

## Call Manager - Options and Preferences Window

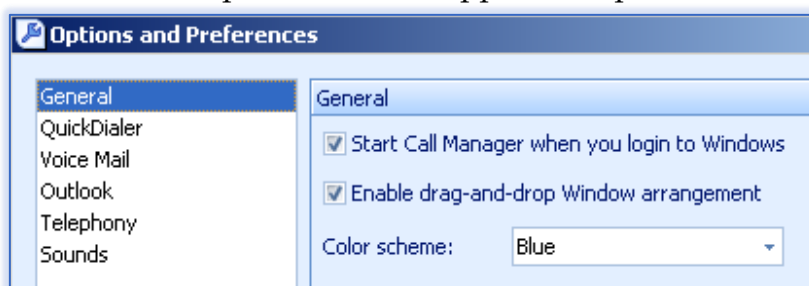
This window contains panels that are used to configure many Call Manager options, components, and functions. The options that are available depend upon the features for which the user is authorized.

### DISPLAY OPTIONS AND PREFERENCES WINDOW

- ❖ Do one of the following:
  - Click **Tools** on the **Main Menu**.
  - Click the **Application Button**.
  - Right-click the **Call Manager** icon in the **System Tray**.
- ❖ Click **Options**.
- ❖ The **Options and Preferences** window will display.

### GENERAL

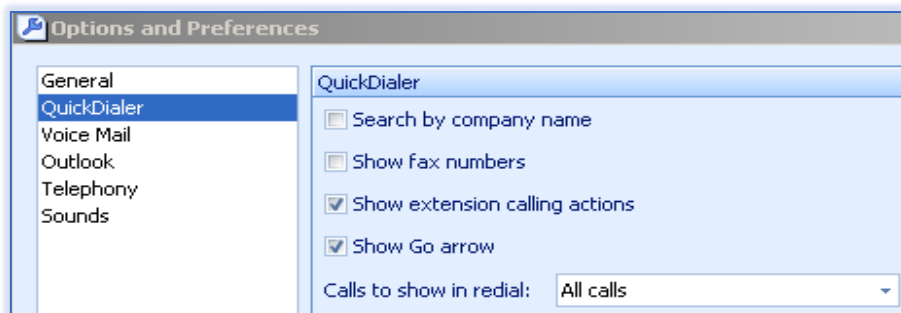
This panel determines the startup behavior and appearance parameters of Call Manager.



- ❖ Open the **Options and Preferences** window.
- ❖ Click the **General** link in the menu on the left side of the window.
- ❖ Change the options as desired. These options are explained below.
  - **Start Call Manager When You Login to Windows** – When this option is selected, Call Manager will open every time you login to Windows.
  - **Enable Drag and Drop Window Arrangement** – To have the capability to move the viewer between the Main Window Content Area and Satellite windows, select this option. This means the user will be able to have more than one window displayed at a time.
  - **Color Scheme** – This option is used to change the color of the Call Manager windows. The color scheme options are Blue, Black, and Gray.
- ❖ Click **OK** to exit the **Options** window.

### QUICK DIALER

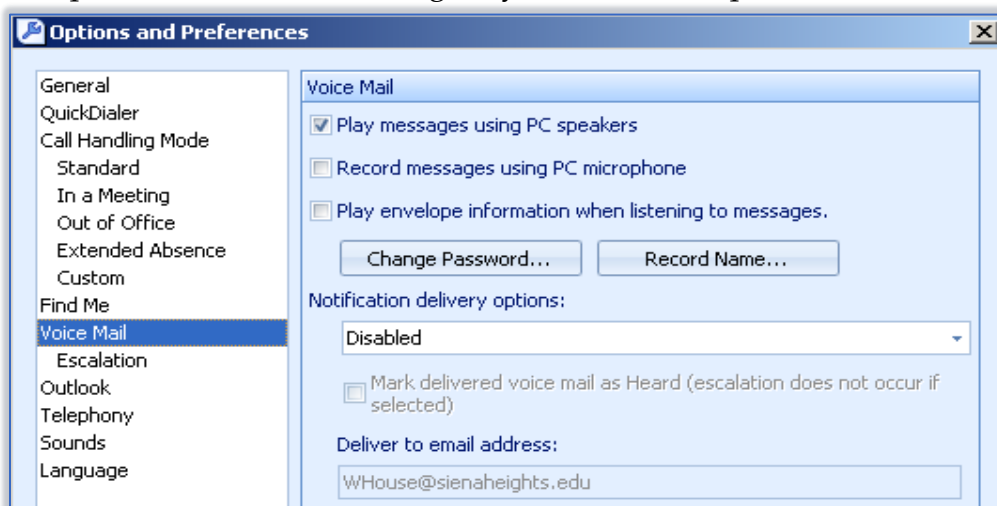
This is a Main Menu component that provides drop-down access to the directory names and numbers that match the information input into the Data Entry Field.



