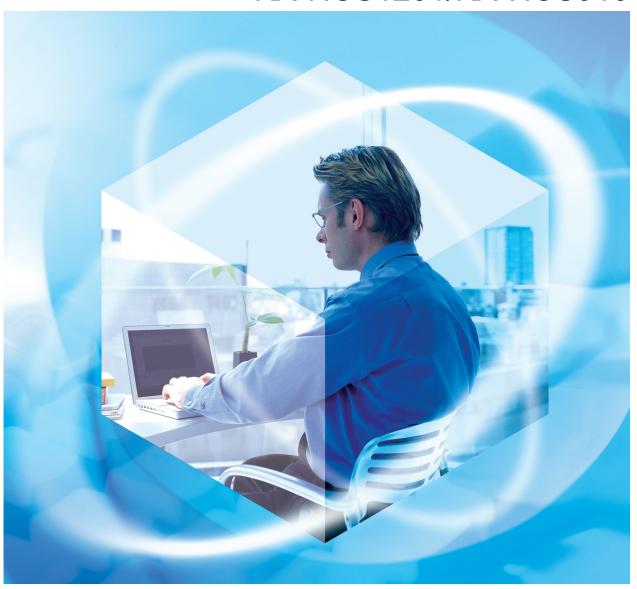
Panasonic®

Operating Manual—Client

Phone Assistant Series

Model No. KX-NCS1101/KX-NCS1105 KX-NCS1110/KX-NCS1199 KX-NCS1201/KX-NCS9101



Thank you for purchasing this Panasonic product.

Please read this manual carefully before using this software and save this manual for future use.

Introduction

The Phone Assistant (PA) application is an intuitive Computer Telephony Integration (CTI) software solution to enhance the productivity of Panasonic Private Branch Exchange (PBX) telephone users. PA software consists of the following software components:

- **1.** PA—used by phone users
- 2. PA Status—for supervisors and operators
- 3. PA Manager (Web server)—perform configuration and setup for all PA users
- 4. PA Server (CTI Control)—core engine for all PA software

Notice

The screen shots may be different from the actual software.

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1 Starting Phone Assistant

1.1 Starting Phone Assistant for the First Time

To start the application:

1. Double-click the shortcut on your desktop, or start the Phone Assistant from the Start menu: Start → All Programs → Panasonic → Phone Assistant → Phone Assistant

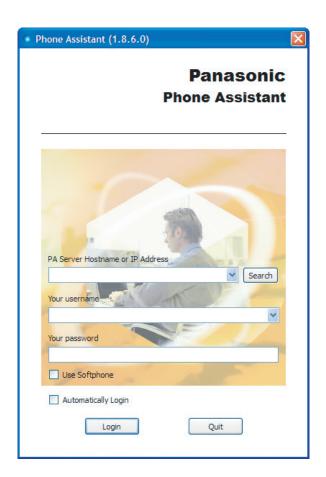


2. Enter the server host name or the IP address.

—or—

Click Search for all the PA Server available on the network.





Note

When the software cannot connect to the PA Server, the following error message will appear.



This error screen also appears when the **Phone Assistant Server Hostname or IP Address** field is either empty or incorrect.

What to do:

Click **OK** to continue, check your server IP address and attempt to connect to the server again. In some cases, it is recommended to use the **Search** button to refresh the PA Server list.

- 3. Enter your user name in the Your username field.
- **4.** Enter your password in the **Your password** field.

Note

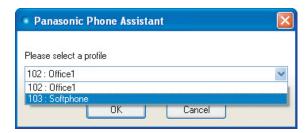
 When the Automatically Login option is checked, you can log in to PA without manually entering your user name and password every time.



5. Click Login.

Note

If 2 or more extensions are set in your profile on PA Manager, the profile selection dialogue box will appear.



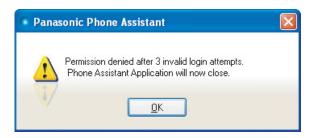
Select a profile from the drop-down list and click **OK**.

After you have successfully logged in to the application, the Information Panel will appear in **Compact** mode.



Note

If you cannot successfully log in after 3 attempts, the following error message will appear.

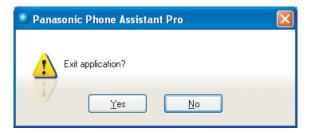


What to do:

Click **OK**, and PA will exit. Launch PA and try logging in again.

To exit the application:

1. Click the close button.



A dialogue box asking you to confirm the operation will appear.

2. Click Yes.

1.2 Logging In after the First Time

To log in to the application:

1. Double-click the shortcut on your desktop, or start the Phone Assistant from the Start menu: Start \rightarrow All Programs \rightarrow Panasonic \rightarrow Phone Assistant \rightarrow Phone Assistant



2. Select your user name from the drop-down list by clicking the arrow.



- **3.** Enter your password in the **Your password** field.
- 4. Click Login.

Note

If 2 or more extensions are set in your profile on PA Manager, the profile selection dialogue box will appear.



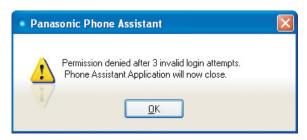
Select a profile from the drop-down list and click **OK**.

After you have successfully logged in to the application, the Information Panel will appear in **Compact** mode.



Note

• If you cannot successfully log in after 3 attempts, the following error message will appear.



What to do:

Click **OK**, and PA will exit. Launch PA and try logging in again.

To exit the application:

1. Click the close button.



A dialogue box asking you to confirm the operation will appear.

2. Click Yes.

A notice appears if you do not have a valid license for Pro mode. You may log in to Pro Trial mode or Express mode instead if you meet the following conditions.

You can log in to Pro Trial mode if:

- you do not have a Pro license.
- the number of users does not exceed the user capacity for Pro Trial mode.
- the 60 day trial period has not expired.

You can log in to Express mode if:

- you do not meet the conditions to log in to Pro Trial mode.
- the number of users does not exceed the user capacity for Express mode.

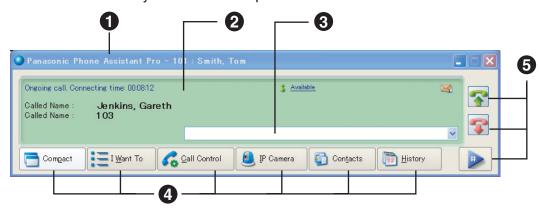
When the number of PA users exceeds the user capacity for each mode, the following message will appear.



2 Interface Overview

2.1 User Information Panel

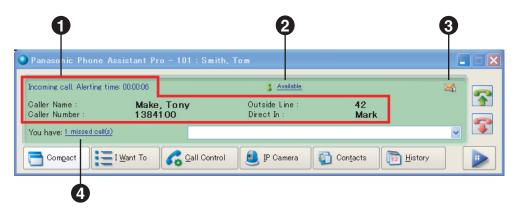
The User Information Panel is the central point of the application where all of the most important information can be monitored at any time. All of the important functions can be started here.



The User Information Panel is composed of the following:

- 1 Title Bar
 - Displays your extension number and name
- User Information Field
- Information Panel Text Box
- Function Tabs
- G Control Buttons

User Information Field



The following information related to the PA user is displayed in this field:

1 The user's current call activity

Shows information about any new/ongoing active communication processes.

Depending on the current operation, the following information may be shown:

Incoming call

When there is an incoming call, information about the call is shown, and you can select what action to take (e.g., answer the call). By default, the **Call Alert** screen appears when there is an incoming call. Please refer to 3.2.2.2 Answering Calls for details.

Outgoing call

When you are making a call, information about the call is shown.

Ongoing (Current/Active) call

If there is an ongoing call, information on the current status of that call is shown.

The following information is displayed about a call:

Caller Name (Incoming)/Calling Name (Outgoing)

The name of the other party, if available.

Caller Number (Incoming)/Calling Number (Outgoing)

The number of the other party.

- Outside Line

The number and name (if available) of the outside line being used. This is only displayed for outside, (i.e., non-extension), calls.

Direct In

The name of the direct dialing in (DDI) number being used, if available.

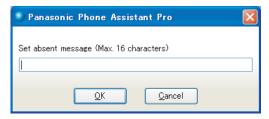
Absent Message

Displays a message (e.g., the reason for absence) seen by other PA users.

You can set your message by clicking the icon. When no Absent Message is set, Available is displayed.



When Option is selected, the Absent Message window will appear. You can assign a custom Absent Message of up to 16 characters.

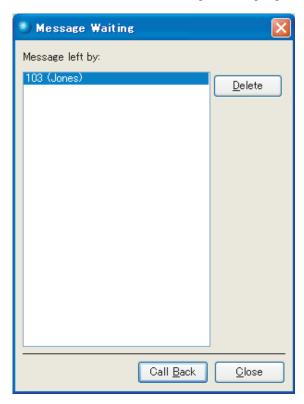


Message Indicator

When a Message Waiting signal has been left on your extension, the message indicator is displayed in the User Information field.



Clicking the Message Waiting icon and selecting "Display Message Waiting List" displays a window that lists extensions that left a Message Waiting signal.



- Click Call Back to call the selected extension.
- Click **Delete** to remove the selected message information.

If you have voice mail configured, a will be displayed when you have no Message Waiting signals at your extension. Clicking the icon and selecting "Call Voice Mail" allows you to access your voice mail. Please refer to 4.1.9 Voice Mail for details on configuring voice mail.

Missed Calls Notification

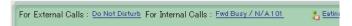
The following notification appears when you miss any calls:

· (The number of) Missed calls

When you do not answer an incoming call, the call is marked as a missed call, and the Missed Calls Notification will be displayed in the User Information field. When you click the Missed Calls Notification field, the missed calls overview appears in the **History** tab, and the Missed Calls Notification is removed from the User Information field.

When you click the Show Incoming Missed Calls button in the **History** tab, the Missed Calls Notification is removed. Please refer to 3.5 History Tab for details.

Forwards/DND Status



Displays your current Forwards/DND settings, and allows you to change your Forwards/DND settings. By clicking the blue underlined text, you can create function presets that you can easily access from this control. You can create up to 20 presets. The following features are available for function presets.

- Forwards/DND
 - Configure the Forwards/DND settings for internal and external calls.
- Absent Message
 - Display a custom absent message.
- Feature Number
 - Specify a phone number to dial when the preset is selected.

Information Panel Text Box

Calls can be made by entering telephone numbers in the text box shown below.

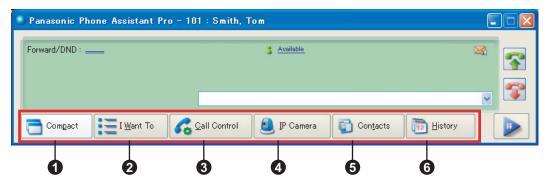


- The Information Panel Text Box is a general purpose box that records data that you enter. Pressing ENTER when the text box contains data records that data.
- The last 10 outgoing calls (internal/external) are stored, including new calls and transferred calls.
- The text box shows the currently called extension number when you make a new call.
- You can choose from the list of previously entered numbers. When a number is chosen from the list, the contents of the text box changes to that number. You can still make changes to this number.

A maximum of 32 characters can be entered in the text box.

Function Tabs

There are 6 function tabs that you can select:



Compact

Closes any tabs that are currently open.

