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# *ez-Attendant*

**Installation**

**&**

**User Guide**

<b>Issue</b>	<b>Release Date</b>	<b>Changes</b>	<b>Page</b>
1.0	10-06	Initial release	--

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set/2006

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## Product Description

### PC Interface

*ez-Attendant* is a software application designed to enhance the attendant functionality of the *Telenium<sup>IP</sup>* by visualizing the Attendant call handling and control functions.

- *ez-Attendant* works in conjunction with the Attendant's multi-button phone providing enhanced attendant functionality and efficiency.
- The user interfaces with the *ez-Attendant* screen, [Figure 1](#), using the mouse (point and click) or programmable *Hot Keys* to select features and functions available.
- A pop-up Incoming Call window notifies the user of incoming calls while working with other applications (word processor, spread sheet, etc.).

### Database Functionality

*ez-Attendant* incorporates a database for internal users and external contacts and shares the System Speed Dial data with the *Telenium<sup>IP</sup>* system.

- The database entries can be searched and used to place calls.
- The external contact database can be linked to a private or shared Personal Information Management (PIM) database including Outlook, Goldmine or ACT!.
- Daily schedules of internal extension users with access to public Outlook files can be shared, and displayed on the *ez-Attendant* screen.

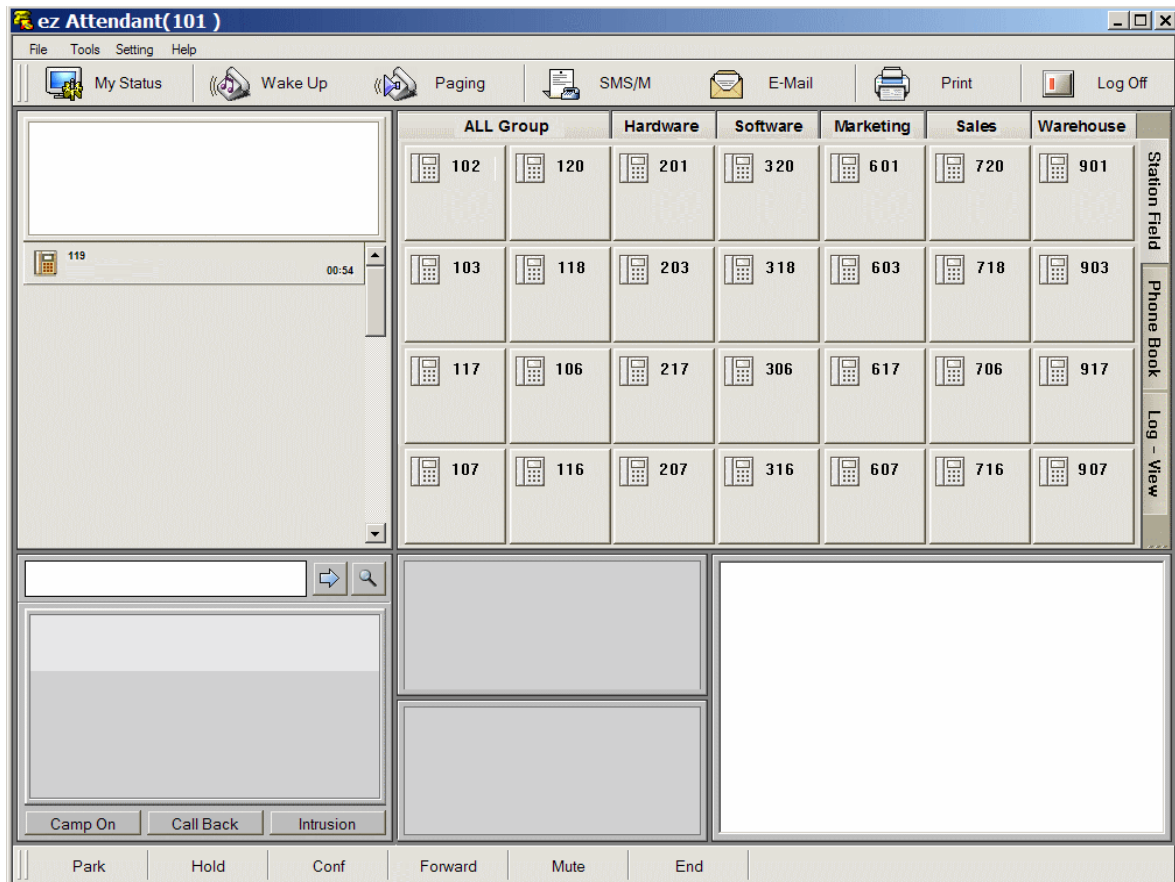


Figure 1: ez-Attendant Screen

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## Installation

Installing the *ez-Attendant* is a four (4) step process, you will need to perform the following:

- 1) License *ez-Attendant* on the *Telenium<sup>IP</sup>* system using an unlock code purchased from Vodavi,
- 2) Install the *ez-Attendant* application on the desired PC,
- 3) Configure the *ez-Attendant* program,  
-and-
- 4) Connect the *ez-Attendant* PC to the host *Telenium<sup>IP</sup>* system.

*NOTE:* After configuring *ez-Attendant*, the *ez-Attendant* PC should be restarted to ensure all configuration information is available in active memory.

### *PC Requirements*

The *ez-Attendant* application software requires a PC with the minimum configuration as defined below:

- Pentium III
- 800 MHz CPU
- 256 M Bytes of RAM
- 100 M Bytes of HDD storage
- 17" monitor with a resolution of 1024 x 768
- Microsoft Windows 2000 or XP operating system
- 10/100 Base T NIC (Network Interface Card)
- CD ROM drive
- Standard Keyboard
- Standard Mouse

### *System Requirements*

#### **Port Connection**

*ez-Attendant* is designed to work with the *Telenium<sup>IP</sup>* system that must be equipped with a LAN port for connecting to the *ez-Attendant* application. A LAN port is standard on both the MFIM and MFIME which makes *ez-Attendant* compatible with both Vodavi *Telenium<sup>IP</sup>* systems.

#### **Software Version**

The *Telenium<sup>IP</sup>* Main Processor Board (MPB) must be equipped with software version 2.2Fi or later.

#### **IP Address**

The *Telenium<sup>IP</sup>* must have a fixed (static) IP address. For security purposes, a private IP address is recommended. The *ez-Attendant* PC will support static or dynamic IP addressing.

#### **Multiple Systems**

*ez-Attendant* will operate in a network environment where several *Telenium<sup>IP</sup>* systems are interconnected. In the network environment, the BLF Manager server, which runs on a separate PC, provides status information on up to 50 extensions of each network node to *ez-Attendant*.

## Installation Routine

Install the *ez-Attendant* application on to a computer using the CD provided. The installation routine uses an Auto Run program that will start when the CD is placed in the CD ROM drive.

### DAO Install

1. Once the CD launches, *Windows* will determine whether or not you already have the DAO (Database Access Object) interface files installed on your computer. If you don't, the InstallShield Wizard will present the dialog box shown in [Figure 2](#).
2. Click **Yes** to install the DAO files needed by *ez-Attendant* to access the database programs on your computer.

» If the DAO dialog box does not appear, skip to the [ez-Attendant Install](#) procedure.

3. From the "DAO Setup" screen, click **Next** to continue.
4. If you are unsure which selection to choose (Jet 3.5 or ODBCdirect), both components may be installed. When finished, click **Next**.
5. If the Jet component was chosen, select the desired programs (Excel, Lotus, etc.) and click **Next**. Again, if you are unsure, select all the components.

» After installing the DAO components, the *ez-Attendant* Wizard will appear, [Figure 3](#).

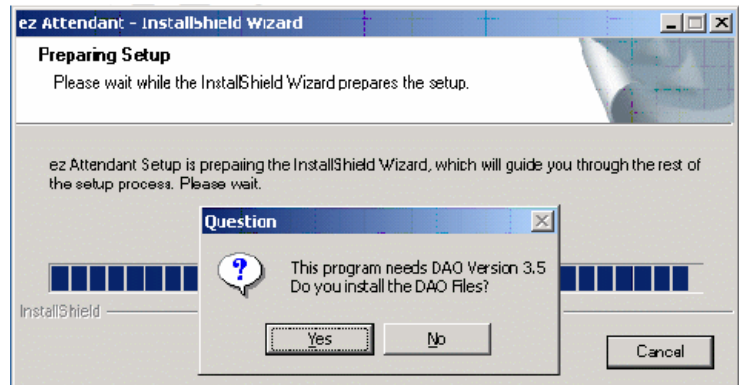


Figure 2: DAO Install

### ez-Attendant Install

1. After the "Welcome" screen displays, click **Next** to start the installation program.
2. Select the setup type for "Vodavi Communications" and click **OK**.
3. Choose the destination folder or accept the default location and click **OK**.
4. Once the installation process is complete, click **NO** when asked to restart your computer.
5. From the "WinCap Setup" screen, click **OK** to continue.
6. Select "I Agree" to accept the License Agreement and click **OK**.
7. When the installation is complete, click **Finish** to exit the wizard.
8. Restart your computer before configuring the *ez-Attendant* program.

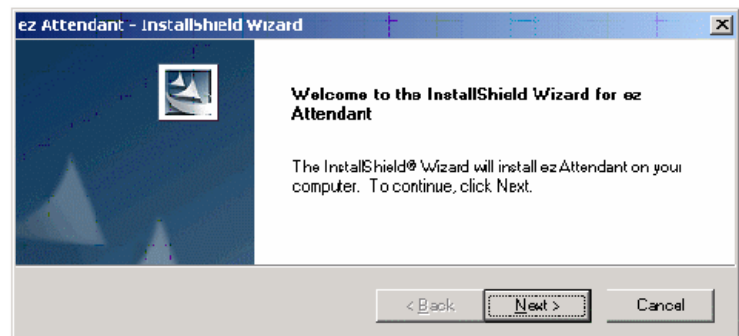


Figure 3: ez-Attendant Wizard

» For proper communication, it will be necessary to install a "software lock-key" in the *Telenium<sup>IP</sup>* system.

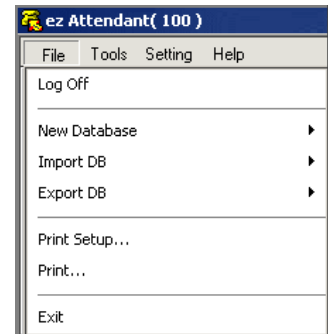
## ez-Attendant Configuration

### *Navigating in the Program Window*

The *ez-Attendant* main program window will allow you to access the settings shown in the following sections:

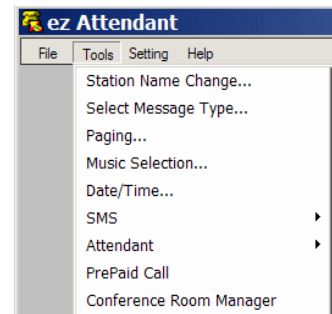
#### **File Menu**

- Log Off
- New Database > New MS Access / New MS Excel
- Import DB > MS Outlook Contact / MS Outlook Schedule / Goldmine / ACT! / MS Access / MS Excel
- Export DB > MS Contact / Goldmine / ACT! / MS Access / MS Excel
- Print Setup
- Print
- Exit



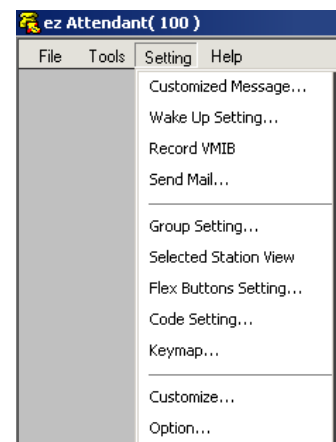
#### **Tools Menu**

- Station Name Change
- Select Message Type
- Paging
- Music Selection
- Date/Time
- SMS > Private SMS / Mobile SMS
- Attendant > Change COS / Temporary COS / Attendant Cancel
- PrePaid Call
- Conference Room Manager



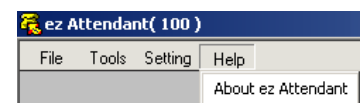
#### **Setting Menu**

- Customized Message
- Wake Up Setting
- Record VMIB
- Send Mail
- Group Setting
- Selected Station View
- Flex Buttons Setting
- Code Setting
- Keymap
- Customize
- Option



#### **Help Menu**

- About ez Attendant



## Program Overview

After successfully installing the ez-Attendant application, the program will need to be configured for optimum performance.

With the program open ... the Display and Settings windows may be accessed from the Main Menu bar under: Setting / Option. Refer to [Figure 4](#) and [Figure 5](#).

The **Display window** will allow the user to select certain display options to modify the way the program looks.

- Station Type (buttons/list)
- Station Window Size (S, M, L)
- Station View
- Park Call Display (show/hide)
- Keypad Display (where to appear)
- Toolbar ICON Display (Wakeup, Recorder icons)
- Language Selection (*not supported*)

The **Settings window** contains specific system parameters, such as: the IP address of the *Telenium<sup>IP</sup>* system LAN port, and the Attendant extension number which must be set for proper communication.

- System Setting for LogOn
  - Log On Information (IP Address/Extn)
  - SMS Information (short messages)
  - Forward Information (where to appear)
  - Group Setting Information (department/names)
- » As shown, these windows are divided into multiple sections and are described in the following paragraphs in the order displayed.
- » Additional configuration items from other dialog boxes are also covered in this section.

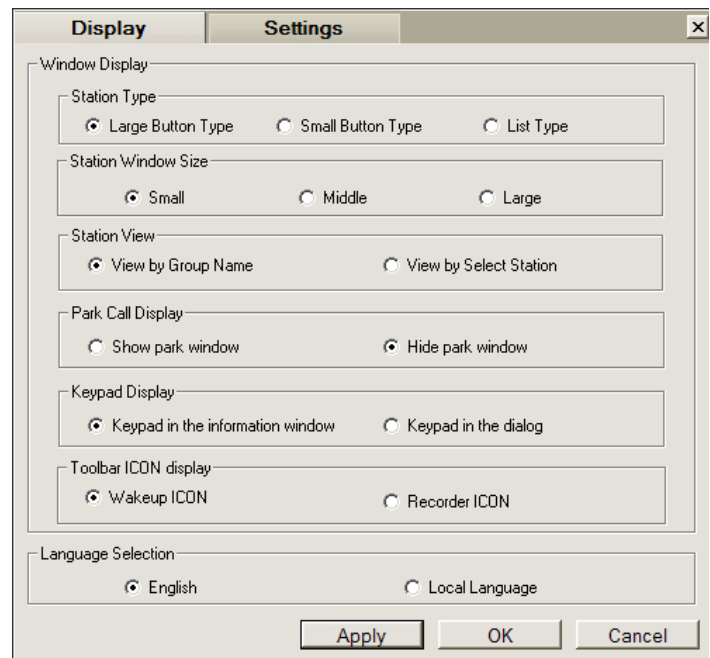


Figure 4: ez-Attendant Display Window

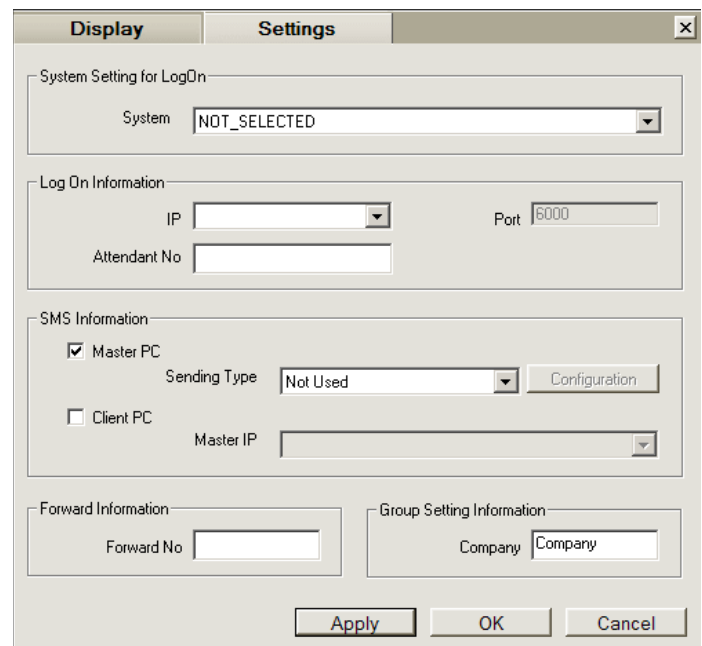


Figure 5: ez-Attendant Settings Window

## Display Window

- » To access the Display window from the Menu bar, select: Setting > Options > Settings tab

### Station Type

The Station window in the *ez-Attendant* main screen is primarily used as a status display of the host system and, if assigned, the network *Telenium<sup>IP</sup>* stations. The Station window is also used to display the *ez-Attendant* Phone Book and to view call logs by selecting the appropriate tab to the right of the window. When used in the Station Field view, the display indicates the status of internal stations and allows the Attendant to call individual stations by selecting the desired station button.