- ❖ Open the **Options and Preferences** window.
- ❖ Click the **Quick Dialer** link in the menu on the left side of the window.
- ❖ Make changes to the options as desired. These options are explained below.
  - **Search by Company Name** – When this option is selected, the company names will be included in the Quick Dialer lists.
  - **Show Fax Numbers** – This option should be selected when fax number entries are to be included in the Quick Dialer lists. When this option is selected, the fax numbers will also display in Directory Viewer context menus that are accessed when an entry is right-clicked.
  - **Show Extension Calling Actions** – To configure Quick Dialer to display available methods of contacting filtered extension, click this option.
  - **Show Go Arrow** – Select this option to display a Go arrow on the right side of the Quick Dialer field. When the Go arrow is pressed a call to the contact will be initiated.
  - **Calls to Show in Redial** – The Redial icon is located on the right side of the Quick Dialer field. It displays recently made and received calls as specified by this parameter setting.
    - **Outbound Calls** – When this option is selected, only previously called numbers will display in the Redial list.
    - **Missed Calls and Outbound Calls** – To display only numbers of missed inbound calls and previously made outbound calls in the Redial list, select this option.
    - **All Calls** – Select this option to display numbers of all inbound and outbound calls in the Redial list.
- ❖ Click **OK** to exit the **Options** window.

## VOICE MAIL

This panel is used to specify the default interface for listening and recording voice messages, recording your spoken name, and to configure your voice mail password.

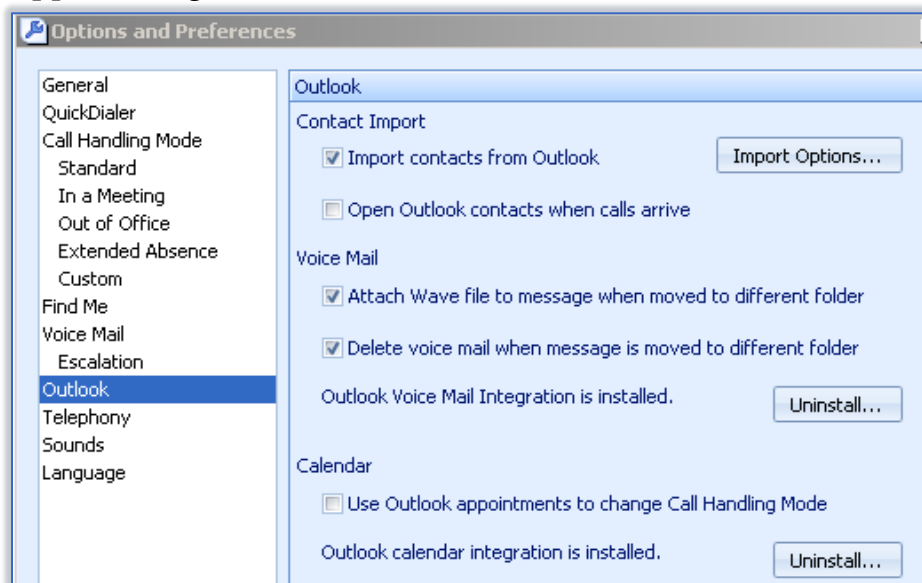


- ❖ Open the **Options and Preferences** window.
- ❖ Click **Voice Mail** in the menu on the left side of the window.
- ❖ Make changes to the options as desired. These options are explained below.
  - **Play Messages via PC Speakers** – To play your voice mail messages through your computer speakers instead of the phone, click this option.
  - **Record Messages Using PC Microphone** – Select this option to record voice messages through a microphone on your computer.

