extension's absent text has priority. For more information, see Setting an Absent Message.

Forward on Busy	Forward on No Answer	Forward Internal Calls	Call Behaviour
✔	✘	✘	External calls are forwarded to the specified number when your extension is busy. Internal calls are transferred to your voicemail, if available.
✔	✘	✔	All calls (internal and external) are forwarded to the specified number when your extension is busy.
✘	✔	✘	External calls are forwarded to the specified number when your extension is not answered. Internal calls are transferred to your voicemail, if available.
✘	✔	✔	All calls (internal and external) are forwarded to the specified number when your extension is not answered.
✔	✔	✘	External calls are forwarded to the specified number when your extension is not answered or your extension is busy. Internal calls are transferred to your voicemail, if available.
✔	✔	✔	All calls (internal and external) are forwarded to the specified number when your extension is not answered or is busy.

To configure the forwarding options:

1. Click ✎ **> Forwarding**
Alternatively, click **View > Preferences > Forwarding**. The Forwarding window opens.

2. Type the destination telephone numbers in to the appropriate fields. Available numbers can also be selected from your directory list.

- Right-click in a number field. The Forward\Follow-me Number window opens.

- Select the telephone number required from the listing.

- Click **Add**.

3. Click **OK** to save your changes.

Notes

- If a Follow Me To Number is entered that is not in the directory list a red exclamation ! appears at the end of the field. The follow-me feature supports internal numbers only. Select an internal number by right-clicking in the Follow Me To Number field to open the Forward\Follow-me Number window. Select the telephone number required from the listing.

- For call appearance users 'Forward On Busy' is only used when all your call appearance buttons are busy.

- Some forwarding options require configuration within IP Office Manager, for example, for a user to set an external number. For more information, see your system administrator.

Mobile Twinning

If Twinning is enabled in IP Office Manager. the Phone Manager user can send internal and external calls to an external number, for example their mobile telephone. Both your internal and external telephones ring when a call is received. The call can be answered from either telephone. For more information, see your system administrator.

Notes

- Mobile Twinning is a licensed feature.

- If you use account codes, you can not enter an account code when you answer a call at the external telephone.

- If the feature Do Not Disturb (DND) is selected any callers to your internal extension hear the busy tone. Your external telephone will not ring. If a caller is entered in to the DND exception list, only your internal telephone rings.

- If you have selected any of the forward options, both the external telephone and the telephone where the calls are forwarded to ring.

- If you have selected the option Follow Me, only the telephone that your calls are forwarded to rings. The external telephone number will not ring.

To set mobile twinning:

1.Click **> Forwarding**
   Alternatively click **View > Preferences > Forwarding**. The Forwarding window opens.

2.Select **Mobile Twining**.

3.In the Mobile Twinning field, enter the telephone number that you want to 'twin' to your extension. Telephone numbers must be entered with no spaces.

4.Click **OK** to save your changes.

Enabling Instant Messaging

Phone Manager provides support for Instant messaging with the Microsoft Live Communication Server (LCS). Instant messaging can occur between internal contacts that use the Microsoft Live Communication Server. For more information, see your system administrator.

When you have enabled instant messaging you can send an instant message using the a speed dial icon.

To enable instant messaging:

1. Click ✎ **> Instant Messaging**.
   Alternatively, click **View > Preferences > Instant Messaging**. The Instant Messaging window opens.

2. To turn instant messaging on check **Enable Instant Messaging Support**. If you have connection to a Microsoft Live Communication Server you need to check this box for other users to add you as an Instant Message user.

3. In the **Server** field, enter the name of the Microsoft Live Communication Server.

4. In the **user name** field, enter your e-mail account and domain as configured on the Microsoft Live Communication Server. For example myname@myserver.com.

5. In the **Protocol** field, click the type of protocol you are using to connect to the Microsoft Live Communication Server. You can choose from **TCP**, **UDP** and **TLS**.

6. In the **Password** field, enter the password associated with your Instant Message profile.

7. (Optional) For Phone Manager to remember your password check **Password**. You do not have to re-enter your password if this box is checked.

8. Click **OK** to save your changes.

Creating Personal Park Slots

By default each Park button in the Call Park area is configured for the four system park areas so a parked call can be picked up at any extension. For more information, see .

You can create a personal or a group park area where a call can only be picked by a user who knows the park ID. For example, a park button might have the ID 55. Other Phone Manager users who want to pick up a call parked in that park area can configure one of their own park IDs as 55 or use a short code. For example, the short code ***38*55#** might be used. For more information about short codes, see your system administrator.

You can also create a private park slot by using text in a Park ID. Other Phone Manager users can not pick up the call using a short code.

To create a personal park slot:

1. Click ⬎ **> Park ID**.
   Alternatively, click **View > Preferences > Park ID**. The Park ID window opens.

2. In a park slot field, enter a park ID. A Park ID can contain a maximum of 9 numeric or text characters. If the ID contain text other Phone Manager users can not pick up the call using a short code.

3. Click **OK** to save your changes.

Changing General Phone Manager Settings

You can control the features of Phone Manager by setting your preferences. Not all options are configurable by all users, some might be unavailable. For more information, see your system administrator.

Some fields are unavailable when using Phone Manager Lite. The table describes the features and indicates in which version of Phone Manager they are available.