For convenience, under the Station Field tab, stations can be displayed in one of three Types (or views): Large Icon buttons, Small Icon buttons, and List View, [Figure 6](#).

- The *Large Icon* view displays the name and number for each station, and a phone icon which is used to indicate the status of the extension.
- The *Small Icon* view shows the station number and a smaller phone icon to indicate extension status.
- The *List View* displays each extension in a list format that shows the name, number and other user related phone numbers, as well as a small phone icon for status of extension.

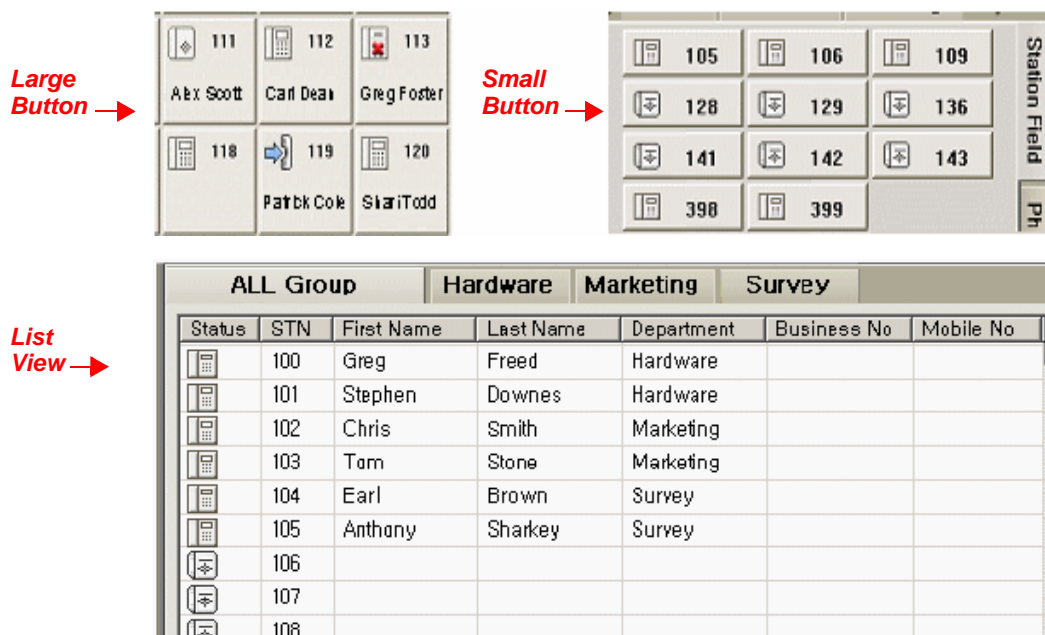


Figure 6: Station Button & List View Displays

## Station Window Size

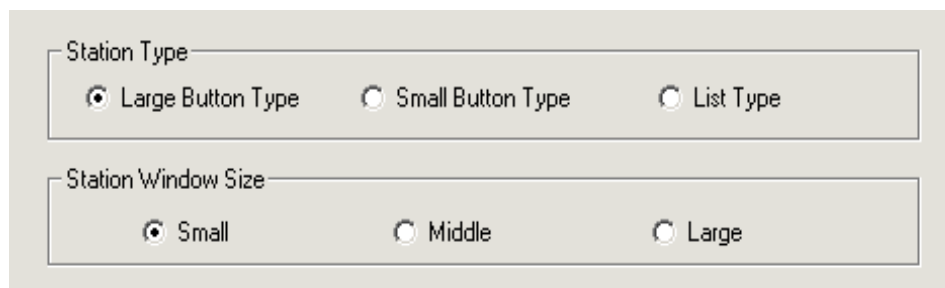
The size of the Station Window can be adjusted to “small, medium or large” which will increase or decrease the number of button rows or list items displayed. The number of rows displayed is based on the Station Window size, and the Station Type selected for the default screen resolution (1024 by 768 XGA), [Table 1](#). For both large and small icon views, seven (7) columns of station icons are displayed.

**Table 1: Station Window Size**

Station Window Size	Station Type (Rows/Buttons displayed)		
	Large Icon	Small Icon	List
Small	4/28	8/56	13
Middle	5/35	10/70	18
Large	6/42	12/84	21

The view and size are configured in the Station Type and Station Window Size sections of the Display window, [Figure 7](#).

- For the Station Type, select the radio button for the view desired:
  - Large Button Type = large icon display
  - Small Button Type = small icon display
  - List Type = list display
- For the Station Window Size, select the radio button desired for the number of rows that will be displayed for each selection: Small, Middle or Large. Refer to [Table 1](#).
- Click **Apply** to save the selection and to allow further entries,  
-or-  
Click **OK** to save the selection and return to the *ez-Attendant* main screen.



**Figure 7: Station Window Display Mode**

**Note** As the size of the Station window is increased, the size of the System Text Message, Schedule and SMS (Short Message Service) windows will be decreased.

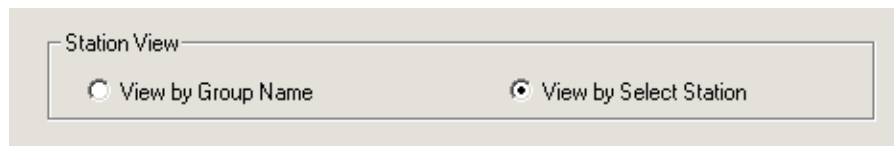
## >>>> Station View

The Station window displays stations by groups. The active group display is selected from the tabs at the top of the Station Window. The available Groups are based on the group (department) name in the internal Phone Book, or a single group of "selected stations". The user can select to view stations by group name or by selected station.

Selecting View by Group Name will display stations by the department name registered on the Phone Book. Refer to [Station Window Display Groups on page 13](#) to add/edit the names of Group members.

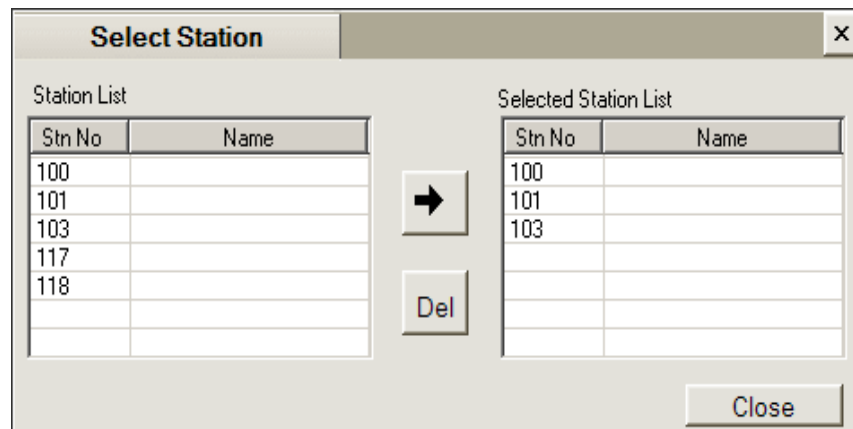
Choosing View by Select Station, the ez-Attendant displays stations selected by user as shown:

- Click the radio button with View by Select Station text to display selected stations, [Figure 8](#). After selecting View by Select Station, stations can then be assigned to the selected station's group.



**Figure 8: View by Select Station option**

- To select stations for monitoring; select Setting from the Main Menu, choose "Selected Station View" from the Setting Menu, select stations for monitoring and select ➡ to add them to the Selected Station List. Select the Close button to store the selection and exit, [Figure 9](#).



**Figure 9: Select Station window**

When complete, the Station Window will display the "ALL Group" and "Selected Stations" tabs as shown in Figure 3.4.1.2c and will not display stations by the Group (department) name. Figure 3.4.1.2c Select station view Button View Number/Name Sort

When the Button Type view is selected, the buttons can be displayed and sorted by extension number or name. When sorted by number, the lowest station number is shown in the upper left and the highest is shown in the lower right. When sorted by name, the buttons are sorted in alphabetical order by first name. To change the sorting option, right-click in the Station Window and select Sort By Name, or Sort By Number.

Figure 3.4.1.3a Popup Menu on the station window / Figure 3.4.1.3b Station window sorted by name / Notes: The default sort order is by Number.

## Park Call Display Window

The Park Call Display window displays information on calls that are “parked” by *ez-Attendant*. The information included is the Park Zone and the caller Id for the parked call. The window will be shown just above the Lower Tool bar. By default, the Call Park window is not displayed. *ez-Attendant* may be configured to show this window from the Park Call Display section in the Display window, *Figure 10*.

- Click the desired radio button to select “Show or Hide” the Park Call window.
- Click **Apply** to save the selection and to allow further entries,
- or-
- Click **OK** to save the selection and return to the *ez-Attendant* main screen.

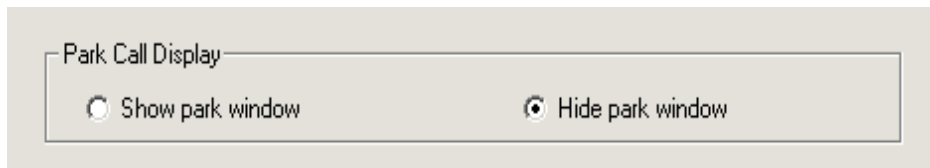


Figure 10: Call Park Display option

## Keypad Display

*ez-Attendant* can display a “telephone keypad” which the attendant can use to place internal or external calls in place of the Attendant's multi-button phone. The keypad is displayed in either the Information or Queue window based on the option selected in the Keypad Display section of the Display window, *Figure 11*.

- Click the desired radio button to show the keypad in the Information or Queue window.
- Click **Apply** to save the selection and to allow further entries,
- or-
- Click **OK** to save the selection and return to the *ez-Attendant* main screen.

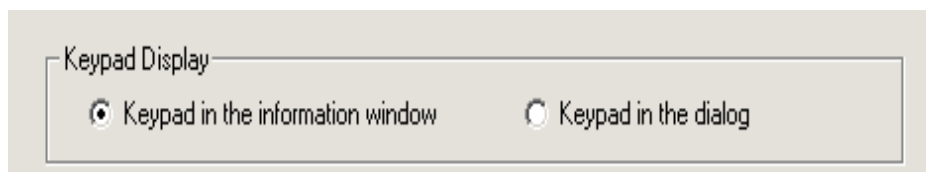
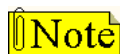


Figure 11: Keypad Display option

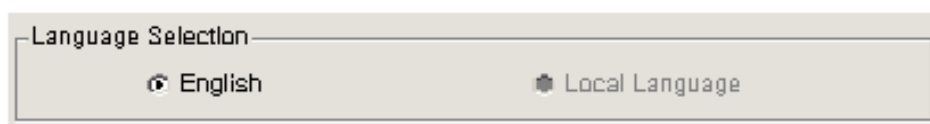


*It is recommended that the Keypad be displayed in the Information window.*

*Hunt Groups can not be assigned a button in the Station window therefore; the keypad is used to place a call to a station Hunt Group.*

## Language Selection (*not available*)

The default language for the *ez-Attendant* application is English. The “Local Language” option is not available or supported at this time.



## Settings Window

After installing the *ez-Attendant*, the user must select the proper target system to log on.

» To access the Settings window from the Menu bar, select: Setting>Options>Settings tab

### System Setting for LogOn

- Select the applicable *Telenium<sup>IP</sup>* system from the drop-down "System" menu.
- Click **Apply** to save the selection and to allow further entries,  
-or-  
Click **OK** to save the selection and return to the *ez-Attendant* main screen.

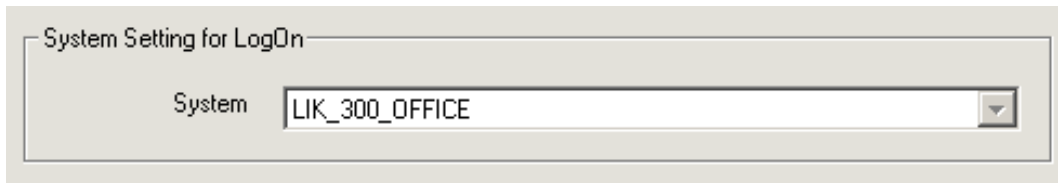


Figure 12: System Setting for Logon

#### CONDITIONS

» The *Telenium<sup>IP</sup>* system can only be changed when no users are logged on to the *ez-Attendant*.

### Log On Information

The IP Address of the host *Telenium<sup>IP</sup>* system and the Attendant extension number are required data and must be assigned in the Log On Information section of the Settings window, [Figure 13](#).

- Enter the IP address of the host *Telenium<sup>IP</sup>* system and the extension number of the Attendant station associated with *ez-Attendant*.
- Click **Apply** to save the selection and to allow further entries,  
-or-  
Click **OK** to save the selection and return to the *ez-Attendant* main screen.

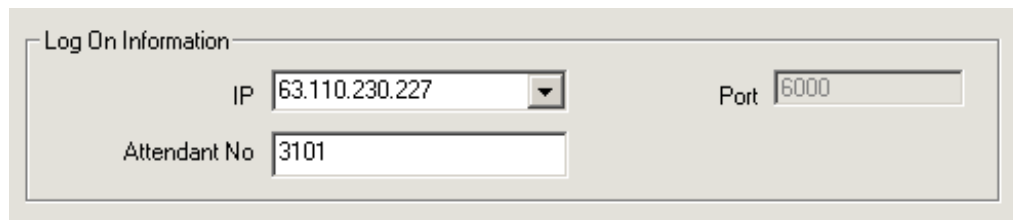
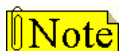


Figure 13: Log On Information in Option Window



» The "Port" entry in the Log On Information section is the fixed UDP port used for communication between *ez-Attendant* and the *Telenium<sup>IP</sup>*.

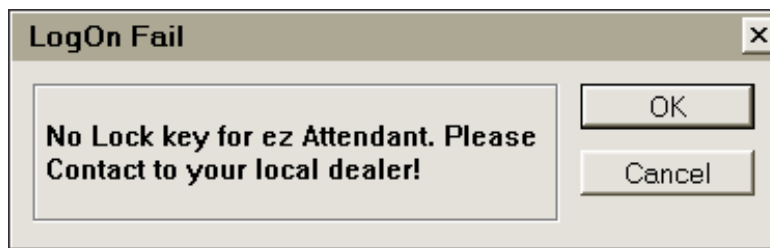
» *ez-Attendant* supports the Hot-Desk feature of the *Telenium<sup>IP</sup>*. In this case, enter the appropriate Hot Desk extension number for the Attendant No in this section. Then, to log-on, the Attendant must enter the associated Hot-Desk password.

**CONDITIONS****Telenium<sup>IP</sup> Settings**

- » Each *ez-Attendant* in a *Telenium<sup>IP</sup>* system, maximum five, must have a separate extension number based on the *Telenium<sup>IP</sup>* Attendant assignments (PGM 164 or 120).
- » If the *ez-Attendant* Password Login setting is ON, the designated station(s) will be required to use a password when entering the *ez-Attendant*. The password is the station number you are connecting *ez-Attendant* to followed by the code set in the Authorization Code Table (PGM 227) for that station. This password is the same as the one used for VSF voice mail.

**LogOn Fail Error Message**

- If you receive the pop-up message "LogOn Fail", it means you have not used a valid product license code on the *Telenium<sup>IP</sup>* system.



- If you have been using *ez-Attendant* during the introductory demonstration period without a permanent license, and receive this message, the demonstration timer has expired.

*Contact your Vodavi dealer to correct the problem.*

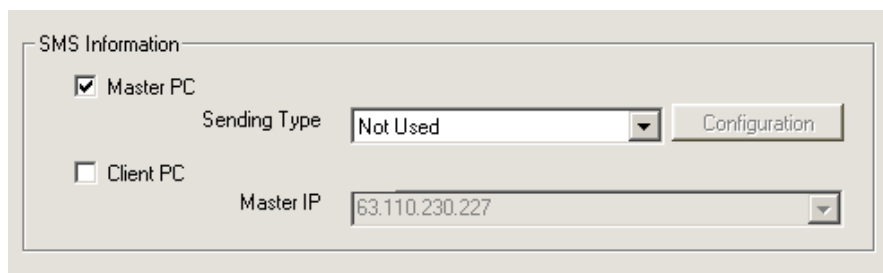
**SMS Information**

*ez-Attendant* can send short text messages (48 characters) to other *ez-Attendants*, *ez-Phones*, VODAVI multi-button display telephones and VODAVI DECT phone displays.