I Want To

Provides shortcuts for certain functions. Please refer to 3.1 I Want To Tab for details.

Call Control

All the call activities are managed through here. Please refer to 3.2 Call Control Tab for details.

4 IP Camera

Specifies the availability of an IP Camera. Please refer to 3.3 IP Camera Tab for details.

Contacts

You can manage your contact list within this function tab. Please refer to 3.4 Contacts Tab for details.

6 History

You may view both incoming and outgoing Call Logs. You may also make a call from the Call Log. Please refer to 3.5 History Tab for details.

Control Buttons

There are 3 buttons that help you to manage your call activity:



Answer or Dial button

The Answer or Dial button has 2 functions:

- Make a call
 - If you have entered a number in the Information Panel Text Box, clicking this button will dial that number.
- Answer a call
 - If there is an incoming call, you can answer it by clicking this button.

A Hang Up button

You can end an ongoing call by clicking this button.

❸ Keypad/IP Softphone button

When you click the Keypad button, a numeric keypad will appear, which you can use to enter a phone number.



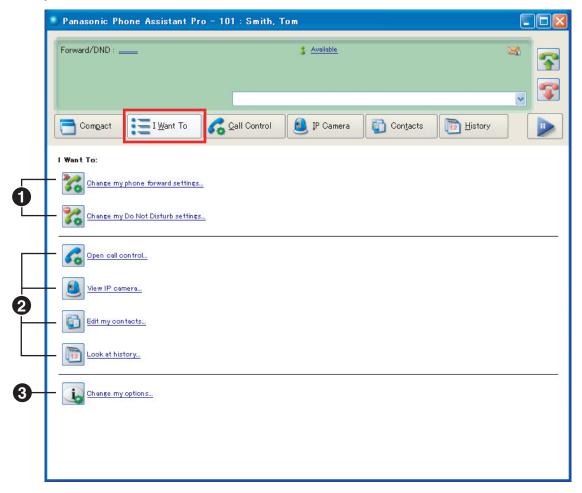
If you are using the IP Softphone, clicking this button will display the IP Softphone interface.

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3 Operation with Tabs

3.1 I Want To Tab

The **I Want To** tab gives you easy access to the most commonly used functions. The screen below is shown when you click this function tab.



- These 2 options allow you to set the Forward or DND settings. When you select these options, sub options are displayed. You can go back to the previous screen by selecting Back or to the default screen of the I Want To tab by selecting Home.
- 2 The 4 middle options (shortcuts) are actually links to other function tabs in this application. Selecting these options will activate the corresponding function tab.
- Selecting Change my options... opens the Profile Option screen. Please refer to 4.1 Profile Options for details.

3.1.1 Changing Forwarding Settings

Clicking **Change my phone forward settings...** lets you configure the settings for automatically forwarding calls received at your extension.



1. To change the call forwarding setting, click the desired type of calls.









- All calls...
 - All incoming calls will be forwarded to the specified number.
- External calls...
 - All external calls will be forwarded to the specified number.
- Internal calls...
 - All internal calls will be forwarded to the specified number.
- None (Clear my Forwards/DND)
 - All call forwarding settings and DND settings are cleared.
 - The control returns to the main screen of the I Want To tab.
- **2.** Click one of the options below to decide when calls should be forwarded.









Always...

The incoming call is forwarded regardless of the Phone Presence.

On busy...

The incoming call is forwarded only when your extension is busy on another ongoing call.

On no answer...

The call is forwarded only when your extension does not answer the incoming call.

On busy/no answer...

The call is forwarded when both your extension is busy on another ongoing call or when the call is not answered.

3. Enter the extension number into the Information Panel Text Box.



After the number is entered in the Information Panel Text Box, click **OK**, then the call forward setting to the specified number will be set, and the control returns to the main screen of the **I Want To** tab. When making the setting, you may abort the setting and return to the previous page by clicking the options **Back** or **Home**.

3.1.2 Changing Do Not Disturb Settings

You can enable Do Not Disturb (DND) by clicking **Change my Do Not Disturb settings...**. When Do Not Disturb is enabled, you will not receive incoming calls.

1. Click Change my Do Not Disturb settings....



2. The following options appear. Click the desired type of DND setting:



- **3.** The following texts corresponding with the type of DND setting displayed in the Information Panel Text Box.
 - Enable Do Not Disturb (All Calls)
 DND is enabled for both internal and external calls.
 - Enable Do Not Disturb (Internal only)
 DND is enabled for internal calls only.
 - Enable Do Not Disturb (External only)
 DND is enabled for external calls only.
 - Clear All Forwards/Do Not Disturb
 Disable DND and call forwarding for both internal and external calls.

3.1.3 Shortcuts

The **I Want To** tab provides a set of shortcuts which you can use to perform frequently used functions or to configure profile options.











Open call control...

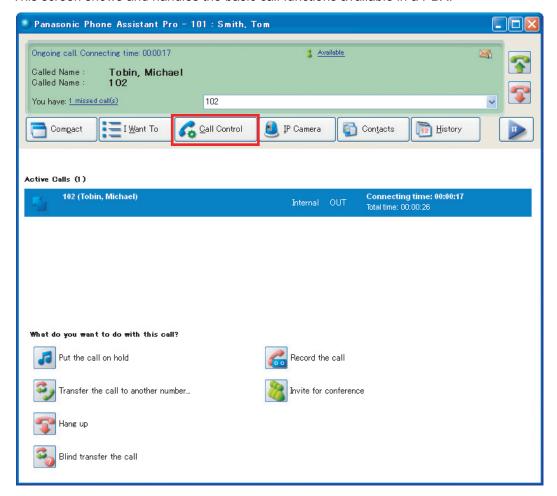
This is a shortcut to the Call Control tab. Please refer to 3.2 Call Control Tab for details.

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- · View IP camera...
 - This is a shortcut to the IP Camera tab. Please refer to 3.3 IP Camera Tab for details.
- · Edit my contacts...
 - This is a shortcut to the **Contacts** tab. Please refer to 3.4 Contacts Tab for details.
- · Look at history...
 - This is a shortcut to the **History** tab. Please refer to 3.5 History Tab for details.
- · Change my options...
 - This is a shortcut to **Profile Option**. Please refer to 4.1 Profile Options for details.

3.2 Call Control Tab

This screen shows and handles the basic call functions available in a PBX.



3.2.1 Active Call Information

The Active Calls information will be shown under the Call Control tab.



For each active call, the following information is displayed in the **Active Calls** field:

- Information of the call (extension number and name)
- Type of call (internal or external)
- Direction of the call (incoming or outgoing)
 - When you are making a call, the extension number and name of the call destination are displayed.



When you receive a call, the extension number and name of the caller are displayed.



 When the call was forwarded by other extension or blind transferred, Forwarded from xxx will be displayed. The number and name of the original caller are also shown.

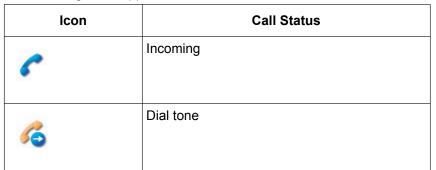


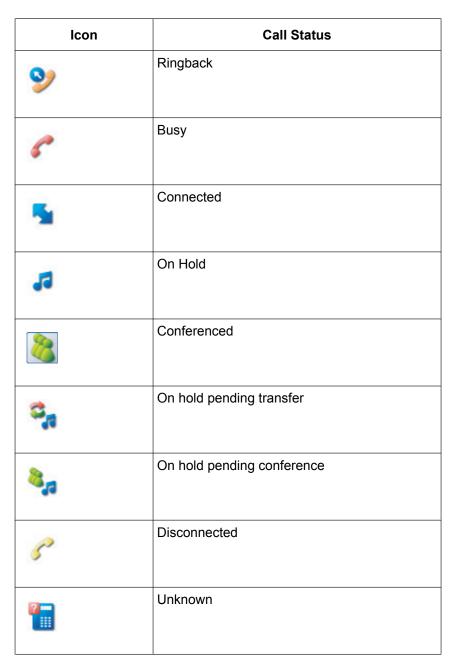
 When the call falls back after being on transfer or hold, Recalled from xxx will be displayed. The number and name of the original caller are also shown.



Call Status Icons

The following icons appear in the Active Calls field. Each icon describes the status of the active call.





- Duration of the call
 - **Dialing time**—From when you pick up the receiver to when the number is dialed completely.



Ringing time—From when the number is dialed to when the call is connected.



Connecting time—From when the call is connected to when it ends.



Total time—The total of the Ringing time and Connecting time.



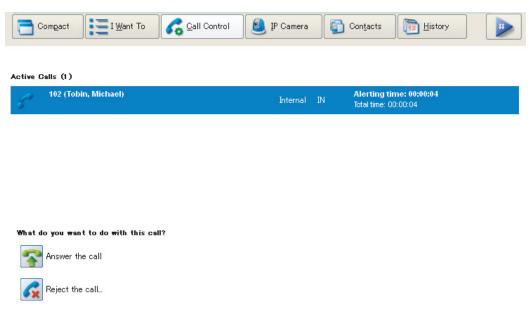
3.2.2 Active Call Handling

This topic specifies all of the call handling functions supported by PA.

There are 6 types of Active Call Handling functions available:

- 1. Make Calls
- 2. Answer Calls
- 3. Terminate Calls
- 4. Transfer Calls
- 5. Hold Calls or Retrieve Held Calls
- 6. Reject Calls

You can handle current calls by clicking the desired options (icons) available under **What do you want to do with this call?** in the **Active Calls** field. When there are no calls at your extension, no options (icons) are available.



The following options are available depending on the type of call.

Icon	Description
**	Answer the call

Icon	Description
€	Reject the call
3	Put the call on hold
3,	Transfer the call to another number
~	Hang up
30	Blind transfer the call
00	Record the call
8	Invite for conference
	Retrieve the call
©	Start chat
	Send e-mail
	Leave voice message
4	Set call back
44	Wait and send call waiting tone
	Leave message waiting

3.2.2.1 Making Calls

Dialing can be Performed to:

- · Another extension.
- An operator (depends on country/area).
- An outside party (automatic line access only).
- A private network (automatically)—(linked PBXs).

Dialing can be Performed by:

- Typing the number into the Information Panel Text Box.
- Hotkey dialing (Keyboard shortcut using clipboard [e.g., CTRL+A]). Using the clipboard (Plain/Text) from any application (copy/paste from application/WEB).
- Double-clicking the contact in the Contacts tab.
- Right-clicking the contact in the Contacts tab and selecting Call.
- Double-clicking the desired number in the History tab.
- Right-clicking the call log in the **History** tab and select Dial number.

After a Call is Made:

After dialing a number, one of the following situations can arise:

- A dial tone is heard and the call is answered.
- A dial tone is heard and the call is not answered.
- A busy tone is heard (the called extension is busy).
- A DND tone is heard (the called extension has set DND).
- The call is rejected or the called extension does not exist.
- The call cannot be made due to the extension's settings (e.g., not permitted to make outgoing calls).
- The call cannot be made due to sufficient resources (e.g., all trunks are occupied).

3.2.2.2 Answering Calls

When you receive a call, the **Call Alert** screen appears automatically.