- **Play Envelope Information When Listening to Messages** – To play sender and receipt time information prior to listening to a voice message, select this option.
  - **Change Password** – Press this button to change the password that protects access to voice mail.
  - **Record Name** – This button is used to initiate the recording of your name. The name is played for callers when they are routed to your voice mail.
  - **Notification Delivery Options** – This option specifies the media the system will use to inform the user of the receipt of a voice message.
    - **Disabled** – When this option is chosen, Escalation Notification will be disabled.
    - **Email Wave File** – This option will send a copy of the voice message to the specified email address.
    - **Email Notification** – A message that announces the receipt of a voice mail message to the specified email address will be sent if this option is selected.
  - **Marked Delivered Voice Mail as Heard** – When this option is selected, the voice message will be marked as heard when a notification message is sent to the specified email address. This option is available only if **Notification Delivery Options** is not **Disabled**.
  - **Deliver to Email Address** – This option specifies the address to which the system sends the initial notification message specified by the **Notification Delivery Options** setting.
- ❖ Click **OK** to exit the **Options** window.

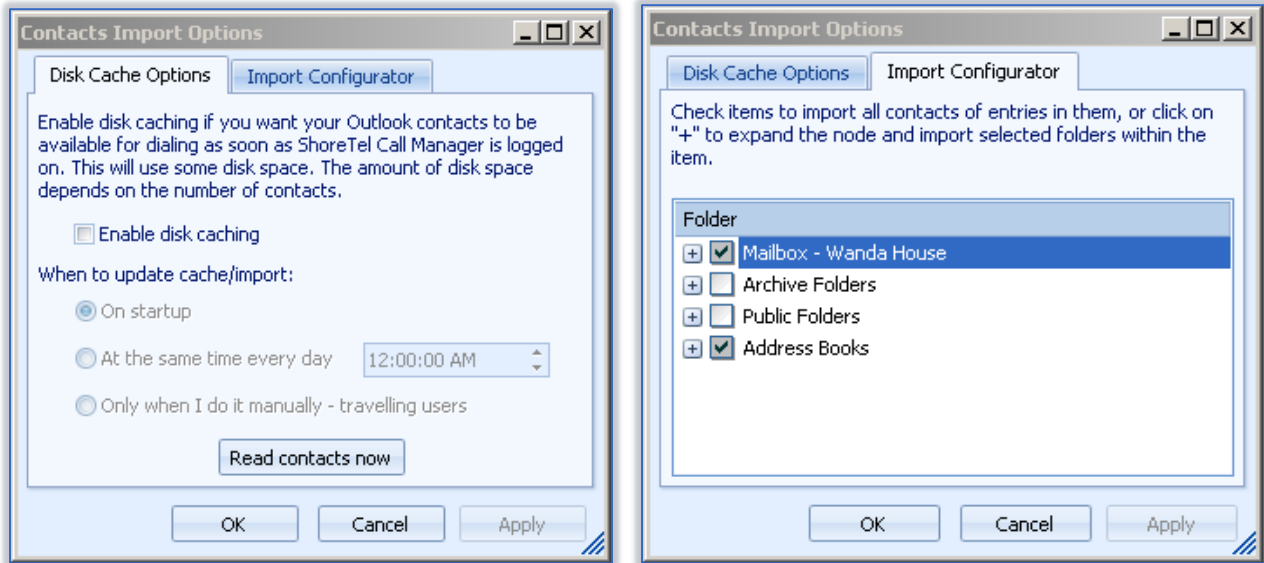
## OUTLOOK

Call Manager supports integration with the Outlook inbox, voice mail, and calendar features.



- ❖ Open the **Options and Preferences** window.
- ❖ Click **Voice Mail** in the menu on the left side of the window.
- ❖ Make changes to the options. These options are explained below.
  - **Contact Import** - This area controls the importing of Outlook contacts. It is possible to configure which contacts are to be imported.
    - **Import Contacts From Outlook**
      - When this option is selected, Call Manager will import Outlook contacts when Call Manager is opened.

- To configure this option, click the **Import Options** button.
  - ◆ **Disk Cache Options** - This option permits the storage of Outlook Contacts in the computer storage. The contacts will be available immediately when Call Manager is opened.