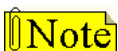
- The "Master PC" will function as the SMS server.
- The configuration includes selection of the SMS server (Master PC) and the IP address of the Master PC.

In the SMS Information section, select either the Master or Client PC box as appropriate.

- For the Master PC, ...
- For a Client PC, enter the IP address of the Master PC.



**Figure 14: SMS Information Dialog Box**



**GSM Messaging** settings may appear in your version of *ezAttendant*, however they do not apply to North American applications. SMS messaging is only available within the *Telenium<sup>IP</sup>* system.

## Forward Information

When required, the Attendant may forward calls to another Attendant or extension in the host *Telenium<sup>IP</sup>* system without the need to Log Off. The extension to receive calls is predefined in *ez-Attendant*. When activated by selecting Forward on the Lower Tool bar, all *ez-Attendant* calls are forward to the extension assigned in the Forward Information section of the Settings window, [Figure 15](#).

- Enter the extension number to receive calls forwarded from *ez-Attendant* in the Forward No box.
- Click **Apply** to save the selection and to allow further entries,  
-or-  
Click **OK** to save the selection and return to the *ez-Attendant* main screen.

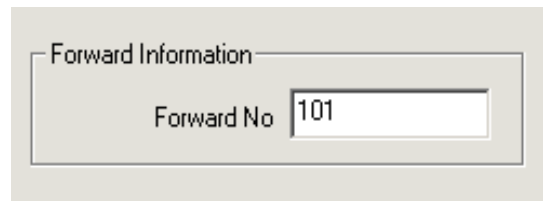


Figure 15: Forward Information

### CONDITIONS

- » The *ez-Attendant* extension must be allowed to activate Call Forward in the host *Telenium<sup>IP</sup>* system database and is subject to the conditions of the *Telenium<sup>IP</sup>*.

## Group Setting Information

When groups are defined as departments, the company name can be defined in the Group Setting Information section of the Settings window, [Figure 16](#).

- Enter the company name in the Company box.
- Click **Apply** to save the selection and to allow further entries,  
-or-  
Click **OK** to save the selection and return to the *ez-Attendant* main screen.

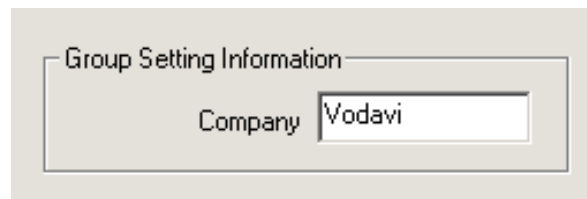


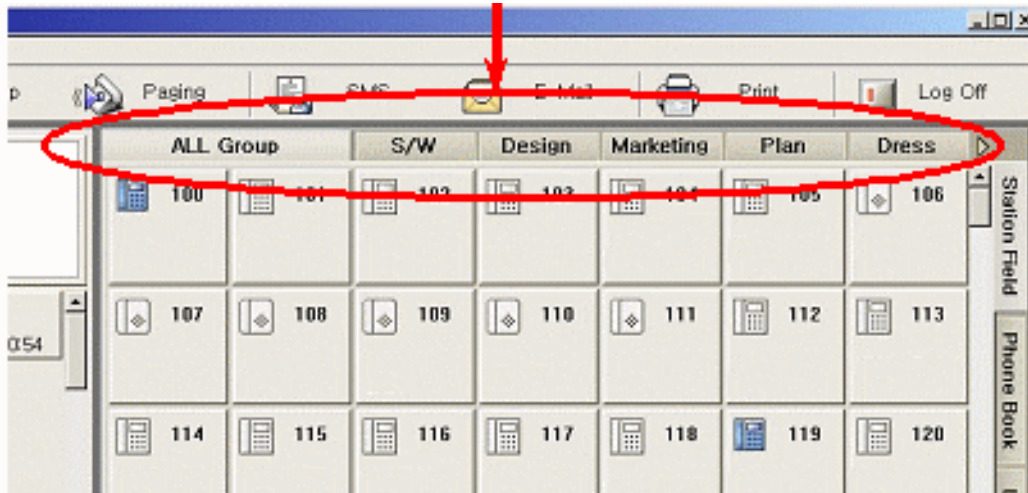
Figure 16: Group Setting Information

*Other Functions*

**Station Window Display Groups**

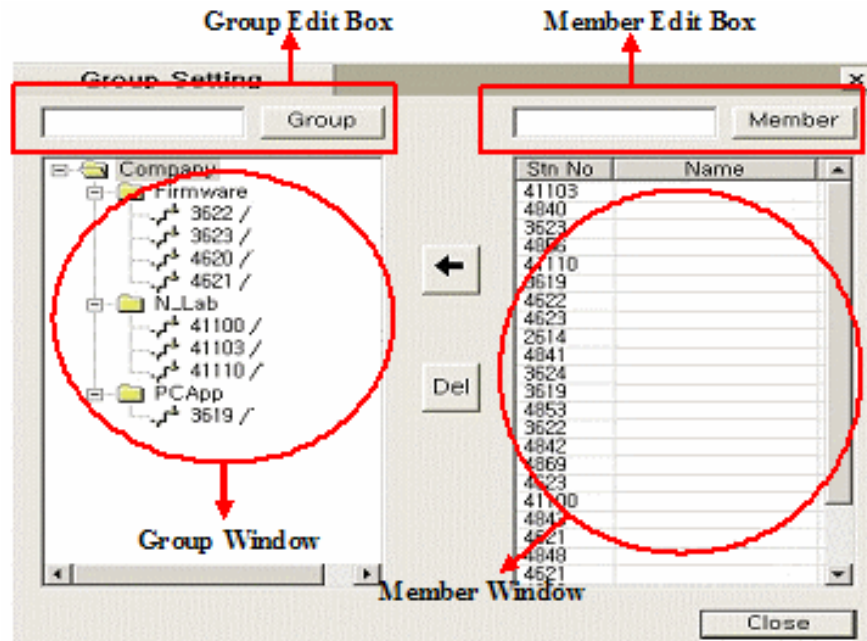
When the ez-Attendant is configured to display stations by group name, refer to >>> [Station View on page 8](#), the Station Window will provide tabs at the top of the window for each group that was entered in the internal Phone Book. When a tab is selected, the stations assigned to that group are displayed as shown in [Figure 17](#).

The Group Display feature is most commonly used to identify departments: Sales, Human Resources, Stockroom, etc. Also, when ez-Attendant is used in a network environment with the DSS/BLF Manager, special groupings are assigned for stations of network nodes.



**Figure 17: Station Window Group Tabs**

- » To display or modify group assignments, [Figure 18](#), go to the Menu bar and select: Setting > Group Setting.





**Figure 18: Group Setting Dialog Box**

Groups are shown in the left window; members (system users) are shown in the right window.

- *In the Group box* the Group name can be entered or edited. Group details can be expanded in the Group window to show group members or hidden, displaying only the group name.
- *In the Member window*, the member names can be searched by entering characters in the Member box. The Member window can be sorted by the station number or the user name by selecting the appropriate column header (Stn No or Name).

***To enter or remove a member for a group:***

1. Enter the group name in the Group box, or select a group in the Group window.
2. Select a member name in the Member window.
3. Select  to add the selected member to the group or  to remove the member.

When Group Names are added or edited, the change is automatically updated in the internal Phone Book.

***CONDITIONS***

- » There is no limit to the number of groups that can be defined.
- » In a network environment, separate Groups can be defined for network stations. A network group may contain stations from any combination of network nodes.
- » When the Group Setting dialog box is closed, Groups that have no members assigned will be deleted automatically.

## Hot-Key Map Configuration

The Attendant may use keyboard shortcuts or *Hot Keys* in place of the mouse for many *ez-Attendant* call processing functions. *Hot Keys*, which involves pressing two (2) keys at the same time, are mapped to each feature shown under the Code Key Map option.

- » To view these call features and their respective Hot Keys, go to the Menu bar and select: Setting > Code Key Map. The default mapping is shown in [Table 2](#).

**Table 2: Hot Key Default Map**

FEATURE	HOT KEY
Answer	Alt + A
Call Back	Alt + B
Call Pick-up (Direct)	Ctrl + P
Camp On	Alt + O
Clear	Alt + X
CO Line Display (View)	Alt + S
Conference	Alt + C
Display Key Pad (Show)	Ctrl + K
End	Alt + E
Forward	Alt + F
Hold	Alt + H
Hunt Group Display	Ctrl + G
Intrusion	Alt + I
Mute	Alt + M
Park	Alt + P
Place Call	Enter
Redial	Alt + R
Search	Ctrl + Enter
Search Next	Ctrl + ↓
Search Previous	Ctrl + ↑
Transfer	Shift + Enter
UnPark	Alt + U
Unscreened Transfer	Alt + Enter

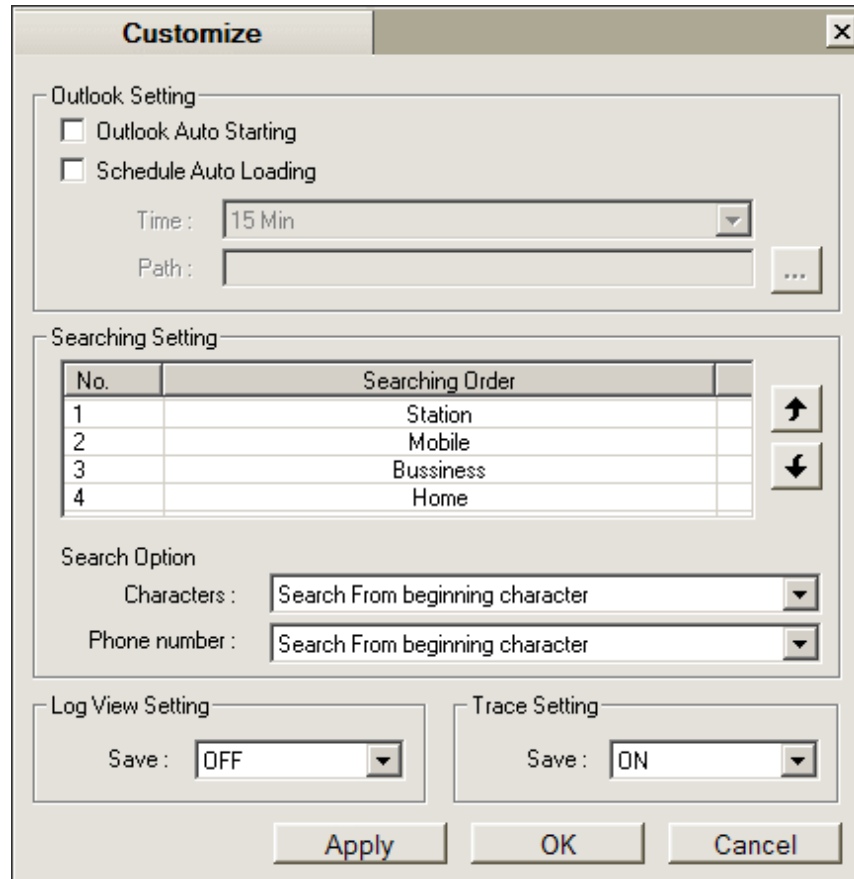
### CONDITIONS

- » Duplicate Hot Key mapping is not allowed.
- » The keyboard "space bar" and "number keys" can not be used in a Hot Key map.

## Customize Environment

Using the Customize dialog box, [Figure 19](#), operation of the *ez-Attendant* may be optimized for the user. There are three categories under the Customize dialog box which include settings for Outlook, Search options and enabling call logs and trace records.

- » To enter parameters in the Customize dialog box, go to the Menu bar and select: Setting > Customize.



**Figure 19: Customize Dialog Box**

**In the Outlook Setting** section, select Outlook Auto Start to activate Outlook when the *ez-Attendant* starts. Outlook will be started and minimized allowing the *ez-Attendant* quick access to the Outlook database. Schedule Auto Load will automatically update the *ez-Attendant* schedule files for other users at increments in the Time box using the path entered in the Path box.

**The Search Order** in the Search Setting section determines the order in which the *ez-Attendant* will search for a phone number when the *ez-Attendant* user attempts to place a call from a Phone Book entry. The user may search through the several *ez-Attendant* databases. The characteristics of the search are defined in Search Option of the Search Setting section. Characters and Phone number can be set to perform a search for a given text/digit string in the search field from either the beginning of the field or contained anywhere within the field (sub characters). Use the drop-down selection menu to select the desired search option.

**The Log View Setting and Trace Setting** enable or disable storing call records and trace records for the *ez-Attendant*. Select the desired option.

## External Call Dial Codes

For proper operation of external calls, *ez-Attendant* must be assigned dial codes for CO Line access, International access, Local country code, etc.

- » To enter parameters in the Code Setting dialog box, go to the Menu bar and select: Setting > Code Setting, *Figure 20*.

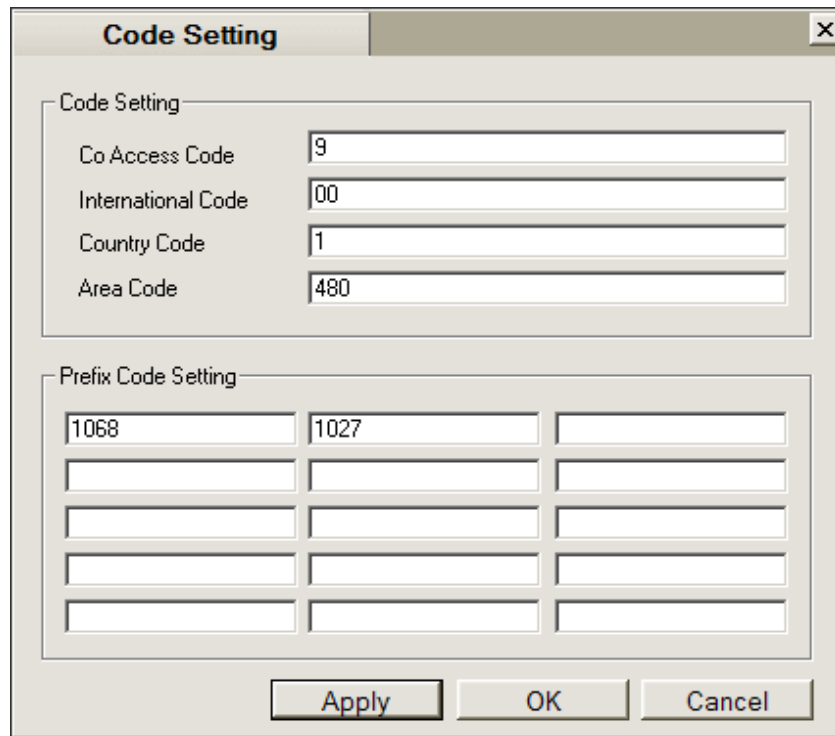


Figure 20: Code Setting Dialog Box

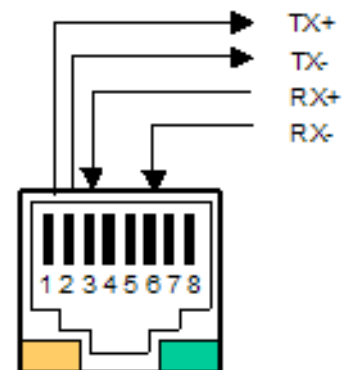


The Prefix code is also called the city or office code.

## ez-Attendant PC to TeleniumIP Connection

*ez-Attendant* is connected to the host *TeleniumIP* system by way of the LAN (Local Area Network).

- It is recommended that each *ez-Attendant* and the *TeleniumIP* system be connected to a 10/100 Base T Ethernet switch port.
- The connection should use Category 5 straight through cable terminated in appropriate connectors, typically an RJ-45 connector, wired as shown in this diagram.



---

## ez-Attendant Operation

### *Operation Overview*

*ez-Attendant* is a software application designed to visualize attendant call processing and handling for the *Telenium<sup>IP</sup>* system. The *ez-Attendant* application resides on the attendant's desktop and is accessed by the *ez-Attendant* short-cut icon on the Windows desktop. Opening the application, the Attendant logs on, establishing the link to the *Telenium<sup>IP</sup>* over the LAN. The *Telenium<sup>IP</sup>* configuration, station status, and other information are downloaded.

**The *ez-Attendant* screen** provides visual status of registered *Telenium<sup>IP</sup>* users in the Station window with the Station Field View showing DSS/Status buttons. These buttons provide more detailed information on the status of users than available from the DSS/BLF buttons and LCD of normal multi-button phones by employing icons to denote status: Forward, DND, etc., combined with station name and number information. The alternative List View includes status icons for all users in a spreadsheet like list which can be viewed, edited, searched and used for placing calls.