Option	Lite	Pro	PC Softphone	Description
Pop Phone Manager	✔	✔	✔	When an incoming call is received or answered, the Phone Manager application 'Pops' to the front and becomes the foreground application.
Hide on Close	✔	✔	✔	Phone Manager is minimized to the System tray on the Windows task bar when you close the application rather than exiting. For more information, see <u>Using the Phone Manager Icon</u> ⌐123⌐.
Play Sounds	✔	✔	✔	Incoming calls are alerted by playing a sound.
Hide on no calls	✘	✔	✔	Phone Manager Pro automatically minimizes when you have finished all calls.
Pop on Answer	✘	✔	✔	Phone Manager Pro only pops when an incoming call is answered.
Pop on Page Call	✔	✔	✔	Phone Manager pops when a page call is received.
Enable VoIP	✘	✔	✔	If the user Name you have associated the Phone Manager with is a VoIP extension you must check this option.
Show All	✘	✔	✔	Display the All tab in the Call History panel.
Show In	✘	✔	✔	Display the In tab in the Call History panel.
Show Out	✘	✔	✔	Display the Out tab in the Call History panel.
Show Missed	✔	✔	✔	Display the Missed tab in the Call History panel.
Show Messages	✔	✔	✔	Display the Messages tab in the Call History panel.
Show Status	✘	✔	✔	Controls whether the Status pane comes to the front when a call is answered.
Show Account Codes	✘	✔	✔	Shows the account code available.

To change Phone Manager options:

1. Click ➘ > **Phone Manager**.
   Alternatively, click **View > Preferences > Phone Manager**. The Phone Manager window opens.

2. Check the required options and clear the options that you do not require.

3. Click **OK** to save your changes.

Selecting Queues to Monitor

The Queue ID settings are only available in Phone Manager Pro.
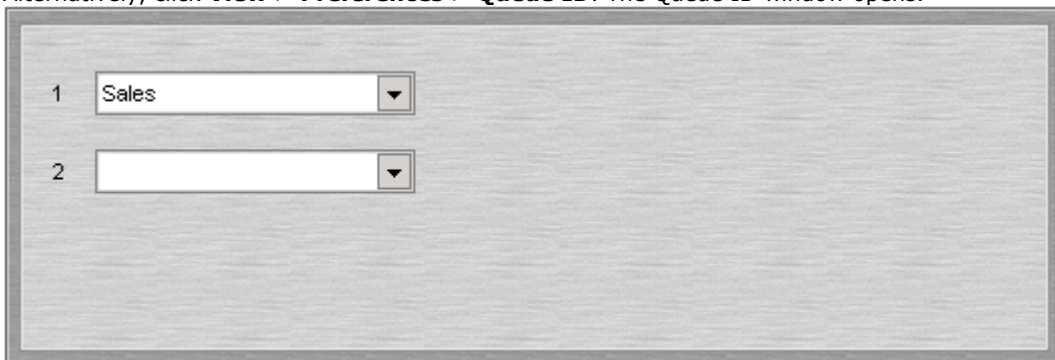
You can select up to two hunt groups. You can then monitor the number of calls being held in each queue. The hunt group must already exist on the system and must have queuing enabled. For more information, see your system administrator. Each drop down box gives a list of valid hunt groups.

When the hunt groups are selected the Queue tab is available in the Call History area. On the Queue tab the monitors indicate the number of calls currently queued for the specified hunt groups. Each call held in a queue is indicated by a blue box. If the mouse pointer is moved over a Queue monitor the number of calls in the queue is indicated. For more information, see Working with Queues 41 .

To select the queues to monitor:

1. Click   **> Queue ID**.
   Alternatively, click **View > Preferences > Queue ID**. The Queue ID window opens.

1	Sales
2	

2. In the Queue 1 field, click the name of the hunt group that you want to monitor.

3. (Optional) In the Queue 2 field, click the name of the hunt group that you want to monitor.

4. Click **OK** to save your changes.

Changing Short Cut Keys

You can change the short cuts assigned to specific features or functions. For more information, see <u>Short Cut Keys</u> [122].

To open the Short Cut Keys Preferences:

1. Click ✎ > **Short Cut Keys**.
   Alternatively, click **View > Preferences > Short Cut Keys**. The Short Cut Keys window opens.
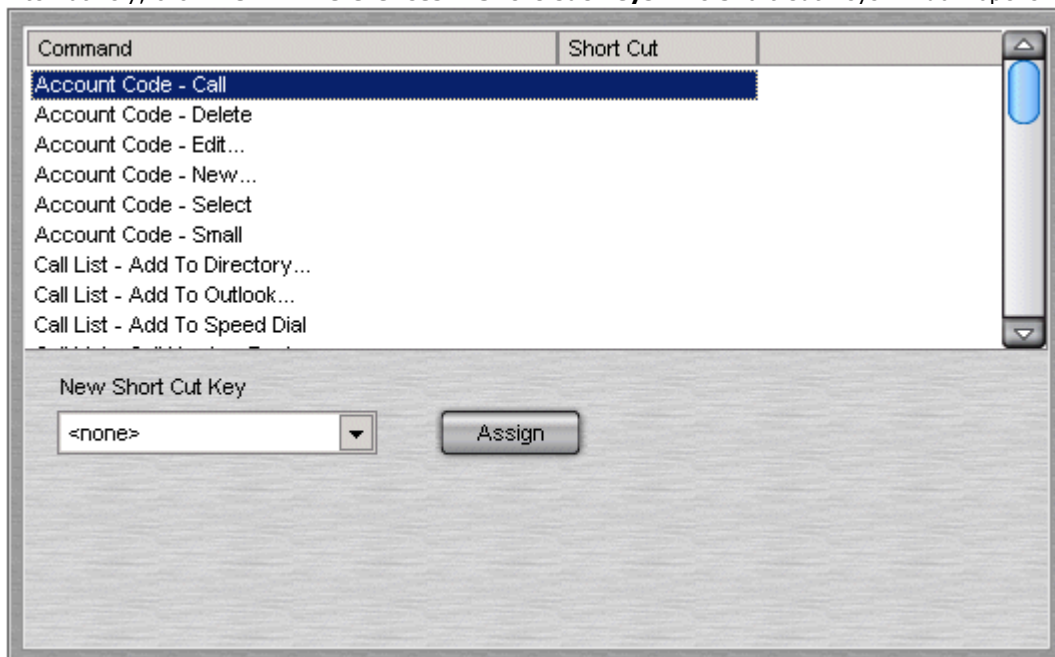
2. Click the Command you want to change.