Note

The alert is both visual and aural. It is possible to turn off both visual and aural alerts if necessary. Please refer to 4.1.5 Sounds and 4.1.6 Visualization for details.

Using the Answer Button in the Call Alert Screen, You can:

- Answer a call.
- Answer a call that has been put on hold.

Answer a call waiting (depends on the extension's setting in the PBX).

Answering Calls can be Performed by:

- Clicking Answer the call in the Call Control tab.
- Clicking Answer on the Call Alert screen.
- Hotkey dialing (Keyboard shortcut using clipboard [e.g., CTRL+A]).

When a Call Arrives:

The call is answered.

3.2.2.3 Terminating Calls

When you are on a call, the call may be terminated.

Terminating Calls can be Performed by:

- Hotkey dialing (Keyboard shortcut using clipboard [e.g., CTRL+D]). Using the clipboard (Plain/Text) from any application (copy/paste from application/WEB).
- Clicking the Hang Up button on the Information Panel.

After a Call is Terminated:

· The call will end.

3.2.2.4 Transferring Calls

When you are on a call, calls can be transferred to another extension or outside party. One of 2 options may be selected when transferring a call:

- Blind transfer the call (Unannounced)
- Transfer the call to another number... (Announced)

Either Transferring Option can be Performed by:

Entering the number into the Information Panel Text Box and clicking one of the options.

Note

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If you click either transferring option without entering a number into the Information Panel Text Box, the Contact List will be displayed. Double-click the extension number.

When either Transferring Option is Clicked:

- When the **Blind transfer the call** option is clicked:
 - The call will be transferred without informing the transfer destination about the call.
 - The transferred call will fall back if it does not get answered.
- When the Transfer the call to another number... option is clicked:
 - The call will be transferred after connecting with the transfer destination and informing him/her about the call.

The transferred call will fall back if it does not get answered.

3.2.2.5 Holding Calls or Retrieving Held Calls

Ongoing calls can be put on hold to be retrieved later.

Holding/Retrieving Held Calls can be Performed as Follows:

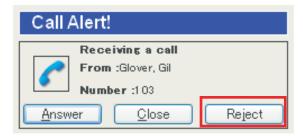
Highlighting the call in the Call Control tab and clicking Put the call on hold/Retrieve the call.

After a Call is Held or Retrieved:

- · Hold: puts the selected call on hold.
- · Retrieve: retrieves the held call.

3.2.2.6 Rejecting Calls

You may reject an incoming call.

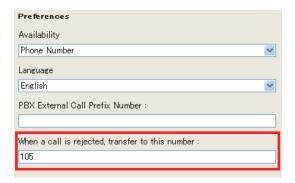


Rejecting Calls can be Performed by:

- Clicking Reject on the Call Alert screen.
- Clicking Reject the call... shown in the Active Calls field under the Call Control tab.

Note

You must specify the extension number or the mailbox number of the Voice Processing System to which rejected calls are transferred. Go back to the **I Want To** tab and click **Change my options...**. Please refer to 4.1.7 Preferences for details.



After a Call is Rejected:

The incoming call is transferred to the specified extension or Voice Processing System mailbox.

Note

When Close is clicked, the Call Alert screen disappears.

3.2.2.7 When the other party does not respond

When the party whom you are calling does not answer, the line is busy, etc., there are several operations you can perform to let the other party know that you called.

The following operations can be performed:

Operation	Description
Start chat	Start a one-on-one text chat with the called party if he or she is also logged in to PA.
Send e-mail	Send an e-mail to the called party using your computer's default e-mail application. The basic format of the e-mail can be configured in Option. Please refer to 4.1.10 Send Email for details.
Leave voice message	If the called party has voice mail enabled, leave a voice mail in his or her mailbox.
Set call back	Receive a call notifying you when the called extension becomes available.
Wait and send call waiting tone	Send a call waiting tone to the called party.
Leave message waiting	Leave a message waiting indication at the called extension.

Note

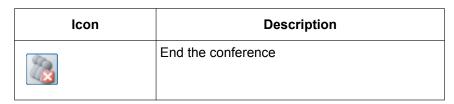
- Some operations may not be available due to PBX settings.
- A chat can only be initiated with another PA user who is logged in.

3.2.3 Conference Call

During a conversation, you can add additional parties to the conversation.

When you initiate a conference call, the following functions are displayed in your **Active Calls** screen.

Icon	Description
	Invite for conference
	Establish conference
8	Remove participant from the conference



Note

These functions are only available in the conference initiator's **Active Calls** screen.

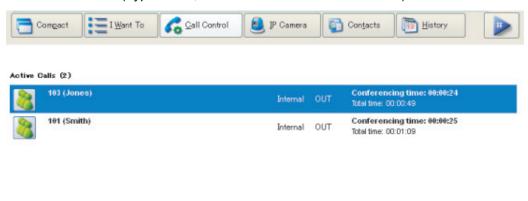
To Establish a Conference Call

- 1. Enter the desired extension number in the Information Panel Text Box.
- 2. Click Invite for conference.

Note

When the text box is empty and this option is selected, the Contact List is displayed. Double-click the extension number.

- **3.** After the invited party answers the call, click **Establish conference**.
- **4.** The following information about the conference participants will be displayed in the initiator's **Active Calls** screen.
 - Extension number or outside party number
 - Name
 - Call information (Type of call, Direction of call and Duration time)





In the **Active Calls** screen of the other conference participants, only the initiator's information will be displayed.

To Disconnect One Party from the Conference

- 1. Select the extension to be disconnected in the Active Calls screen.
- 2. Click Remove participant from the conference.

To Leave a Conference

You can leave the conference and allow the other parties to continue the conversation by clicking Redirect.

To Close a Conference

To close the conference, click End the conference.

3.2.4 Recording a Conversation

To record a conversation, a Panasonic Voice Processing System (VPS) needs to be connected to your PBX. Before using this function, assign a VPS mailbox number in the Voice Mail screen. Please refer to 4.1.9 Voice Mail for details.



You may record a conversation either manually or automatically.

Manual Recording

During a conversation, click **Record the call**. You can record a conversation into your mailbox. The following icon flashes while a conversation is being recorded.



The recording will stop when the call is terminated. If you wish to stop recording during a conversation, click **Stop recording**.



Automatic Recording

When **Automatic recording** in the Voice Mail screen is enabled, recording starts automatically when a call is started.



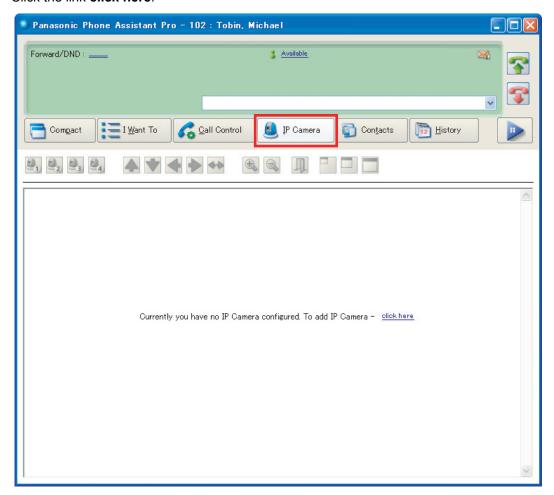
3.3 IP Camera Tab

3.3.1 Setting IP Camera

The **IP Camera** tab enables the integration of Panasonic KX-HCM/BB-HCM/BL-C series IP cameras. Using this feature, you can view live streaming video from up to 4 IP cameras connected to the network. It is also possible to control the IP cameras.

After clicking the **IP Camera** tab, follow the instructions below to start viewing video from an IP camera.

1. Click the link click here.



2. Assign an IP address to the IP camera in the IP Camera setting screen in Profile Option.



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This screen allows you to enable or disable IP cameras visible by PA users. You may specify which IP camera can be viewed from your **IP Camera** tab.

3.3.2 Operating IP Camera

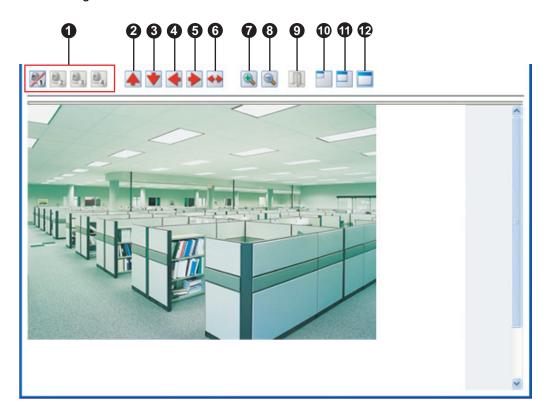
When you start using the IP camera functions, you are requested to enter the username and password that you assigned when configuring the IP camera.



IMPORTANT

Please refer to the manuals included with your IP camera for details about connecting your camera.

The following functions can be controlled in the **IP Camera** tab.



Select IP camera



Starts viewing



Stops viewing

- 2 Moves the camera view upward
- **3** Moves the camera view downward
- 4 Moves the camera view to left
- **6** Moves the camera view to right
- Pan scanning from left to right
- **7** Zoom in
- Zoom out
- Opens the door
- 10 Small screen size
- Medium screen size
- Large screen size

Doorphone and Door Opener

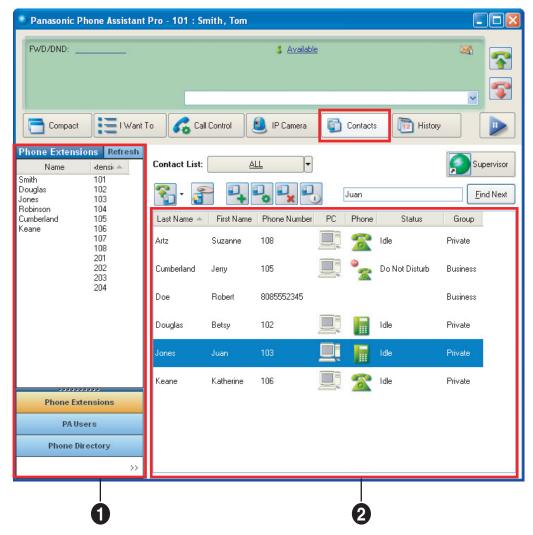
- If a doorphone and a door opener module are installed, you can open doors remotely using the PA application. To use this feature, the IP camera can be configured to monitor activity at the door. When a call is initiated from the door, you can monitor the door from the IP Camera tab.
- Doorphone link can be set for each IP camera by selecting the doorphone number and name.

IMPORTANT

Please refer to the Panasonic Hybrid IP-PBX manuals for details about the PBX settings to use doorphone.

3.4 Contacts Tab

There are 2 sections that show your contacts.



Contacts Directory List (CDL)

The CDL is the central repository of all contacts available in PA Server, the PBX and Microsoft® Outlook®.

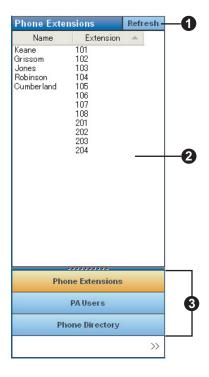
Contact List

The personal Contact List can be edited.

The following buttons are available in the **Contacts** tab.