**Incoming calls** to *ez-Attendant* are displayed in the Queue window with Caller ID and queue time. When answered, the call information is shown in the Active Call window with additional information from comparison to the *ez-Attendant* Phone Book database. *ez-Attendant* can run in background, allowing the Attendant to employ other PC applications for word processing, etc. When a call is received while "minimized", *ez-Attendant* delivers the call in a pop-up window, the user can answer and activate the *ez-Attendant* screen by 'clicking' the pop-up.

**Transferring the call** can be as simple as 'clicking' a button in the Station window or, entering a station number or name in the search box. Matches to the search entry displays detail from the Internal User Phone Book database and status from the *Telenium<sup>IP</sup>* in the Information window. The Schedule window displays schedule information for the station from a public MS Outlook database and any active Text Message is displayed in the System Text Message window. Selecting the arrow button places a call to the selected user for transfer.

**On screen buttons give easy access** to commonly needed Attendant features such as Park, Paging, Camp on, Forward, Hold, Conference, etc. *ez-Attendant* affords access through the *Telenium<sup>IP</sup>* to send SMS (Short Message Service) messages to other system users with an LCD multi-button phone, VODAVI DECT phone, ez-Phone or *ez-Attendant*. Incorporating a GSM modem in the PC, *ez-Attendant* can send and receive text messages over GSM mobile networks supporting SMS service. The *ez-Attendant* user can select recipients from the *ez-Attendant* databases (Phone Book, Log View or System Speed Dial) or, with the Keypad pop-up window, dial a number for ad-hoc calling.

***ez-Attendant* gives graphical access** for Attendant system control functions commonly available through the multi-button phone including: Day/Night ringing activation, Attendant Cancel control, Call Forward, DND and System Text Messaging for other users, Temporary COS (Phone Lock), Date/Time, Wake-Up, etc. For each control function a dialog box is provided, allowing *ez-Attendant* user input. In addition, *ez-Attendant* can share, via the upload/download utility, the *Telenium<sup>IP</sup>* System Speed Dial database which permits the user to add or modify entries as well as search and place calls from the database.

**ez-Attendant maintains a database** of External contacts which is accessed in the Station window Phone Book View. Entries in the Phone Book can be added, edited, search and used to place calls. The Phone Book is stored as either an MS Access file and is linked to the user Outlook, Goldmine or ACT! database using the import/export Tool.

**ez-Attendant monitors** and can log all external call activity of the *Telenium<sup>IP</sup>* as well as internal calls to/from the *ez-Attendant*. This Log is shown in the Station window as the Log View in place of the Station Field or Phone Book View. As with other *ez-Attendant* databases, entries can be searched and used to place calls.

These and other operations are detailed in the following paragraphs referencing the *ez-Attendant* screen as shown in *Figure 21*. The following illustration provides call-outs for each of the *ez-Attendant* screen windows, tool bars, etc.

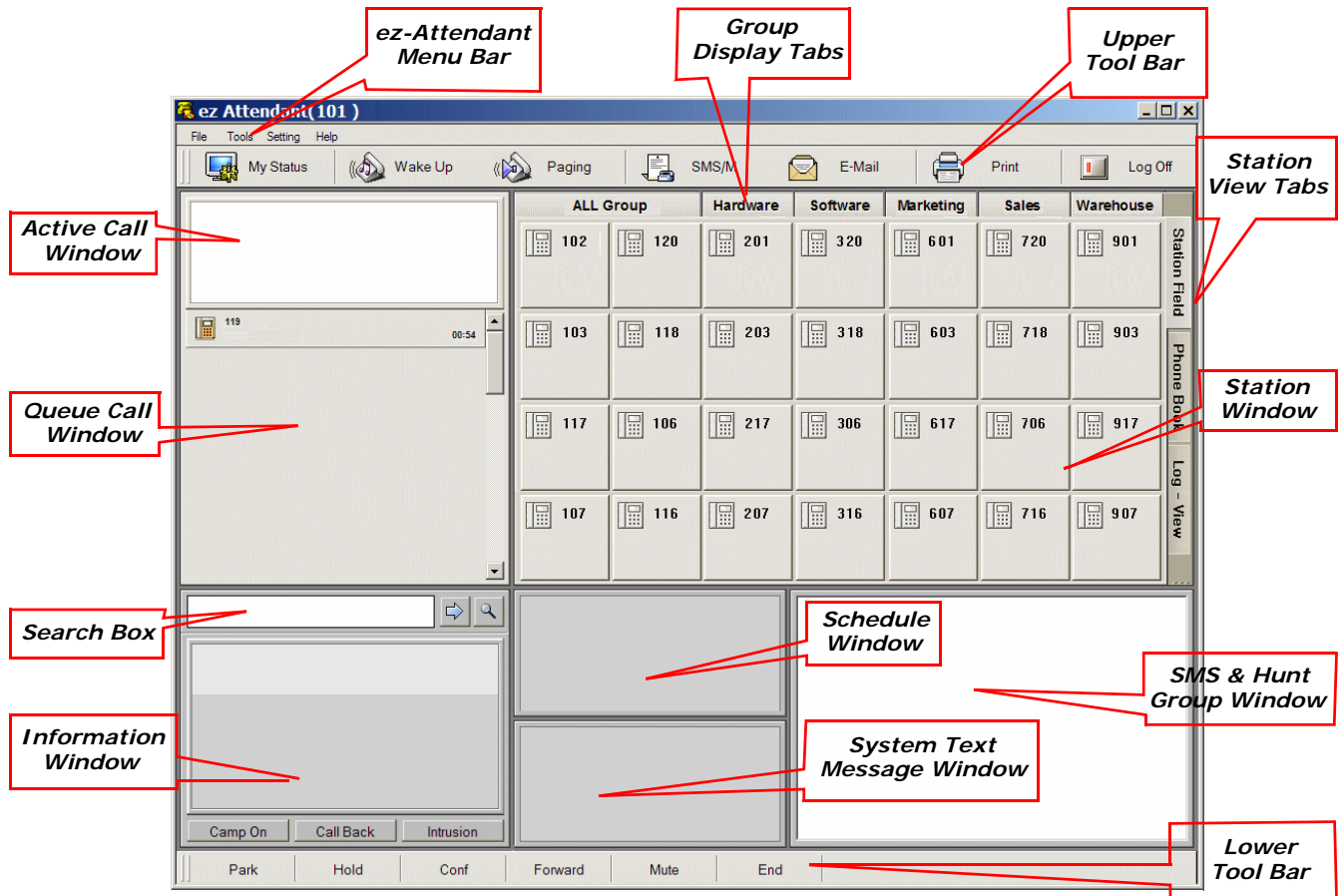
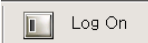

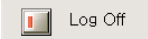


Figure 21: ez-Attendant Screen

## Log on

Before starting Log on, *ez-Attendant* must be the active application. To start *ez-Attendant* double-click the *ez-Attendant* shortcut icon on the Windows desktop.

To log on *ez-Attendant*, with *ez-Attendant* as the active screen, click the  icon on the right side of the Upper Tool bar of the *ez-Attendant* screen. The log on process can also be started with the Log On selection in the File menu, the Log-on Process window, [Figure 22](#), will appear. The log on process includes download of various data files and configurations from the *TeleniumIP* and will require several minutes. The log on process may require additional time depending on traffic in the *TeleniumIP* system and the LAN.

Once complete, the  icon will change to  allowing easy log off.

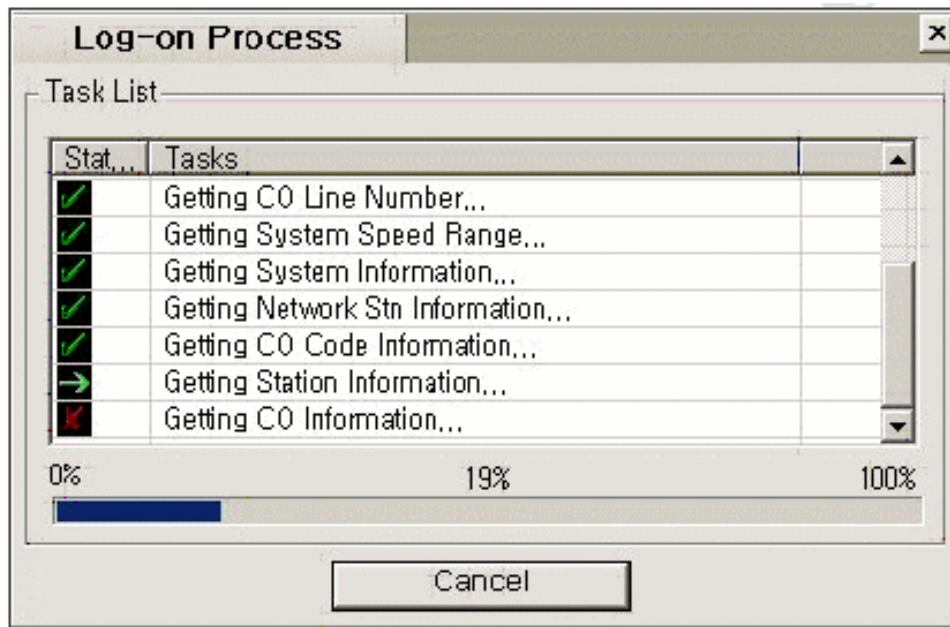


Figure 22: Log-on Process Window

If the log on process is not successful, the LogOn Fail pop-up window, [Figure 23](#) will appear with an error message indicating the cause of failure. Refer to [Logon Error Messages on page 59](#) to view the various messages.

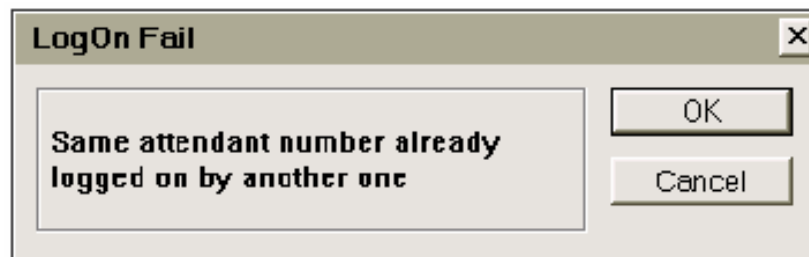


Figure 23: LogOn Fail Error Message Window

When *ez-Attendant* is used with the *Telenium<sup>IP</sup>* Hot Desk feature, the user must follow the Hot Desk log on procedure. The Hot Desk Password dialog box, [Figure 24](#), will appear for password entry. When the password is correctly entered, select OK to proceed with the log on process.

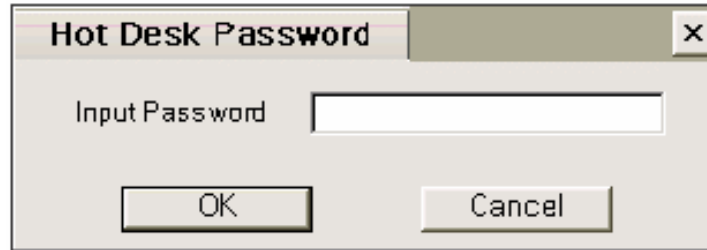


Figure 24: Hot Desk Password Dialog Box

## Answering Incoming Calls

*ez-Attendant* can answer calls in several ways depending on the state of the *ez-Attendant* application, active or minimized, and the extension receiving the call, *ez-Attendant* or another extension in the system.

### ez-Attendant Minimized

When *ez-Attendant* receives an incoming call with the application minimized, the Incoming Call pop-up window, [Figure 25](#), will appear. Selecting this window will answer the call and activate the *ez-Attendant* screen for further call processing. For further call processing options refer to [Attendant Call Processing on page 24](#).



Figure 25: ez-Attendant Incoming Call Pop-Up Window

### ez-Attendant Screen Active

When *ez-Attendant* receives a call with the application active, the call information is displayed in the Queue window. Information provided depends on the Caller Id received with the call and may include the calling party name, number and length of time in queue.

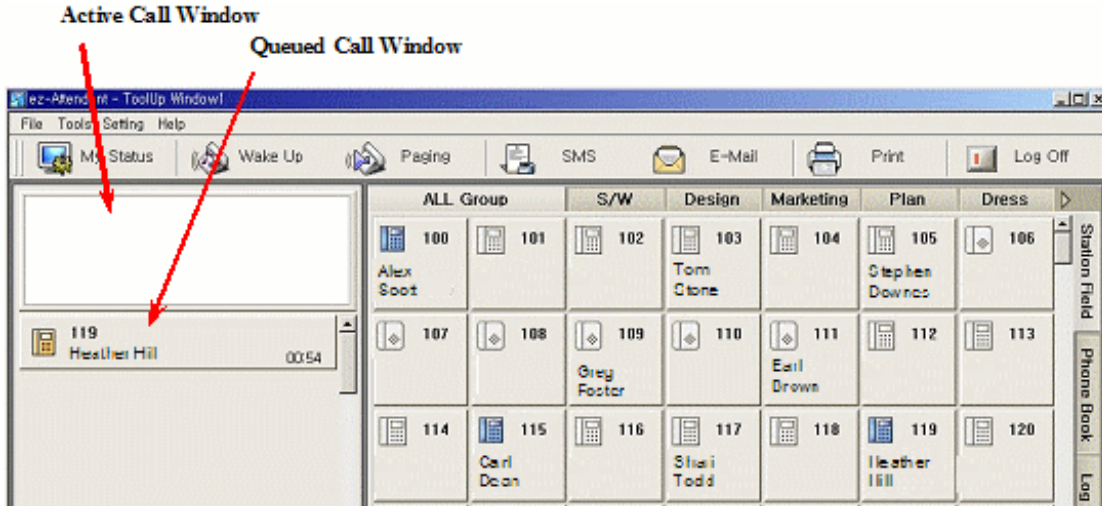


Figure 26: Incoming Call Queue Window

The *ez-Attendant* user may answer a queued call by selecting the desired call using the mouse or using the "Call Answer" *Hot Keys* (default = ALT + A). Using the *Hot Keys* will answer the queued call shown at the top of the Queue window.

Once answered, information on the call is moved from the Queue window to the Active Call window just above the Queue window, *Figure 27*, and audio is sent to the Attendant's multi-button phone. In addition to the Caller name, number and call duration, when CLI is provided and the call is from a caller registered in the Phone book, the Company name will be displayed. In addition, for recalls, the Active Call window will display the origin of the recall.

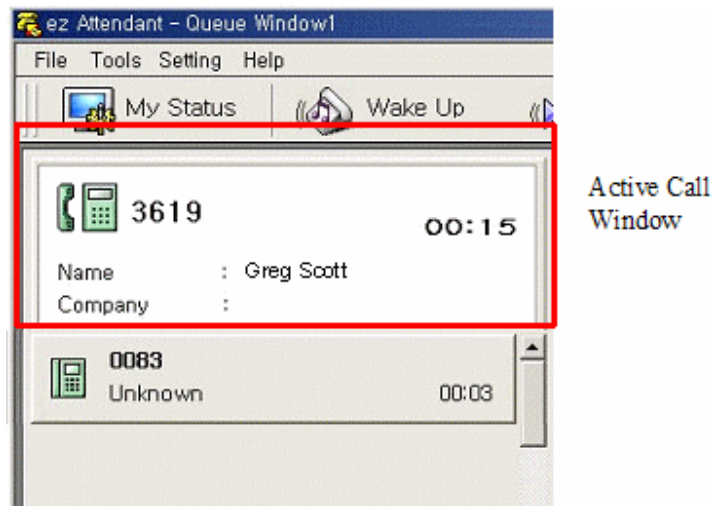


Figure 27: Active Call Window

*CONDITIONS*

- » Up to 20 calls can be queued to an Attendant in the *Telenium<sup>IP</sup>*.
- » If the Attendant is using another PC application when a new call arrives, the Incoming Call pop-up window will be displayed and can be used to activate the *ez-Attendant* and answer the call. Refer to [ez-Attendant Minimized on page 21](#).
- » The *ez-Attendant* user may answer a call in the traditional manner using the multi-button phone associated with *ez-Attendant*.
- » When a call is answered by the *ez-Attendant*, a cursor appears in the Search box of the *ez-Attendant* main screen in preparation for the Call Transfer operation. Refer to [Transferring an Active Call on page 24](#).

**Call Pick-Up**

The *ez-Attendant* user can answer calls ringing at other extensions using Call Pick-Up. Tone ringing intercom calls, incoming CO line calls, recalling CO line calls and transferred CO line calls may be answered using the Pick-Up feature.