3. Select the Short Cut Key from **Select new shortcut** drop down box.

4. Click **Assign**.

5. Click **OK** to save your changes.

Configuring Screen Pop

The screen pop settings are only available in Phone Manager Pro.

The screen pop window is used to enable integration to contact management packages so that Phone Manager can screen pop contact details. The screen pop options are only available when the content management packages are installed and are detected by Phone Manager.

Notes

- The ACT!, Goldmine or Maximizer database needs to be open on your desktop. The record of the caller pops in receipt of the call.

- If the screen pop options are unavailable, you are unable to change the settings. For more information, see your system administrator.

The content management packages that have been tested are:

- ACT! 6.0

- Goldmine 6.0 and 6.7

- Maximizer 7.5 Enterprise

- Microsoft Outlook (2000, 2003 and XP).

It should be noted that when set to pop on ringing, Phone Manager Pro will only pop for the first ringing call. If another call is received while the first is still ringing or has been answered, Phone Manager will not pop for the subsequent call until the first has either been cleared or held/parked.

Users should also note that when the second call does pop, depending on the application being used, the seconds calls data may overwrite the first. Therefore with some applications users should keep the first call connected and complete entering any manual call data into the application before clearing that call and allowing the subsequent call to pop the application with its call data.

To configure screen popping:

1. Click ↘ **> Screen Pop**.
   Alternatively, click **View > Preferences > Screen Pop**. The Screen Pop window opens.
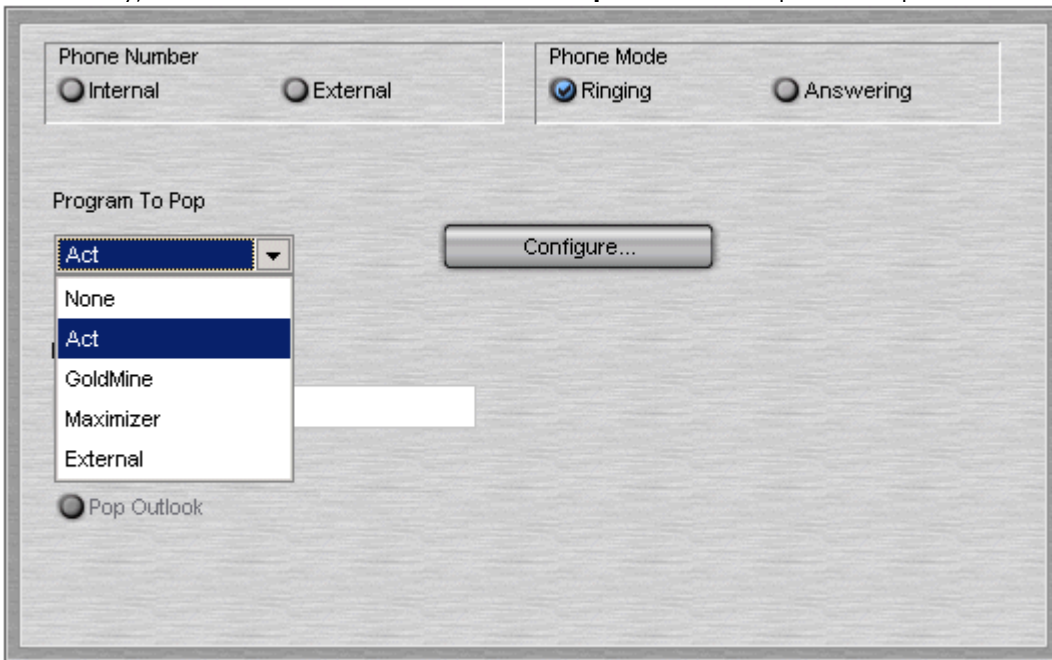
2. In the **Program to Pop** field, enter the content management package that you want to use.

3. The content management package must be configured. Click **Configure**.

4. Enter the required information depending on the content management package you selected.

   · **ACT!** - Enter your database file name (.dbf), the name of your Database and your password of the Act! Database.

   · **Goldmine** - Enter the path of the Server (gmw6.exe)

   · **Maximizer** - Enter the path of the Server (Maxwin.exe)

   · **External -** This is a Third party External Program specifier that is executed when normal popping would occur. Several call parameters are passed to the external program when called. For more information, see the Applications Installation and Administration guide.

5. (Optional) Select the **Outlook** option.
   If there are no matches for the incoming call in the selected content management package, Outlook is checked for a matching entry in the default Contacts folder. If the incoming number matches a number in one of your contacts that contact will pop up. MAPI must be installed on your PC for this facility to be available. For more information, see your system administrator.

6. Select the **Phone Number** option.

   · **Internal** - Check this box to pop the Phone Manager for internal numbers.

   · **External** - Check this box to pop the Phone Manager for external numbers.

7. Select the **Phone Mode** option:

   · **Ringing** - Check this box to pop Phone Manager when the telephone rings.

   · **Answering** - Check this box to pop Phone Manager when you answer the telephone.

8. Click **OK** to save your changes.

Selecting Telephone Controls

You can control the basic telephony features of your extension by setting your preferences.