Button	Description
•	 Call the selected contact. Clicking the arrow next to the button displays a list of additional actions. Call—Call the contact's extension. Call phone (Mobile)—Call the contact's mobile phone if registered in the contact's profile. Call phone (Home)—Call the contact's home phone if registered in the contact's profile. E-mail—Send an e-mail to the contact if an e-mail address is registered in the contact's profile. Start chat—Start a text chat with the contact if he or she is currently logged in to PA.
	Answer this extension Answer an incoming call at the selected extension.
	Add Contact Add a new contact. Refer to Adding a New Contact for details.
0	Edit Contact Edit the selected contact. Refer to Editing a Contact for details.
×	Delete Contact Delete the selected contact. Refer to Deleting a Contact for details.
	Show PA User's Contact Info Refer to PA User Detailed Information for details.

3.4.1 Contacts Directory List (CDL)



Refresh button

Obtains the latest information from the PBX/PA Server (CTI Control).

2 List of the selected contact directory

You can sort the list by clicking the column headings. By default, the list is sorted by name.

Contact directory list

There are 2 kinds of CDLs (by default), as follows:

- Phone Extensions (all the extension numbers available in the PBX system).
- PA Users (all the PA users available from the PA Server).
- Phone Directory (System Speed Dialling in the PBX).

<u>Note</u>

In addition to the default CDLs, you may add a CDL from Outlook. Please refer to 3.4.4 Importing/ Editing Outlook Contacts for details.

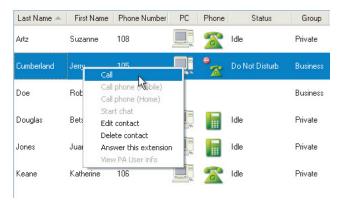
3.4.2 Contact List

The Contact List is a place to locally store frequently dialed numbers.

When the mouse is placed over a contact in the Contact List field, you can right-click to display a context menu in order to call the contact and manage the contact's information.

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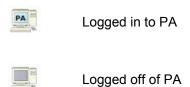
You can also call a contact by double-clicking the contact in the Contact List.



The following icons appear in the Contact List. If the contact is not a PA user, icons will not appear.

Phone Type				Status
DPT/APT	SLT	IP-PT	PS	Status
	%	0		Extension is idle.
=	<u>\$</u>	=	4	Extension is ringing.
	3	0	6	Extension is on the phone.
	~	•	•	Absent Message/DND is set.

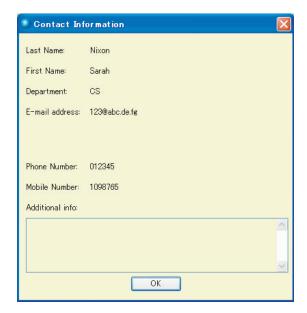
If the contact is an extension (except PS), the following icons are displayed in the **PC** column.



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PA User Detailed Information

When a contact is highlighted in the Contact List field, clicking the Show PA User's Contact Info button displays the contact's detailed information that is stored in the PA Server.



Note

• If a contact in the Contact List is not a PA user, the following notification screen appears.



If a contact in the Contact List is not logged in to PA, the following notification screen appears.



Adding a New Contact

You can add a new contact in the following 2 ways.

- Click the Add a new contact button.
- Drag a contact from a CDL into the Contact List field.

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When you add a new contact, the New Contact screen appears.



- 1. Enter the information of the new contact. All fields in this screen are required.
- 2. Click OK to store this contact.

Note

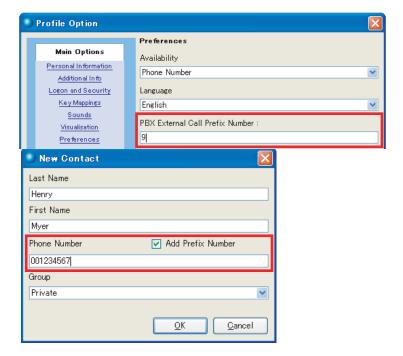
40

- If Add Prefix Number is selected, a prefix number will be added automatically when you dial this
 contact.
- If the first digit of the phone number is same as the PBX External Call Prefix Number that is set in the Preferences in Profile Option, it is automatically removed and the Add Prefix Number check box is selected.

For example:

Name: Henry Myer

Phone number: 9001234567

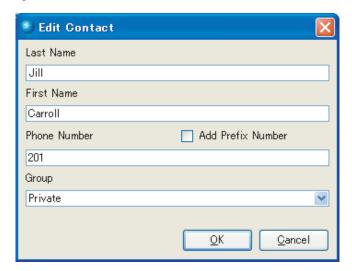


Editing a Contact

- 1. Select the contact to edit.
- 2. Click the Edit Contact button.

-or-

Right-click the selected contact and select Edit Contact from the context menu.



The Edit Contact screen appears.

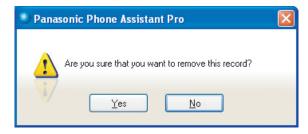
- **3.** Edit the contact's information.
- 4. Click **OK** to apply the changes.

Deleting a Contact

- **1.** Select the contact that you want to delete.
- 2. Click the Delete Contact button.
 - -or-

Right-click the selected contact and select Delete Contact from the context menu.

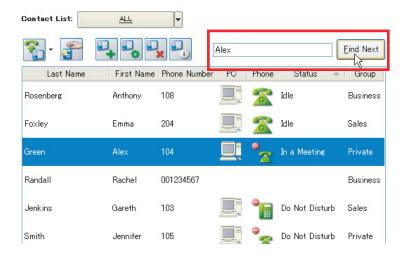
3. The following confirmation screen appears.



4. Click Yes to remove from the Contact List field.

Searching for a Contact

You can search for a specific contact in the Contact List field.



The following data is searched.

- Last Name
- First Name
- · Phone number

A maximum of 255 characters can be entered in this field.

Note

Only the current contact list group is searched.

3.4.3 Contact List Group

You can use the **Contact List** pull-down menu to select a contact list group in order to display only the contacts in the selected group.

In addition, you can access an LDAP directory server by selecting **LDAP**.



Note

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- There are 2 default groups: Private and Business.
- You may have up to 100 groups in total (all the group names appear in the drop-down list).
- Each group may contain 100 contacts.

3.4.3.1 Customizing the Contact List Groups

The Customize... option allows you to do the following:

Create a new contact list group

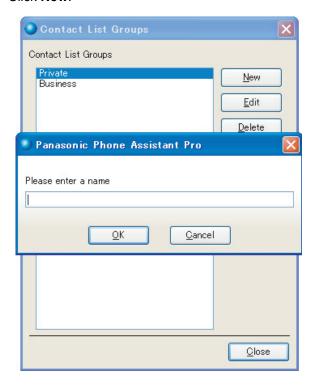
- · Edit a contact list group
- Delete a contact list group
- Rearrange the display order of the contact list groups

Selecting Customize... from the drop-down list displays the Contact List Groups screen.



Creating a New Contact List Group

1. Click New.

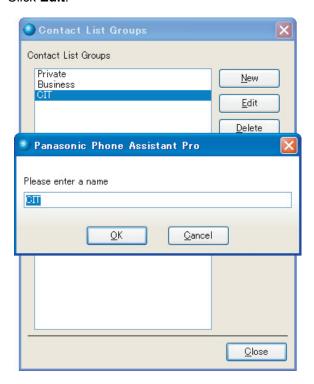


- **2.** Assign a contact list group name.
- **3.** Click **OK** to store a new group.

Editing a Contact List Group

1. Select the contact list group that you want to edit.

2. Click Edit.



- **3.** Edit the contact list group name.
- 4. Click **OK** to apply the changes.

Deleting a Contact List Group

- 1. Select the contact list group that you want to delete.
- 2. Click **Delete**. A confirmation dialogue box will appear.



Note

If the group to be deleted contains contacts, the following confirmation dialogue box will appear. Click **Yes** to delete all the contacts that belong to that group, and **No** to cancel the deletion of the group.



Rearranging a Contact List Group

To rearrange a contact list group, select the desired group, and:

- click Move Up or Move Down.
- -or-
- drag the group to the desired position.

3.4.4 Importing/Editing Outlook Contacts

You can import contacts from Outlook into the CDL, and you can also edit, delete, and rename the contacts that appear in the CDL.

1. Click the double arrow button and select Import MS Contacts... from the drop-down list.



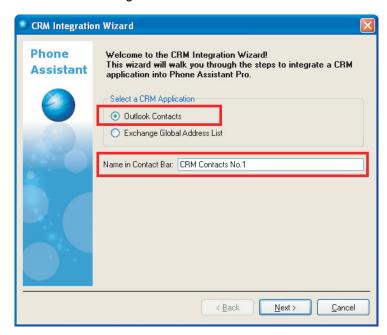
The CRM Integration List screen appears.



2. Click New... to import contacts.

—or—

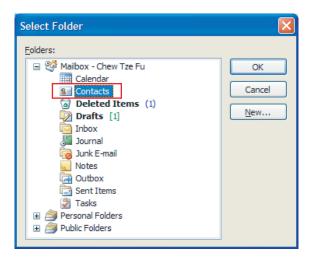
Click **Edit...** to change the CRM List name or its contents.



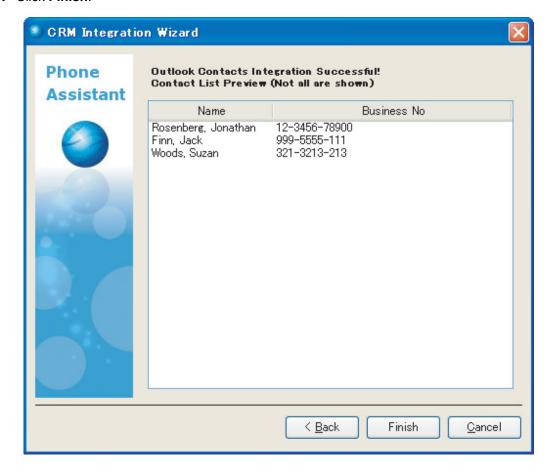
The CRM Integration Wizard screen appears.

- 3. Click Outlook Contacts, and enter a name into the Name in Contact Bar text box.
- 4. Click Next to proceed.

5. Click the desired Contacts folder and click OK.



6. Click Finish.

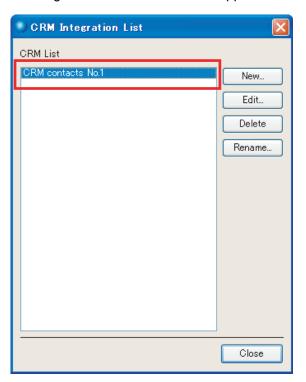


Note

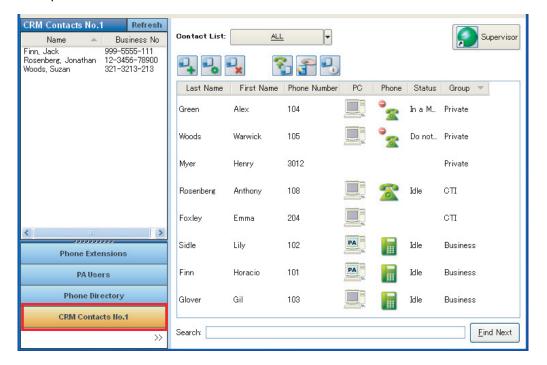
48

All of the contacts listed in the CRM Integration Wizard screen are imported. You may not select the contacts to import.