***To answer a call using Pick-Up:***

1. In the Station window, select the extension button with the incoming call,  
-or-  
In the Search box, enter the extension number.
2. Press the "Pick-Up" *Hot Keys* (default = CTRL + P).

*CONDITIONS*

- » Call Pick-Up is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

## Attendant Call Processing

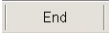
### Transferring an Active Call

*ez-Attendant* can send an active call to another extension or station group in the host *Telenium<sup>IP</sup>* system. The transfer operation allows the *ez-Attendant* user to announce the call to the receiver and await a response. This is known as "Screened Call Transfer". The Attendant need not announce or await a response, which is known as "Unscreened Call Transfer".

Calls may be Transferred using the Station window buttons or entering search criteria in the Search entry box. A match to the entry is displayed in the Information window with user information as shown in [Figure 28](#). In addition the user's schedule and text messages are displayed in the appropriate window. This information may be employed by the *ez-Attendant* user to more efficiently handle the call. *ez-Attendant* may also access the search function by pressing the "F2" keyboard button which will place the cursor in the search box.



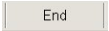
If the intended receiver is busy, *ez-Attendant* may camp the call on the busy user, or use Intrusion to announce the call. Refer to [Camp-on on page 25](#), and [Intrusion on page 25](#).

#### To transfer an active call:

1. Select the desired station button in the Station window.
2. To screen the transfer, await answer and announce call.
3. Select  to complete the transfer.

-or-

#### Using the search function:

1. Select the  button and enter the search criteria,  
-or-  
Use the *Hot Keys* to view search information (default = CTRL + ENTER).
2. To transfer the call, select the  button.
3. To screen the transfer, await answer and announce call.
4. Select  to complete the transfer.

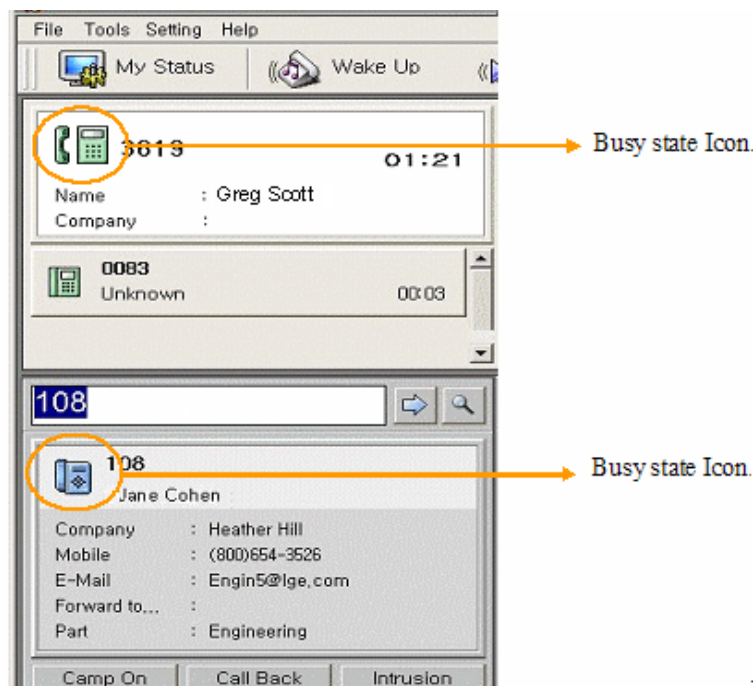


Figure 28: Information Window Call Transfer

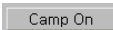
*CONDITIONS*

- » The search function will not provide information on the status of a Hunt Group and only unscreened transfers can be made to a Hunt Group.
- » If multiple matches are found, the number of matches is shown and the user may review each match using the Search *Hot Keys*. The defaults are: CTRL + ▲ for Search Previous, and CTRL + ▼ for Search Next.

**Camp-on**

When transferring a call to or calling a busy extension, *ez-Attendant* can Camp the call on the busy extension sending a call camp-on tone to the user.

**To Camp-on a call:**

1. Receive busy signal on an internal call.
2. Press the  button below the Information window.

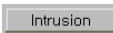
*CONDITIONS*

- » Camp-on is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

**Intrusion**

When calling a busy extension, *ez-Attendant* may Intrude into the extension user's conversation to announce an important call, etc. Intrusion must be allowed in the host *Telenium<sup>IP</sup>* system.

**To Intrude on a conversation:**

1. Receive busy on an internal call.
2. Press the  button below the Information window.


*CONDITIONS*

- » Intrusion is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

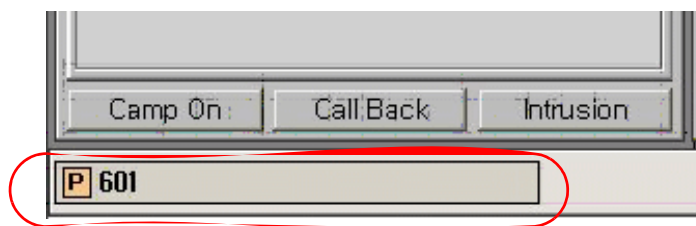
**Call Park and Retrieve**

*ez-Attendant* may place a call into a Park state where the call is on hold and internal users can retrieve the call by dialing the Park Zone or orbit. This feature is often employed by an Attendant to Park a call and then page a user to pick-up the call from the Park Zone.

**To Park a call:**

Press the  button on the Lower Tool bar.

The call is placed on hold in the next available Park Zone and the Zone number is displayed in the optional Park window, [Figure 29](#).



**Figure 29: Park Window Display**

**To retrieve a Parked call:**

1. Activate the Keypad window (default Ctrl K).
2. Dial the Park Zone,  
-or-  
Select the desired Park Zone from the Park window.



**Figure 30: Parked Call Access with Keypad Window**

**CONDITIONS**


- » Call Park is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

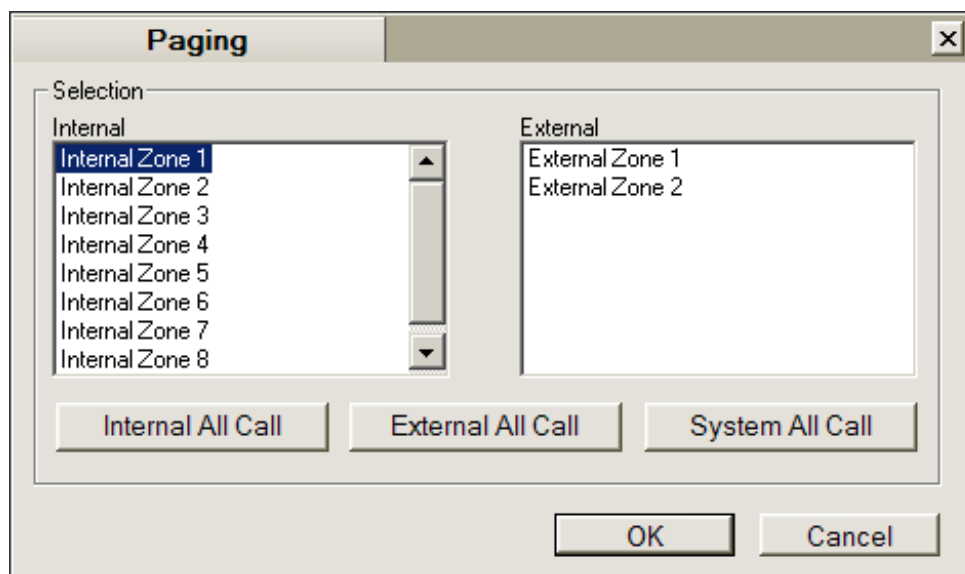
## Paging

*ez-Attendant* can make announcements over the speakers of idle extensions and/or external announcement speakers. Extensions and speakers are arranged in groups called Page Zones. Extensions are arranged in Internal Page Zones, audio speakers are arranged in External Page Zones.

In the Paging window, [Figure 31](#), *ez-Attendant* can select an individual zone, groups of zones or all zones to page simultaneously.

### **To place a page announcement:**

1. Press the  Paging button on the Upper Tool bar.
2. Select the desired zones in the Paging window, [Figure 31](#).
3. Make announcement into the Attendant multi-button phone handset.
4. Hang-up.



**Figure 31: Page Zone Dialog Box**

### **CONDITIONS**

- » Paging is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

## Placing a Call

The *ez-Attendant* user has a number of mechanisms available to place calls. In addition to placing calls in the traditional manner from the Attendant multi-button phone, outgoing calls from *ez-Attendant* can be placed using any of the Station window tabs (Station Field, Phone Book and Log View) from the Search box, or from the Keypad window.

### Station Window Station Field

To place a call from the Station Field view, merely click on the desired station button or, in the List view, double-click on the desired user record. *ez-Attendant* places the call with the audio to the Attendant multi-button phone.

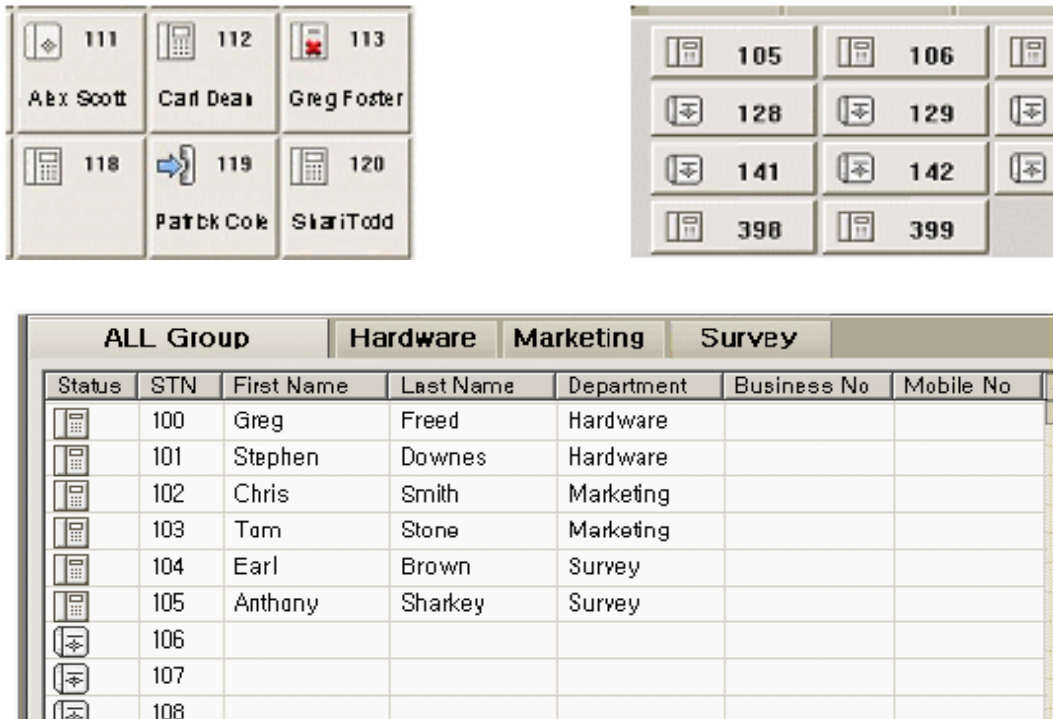


Figure 32: Station Button and List View Display

### Station Window Phone Book Tab

The Phone Book view, [Figure 33](#), gives different views for each *ez-Attendant* database (Internal parties, External parties) and System Speed Dial numbers. Each or all *ez-Attendant* database groups can be displayed and searched for the desired number.

#### To place a call:

1. Select the radio button for the desired view.
2. Search the database using the 'Enter text here' cell at the top of each field by entering text or digits.
3. Double-click on the field with the desired phone or Speed Dial bin number, company, home, etc.

-or-

Double-click the user name.

ez-Attendant will search the selected record for a phone number based on the search priority set in the Searching Order defined in the Customize dialog box, refer to [Customize Environment on page 16](#).

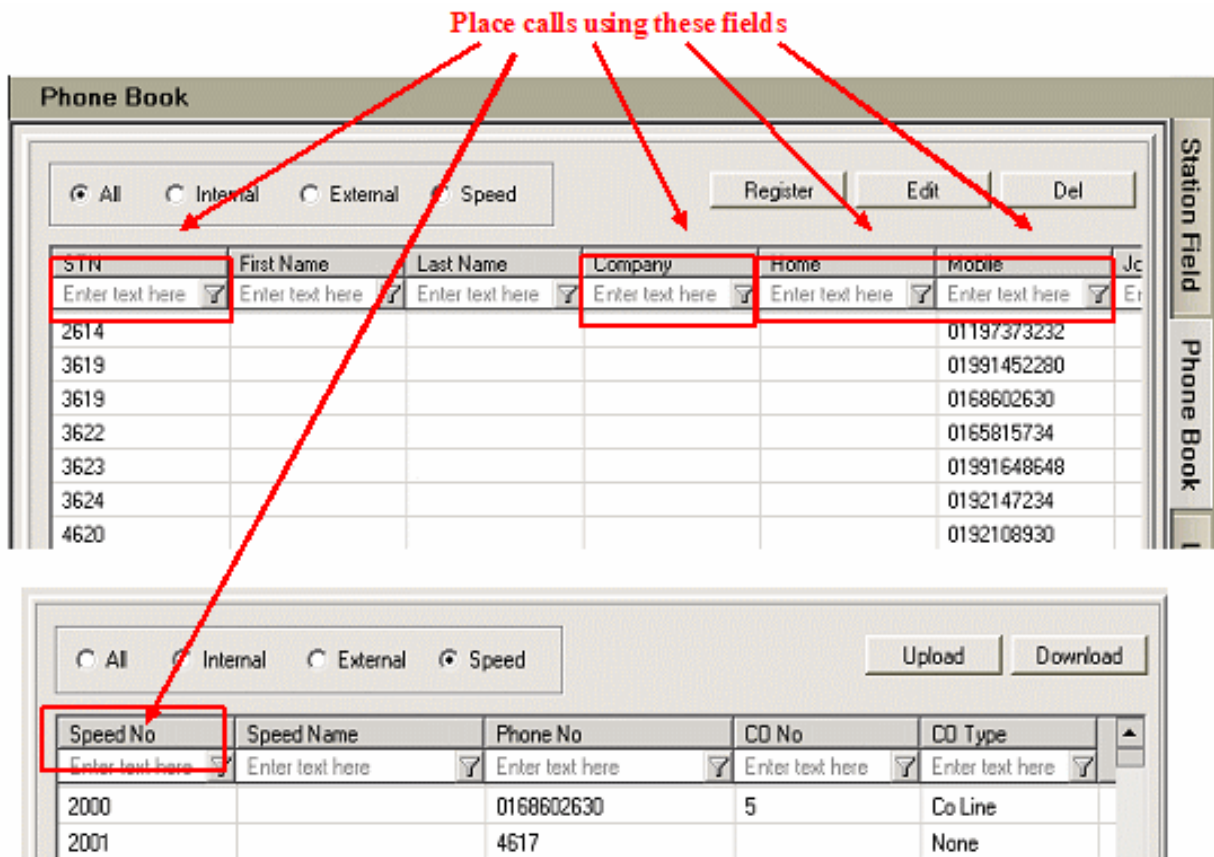


Figure 33: Phone Book Internal and Speed Dial Fields

### Station Window Log View

The Log View selects a log of external calls made or attempted by or to users of the host *Telenium<sup>IP</sup>* system as well as internal calls from or to the *ez-Attendant*. *ez-Attendant* can view, search and select a call to any logged called or calling party.

**To place a call:**

1. Search the database using the "Enter text here" box at the top of each field by entering text or digits.
2. Double-click the field with the desired phone number, caller or called.

Status	Caller	Called	Date	Time	Duration
CO-DUT	ATD(3619)	0168602630	2003-07-06	17:15:55	00:03
CO-DUT	ATD(3619)	90162971450	2003-07-06	17:28:21	04:24
CO-IN	0081	3686	2003-07-06	18:14:26	00:50
CO-DUT	1686	94231832	2003-07-06	17:42:19	04:13
CO-DUT	4629	01195403749	2003-07-06	19:49:56	00:57
CO-DUT	2807	90164629956	2003-07-06	19:58:50	10:13

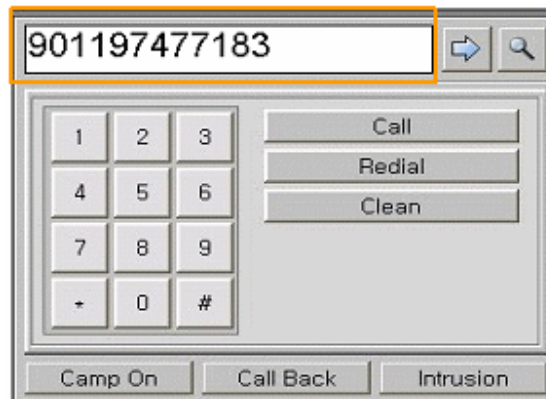
Figure 34: Log View Fields

## Keypad Window

*ez-Attendant* can make calls as if dialed from the Attendant's multi-button phone.