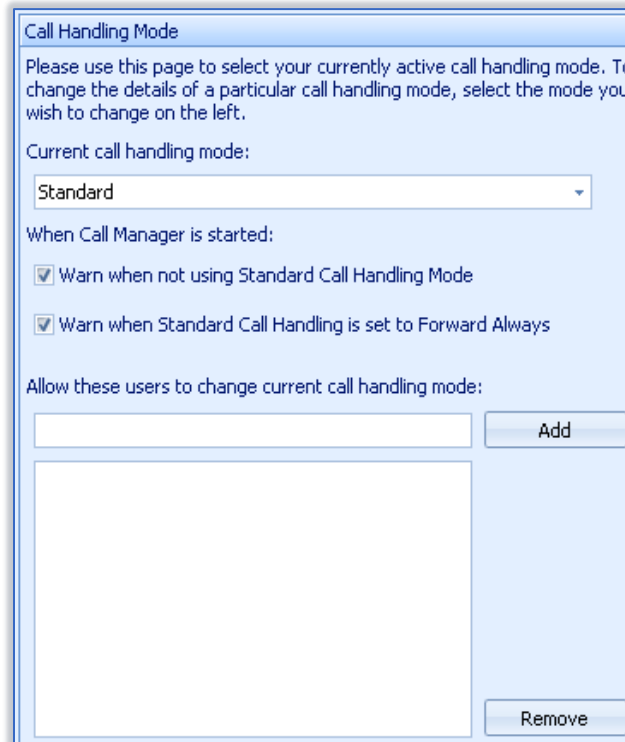
- ◆ **Import Configuration** - Use this tab to specify the Outlook Contact folders from where contacts will be imported.
  - ◆ Click **OK** to exit the window.
- **Open Outlook Contacts When Calls Arrive** - If this option is selected, the Outlook Contacts panel will become active when a call is received from an Outlook contact.
- **Voice Mail** - To display the Outlook Voice Mail Integration status and to specify the disposition of received voice messages.
  - **Attach Voice Mail to Message when Moved** - Select this option to move an email from the Outlook Inbox to another folder and save the attached Voice Message .wav file to an Outlook message file.
  - **Delete Voice Mail from Message when Moved** - To move an email message from the Outlook Inbox to another folder and have the attached Voice Mail Message removed from the Shore Ware server, select this item.
  - **Integration Installation Status** - This area indicates the Outlook Voice Mail Integration Status.
    - **Install** - This button will display if Voice Mail Integration is not installed and Outlook is available on the computer.
    - **Uninstall** - This button will display if Voice Mail Integration is installed.
- **Calendar** - This Outlook option installs a Call Manager panel in the Outlook Calendar Window.
  - **Use Outlook Appointments to Change Call Handling Mode** - Select this option to have Call Manager use the Outlook Calendar to schedule changes to the Active Call Handling Mode. This option is only available if Voice Mail Integration with Outlook is installed.

- **Integration Installation Status** – This area indicates the Outlook Voice Mail Integration Status.
  - **Install** – This button will display if Calendar Integration is not installed and Outlook is available on the computer.
  - **Uninstall** – This button will display if Calendar Integration is installed.

❖ Click **OK** to exit the **Options** window.

### CALL HANDLING MODE

This service determines the settings that Call Manager will use to handle inbound calls.



- ❖ Open the **Options and Preferences** window.
- ❖ Click the **Call Handling Mode** link on the left side of the window.
- ❖ Make changes to the parameters. These parameters are described below.
  - **Current Call Handling Mode** – This option specifies the active call handling mode: Standard, In a Meeting, Out of Office, Extended Absence, or Custom.
  - **When Call Manager is Started** – To enable call handling mode warnings, select one of the options under this area. These are:
    - **Warn When not Using Standard Call Handling Mode** – This option should be selected if a warning is to be received if the active **Call Handling Mode** is **Standard** and the **Forward Calls** parameter is set to **Always** when Call Manager is started.
    - **Warn When Standard Call Handling is set to Forward Always** – To receive a warning if the active **Call Handling Mode** is **Standard** and the **Forward Calls** parameter is set to **Always** when Call Manager is started, select this option.
  - **Allow These Users to Change Current Call Handling Mode** – This option is used to allow delegation of Call Handling Mode.
    - The **Edit Box** is a **Quick Dial** type window.

- **Add Button** – This button is used to add the user listed in the Edit Box to the table below the box.
- **Remove Button** – Select this box to remove a selected user from the List of Users.
- When a **Name** or **Number** is entered into the **Data Entry Field** a drop-down menu will display.
- A list of **Names** and **Numbers** that match the entered information will appear.
- **Call Handling Table** – This table contains the lists of users who are allowed to change the current call handling mode of the user.
- ❖ Click **OK** to exit the **Options** window.