7. The assigned name for the contacts appears in the CRM List field.



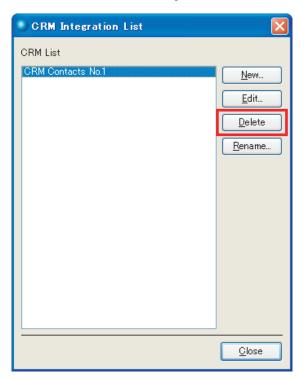
- 8. Click Close.
- **9.** The imported contacts are now added to the CDL.



3.4.4.1 Deleting Outlook Contacts

You can delete the contacts imported from Outlook.

- 1. Click the double arrow button and select Import MS Contacts... from the drop-down list.
- **2.** Click **Delete** in the CRM Integration List screen.



3. A confirmation dialogue box will appear. Click **Yes** to complete the deletion.



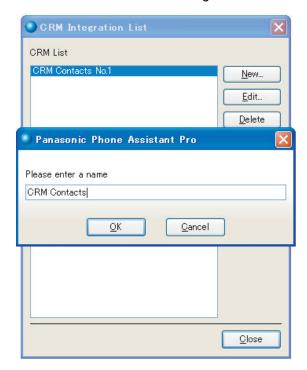
3.4.4.2 Renaming Outlook Contacts

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You can change the name of a contact list imported from Outlook.

1. Click the double arrow button and select Import MS Contacts... from the drop-down list.

2. Click **Rename...** in the CRM Integration List screen.



- 3. Change the contact name.
- 4. Click OK.

3.4.5 Picking Up Another Extension's Call

You can pick up an incoming call for a selected contact in a Contact List in the following 2 ways.

Click the Answer this extension button.



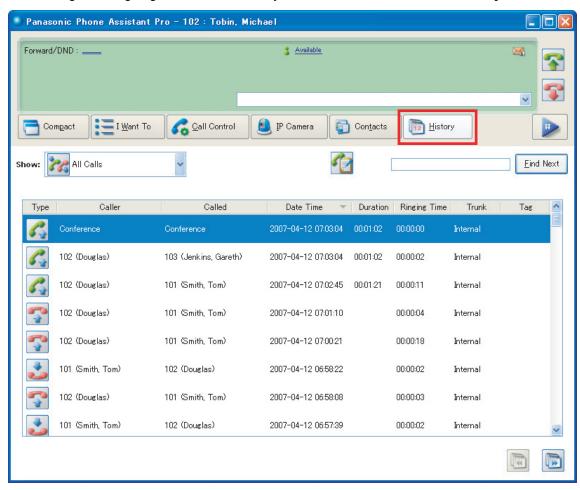
• Right-click the selected contact and select Answer this extension form the context menu.



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3.5 History Tab

All incoming and outgoing call information for your extension is shown in the **History** tab.



It is possible to view the history of past calls depending on the call type (e.g., incoming missed calls, outgoing unanswered calls, etc.) by using the Call Type drop-down list. Up to 100 records per page can be displayed for each call type.



- Previous button
- 2 Next button

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Click **Next** to view the next page, and click **Previous** to view the previous page.

Call Type Drop-Down List

The following can be selected from the drop-down list to change the type of calls that are displayed in the **History** tab.

Item	Type of Call
	Show All Calls
	Show Incoming Missed Calls
>	Show Incoming Received Calls
	Show Outgoing Unanswered Calls
	Show Outgoing Answered Calls

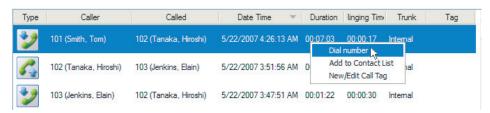
Call History Information

- Type
 - Incoming Missed Calls
 - Incoming Received Calls
 - Outgoing Unanswered Calls
 - Outgoing Answered Calls
- Caller
- Caller Name
- Called
- Called Name
- Date/Time of the call
- Duration of the call (h: min: s)
- Ringing Time (h: mm: s)
- Trunk
- Tag

Calling a Party from the Call History

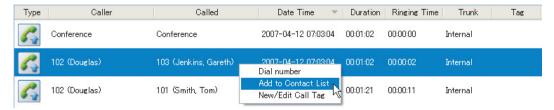
There are 2 ways to make a call using the call history in the **History** tab:

- Double-clicking the desired call history item.
- Right-clicking the desired call history item and selecting Dial number.



Adding a Contact from the Call History

You can add a contact to a Contact List by right-clicking the desired call history item and selecting Add to Contact List.



Sorting/Column Moving Possibilities

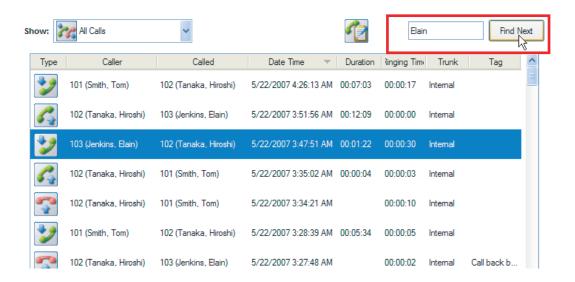
It is possible to:

- Sort history items according to each column heading. This is performed by clicking the desired column header
- Change the order of the columns displayed. This is performed by selecting and dragging a column header to the desired location.

Searching

Call History items can be searched using the values (e.g., 102, Chris Martin) for the following topics:

- Caller
- Called
- Caller Name
- Called Name



Adding/Editing a Call Tag

The Tag column in the **History** tab can be used as a memo. You can input information about the call or edit that information using the Show Call Tag button.

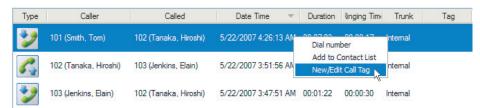


Show Call Tag button

1. Click the Show Call Tag button.

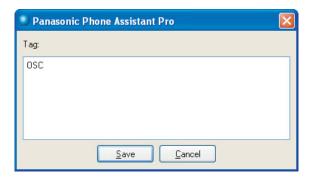
—or—

Right-click the call history item and select New/Edit Call Tag.



The tag input screen will appear.

2. Enter or edit the tag information.



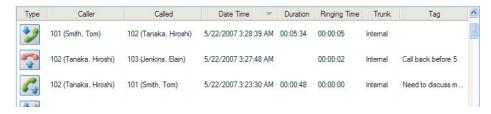
If the call tag information has already been set, that information will be displayed in the call tag screen.

Note

A maximum of 255 characters can be entered in this field.

3. Click Save.

The call tag information appears in the **Tag** column.



4 Configurations

4.1 Profile Options

To configure your profile, select **Change my options...** in the **I Want To** tab. The following profile options are available:

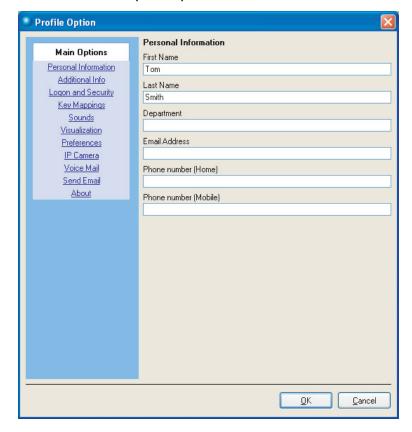
4.1.1 Personal Information

This screen displays your personal information, and is initially configured by the administrator. The values available for each field are limited as follows:

- First Name—max. 32 characters
- · Last Name—max. 32 characters
- Department—max. 32 characters

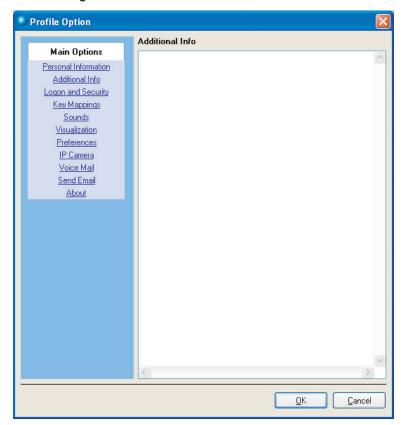
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- Email Address—max. 200 characters
- Phone number (Home)—max. 32 characters
- Phone number (Mobile)—max. 32 characters



4.1.2 Additional Info

This area provides space for notes to be entered. This information can also be edited in the User Admin page of PA Manager. A maximum of 1000 characters can be entered.



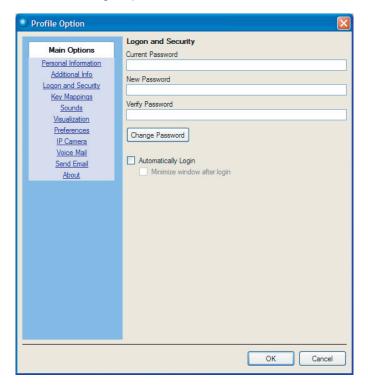
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4.1.3 Logon and Security

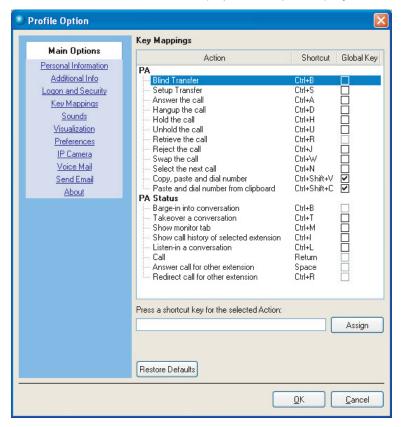
From this screen you can change your login password and Automatic Login settings. When the **Automatically Login** check box is selected, the login password does not need to be entered each time you launch the application.

If you select the **Minimize window after login** check box, PA will be automatically minimized when you use the automatic login option.



4.1.4 Key Mappings

This screen allows for shortcuts to be enabled for the functions shown in the screen below. Shortcuts are shown for both PA Client and PA Status (supervisor/operator) if your account has Supervisor or Operator privileges.



Editing shortcut settings

- 1. Select an Action.
- 2. Place the cursor in the shortcut key text box.
- 3. Press the desired shortcut key for the selected Action (e.g., CTRL+P, ALT+E, etc.).
- 4. Click **Assign** to change the setting.

Clicking Restore Defaults returns the shortcuts to their default settings.

Global Key check box

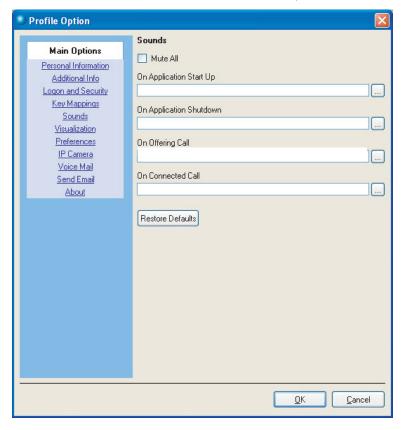
If the **Global Key** check box is selected, you can operate PA functions by using PA application shortcut keys even if other applications are active.

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4.1.5 Sounds

This screen allows for sound notifications to be specified for the events shown in the screen below.



For each event, a WAV file can be specified by clicking the browse (...) button. When the **Mute All** check box is checked, all sound notifications are disabled.

Click **Restore Defaults** to set the default WAV file for each event.