### To place a call using the Keypad:

1. Press the "Show Keypad" *Hot Keys* (default = CTRL + K), to view the Keypad window.  
*Figure 35*
2. Dial the desired number, including any Line group access code required.
3. Select ➡ or Call to place the call.



**Figure 35: Keypad Window**

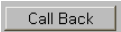
### CONDITIONS

- » The conditions associated with placing a call from the Attendant's multi-button phone apply to calls made from the Keypad window.
- » Hunt Groups can not be assigned a station button. Thus, to call a hunt group, the *ez-Attendant* must use the Keypad window.
- » The Keypad window can be used to call the last *ez-Attendant* dialed number, "Redial", by selecting the Redial button in the Keypad window.
- » The Clean button will remove the entire number if an error is made in the dialed number.

## Message Wait/Call Back

When calling an extension that is busy, *ez-Attendant* may request a Call Back. If the extension is idle or in DND, the *ez-Attendant* can leave a Message Wait indication to the called extension.

### To activate Message Wait or Callback:

1. Call an extension.
2. If no answer, busy signal, or DND signal is received, press the  button.
  - If the extension is busy, Call Back is activated. When the called extension returns to idle, the system will notify the *ez-Attendant* with a Call Back. When *ez-Attendant* responds to the Call Back, the previously busy station is called.
  - If the called extension is idle but does not answer or is in DND, the host *Telenium<sup>IP</sup>* system will activate Message Waiting. When the called extension responds to the Message Wait indication, a call is placed to the *ez-Attendant* extension.

### CONDITIONS

- » Message Wait/Call Back is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

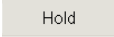
## Lower Tool Bar

The Lower Tool bar gives the *ez-Attendant* user convenient access to other call processing features of the host *Telenium<sup>IP</sup>* system including Hold, Conference, Call Forward, Mute and End.

### Hold Call

*ez-Attendant* can place calls on hold. The call will be placed on the preferred hold mode in the host *Telenium<sup>IP</sup>* system database. Held calls are displayed in the Queue window with the hold icon, [Figure 36](#). After expiration of the Recall timer, the call recalls to *ez-Attendant* and the Recall Icon is displayed, [Figure 37](#).

#### To place a call on hold:

Select the  button on the Lower Tool bar, or press the "Hold" Hot Key (default = ALT + H).

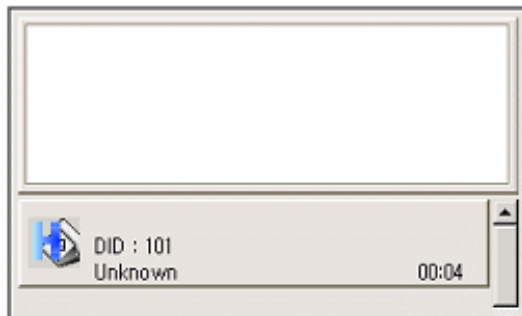


Figure 36: Hold Icon

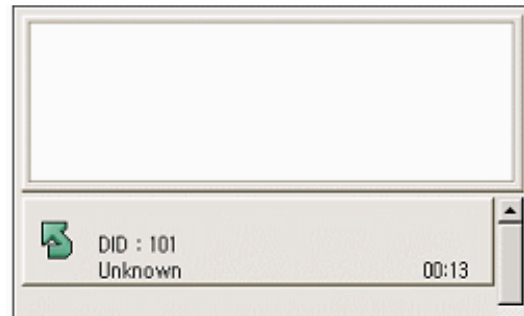


Figure 37: Recall Icon

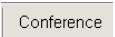
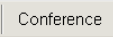
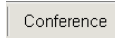
#### CONDITIONS

- » Recall timers for Hold are assigned in the host *Telenium<sup>IP</sup>* system.

### Conference

The *ez-Attendant* user can join several parties in a conference call. A maximum of five parties can be joined with the *ez-Attendant*'s multi-button phone in a conference.

#### To establish a Conference:

1. Place a call to the first party and press the  button. (The first caller is placed on hold.)
2. Place a call to the second party and press the  button. (The second caller is placed on hold.)
3. Repeat the process for additional parties.
4. After all parties have been called, press the  button again to establish the conference call and connect all parties.


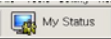
#### CONDITIONS

- » Conference is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

## Call Forward

*ez-Attendant* can activate Call Forward, forwarding all calls to a pre-defined extension. The extension is assigned under the Setting menu, refer to [Forward Information on page 12](#).

### To activate Call Forward from ez-Attendant:

1. Select the  button on the Lower Tool bar to activate *ez-Attendant* Call Forward, -or-  
Select the  on the Upper Tool bar.
2. Select the Forward box from the My Status dialog box, [Figure 38](#), to activate *ez-Attendant* Call Forward.

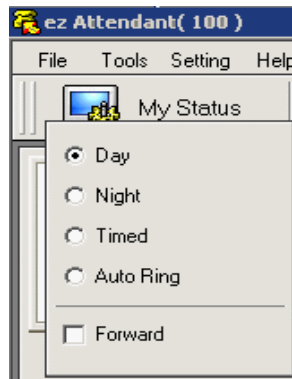


Figure 38: My Status Dialog Box


### CONDITIONS

- » Call Forward is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

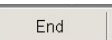
## Mute

While on an active call, *ez-Attendant* can mute the user's microphone so that the connected party can not hear the user. By activating Mute, all audio transmission from the user's phone is blocked.

### To activate Mute:

Select the  button on the Lower Tool bar, the *ez-Attendant* multi-button phone is muted.

## End

*ez-Attendant* can terminate an activate call by selecting the  button on the Lower Tool bar. This action will terminate the call as if the handset on the multi-button phone were returned to the cradle.

## Tools Menu

The Tools menu allows *ez-Attendant* easy access to features generally programmable by the Attendant position including:

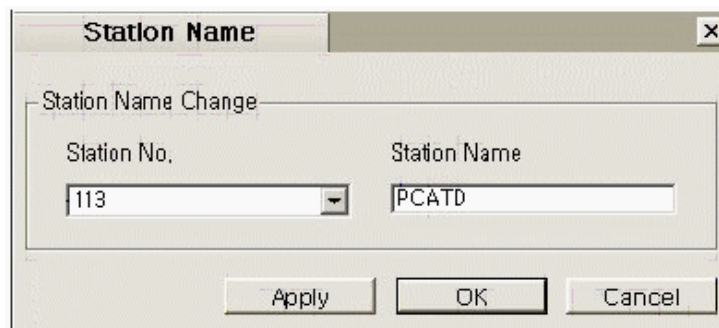
- Station Name
- Date and Time
- BGM Source Selection
- Station COS
- Temporary COS
- Pre-selected & Customized Messages

### Station Name Change

*ez-Attendant* can assign or change the name associated with extensions in the host *Telenium<sup>IP</sup>* system. This name is displayed in the LCD of other extensions when placing or receiving a call from the extension.

#### *To assign an extension name:*

1. From the Menu bar, select: Tools > Station Name.
2. Enter the desired extension number and name in their respective fields, [Figure 39](#).
3. Click **Apply** or **OK** to save the entry.



**Figure 39: Station Name Dialog Box**

#### *CONDITIONS*

- » Only English is supported for the Station Name.
- » The Station Name may be up to 11 characters.

## Date/Time Change

If required, *ez-Attendant* can change the host *Telenium<sup>IP</sup>* system date and time in the Date/Time dialog box.

### To modify the Date or Time:

1. From the Menu bar, select Tools > Date/Time, *Figure 40*.
2. Select the month and date from the Calendar area.
3. Select the date display mode (day/month/year or month/day/year) in the Date area.
4. Enter the time and time display mode (12 or 24 hour) in the Time area.
5. Select OK.

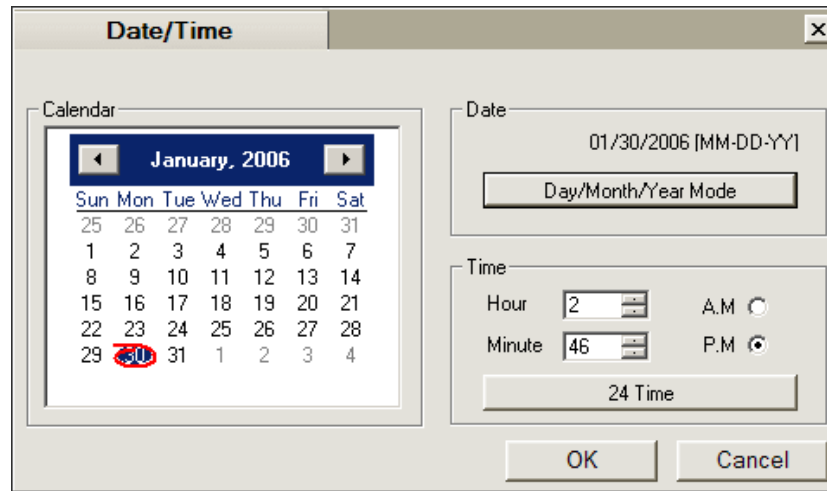


Figure 40: Date/Time Dialog Box

### CONDITIONS

- » The Date/Time assignments are for the host *Telenium<sup>IP</sup>* system and will not affect the *ez-Attendant* PC.

## Text Messaging, Preselcted & Custom

ez-Attendant can activate the host *Telenium<sup>IP</sup>* System Text Messages (Preselected or Custom) for other extensions. When activated internal callers to the extension will receive the text message in the LCD of their multi button phone. Many of the Preselected (Fixed) Messages provide for the entry of additional characters to specify time, date, etc. Text Messaging is activated from the Message Type window, [Figure 41](#).

### To activate Text Messaging:

1. From the Menu bar, select Tools > Select Message Type.
2. Select the desired message type tab (Preselected or Customized), [Figure 41](#).
3. Select the desired text message radio button or Remove Message button.
4. Enter the extension range in the Station boxes.
5. Click **Apply** or **OK** to activate.

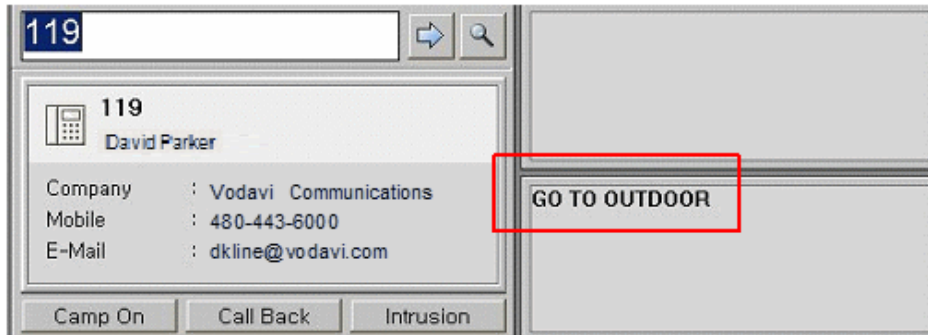
MSG No.	Contents		
<input type="radio"/> 01	LUNCH, RETURN AT (HH:MM)	0	: 0
<input type="radio"/> 02	ON VACATION / RETURN AT DATE (MM/DD)	1	/ 1
<input type="radio"/> 03	OUT OF OFFICE/RETURN AT TIME (HH:MM)	0	: 0
<input type="radio"/> 04	OUT OF OFFICE/RETURN AT DATE (MM/DD)	1	/ 1
<input type="radio"/> 05	OUT OF OFFICE/RETURN UNKNOWN		
<input type="radio"/> 06	CALL (TelePhone No : Up to 17 digits)		
<input type="radio"/> 07	IN OFFICE : STATION		
<input type="radio"/> 08	IN A METTING/RETURN AT TIME(HH:MM)	0	: 0
<input type="radio"/> 09	AT HOME		
<input type="radio"/> 10	AT BRANCH OFFICE		
<input type="radio"/>	Remove Message		

Station: [ ] ~ [ ]

Buttons: Apply, OK, Cancel

Figure 41: Message and Type Selection Window

When *ez-Attendant* calls a station with Text Messaging active, the message will display in the System Text Message window, [Figure 42](#).



**Figure 42: System Text Message Window Display**

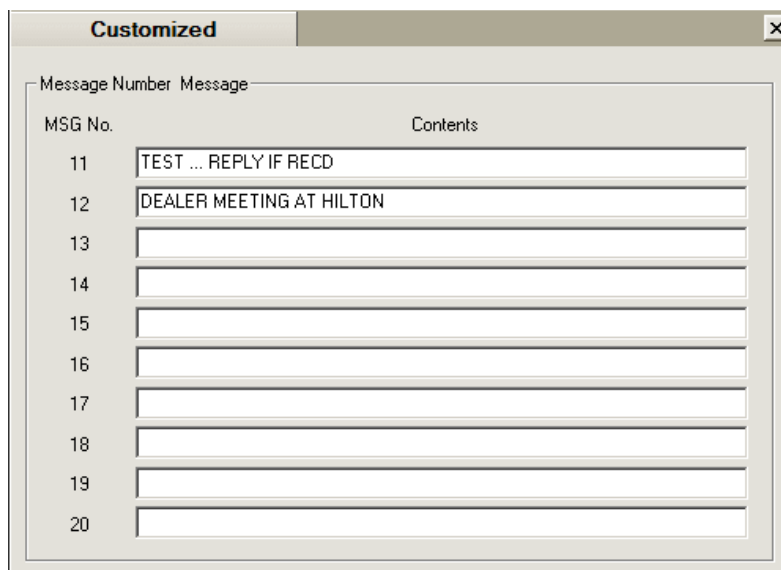
**CONDITIONS**

- » Text messaging is subject to the conditions of the host *Telenium<sup>IP</sup>* system.
- » Selecting the Remove Button in the Message Type window will deactivate Text Message Forward.

*ez-Attendant* can access and edit the host *Telenium<sup>IP</sup>* system's Customized Message table to enter or edit the Custom Messages. When activated, Custom Messages are sent to the LCD of callers' multi-button phones, *ez-Phone* user's screen and the *ez-Attendant* screen. Custom Messages are edited in the Custom Message window under the Setting menu.

**To add or edit a customized message:**

1. From the Menu bar, select Setting > Customized to view the Custom Message window, [Figure 43](#).
2. Using the keyboard, enter message text.
3. When finished, click OK.



**Figure 43: Custom Message Window**

**CONDITIONS**

- » Text Messaging is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

## Class of Service (COS)

### Class Of Service Assignment

ez-Attendant can access the host *Telenium<sup>IP</sup>* database to modify the COS (Class of Service) assignments of the system extensions. COS controls the external call dialing privileges for extensions. COS assignments are modified in the Change COS dialog box, [Figure 44](#).

#### To modify a Class of Service:

1. From the Menu bar, select: Tools > Attendant > Change COS.
2. Enter the desired station range in the Station Range area, [Figure 44](#).
3. Select the desired Day and/or Night COS desired in the COS Setting area.
4. Click **Apply** or **OK** to change the COS.

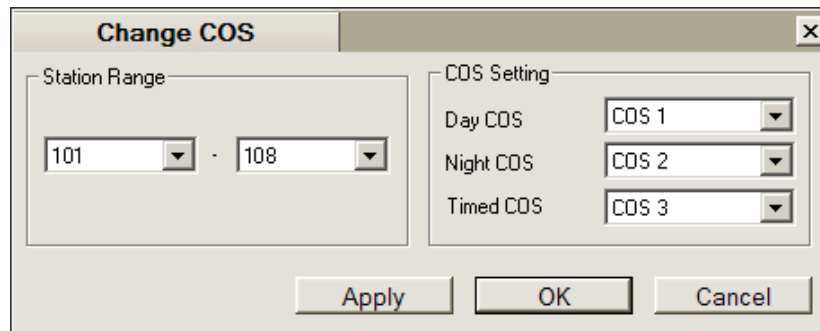


Figure 44: Change COS Dialog Box

#### CONDITIONS

- » Extensions in the *Telenium<sup>IP</sup>* system are subject to the COS dialing restrictions assigned.

**Temporary COS (Phone Lock)** -- Temporary COS is employed to temporarily block non-authorized outgoing external calls. ez-Attendant can activate Temporary COS for other extensions which assigns the extension a COS level of 7. This effectively locks the phone by denying the extension the ability to access or dial on an outside CO Line. Temporary COS is activated in the Temporary COS dialog box, [Figure 45](#).