Note

- If the Telephone options are unavailable, you are unable to change the settings. For more information, see your system administrator.

To set your telephone preferences:

1. Click ➘ **> Telephone**.
   Alternatively, click **View > Preferences > Telephone**. The Telephone window opens.
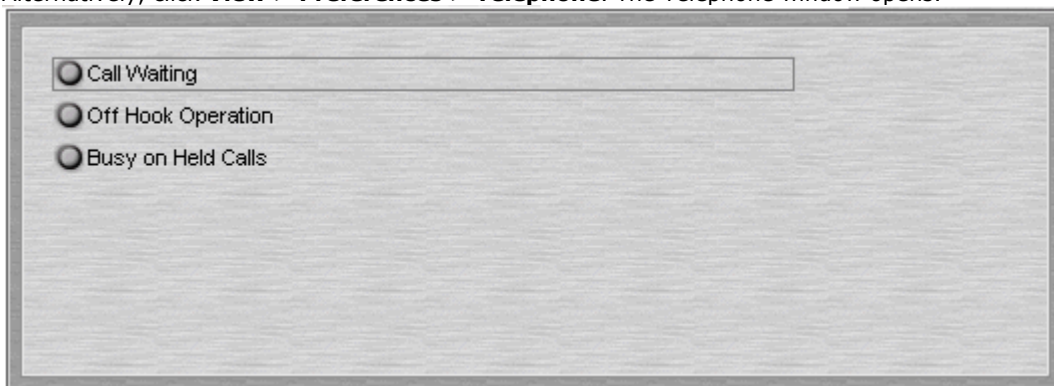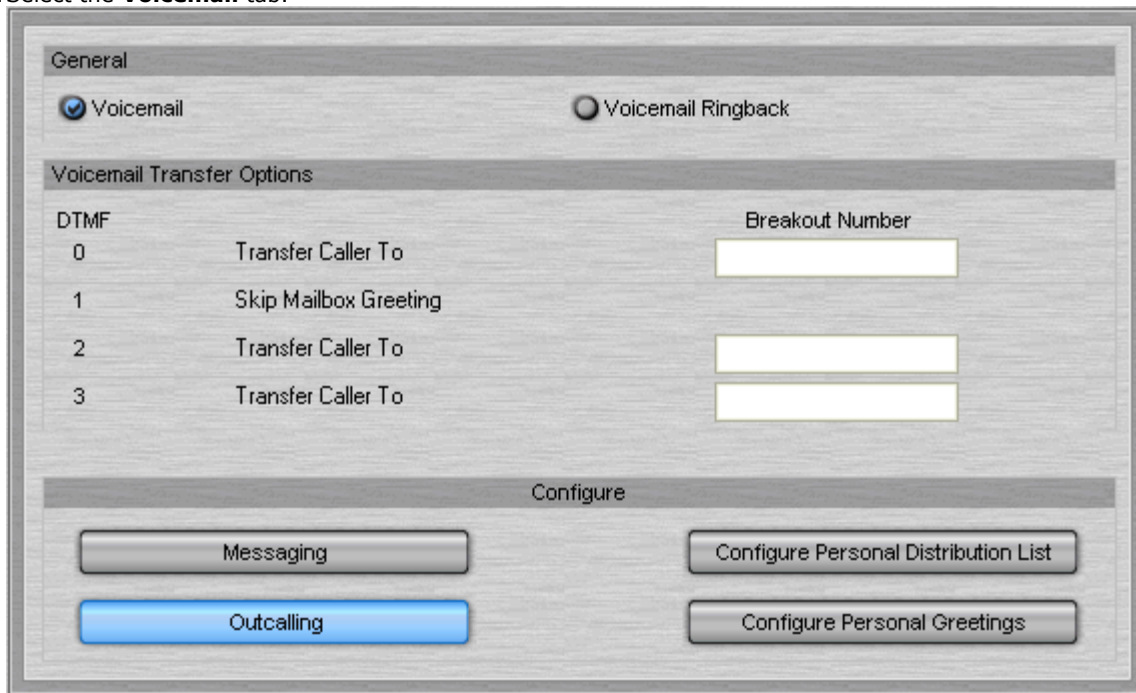
2. (Optional) Select the **Call Waiting** check box to turn on call waiting. This allows a call to be presented to your telephone even when it is in use. A beep is heard and Call Status [20] shows who is calling. Press 'Recall' on the phone, or select the second call in Call Status. You will receive the waiting call and your current call will be placed on hold. You can then swap between calls by clicking the call you require.

   · The Call Waiting settings are ignored if you are configured as a call appearance user.

3. (Optional) Select the **Off Hook Operation** check box to turn on off hook operation. See Turning Off Hook Operation On or Off [112].

4. (Optional) Select the **Busy on Held Calls** check box to turn on busy on held calls. If selected, when the user has a call on hold, new calls receive the busy tone (ringing if analog) or are diverted to voicemail if enabled, rather than ringing the user. This overrides call waiting when the user has a call on hold.

5. Click **OK** to save your changes.

Configuring the Voicemail Options

You can control the voicemail operation of your extension by setting your preferences, assuming Voicemail is available on your system. Some options are only available if the user has access rights granted in IP Office Manager.

1. Click ![wrench icon] or select **View | Preferences**.

2. Select the **Voicemail** tab.

3. The options available may depend on the type of voicemail server installed with your IP Office system.

- **General** *(All voicemail server types)*

  - **Voicemail**
    Select whether your voicemail mailbox should be used to take messages from unanswered callers. Note that when off, other mailbox users can still forward messages to your mailbox.