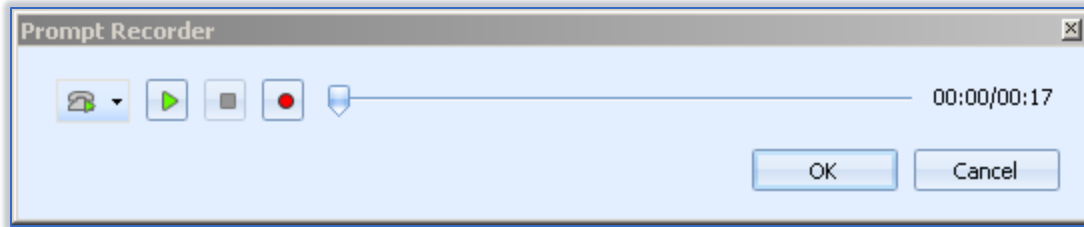
### CALL HANDLING MODE CONFIGURATION

These options are used to configure call handling methods when the specified Call Handling Mode is active. The image below displays the Standard Mode Call Handling configuration window. The other panels are identical in appearance, but differ in the available settings for some of the options.

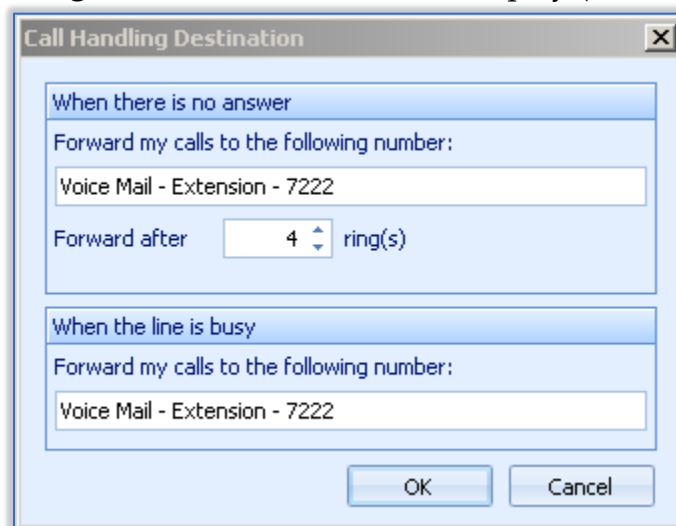
There are five different Call Handling Modes: Standard, In a Meeting, Out of Office, Extended Absence, or Custom.

- ❖ Open the **Options and Preferences** window.
- ❖ Click one of the five options in the left frame.
- ❖ Make changes to the parameters. These parameters are described below.
  - **Record Greeting** – This button is used to record the greeting that callers receive when the voice mailbox is reached.

- The **Prompt Recorder** window will appear (see illustration below).



- To select whether to record using the phone or the computer, click the **Record Selection** button.
- To play or pause the recording, click the **Play/Pause** button. This is a toggle button that switches between **Play** and **Pause**.
- To stop the recording, click the **Stop** button.
- To record the message, click the **Record** button.
- After the message is recorded, click the **OK** button to exit the window.
- **Forward Calls** – Use this option to specify the conditions for forwarding inbound calls.
  - **Always** – All inbound calls will be sent to the number listed in the **Forwarding Destination** box.
  - **When No Answer or Busy** – Inbound calls will be forwarded to one of the two numbers listed in the **Forwarding Destination** box.
    - **When No Answer** – This option lists the number to which calls will be forwarded after a specified number of rings.
    - **When Line is Busy** – This option lists the number to which calls will be forwarded when the line is busy.
  - **Never** – To disable call forwarding, select this option.
- **Forwarding Destination** – This option displays the destination of calls that are forwarded. It also displays the number of times the phone rings before the call is forwarded.
  - Press the **Edit Destination** button to change the **Call Forwarding Destination**.
  - The **Call Handling Destination** window will display (see illustration below).



- Fill in the appropriate information.
- Click **OK** to exit the window.

- When the **Call Handling Condition** is **Always**, one number will be displayed for handling all inbound calls.
  - When the **Call Handling Condition** is set to **When No Answer or Busy**, the field will display two numbers.
    - The first number specifies a destination for unanswered calls after the specified number of rings.
    - The second number specifies a destination for unanswered calls when the line is busy.
  - When the **Call Handling Condition** is **Never**, no forwarding numbers will be displayed.
- **Enable Find Me** – Use this box to enable the **Find Me** call handling when a specified **Call Handling Mode** is active.
  - **When Caller Presses “0”, Transfer to** – Select this option to designate the recipient of the call when the caller presses 0 (zero) while listening to the voice mail greeting.
  - **Schedule Mode Change** – This field is used to specify the Shore Ware schedule. This schedule determines the default period for the specified Call Handling Mode.
  - **Voice Mail Escalation Profile** – These policies provide a list of contacts that are notified when Call Manager forwards a call. They are used for periods when the user may receive calls that require immediate attention.
  - **Call Handling Note** – This is a stream of text that can be provided to the operator who monitors an extension.
    - These **Notes** provide additional information, such as when the user plans to return.
    - The **Contacts Window** displays **Call Handling** notes.
- ❖ Click **OK** to exit the **Options** window.