4.1.6 Visualization

Application Appearance

This option configures the appearance of the Taskbar and Notification area. If **System tray** is selected, the icon below appears in the Notification area while PA is activated.



Always on Top

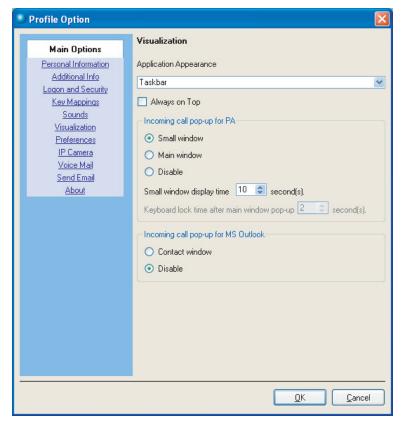
This option allows PA to remain in front of all other running applications at all times.

· Incoming call pop-up for PA

- Small window—The Call Alert pop-up window notifies you of an incoming call. Refer to 3.2.2.2 Answering Calls for details.
 - Small window display time—Specify how long to display the pop-up window.
- Main window—The main PA window is brought to the front when a call arrives.
 Keyboard lock time after main window pop-up—Specify how long to lock the keyboard after PA is brought to the front.
- Disable—Do not display any notification when a call arrives.

Incoming call pop-up for MS Outlook

If you use Microsoft Outlook, a pop-up window can be displayed in Outlook to notify you of an incoming call. Select **Contact window** to display the pop-up window. Select **Disable** to not display the window.



4.1.7 Preferences

This screen allows you to configure the following general preference settings:

Language

You can select the language of the interface from the list box.

PBX External Call Prefix Number

You can enter the PBX external call prefix number for all external calls.

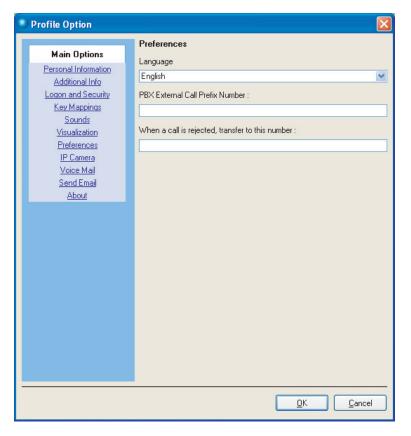
· When a call is rejected, transfer to this number

Specifies the extension or the mailbox number of the Voice Processing System to transfer rejected calls to.

Note

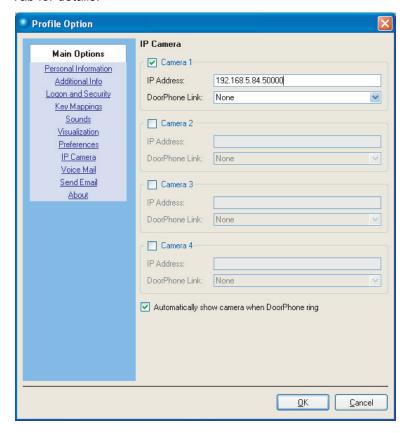
62

If this field is left empty, calls cannot be rejected.



4.1.8 IP Camera

This screen allows you to enable or disable IP cameras visible by PA users. Please refer to 3.3 IP Camera Tab for details.

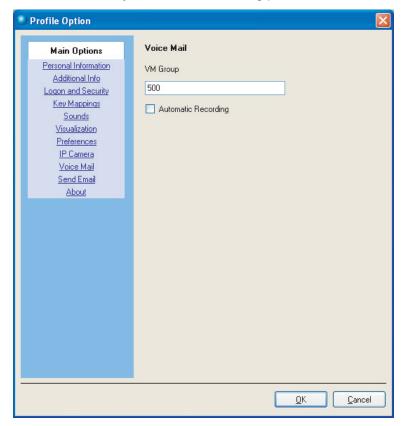


Automatically show camera when DoorPhone ring
 This option enables PA to open the IP Camera tab and display the IP camera feed automatically when a doorphone rings.

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4.1.9 Voice Mail

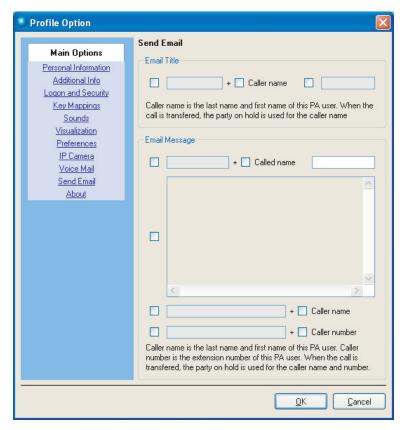
This screen allows you to set call recording preferences.



- Assign a VM Group.
- Automatic recording
 If Automatic Recording is checked, recording starts automatically when a call is started.

4.1.10 Send Email

This screen allows you to specify the general format for an e-mail sent using the Send e-mail operation from the **Call Control** tab.



- Select the check boxes next to the items that you want to include in the e-mail.
- If the recipient's e-mail address is registered in his or her PA profile, the e-mail address will be automatically filled in.

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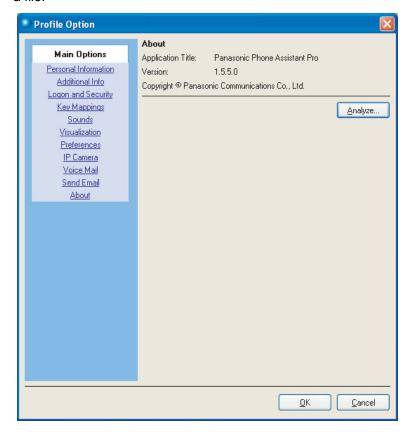
66

4.1.11 About

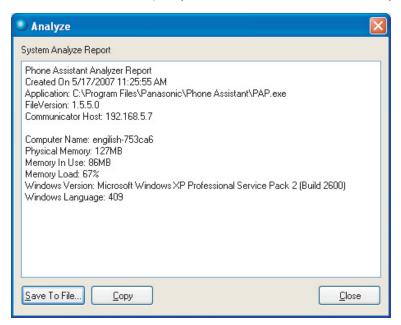
The About screen shows the following summary.

- Application Title
- Software Version
- Copyright Information
- · Registration Details

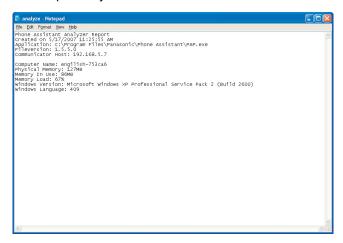
Clicking **Analyze...** will generate a System Analyze Report which can be copied to the clipboard or saved as a file.



Click Save To File... to specify the desired location to save the System Analyze Report.



An example of system information is shown below.

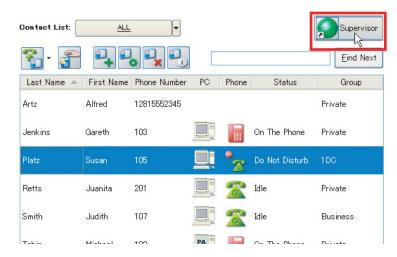


5 PA Status Functions

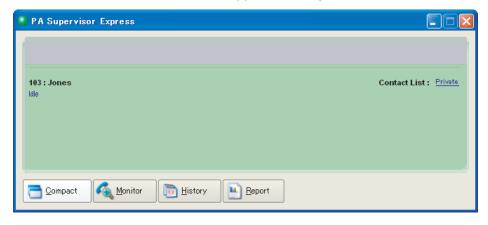
5.1 Opening the PA Status Window

If you log in to an account that has been assigned Supervisor or Operator privileges in PA Manager, you can use supervisory functions.

To open the PA Status Information Panel, click Supervisor or Operator in the Contacts tab.



The PA Status Information Panel will appear in **Compact** mode.



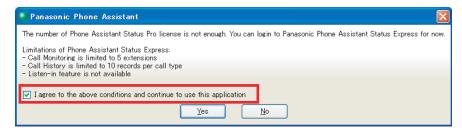
To exit the application, click the Close button.

Note

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- The PA Status window is closed automatically when PA is closed.
- An account can only be assigned one of Supervisor or Operator privileges. Most supervisory functions
 are available for both Supervisors and Operators. Functions that are not available for operators are
 marked "Supervisor Only".

In Pro mode, if the number of supervisors/operators exceeds the number of supervisors/operators allowed by your license, you can use the supervisory functions for Express mode. Up to 3 supervisors/operators can use the application in Express mode.



If you agree to the conditions stated above, select the check box and click Yes to use this function.

If Supervisor/Operator privileges are revoked by the administrator after logging in to PA, the following message will appear when you open the PA Status window.



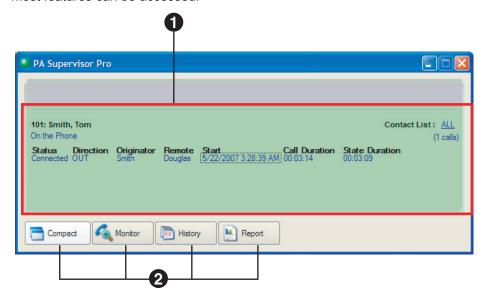
When the number of supervisors/operators exceeds the user capacity for each mode, the following message will appear.



5.2 Information Panel

Information Panel

The Information Panel is the main interface where all of the most important information is found and where most features can be accessed.



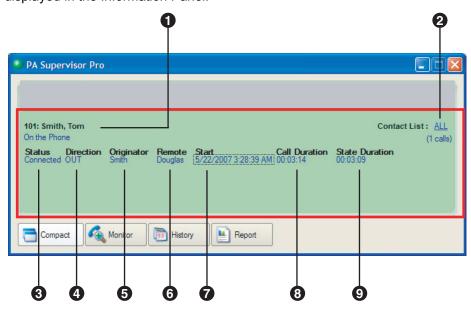
The Information Panel is composed of the following:

- Specified Monitored Extension Information Field
- Function Tabs

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Current Monitored-Extension Information

By selecting an extension in the monitor list, the following information (if available) about that extension will be displayed in the Information Panel.



User's Extension Number and Full Name

If the extension you are monitoring is not registered in PA, the extension name from the PBX is displayed. If nothing is registered in the PBX, a name is not displayed.

2 Contact List Group selection

Select a contact list group to monitor extensions in that group. Please refer to 3.4.3 Contact List Group for details on creating and managing contact list groups.

Status

Shows the status of a call as follows:

- Incoming
- Ring back (with FWD/DND)
- Connected
- Hold
- Hold Pending Conference
- Hold Pending Transfer
- Conferenced
- Disconnected
- Dial tone
- On the Phone

Direction

Shows the original call state of the call as follows:

- Out: the call was originally made from this extension.
- In: the call was received to this extension.

Originator

Shows the extension name and/or number of the caller.

Remote

Shows the extension name and/or number of the called extension.

Start

Shows the start date and time of the current call. For instance, with a transfer, the start time is when the call was transferred and not the start time of the original call.