  - **Voicemail Ringback**
    When selected the system automatically calls your extension to inform you that you have a new message. Ringback occurs after you replace your handset when you have an unread voicemail messages.

- **Voicemail Transfer Options**
  You can set alternate numbers to which callers hearing your mailbox greeting can select to be transferred. The numbers are set in the Breakout Number fields and if external should include any external dialing prefix used by your IP Office. If these options are configured you should include details of them in your mailbox greeting.

  - **0** *(All voicemail server types)*
    This option is used for callers who press 1 while listening to your mailbox greeting (*0 on Embedded Voicemail).

  - **1/2** *(Voicemail Pro 3.2+ Intuity mode, Embedded Voicemail 4.0+)*
    These additional breakout numbers are supported for callers who press 2 or 3 while listening to your mailbox greeting (*2 or *3 on Embedded Voicemail).

- **Configure**
  These buttons access additional menus for configuring voicemail settings. If the button is greyed out it may indicate that the feature is not supported by your voicemail server.

  - **Configure Personal Distribution List** *(Voicemail Pro running in Intuity emulation mode)*
    You can use Personal Distribution Lists (PDL) to create lists of other mailboxes to which you can then forward voicemail messages from your voicemail mailbox. See <u>Creating a Personal Distribution List</u> ₆₉.

  - **Configure Personal Greetings** *(Voicemail Pro running in Intuity emulation mode)*
    You can record a number of mailbox greetings and then configure which greeting to use for different types of calls. See <u>Using Personal Greetings</u> ₆₁.

  - **Messaging** *(Voicemail Pro 4.2+)*
    Used to configure the destination telephone numbers for use with Outcalling below.

- **Outcalling** *(Voicemail Pro 4.2+)*
  You can configure the voicemail server to call you at various numbers and times when you have new messages in your mailbox. See Outcalling Configuration .

4. When completed as required click **OK**.

Language

Phone Manager can run in one of a number of languages. To change language select View | Language and then select the language required. If the language required is greyed out then the required files for that language were not installed as part of the Phone Manager installation.

Note that if you change language you should close and restart Phone Manager for all the menus and controls to be updated to the newly selected language.

The required language fonts must be available on the PC and for some languages, the PC must be set to use that Windows Language for non-Unicode programs is set to the required language.

Setting your Preferences

This is a quick reference section about how you can handle calls by setting personal preferences. The options listed are some of the most popular changes made, not all preferences are covered. For more information, see Changing Phone Manager Settings 86.

Turning Voicemail On or Off

Callers can leave a message if your extension is busy or not answered after the No Answer Time. Voicemail requires configuration within IP Office Manager.

To turn Voicemail on:

1. Click ➘ > **Voicemail**.

2. Click the **Voicemail** option.

3. Click **OK** to save your changes.

For more information, see Configuring the Voicemail Options 107.

Turning Voicemail Ringback On or Off

Your telephone rings to indicate that you have a new message. Voicemail requires configuration within IP Office Manager.

To turn Voicemail Ringback on or off:

1. Click ➘ > **Voicemail**.

2. Click the **Voicemail Ringback** option.

3. Click **OK** to save your changes.

For more information, see Configuring the Voicemail Options 107.

Taking Your Calls from Another Extension

If you want to take your calls at another location, you can instruct the system to pass your calls to another internal or external number. This option must be set at your extension.

To take your calls at another extension:

1. Click ➘ > **Forwarding**.

2. Enter the extension number in the **Follow Me to Number** field.

3. Click **OK**. The title bar of Phone Manager Pro indicates that **Follow to** has been set.

To turn forwarding off:

1. Click ➘ > **Forwarding**.

2. Remove the extension number from the **Follow Me to Number** box.

3. Click **OK**.

For more information, see .

Transferring Back to Forwarded Extension

If Forward Unconditional is set a forwarded call can not be transferred back to the original destination. The Forward on Busy and Do Not Disturb feature is used to enable this facility.

For example, you have set all your calls to be forwarded to extension 203 using the Forward Unconditional feature. You are expecting an important call that will be forwarded to extension 203. Extension 203 can transfer the call to your extension if you set extension 203 as a Do Not Disturb Exception.

To enable a call to be transferred back to a forwarded extension:

1. Click ➘ > **Forwarding**.

2. Click **Forward Unconditional** and enter the extension number.

3. Click **Forward On Busy** and enter the same extension number.

4. Click **Do Not Disturb** tab.

5. Enter the Forward on Busy extension number as a Do Not Disturb Exception.

6. Click **Add**.

7. Click **OK**. When a call is received at the forwarded extension it can be transferred back to your extension.

For more information, see .

Setting Do Not Disturb (DND)

If DND is turned on, your telephone does not ring when incoming calls are received. The caller gets the Busy tone or is transferred to voicemail.

To turn on DND:

1. Click ✎ > **Do Not Disturb**.

2. Click **Do Not Disturb** option.

3. Click **OK**. The title bar of Phone Manager Pro indicates that DND is set.

To turn off DND:

1. Click ✎ > **Do Not Disturb**.

2. Click **Do Not Disturb** option to remove the selection.

3. Click **OK**. The DND indicator in the title bar of Phone Manager Pro is removed.

For more information, see .

Setting a Do Not Disturb Exception Number

You might be expecting an important call and wish to ensure that the call is answered even when you have Do Not Disturb set. This incoming number can be entered as a Do Not Disturb Exception.

To set a do not disturb exception number:

1. Click ✎ > **Do Not Disturb**.

2. Type the extension number in the DND Exception Number box. The variables "N" or "X" can also be used, N = any number of digits and X = one digit.