## TELEPHONY

This window is used to specify the manner in which Call Manager interfaces with the phone. The options in this window specify the ShoreWare user name of the Call Manager user and the Main Server location of the user’s account.

Telephony

Server name: 10.10.1.2

User name: whouse

\*Note: You will be required to log off of Windows in order for your changes to take effect.

Change Password...

Maximum number of active calls to show: 8

Show empty call cells in Normal view

Show incoming call alert

Suppress call waiting tone for subsequent calls

Suppress dial-tone when off-hook (headset mode for analog phones)

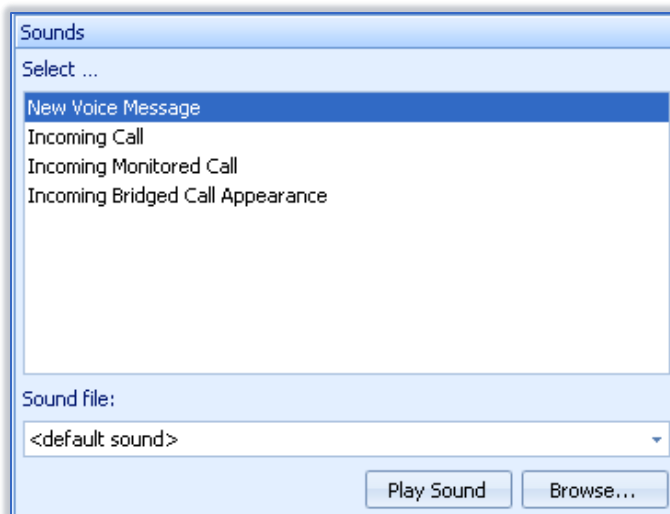
Prefix to dial external number: 9

Default audio path for automatic off-hook: Speaker

- ❖ Open the **Options and Preferences** window.
- ❖ Click the **Telephony** link.
- ❖ Make changes to the available parameters. These parameters are described below.
  - **Server Name** – This option specifies the name or address of the Main Server
  - **Username** – This option specifies the ShoreWare user name.
  - **Change Password** – To change the password that authorizes the user to access Call Manager, click this button.
  - **Maximum Number of Active Calls to Show** – Use this option to specify the maximum number of active calls Call Manager will handle during each instance. The system administrator determines the maximum size configuration that is allowed for each extension.
  - **Show Empty Call Cells in Normal View** – This option determines whether or not the Active Call Area will be displayed in the Call Manager.
  - **Show Incoming Call Alert** – To display an alert in the bottom right corner of the monitor when a call is received, select this option.
  - **Suppress Call Waiting Tone for Subsequent Calls** – This option suppresses the Call Waiting Tone. The Call Waiting Tone is a signal that is inserted into the audio path that alerts the user of an inbound call.
  - **Suppress Dial-tone When Off-Hook** – Select this option to enable Handsfree Mode. The Handsfree Mode makes it possible to use Call Manager with a headset or speaker phone instead of a receiver.
  - **Prefix to dial External Number** – This option specifies the number (trunk) to which calls that are made through Call Manager are routed.
  - **Default Audio Path for Automatic Off-Hook** – To specify the audio path that Call Manager enables when a call is made or received, select this option.
- ❖ Click **OK** to exit the **Options** window.

### SOUNDS

This window is used to specify the sound files that the computer plays to indicate a communication event, such as an inbound call. Call Manager supports .wav files for audio alerts.

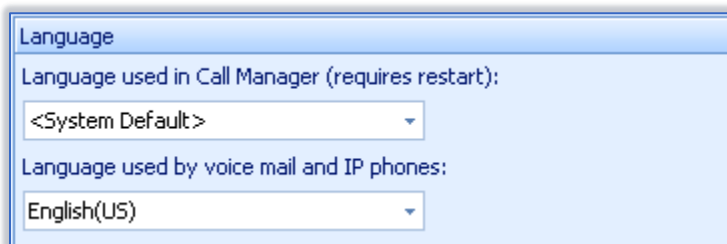


- ❖ Open the **Options and Preferences** window.