Call Duration

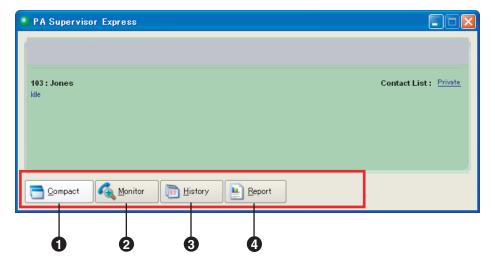
Shows the total duration of the call.

State Duration

Shows the duration of the current call state. If a call is transferred in any way to this extension, the timer starts when the extension user picks up the call.

Function Tabs

By clicking the function tabs, the lower half of the Information Panel will open allowing the following functions to be used.



Compact

Closes any tabs that are currently open.

Monitor

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Enables you to monitor all available extension users. A maximum of 100 groups, each with 100 users, can be monitored. Please refer to 6.1.1 Extension Status Monitoring for details.

3 History (Supervisor Only)

Enables you to view information regarding past calls made by monitored extension users. Please refer to 6.2 History Tab for details.

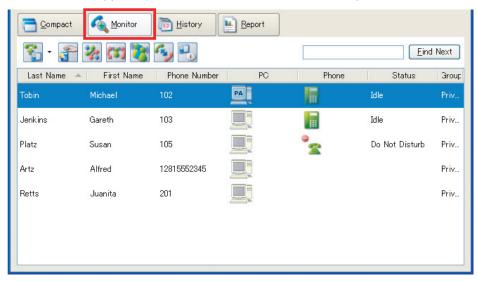
4 Report (Supervisor Only)

Enables you to view the current call information. Please refer to 6.3 Report Tab for details.

6 Using the PA Status Tabs

6.1 Monitor Tab

The **Monitor** tab gives an overview of the ongoing activities of the extension users listed in the **Contacts** tab in the PA client application. You can view the information explained in the sections below for each extension.



You can monitor up to 100 extensions in a maximum of 100 groups.

The following types of devices can be monitored:

- Digital Proprietary Telephones (DPT)
- Analogue Proprietary Telephones (APT)
- Single Line Telephones (SLT)
- IP Proprietary Telephones (IP-PT)
- Portable Stations (PS)

6.1.1 Extension Status Monitoring

Depending on the type of call the following information will be displayed.

- Last Name
 - The last name as registered in the PA Manager (Web server) application.
- First Name
 - The first name as registered in the PA Manager (Web server) application.
- Phone Number
 - The PA user's phone number.
- PC

An icon indicating whether the user is currently logged into the PA client application.

PA

Logged in to PA



Logged off of PA

Phone type and Status

The following device state icons will be displayed.

	Phone	Status		
DPT/APT	SLT	IP-PT	PS	Status
	%		<u> </u>	Extension is Idle.
-	<u>\$</u>	=	4	Extension is Ringing.
	***		·	Extension is On the Phone.
	~			Absent Message/DND is set.

- Phone Presence Setting
 If the extension has been set to DND, "Do Not Disturb" is shown.
- Absent Message Setting
 If the extension has set an Absent Message, the specified message is shown (e.g., Gone Home).

Group

The contact list group to which the extension belongs.

6.1.2 Control Functions

A Supervisor or Operator can perform many kinds of call control functions from the **Monitoring** tab. For instance, you can take control of an ongoing call being handled by PA users. Control functions are performed using the buttons in the **Monitoring** tab.

The following are the call control functions that can be performed:

- Call a monitored extension
- Answer another extension's call
- Redirect an incoming call to another extension
- Listen In (on a conversation)—Supervisor Only
- Barge In—Supervisor Only
- Take Over (an ongoing call)—Supervisor Only

IMPORTANT

Please refer to the Panasonic Hybrid IP-PBX manuals for details about the PBX settings in order to use the supervisor functions.

6.1.2.1 Call Button

This function lets you call the selected PA user.



Call button

By default, clicking this button dials the user's extension. However, by clicking the arrow, you can select one of the following:

- Call—Call the contact's extension
- Call phone (Mobile)—Call the contact's mobile phone if registered in the contact's profile.
- Call phone (Home)—Call the contact's home phone if registered in the contact's profile.
- E-mail—Send an e-mail to the contact if an e-mail address is registered in the contact's profile.
- Start chat—Start a text chat with the contact if he or she is currently logged in to PA.



6.1.2.2 Answer Button

This function lets you answer an incoming call at the selected extension.



Answer button

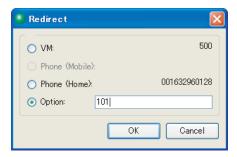
6.1.2.3 Redirect Button

This function allows you to redirect an incoming call at the selected extension.



Redirect button

When you click the Redirect button, the following window appears.



You can redirect to one of the following destinations.

- VM—The voice mailbox, as configured in the user's profile.
- Phone (Mobile)—The user's mobile phone, as configured in the user's profile.
- Phone (Home)—The user's home phone, as configured in the user's profile.
- Option—Another destination. Enter the desired destination phone number in the text box.

Note

If the user is not a PA user, only Option will be available in the above list.

6.1.2.4 Listen In Button

Supervisor Only

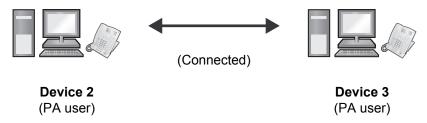
This function allows the supervisor to listen in on an ongoing conversation of a monitored extension. The supervisor's voice cannot be heard.



Listen In button

Example

1. Device 2 and device 3 are on a call. Device 1 (supervisor) selects device 2 in the **Monitor** tab and presses the Listen In button. Device 1 listens in on an ongoing conversation between device 2 and device 3.





Listens In On a Conversation



Device 1 (Supervisor)

Note

The supervisor can stop listening in on a conversation by right-clicking the monitored extension and selecting Redirect.

Conditions

Listen In can only be executed under the conditions noted below.

PBX settings:

Call Monitor in COS settings is enabled.

Call specific conditions:

The supervisor cannot listen in on a conversation under the following conditions:

- The monitored extension is currently connected to the supervisor.
- The supervisor's own extension is busy.
- The selected call is a part of a conference call.
- There is consultation hold on one of the involved extensions.
- The call is being monitored by another extension.
- The call is a doorphone call.

6.1.2.5 Barge In Button

Supervisor Only

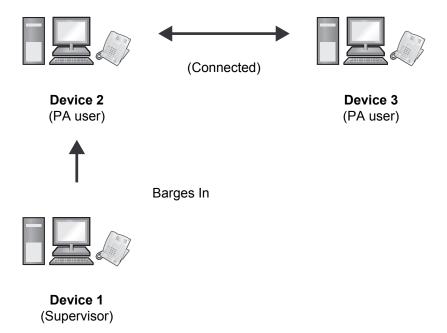
This function allows the supervisor to enter into an existing call, therefore creating a three-party conference call.



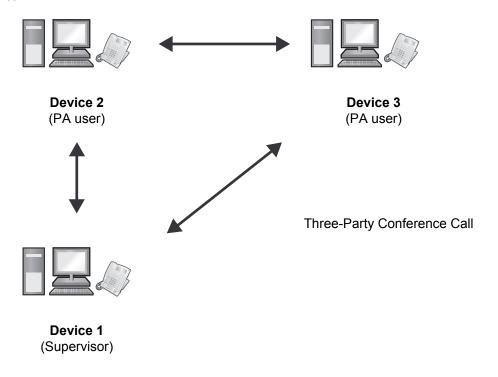
Barge In button

Example

1. Device 2 and device 3 are on a call. Device 1 (supervisor) selects device 2 in the **Monitor** tab and presses the Barge In button.



2. Device 1 interrupts the connected call between device 2 and device 3 to make a three-party conference call.



Note

During the conversation, if any of the parties hangs up the conference will end, however the remaining two parties can continue talking.

Conditions

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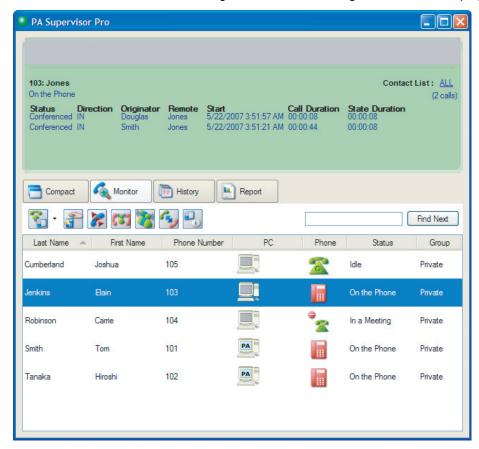
Barge In can only be executed under the conditions noted below.

Call specific conditions:

The supervisor cannot barge in on a conversation under the following conditions:

- The monitored extension is currently connected to the supervisor.
- The supervisor's own extension is busy.
- The selected call is a part of a conference call.
- There is consultation hold on one of the involved extensions.
- The call is being monitored by another extension.
- The call is a doorphone call.

When the desired call has been barged-in on, the following information is displayed:



6.1.2.6 Take Over Button

Supervisor Only

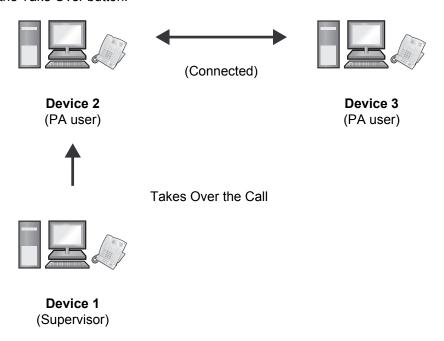
This function allows the supervisor to take over an ongoing two-party call, by selecting an extension on an ongoing call and pressing the Take Over button. The target extension is disconnected from the call.



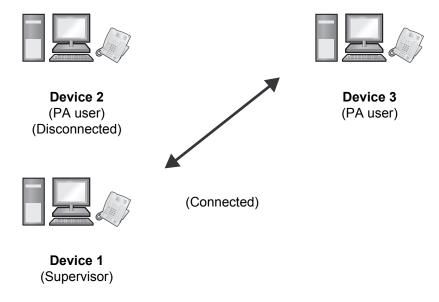
Take Over button

Example

1. Device 2 and device 3 are on a call. Device 1 (Supervisor) selects device 2 in the **Monitor** tab and presses the Take Over button.



2. Device 1 takes over the ongoing call to connect with device 3. Device 2 is disconnected.



Conditions

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Take Over can only be executed under the conditions noted below.

PBX settings:

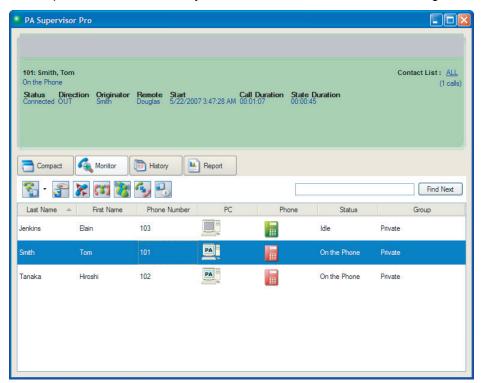
· Executive Busy Override in COS settings is enabled.

Call specific conditions:

The supervisor cannot take over a call under the following conditions:

- The monitored extension is currently connected to the supervisor.
- The supervisor's own extension is busy.
- The selected call is a part of a conference call.
- There is consultation hold on one of the involved extensions.
- The call is being monitored by another extension.
- The call is a doorphone call.