3. Click **Add**. The number appears in the **DND Exception List**.

4. Click **OK**.

To remove a do not disturb exception number:

1. Click ✎ > **Do Not Disturb**.

2. Select the number to be removed from the **DND Exception List**.

3. Click **Remove**.

4. Click **OK**.

For more information, see .

Turning Call Waiting On or Off

You can receive an incoming call when on another call. If Call Waiting is on a beep is heard and the <u>Call Status</u> [20] will show the call information. Click the second call in Call Status to answer the call and automatically place your current call on hold. You can then swap between the calls by clicking the call you require.

To turn call waiting on or off:

1. Click ➘ > **Telephone**.

2. Click **Call Waiting**.

3. Click **OK**.

Note

- The **Call Waiting** settings are ignored if you are configured as a call appearance user.

For more information, see <u>Selecting Telephone Controls</u> [106].

Turning Off Hook Operation On or Off

Off-hook station is intended for analog extensions, especially those being used in conjunction with the IP Office Phone Manager or SoftConsole applications. When enabled, the analog extension user is able to control calls using the IP Office application in the following ways:

- With the extension on-hook, calls can be initiated from the IP Office application. After entering the required number and making the call, the on-hook analog extension receives a ringback showing the users own caller ID and when answered the outgoing call is started.

- The IP Office application can be used to end a call with the analog extension still off-hook. Instead of hearing disconnect tone the user hears silence and can use the IP Office application to make another call. Though off-hook the user is indicated as idle on BLF indicators. Without off-hook Station set the user would be indicated as busy when off-hook, whether on a call or not.

- If off-hook and idle (having cleared a previous call), incoming call alerts by presenting ringing through the audio path. The call can be answered using the IP Office application or going on-hook/off-hook or by pressing recall. Note that if the phone normally displays call ID, any caller ID displayed on the phone is not updated in this mode, however the call ID in the IP Office application will be that of the current call.

- If on-hook, an incoming call alerts as normal using the phone's ringer and is answered by going off-hook. The answer call option in the IP Office application cannot be used to answer calls to an on-hook analog extension.

- While off-hook and idle, the analog extension user will receive page calls.

- Offhook Station is not intended for non-analog phone extension. However it enables the answer calls control in IP Office Phone Manager and so it is recommended that the option is selected for non-analog extension users.

To turn off-hook operation on or off:

1. Click ➘ > **Telephone**.

2. Click **Off Hook Operation**.

3. Click **OK** to save your changes.

For more information, see <u>Selecting Telephone Controls</u> [106].

Selecting the Tabs to Show in Call History

To select the tabs to show in the call history panel:

1. Click ✎ > **Phone Manager**.

2. Select the options required.

- **Show all:** displays call information for all incoming and outgoing calls.

- **Show in:** displays call information for incoming calls.

- **Show out:** displays call information for outgoing calls.

- **Show missed:** displays call information for unanswered incoming calls.

- **Show messages:** displays number of messages in Voicemail.

3. Click **OK** to save your changes.

For more information, see Changing General Phone Manager Settings 100.

Saving your Preferences

You can save the changes that you make to the Phone Manager configuration, including speed dials, directory information and other settings. By default, the profile file (**Profile.xml**) is saved in a sub-folder based on your extension number in **My Documents > Avaya** > **IP 400** > **PhoneManager** > **Profiles**.

Profiles can be saved to another location if required. Note however that the location must be one that remains avaibale to your copy of Phone Manager at all times.

To save your profile:
1. Click **File > Save Profile**.

2. Select the location to save your profile. This location will be used for subsequent loading and saving by Phone Manager and so should be a location at which the profile folder and files remain available. To access your profile from another computer you must save the profile to a location that can then be retrieved from another computer.

3. The file name should be left as **Profile.xml.** Phone Manager will save the file at the location specified into a sub-folder based on your extension number.

4. Click **Save**.

To load your profile:

1. Click **File** > **Load Profile**.

2. If necessary browse to the location of the **Profile.xml** file.

3. You will be requested to enter the login code that matches the extension number of the profile. If you haven't been issued an login code for the IP Office click **OK** without entering any code.

4. Click **Open**.

Moving /Copying a Profile

1. To move or copy a profile move the whole folder. Do not move/copy just the Prfofile.xml file.

Using the Phone Manager Pro Versions

PC Softphone Operation

The system administrator can create VoIP extensions. When Phone Manager Pro is associated with a VoIP extension number and **Enable VoIP** is selected in the Phone Manager preferences, two additional controls become active.

- Click the drop-down symbol to display a volume slider.

- Click the main body of either icon to turn mute on/off. An example of a muted icon is shown.

This type of operation is also called IP Soft Phone.

VoIP only works if:

- the PC has audio setup, for example, speakers and microphone or a headset and microphone.

- licenses are available.

For more information about configuring a Softphone user see the Applications Installation and Administration guide.

 <<<If switch off, to re-enable close PM and restart and then reselect>>>

Hands Free Operation

Phone Manager Pro only.

The Phone Manager Pro application can be used in conjunction with a hands free phone or headset. When using a hands free phone or headset, the telephone must be left off-hook permanently. The "Off Hook Operation" option must be set under the **Telephone** tab of the Configure Preferences dialog box. For more information, see Selecting Telephone Controls 106. All calls are answered, transferred, queued and so on by clicking the appropriate Phone Manager call handling icons.

Note

- Under normal operation nothing is heard in the headset when the 'phone' is left in the off-hook state. Clicking the answer icon at this point answers the call, equivalent to picking up a telephone handset.

- If you use an analog telephone you will hear the Ringing Tone in the headset when an incoming call is presented to the extension. You will also hear the Dial Tone when the Call button in the Call 37 window is pressed.

Agent Mode Operation

Phone Manager Pro only.