- ❖ Click the **Sound** link on the left side of the window.
- ❖ Make changes to the available parameters. These parameters are described below.
  - **Sounds** – This area provides a list of events to which Call Manager can assign a .wav file. Select one of the options in the list before specifying a .wav file for that area.
  - **Sound File** – To specify the .wav file that Call Manager will play to signal the event specified in the sounds table, click the list arrow at the end of the data entry field.
    - **Play Sound** – Click this button to play the selected .wav file.
    - **Browse** – To search for additional wav files, click this button.
- ❖ Click **OK** to exit the **Options** window.

## LANGUAGE

This window is used to specify the language the system will use for Call Manager panels, Voice Mail prompts, and IP Phone instructions.



- ❖ Open the **Options and Preferences** window.
- ❖ Click the **Language** link on the left side of the window.
- ❖ Make changes to the available parameters. These parameters are described below.
  - **Language Used in Call Manager** – Use this option to specify the language through which Call Manager will display information.
  - **System Default** – This option refers to the language designated by the administrator as the default language. Call Manager must be closed and reopened in order for any changes to take effect.
  - **Language Used by Voice Mail Prompts and IP Phones** – This option is used to specify the language the system will use for the IP Phone display messages and voice mail and audio prompts.

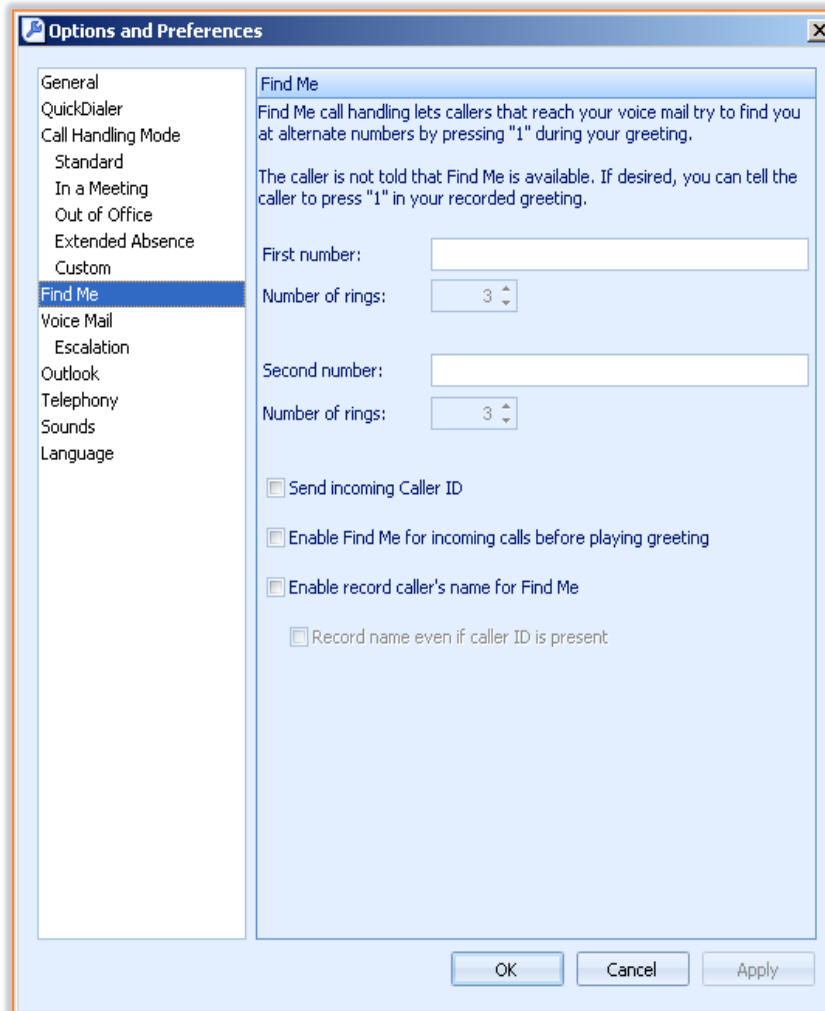
## FIND ME

This feature allows callers to contact you at alternate numbers by pressing one (1) while they are listening to your voice mail greeting. It is possible to specify two numbers for rerouting callers using the Find Me feature. After the person calling presses one (1), an audio prompt will be played advising the caller that the defined destination is being called. If the call is not answered at either destination the caller will be sent to your Siena voice mail.