#### To modify the Temporary COS:

1. From the Menu bar, select Tools > Attendant > Temporary COS.
2. Enter the desired station range in the Station Range area, [Figure 45](#).
3. Select COS Down (Class 7) to activate Temporary COS, or COS Restore to restore the extension's normal COS level.
4. Click **Apply** or **OK** to save the entry.

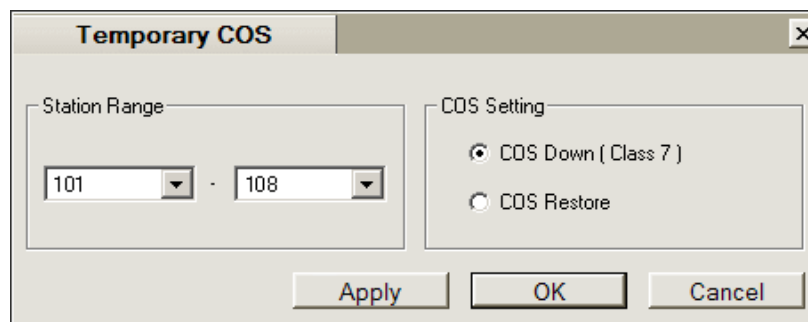


Figure 45: Temporary COS Dialog Box

## Attendant Cancel

*ez-Attendant* can “cancel” certain features that may be active at one or more stations. Station features that are deactivated by Attendant Cancel include DND (Do Not Disturb), Call Forward, System Text Messaging and Wake-Up call. Attendant Cancel is located in the Attendant Cancel dialog box, [Figure 46](#).

### To deactivate a station feature:

1. From the Menu bar, select Tools > Attendant > Attendant Cancel.
2. Enter the desired station range in the Station Range area, [Figure 46](#).
3. Click **Apply** or **OK** to save the entry.

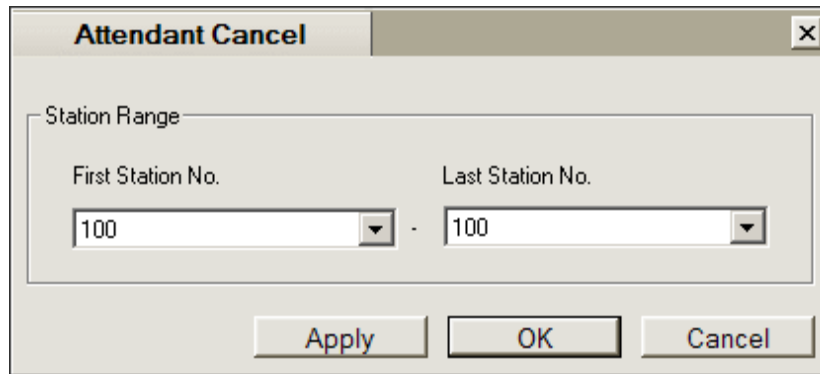


Figure 46: Attendant Cancel Dialog Box

### CONDITIONS

- » The Attendant Cancel feature is subject to the conditions of the host *Telenium<sup>IP</sup>* system.

## BGM (Background Music) Selection

The host *Telenium<sup>IP</sup>* system may provide multiple channels or sources for BGM (Background Music) which is played over the speakers of idle multi-button phones. *ez-Attendant* may select the source channel for BGM. This selection is made in the ICM BOX BGM Selection dialog box.

### To change Background Music:

1. From the Menu bar, select Tools > Music Selection > BGM Music Selection.
2. Select desired channel from the drop-down menu in the Music Channel area, [Figure 47](#).
3. When completed, click **OK** to change the Music Selection.

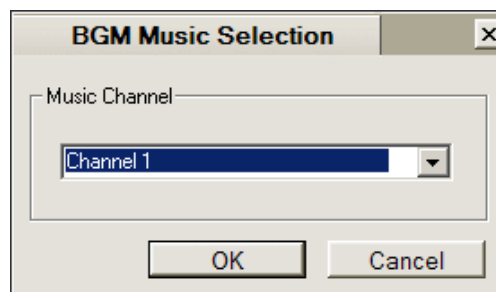


Figure 47: BGM Music Selection Dialog Box

### CONDITIONS



- » Music channels available are dependent on the host *Telenium<sup>IP</sup>* system and installation.

## Upper Tool Bar Functions

### Wake-up Call Registration/Cancel

A 'Wake-up call' or alarm can be set for an extension that will cause the system to ring the extension at the assigned time of day. The Wake-up can be a one-time event or may be repeated on a daily basis. *ez-Attendant* can set a Wake-up time for other extensions in the system in the Wake-Up dialog box [Figure 48](#).

#### To set a Wake-up time:

1. Select the  Wake Up button from the Upper Tool Bar to view the Wake-Up dialog box.
2. Select the desired user from the Category area.
3. Click the  button to select a user(s), or enter an extension number in the entry box.
4. Enter the desired time in the Time Setting area.
5. Select the appropriate radio button in the Alarm Type area: One Time, Continue or Remove.
6. Click **Apply** or **OK** to save the entry.

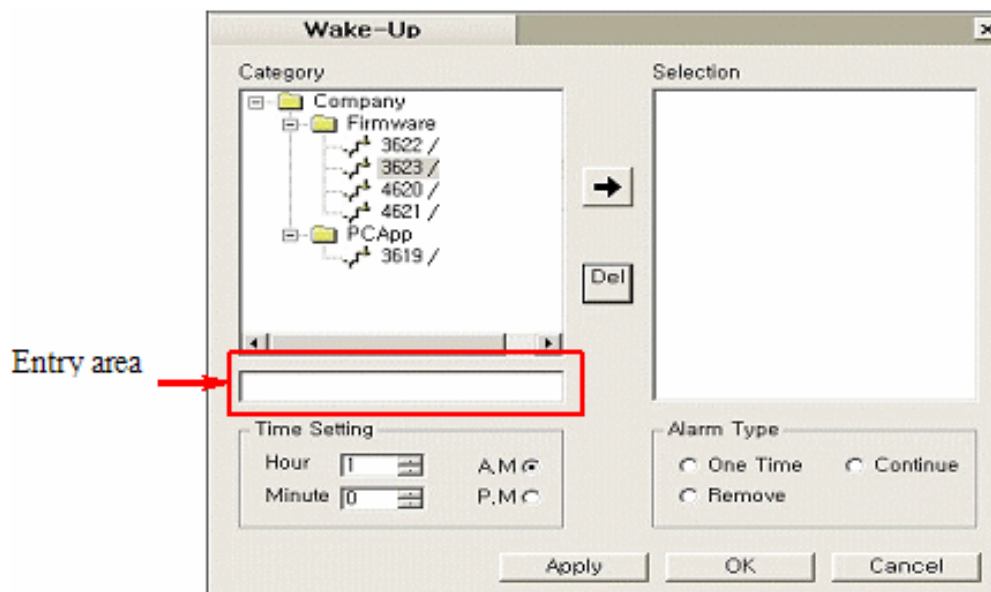


Figure 48: Wake-Up Dialog Box


#### CONDITIONS

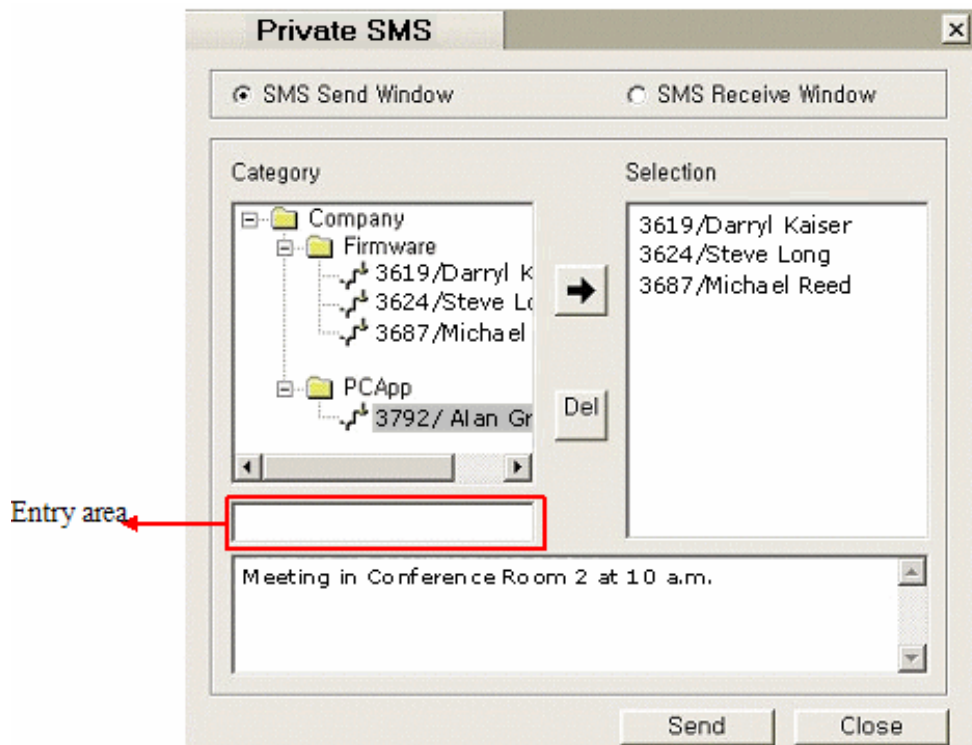
- » The maximum number of extensions that can be assigned to receive a Wake-Up signal at one time is based on limits of the host *Telenium<sup>IP</sup>* system.

## Short Message Service (SMS)

**Internal SMS** -- *ez-Attendant* can send short messages, up to 48 characters to other internal system users equipped with a multi-button phone with display, VODAVI wireless DECT phone (Model GDC34X) or ez-Phone. When sent, the extension is notified of the message and the LCD or ez-Phone screen will display the message. *ez-Attendant* can also receive short messages from other *ez-Attendants* or ez-Phone users. Internal SMS messages are sent or received in the Private SMS window, [Figure 49](#).

### To send a Short Message:

1. From the Menu bar, select Tools > SMS > Private SMS, [Figure 49](#).
2. Select the radio button for "SMS Send Window".
3. Select the desired user from the Category area.
4. Select the  button to select a user(s), or enter an extension number in the Entry area box.
5. Enter the text message string in the "Message Text" window.
6. Press the Send button.



**Figure 49: Private SMS Window**

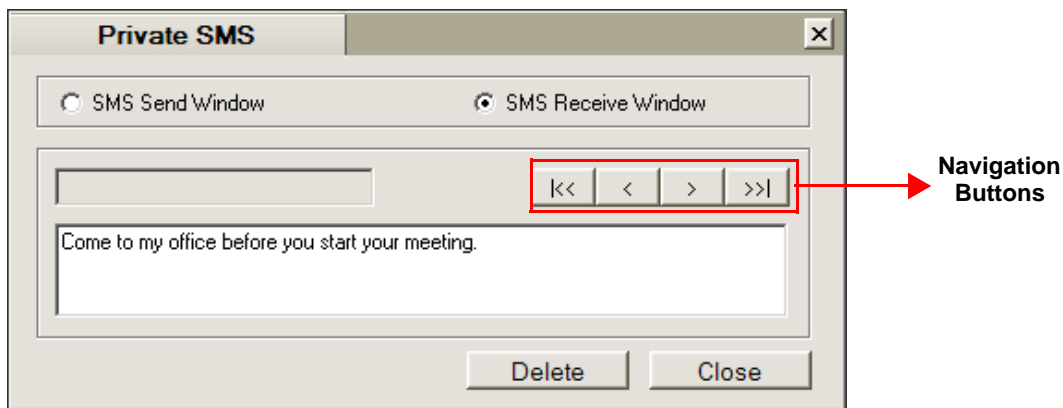
Received SMS messages are displayed in the SMS window of the *ez-Attendant* main screen and can also be viewed in the Private SMS window.

**To view the SMS messages from the Private SMS screen:**

1. Select the radio button for "SMS Receive Window" to view received messages, [Figure 50](#).
2. Use the Navigation buttons to review messages.

**To delete a received message in the SMS Receive Window:**

1. Select the desired message in the Message Text window.
2. Click **Delete**.



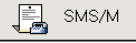
**Figure 50: SMS to Keypad, Receive Message Window**

**CONDITIONS**

- » Internal SMS messages can be up to 48 characters in length.
- » The *ez-Attendant* can store up to 30 received messages. Any additional messages received will automatically delete the oldest stored messages.

**External SMS** -- *ez-Attendant* will support GSM SMS (Short Message Service) when properly equipped with a GSM modem; refer to [SMS Information on page 11](#). SMS messages can be sent to one or more GSM subscribers simultaneously. An *ez-Attendant* user can send SMS messages through several means including through the Tools menu, SMS on the Upper Tool bar, or directly from the Station window List Display, Phone Book or Log View. The basic steps are: enter the message, select a mobile subscriber, and send the message. Mobile SMS is managed through the Mobile SMS window, [Figure 51](#).

**To access the Mobile SMS window:**

1. Select the  SMS/M button on the Upper Tool bar,  
-or-  
Select the SMS option from the Tools menu,  
-or-  
Right-click the mouse on any Station window List Display, Phone Book, or Log View entry.
2. Select Mobile SMS from the selection menu to view the Mobile SMS window, [Figure 51](#).  
If not already selected, select the desired user from the Category area,  
-or-  
Enter a user name or mobile number in the Entry box.
3. Select the Insert button.
4. Enter the text message string in the Message Text window.

5. Press the Send button.

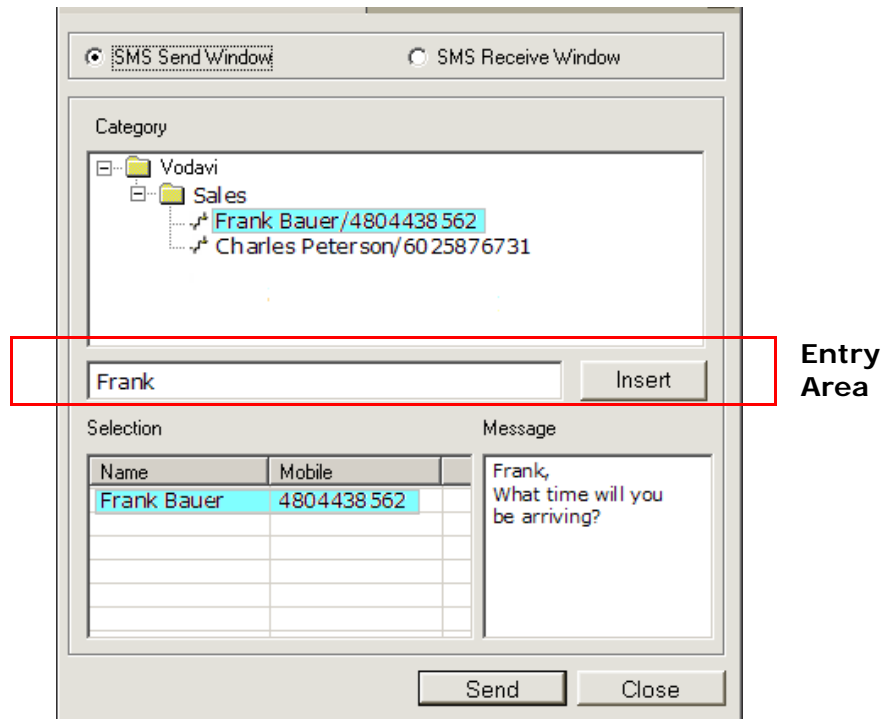


Figure 51: Mobile SMS Window

#### CONDITIONS


- » *ez-Attendant* must be properly configured and equipped for access to a GSM modem, refer to [SMS Information on page 11](#).

## My Status Ring Mode Control

*ez-Attendant* can control the Day/Night Ring mode of the host *Telenium<sup>IP</sup>* system, placing the system in the Day, Night, Weekend, or Auto Ring Selection mode. Ring assignments for the mode selected are then enforced by the system. The Auto Ring Selection mode employs the system clock to shift from Day, Night and Weekend Ring modes based on the schedule assigned in the system database.

The Ring mode is controlled by the *ez-Attendant* in the My Status dialog box, [Figure 52](#).

#### To access this dialog box:

1. Select the  My Status button on the Upper Tool bar to view the My Status dialog box.
2. Select the radio button for the desired Ring mode.