Phone Manager can be used as a call center tool in Agent Mode. You can perform several call center functions without needing a specially designed call center telephone with dedicated keys for functions such as busy wrap up.

- Avaya recommends that only Avaya telephones are used in call centers. Most standard telephones are not designed for normal call center conditions, for example, the high number of on-hook, off-hook actions and key presses. Standard telephones are okay in most domestic and business situations, they are likely to fail frequently in a call center environment.

Agent Mode is enabled through the **Agent Mode** tab within **Preferences**. Logging on and logging off is separate from Agent Mode. For more information, see Logging in as an Agent 9 .

In Agent Mode:

- Phone Manager displays **Busy Wrap Up** and **Busy Not Available** icons. You can use the icons to go into those states.

  - Use **Busy Wrap Up** when you temporarily need to stop receiving calls when you 'wrap up' the details of the call just finished.

  - Use **Busy Not available** when you need to stop receiving calls for some other reason.

- The **Select Group** icon shows the groups for which you will receive calls when not in Busy Wrap Up or Busy Not Available. For more information, see Configuring Agent Mode 87 .

- The **Start** and **Stop** icons are available for recording conversations. Call recording requires IP Office Voicemail Pro. For more information, see Recording a Call 40 .

- You can use the **Account Codes** tab to make calls with the appropriate account code or to easily apply an account code to a current call. For more information, see Using Account Codes 48 .

- In Agent Mode, the functions of the F1 and F3 keys are swapped. F1 becomes 'account code' and F3 becomes 'call'. These are the default settings.

Changing the Look of Phone Manager

Using Phone Manager in Compact Mode

Phone Manager Pro only.

Compact mode runs Phone Manager on your screen in a considerably reduced mode, as shown in the example. Phone Manager must be configured if you want to continue in Compact mode when you make or receive a call. For more information, see Viewing Phone Manager in Compact Mode ⌐89⌐.

To view Phone Manager in Compact mode:

1. Click ⬍ in the toolbar.
   You can also view Phone Manager in compact mode by:

   · Click the compact mode glyph ⬚. This is at the bottom right of the Phone Manager main window.

   · Select **View** > **Compact View**.

To close Compact view:

1. Click ⬍ in the toolbar.
   You can also return to the full screen by:

   · Click the compact mode glyph ⬚ again.

Using Phone Manager in Compact Mode

When using Phone Manager in Compact mode there are several ways to handle your calls. The slider provides information about the caller. Depending on the state, the controls on the slider change automatically.
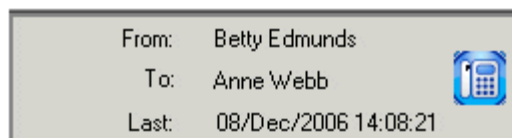
When you receive a call in compact mode a slider opens. The slider contains details of the incoming caller and the last date and time the caller called. If this does not happen you need to select the preference **Stay in Compact Mode on Receiving a Call.** For more information, see Viewing Phone Manager in Compact Mode ⌐89⌐.

To answer a call:

1. Click the flashing Answer Call button on the slider. When the call is answered the slider shows the duration of the call.

   · Alternatively, click the Answer Call button on the menu bar. Phone Manager reverts to full Phone Manager mode.

To end a call:

1. Click on the slider or in the Compact mode main menu.

To make a call:

1. Click .
   Phone Manager reverts to full Phone Manager mode.

Loading a Skin

The 'look' of Phone Manager is controlled by the skin that has been loaded. New skins can be created and loaded using skin development software. For more information, see the Applications Installation and Administration guide.

To load a new skin:

1. Click **View** > **Load Skin**.

2. Browse to the folder that contains the new skin and select the .ini file. Phone Manager skin files are located in C:\Program Files\Avaya\IP Office\Phone Manager\Skin\.

3. Click **OK**.

Default Sizing

This option is used to return the Phone Manager window to its original size.

To change the window size:

1. Click **View > Default Sizing**. You are asked if you are sure.

2. Click **Yes** to resize the Phone Manager window to its default size.
   Click **No** to cancel the resizing request.

Chapter 7.
Appendix

Appendix
Hints & Tips

The **Call History** tabs each display information on a maximum of 100 calls. The oldest record is then replaced.

1. Park IDs can contain a maximum 9 characters.

2. If a particular feature does not appear to work, try closing and opening Phone Manager Pro. All configuration changes are saved when the application is closed. Phone Manager Pro looks for all configurations on start up.

3. If the Status tab does not come to the front when a call is answered, the Phone Manager settings need to be changed. For more information, see Changing General Phone Manager Settings 100.

4. The Status tab automatically comes to the front 15 seconds after displaying the Script tab. If you want the script to remain in view, clear the Show Status option. For more information, see Changing General Phone Manager Settings 100 .

5. If a call to an internal user is not answered within the No Answer Time, and the user has voicemail enabled, you are prompted to leave a message. When you have finished the call, the call information is listed in Call History under the Out tab. Double-click the call information to redial the number.

6. If you are dialing a busy extension from your handset and your call does not go through to voicemail the Ringback icon is available. When the destination becomes free your telephone will be called back. If the Ringback call is answered a new call is automatically placed on the destination extension. If the Ringback is not answered the call is cancelled.

7. Do not use spaces when typing the telephone number. For example, type 123456 not 123 456.

8. The Tag feature is only available for internal calls and is not supported for VoIP extensions.

9. You can not modify the transfer options if you do not have permission to configure voicemail. For more information, see your system administrator.

10. If more than one Speed Dial is created for the same internal user, only one Speed Dial acts as a Busy Lamp Field.

11. In order for the Busy Lamp Field feature to operate, your PC must be on the same physical LAN as the PBX. For more information see, your system administrator.