If the supervisor has successfully taken over a conversation, the following information is displayed:



6.1.2.7 Information Button

This function allows you to view the selected PA user's detailed information.

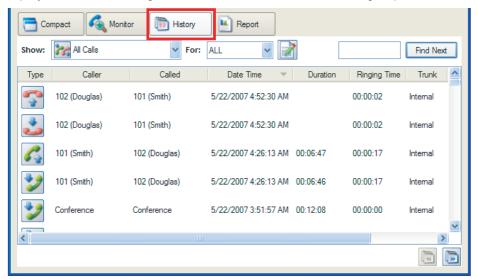


Information button

6.2 History Tab

Supervisor Only

All incoming and outgoing calls for the monitored extensions can be displayed in the **History** tab. You can display the data for a single extension or an entire contact list group.



It is possible to view the history of past calls depending on the call type (e.g., incoming missed calls, outgoing unanswered calls, etc.) by using the Call Type drop-down list. Up to 100 records per page can be displayed for each call type.



- Previous button
- Next button

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Click **Next** to view the next page, and click **Previous** to view the previous page.

Call Type Drop-Down List

The drop-down list can be used to change the type of calls that are displayed in the **History** tab.

Item	Type of Call
	Show All Calls
	Show Incoming Missed Calls
>	Show Incoming Received Calls
	Show Outgoing Unanswered Calls

Item	Type of Call
	Show Outgoing Answered Calls

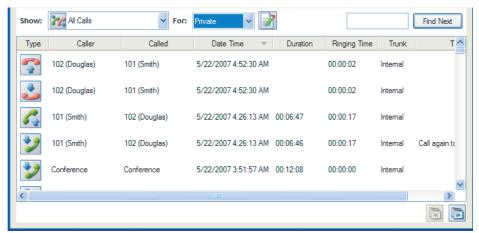
6.2.1 Display of Call Information

The **For** drop-down list allows you to switch between viewing call histories for all extensions in the selected contact list group, and the call history for the currently monitored extension.



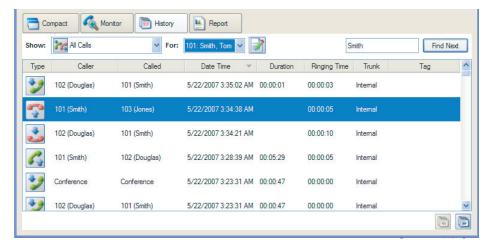
Extensions in Contact List Group
You can view the call histories for all monitored extensions in the contact list group to

You can view the call histories for all monitored extensions in the contact list group that is selected in the Information Panel.



Selected extension

The call history of the extension that is selected in the **Monitor** tab will be displayed.



Call History Information

The following information is displayed for each call in the call history table:

- Type
 - Incoming Missed Calls
 - Incoming Received Calls
 - Outgoing Unanswered Calls
 - Outgoing Answered Calls
- Caller phone number and extension name (for conference calls "Conference" is displayed)
- Called phone number and extension name (for conference calls "Conference" is displayed)
- · Date and Time of the call
- Duration of the call (h: min: s)
- Ringing time (Ringing duration) (h: min: s)
- Trunk
- Tag

Sorting/Column Moving Possibilities

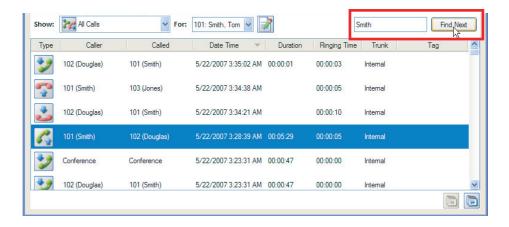
It is possible to:

- Sort history items according to each column heading. This is performed by clicking the desired column header.
- Change the order of the columns displayed. This is performed by selecting and dragging a column header to the desired location.

Searching

Call History items can be searched using the values (e.g., 102, Chris Martin) for the following topics:

- Caller
- Called
- Caller Name
- Called Name



Calling a Party in the Call History from Your Extension

It is possible to make a call by double-clicking or right-clicking the call history item and selecting Redial.

- When the call history for your own extension is highlighted, you can make a call to the party regardless of whether the history is an incoming or an outgoing call.
- When the call history for another extension is highlighted, redial is performed based on Caller.



It is possible to redial the following types of calls:

- Incoming Missed Calls
- Incoming Received Calls
- Outgoing Unanswered Calls
- · Outgoing Answered Calls

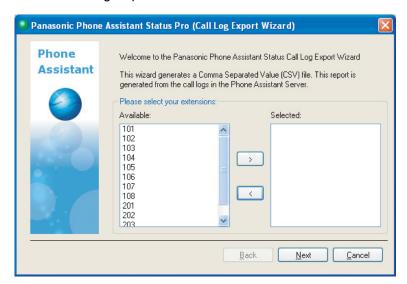
6.2.2 CSV Output

The Call Log Report button allows you to save call log history data as a CSV (comma-separated values) formatted file.



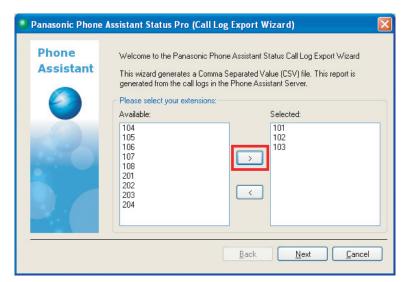
Call Log Report button

1. Click the Call Log Report button.



The Call Log Export Wizard screen will be displayed.

2. Select the desired extensions in the **Available** field and click the right arrow button to move them to the **Selected** field.



It is possible to move selected extensions back to the **Available** field by clicking the left arrow button.

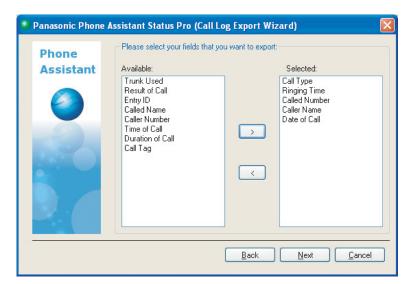
- 3. Click Next to proceed.
- **4.** Select the desired call history types in the **Available** field and click the right arrow button to move them to the **Selected** field.



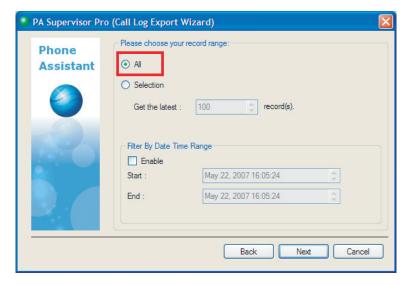
5. Click Next to proceed.

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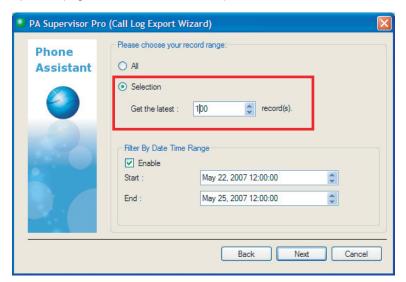
6. Select the call information types to export in the **Available** field and click the right arrow button to move them to the **Selected** field.



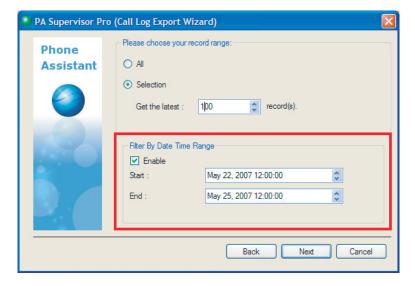
- 7. Click Next to proceed.
- 8. In the record range screen, you are provided with 2 types of the record range to be exported.
 - If All is selected, all records matching the selected criteria are exported.



• If **Selection** is selected, the most recent records, where the number input into the **Selection** field, are exported (e.g., the latest 100 records).



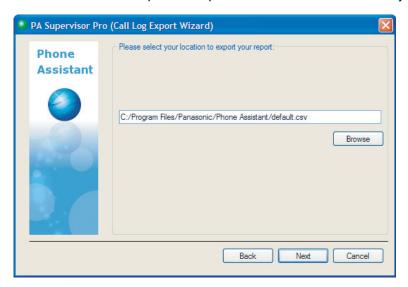
• If the Date Time Range field is selected, matching records are filtered by the specified start and end date/time.



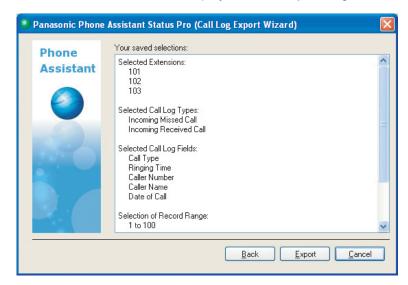
9. Click Next to proceed.

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10. Select the location to export the report. You can select a location by clicking Browse.

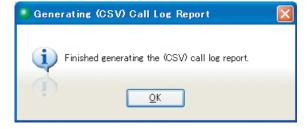


- 11. Click Next to proceed.
- 12. The selected contents will be displayed. Click Export to generate the CSV report.



You can go back to the previous screen by clicking Back or abort this operation by clicking Cancel.

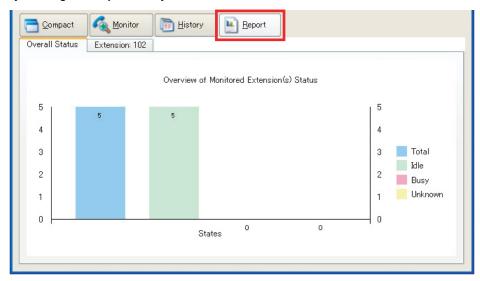
13. The following dialogue box will appear when the export is complete. Click **OK**.



6.3 Report Tab

Supervisor Only

By clicking the **Report** tab, you can view the current call information and call statistics of the specified extension.

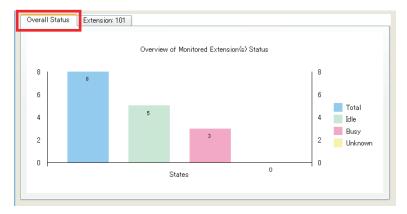


6.3.1 Overall Status Reporting

The following information is displayed in the **Overall Status** tab.

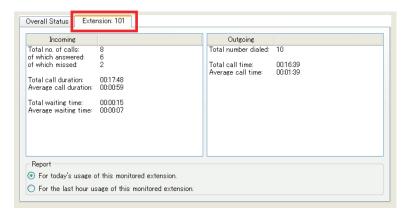
- · Total: Total number of monitored extensions
- Idle: Total number of monitored extensions with the device state Idle
- Busy: Total number of monitored extensions with all device states except Idle
- Unknown

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6.3.2 Extension Reporting

In the **Extension** tab, the general call statistics for a monitored extension in the **Monitor** tab is displayed.



It is possible to limit the data displayed to the 2 following time criteria:

- The last hour
- The current day (from 00:00 up to the current time)



The following information is displayed in the **Extension** tab.

Incoming field

- Total number of incoming calls
- · Total number of answered calls
- Total number of missed calls
- Total call time
- Average call time
- Total waiting time (ringing time)
- Average waiting time

Outgoing field

- · Total number of dialed calls
- Total call time
- Average call time

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Setting 64

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