When the call is received from the caller, you can choose whether to answer the call or not to answer. The caller will not know which option you have chosen. They will be given a message saying that you could not be reached. Once the option not to answer has been chosen, the caller will be returned to your voice mail.

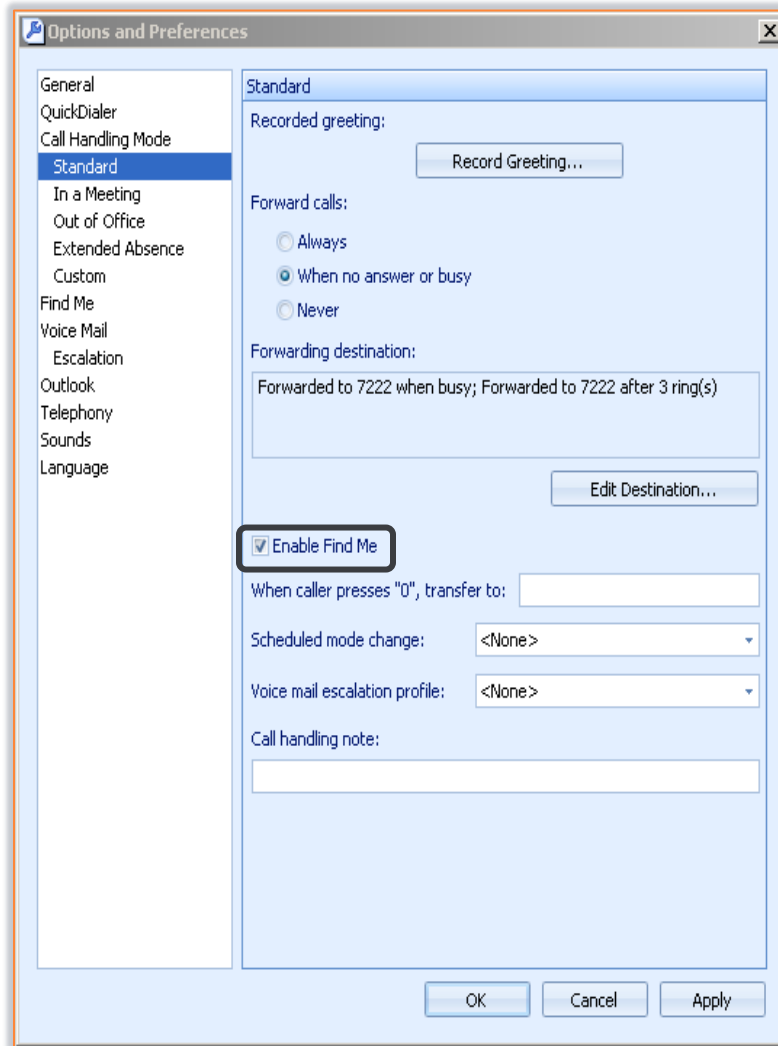
## SETTING UP FIND ME

- ❖ Click the **Application Button**.
- ❖ This button appears in the upper-left corner of the **Call Manager** window (see illustration at right).
- ❖ Select **Options** from the list that appears.
- ❖ The **Options and Preferences** window will display.
- ❖ Click **Find Me** in the list of options on the left side of the window.
- ❖ The **Find Me** window will display (see illustration below).



- ❖ In the **First number** box, input the phone number to which the call is to be forwarded.
- ❖ Click the **Number of rings** spinning arrow to specify the number of times the phone is to ring before it goes to the next number or to voice mail.
- ❖ If a second number is to be specified, input that number into the **Second number** box.
- ❖ Once again, specify the number of rings before the person will be forwarded to your voice mail box.
- ❖ The person's **Caller ID** will play, if available, when **Send incoming Caller ID** is checked.
- ❖ **Enable Find Me for incoming calls before playing greeting** will send the call directly to the Find Me number before any greeting is played for the caller. This is not recommended.
- ❖ Click the **Enable Record Caller's name for Find Me**, to force the person who is calling to record his/her name.

- ❖ Click the **Enable Find Me** check box in each of the **Call Handling Modes** to activate this feature for that mode (see illustration below).



- ❖ Click **OK** to save the changes and exit the **Find Me** window.
  - The next time you receive a call, this feature will be activated.
  - Make sure that you disable this feature when you don't want the caller to find you.
  - When this feature is not enabled, the call will go directly to your **Voice Mail**.