12. If you use a group key or function on your telephone to go in or out of group, it will do so for all groups of which you are a member rather than just those selected in the Agent Mode tab.

13. In Agent Mode, the functions of the F1 and F3 keys are swapped. F1 becomes 'account code' and F3 becomes 'call'.

Tool Bar Icons

The icons in the main Phone Manager window help you to make and receive calls.

Make a Call - For more information, see [Making a Call](#) 36.

Answer a Call - For more information, see [Answering a Call](#) 35.

Set Ringback when Free. - For more information, see [Making a Call](#) 36.

Place a Call on Hold - For more information, see [Holding a Call](#) 38.

Add a Call to a Conference - For more information, see [Creating a Conference Call](#) 46.

Hangup a Call - For more information, see [Ending a Call](#) 36.

Transfer a Call - For more information, see [Making a Consultation Call](#) 43.

Complete a Transfer - For more information, see [Making a Consultation Call](#) 43.

Configure Preferences - For more information, see [Changing Phone Manager Settings](#) 86.

Compact View - For more information, see [Using Phone Manager in Compact Mode](#) 116.

Speaker Volume - Click drop down to adjust the PC speaker volume. Click to turn mute on/off. For more information, see [PC Softphone Operation](#) 114.

Microphone Volume - Click drop down to adjust the PC microphone volume. Click to turn mute on/off. For more information, see [PC Softphone Operation](#) 114.

Book a Conference - This icon is used to book an IP Office Conferencing Center Conference. The icon is only available if permission is specified by your system administrator. For more information, see [Phone Manager and Conferencing Center](#) 47.

Join a Conference - This icon is used to join an IP Office Conferencing Center Conference. For more information, see [Phone Manager and Conferencing Center](#) 47.

If Phone Manager is being used in Agent Mode additional icons show:

Busy Wrap Up - Allows you to go in and out of busy wrap-up state. The Status tab shows "Busy Wrap Up" when in that state. If the Busy Wrap Up icon is unavailable, you are not currently a member of any group. If all your group memberships are removed or disable when in busy-wrap up, Phone Manager continues to display Busy Wrap Up until restarted. For more information, see [Agent Mode Operation](#) 115.

Busy Not Available - Used to go in and out of busy not available state. The Status tab shows "Busy Not Available" when in that state. For more information, see [Agent Mode Operation](#) 115.

Select Group - Displays the groups for which you are an available member when not in Busy Wrap Up or Busy Not Available. For more information, see [Agent Mode Operation](#) 115.

Start Recording - Click the icon to Start Recording a call. For more information, see [Recording a Call](#) 40.

Stop Recording - Click the icon to Stop Recording a call. For more information, see [Recording a Call](#) 40.

Short Cut Keys

The listing shows the default operation of the function keys. All the functions keys can be configured in the Shortcut configuration form.

F1   **Call** - For more information, see [Making a Call](#) 36.

F2   **Transfer** - For more information, see [Transferring a Call Unsupervised](#) 44.

F3   **Account Code** - For more information, see [Using Account Codes](#) 48.

F4   **Hold Call** - For more information, see [Holding a Call](#) 38.

F5   **Record** - For more information, see [Recording a Call](#) 40.

F6   **Absent Status** - for more information, see [Setting an Absent Message](#) 75.

F9   **Park**/**Unpark** - For more information, see [Parking a Call](#) 39.

F10   **Park**/**Unpark** - For more information, see [Parking a Call](#) 39.

F11   **Park**/**Unpark** - For more information, see [Parking a Call](#) 39.

F12   **Park**/**Unpark** - For more information, see [Parking a Call](#) 39.

Enter   **Answer** - For more information, see [Answering a Call](#) 35.

Esc   **Clear**

End   **Hangup** - For more information, see [Ending a Call](#) 36.

Note
- When Phone Manager is in Agent Mode, the roles of the **F1** and **F3** functions are swapped.

Using the Phone Manager Icon

When the option Hide on Close is selected, Phone Manager is minimized to the System tray on the Windows task bar when you close the application rather than exiting.

The Phone Manager icon will have either a red or green screen.

- - Calls missed. Place your cursor over the icon in the System tray and the number of missed calls are shown.

- - No missed calls.

When you receive a call the icon will flash, the screen colour in the icon changing from red to green until the call is answered. If the call is answered by your voicemail the icon indicates that you have missed a call.

To open Phone Manager using the icon:

1. Double-click the icon in the System Tray.
   Alternatively, right-click the icon and select **Pop Phone Manager**.

If you right-click the icon you also have the following options:

- **Pop Outlook** - Opens Outlook if the Screen Pop option has been configured. For more information, see Configuring Screen Pop 104.

- **Clear Missed Calls** - Clears the details of calls that have not been answered from the Call History area. The Phone Manager icon changes from red to green when the missed calls have been cleared. For more information, see The Missed Tab 24.

- **Call** - Opens the Phone Manager Call window. For more information, see Using the Call Window 37.

- **Hangup** - Ends any call that you are connected to.

- **Exit Phone Manager** - Closes the application.

Phone Manager Information

The mode in which Phone Manager is running and the associated user are shown in the title bar. In addition to this it is also possible to display information about the version of Phone Manager and other information. This information may be requested when reporting a problem.

1. Select **Help | About Phone Manager**.

2. The **About Phone Manager** menu display the software version of Phone Manager. The software version on the IP Office system and the IP Office Voicemail Pro voicemail server are also shown.

3. To display license information for Phone Manager, place the cursor over the Phone Manager version number and then simultaneously press Ctrl+Alt+Shift.