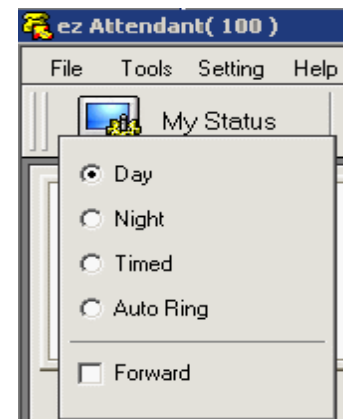


Figure 52: My Status Dialog Box


#### CONDITIONS

- » Ring assignments for the Day, Night and Weekend ring modes are made in the host *Telenium<sup>IP</sup>* system database.
- » The schedule for the Auto Ring mode is assigned in the host *Telenium<sup>IP</sup>* system Database.

## Send E-mail

The *ez-Attendant* user may send e-mails from the *ez-Attendant* screen using their normal e-mail client. E-mail recipients can be manually entered or selected from the Station window List Display or Phone Book entries. After selecting recipients, the user's normal e-mail client is invoked with the selected addresses entered automatically. The user may then enter the e-mail text and send the mail in the normal manner. Recipients are entered from the E-Mail window, [Figure 53](#).

### To access the E-mail window:

1. Select the  E-Mail button from the Upper Tool bar,  
-or-  
Select Send Mail from the Setting menu,  
-or-  
Right click on any entry in the Station window "List Display or Phone Book" with an e-mail address.
2. Select or enter the desired recipients.
3. Select **Send** to activate the e-mail client and proceed as normal for the e-mail client.

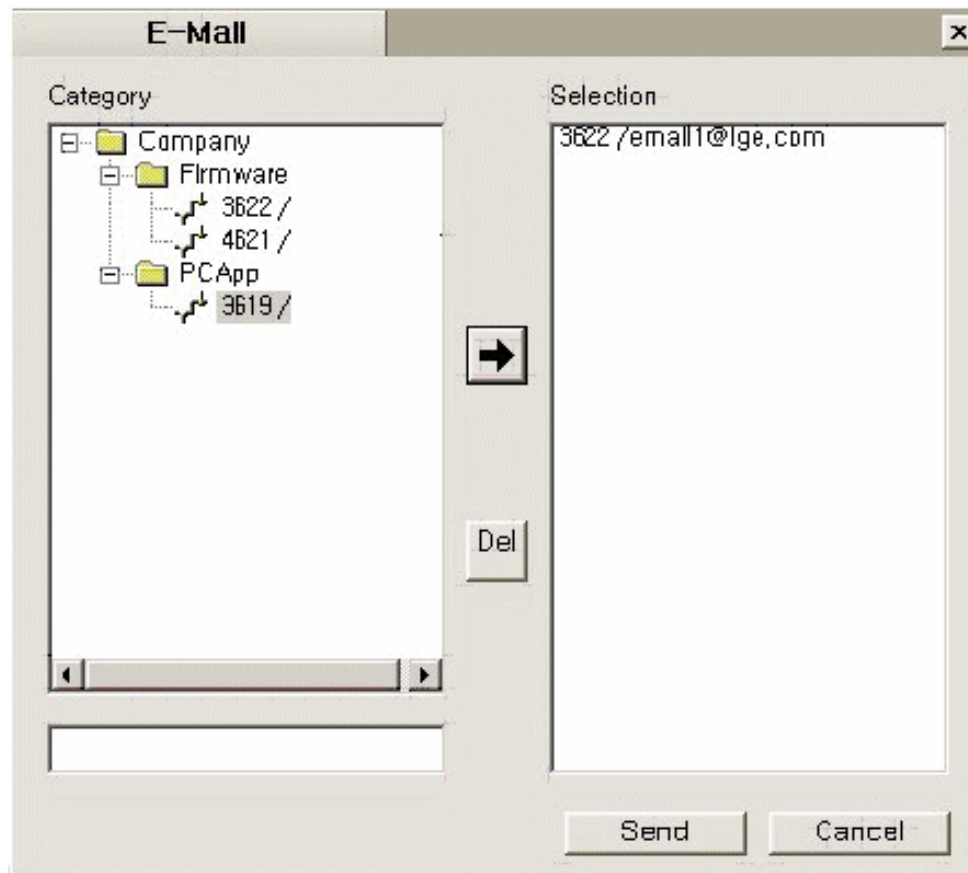


Figure 53: E-Mail Window

### CONDITIONS

- » The *ez-Attendant* supports Outlook or Outlook Express as the e-mail client.
- » To improve execution speed, the e-mail client application should be running but minimized.

## CO Line Display Window

The ez-Attendant user has access to a CO Line Display pop-up window, [Figure 54](#) using *Hot Keys* (default = ALT + S). In this window, ez-Attendant displays the status of all CO lines and permits the user to access a CO Line to answer or place external calls.

### To answer or place a call:

1. To answer a call, enter the "Show CO Line" *Hot Keys* (default = ALT + S).
2. Select the desired CO Line to answer the call.
3. To place a call, if the CO Line is idle and Phone Number dialog box appears, enter the phone number and press ENTER, [Figure 55](#).

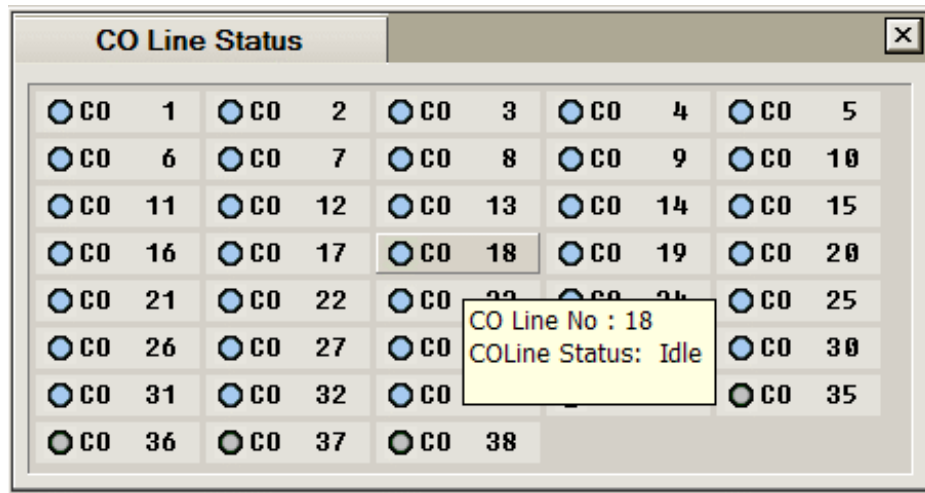


Figure 54: CO Line Display Window

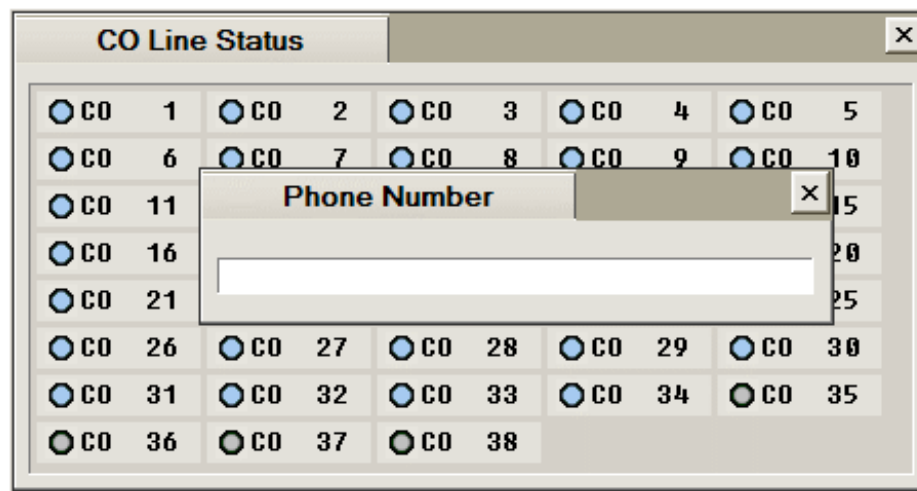


Figure 55: CO Line Display Window w/Phone Number Dialog Box

### CONDITIONS

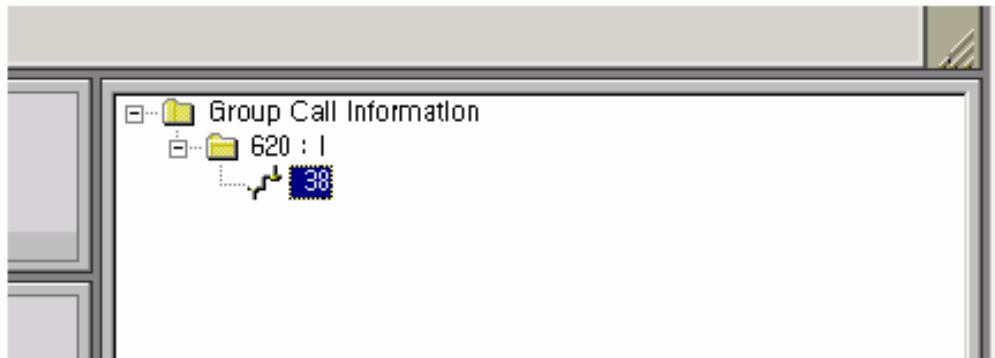
- » Access to CO Lines is subject to the host *Telenium<sup>IP</sup>* database.
- » The Tool Tip window will display when the mouse pointer is moved over a CO Line icon.

## Hunt Group Information Window

The *ez-Attendant* SMS window is shared with the Hunt Group Information window. The Hunt Group Information window, [Figure 56](#), shows the Hunt Group Number, number of incoming calls, and the CO Line number.

### To toggle between the SMS & Hunt Group windows:

Press the "Show Hunt Group" *Hot Keys* (default = CTRL + G).



**Figure 56: Hunt Group Information Window]**

This display shows Hunt Group 620 has one incoming call on CO Line 38 and CLI will be shown when provided.

## Phone Book

The *ez-Attendant* Phone Book gives the user an extension database, external (customer) database. It also gives access to the host *Telenium<sup>IP</sup>* System Speed Dial database. The *ez-Attendant* user databases are stored in an \*.mdb format. Other database formats (Outlook, Excel, Goldmine and ACT!) are supported via the Import/Export utility. The Phone Book database can be used with a number of other *ez-Attendant* features, thus an accurate timely database is important for efficiency. Refer to [Figure 57](#).

The **database fields** include the following criteria:

- STN (extension number or blank for an external contact)
- First Name
- Last Name
- Company
- Home (telephone number)
- Mobile phone number
- Job title (Ex: manager, engineer, etc.)
- Fax number
- Business telephone number (office telephone number)
- Address
- E-mail address
- Nick name
- System Speed Dial bin number from host *Telenium<sup>IP</sup>* system
- Memo
- Department


**To access the Phone Book window:**

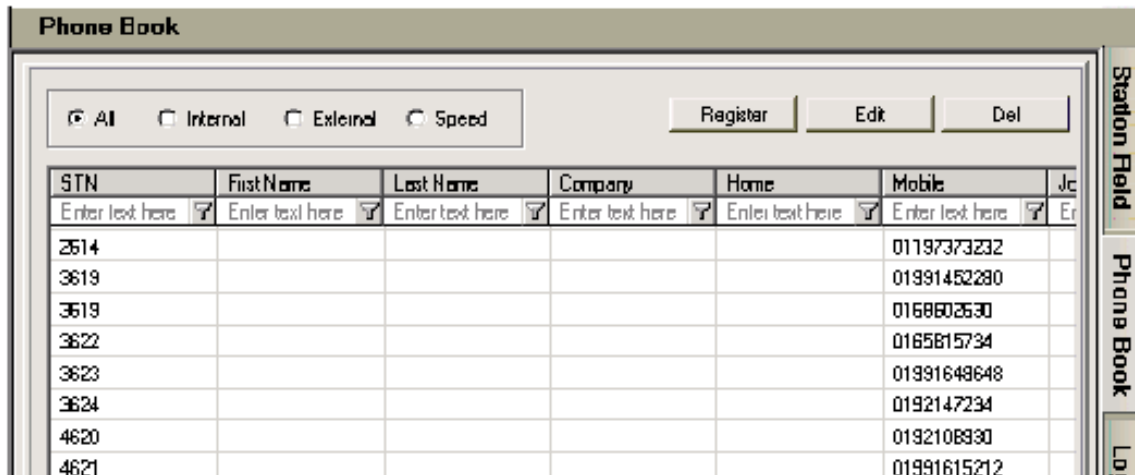
- Select the Phone Book tab in the Station window,
- or-
- Press the [F4] key.

**To search for a Phone Book entry:**

Enter the search text for the appropriate field in the "Enter text here" cell.

**To delete a Phone Book entry:**

Select the desired entry and click the  button.



**Figure 57: Phone Book Window**

**CONDITIONS**

- » The ez-Attendant user may add (register) or edit Phone Book entries, refer to [Add/Edit Phone Book Entries on page 47](#)
- » The "All" radio button option in the Phone Book window applies to the internal and external databases and does not include the host *Telenium<sup>IP</sup>* System Speed Dial database.
- » *Moving from system to system makes changes in Phone Book*

The Phone Book entries only apply to a specific system; the phone book is not an independent database, but instead is tied to the list of stations in the *Telenium<sup>IP</sup>* system. ez-Attendant is intended to be an operator console, not a system management tool for multiple unconnected systems.

### Add/Edit Phone Book Entries

The *ez-Attendant* user can add (register) or edit Phone Book entries with the Register and Edit dialog box, [Figure 58](#).

All phone numbers should be entered in the following format:

- Phone numbers should begin with a "+" followed by the country code.
- The country code should be followed by a space.
- The area code should be enclosed in parenthesis.

#### To add or edit the Phone Book,

1. Select the Register or Edit button from the Phone Book window, see [Figure 57](#).
2. To view the Register and Edit dialog box, [Figure 58](#), enter data for the contact.
3. After completing the entry, click **Apply** to continue entering data,  
-or-  
Click **OK** to save the data and return to the *ez-Attendant* main screen.

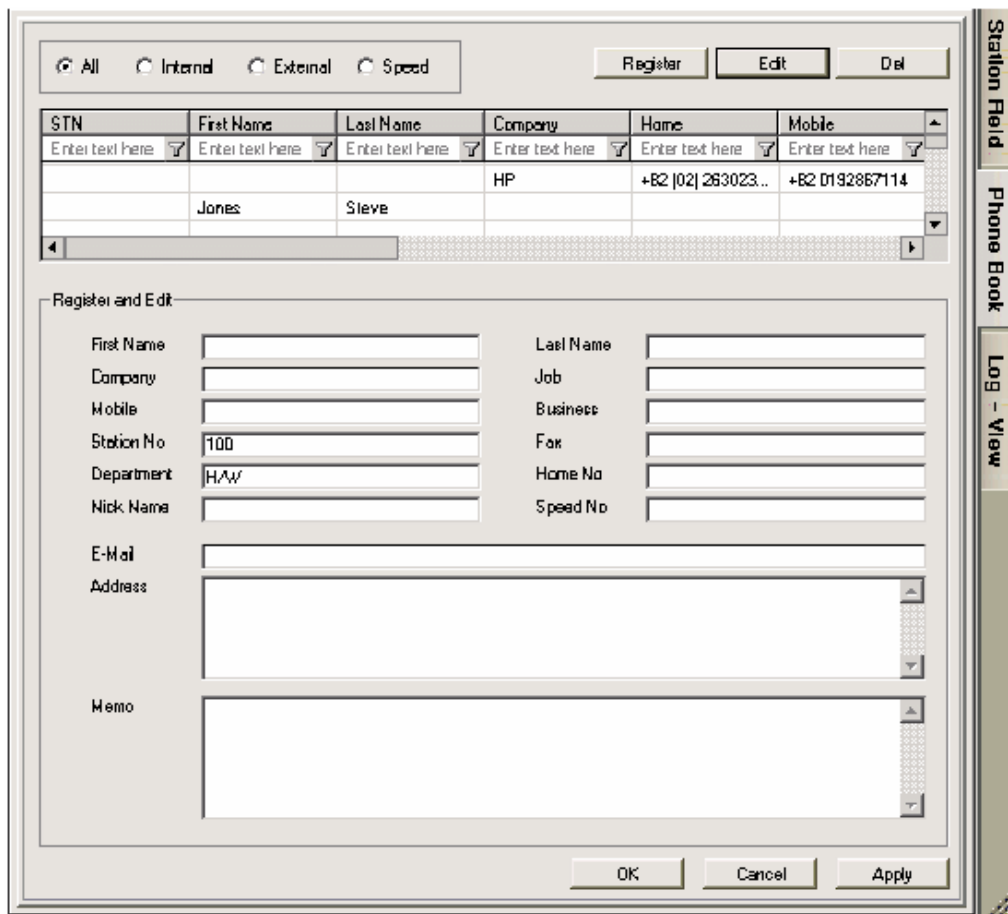
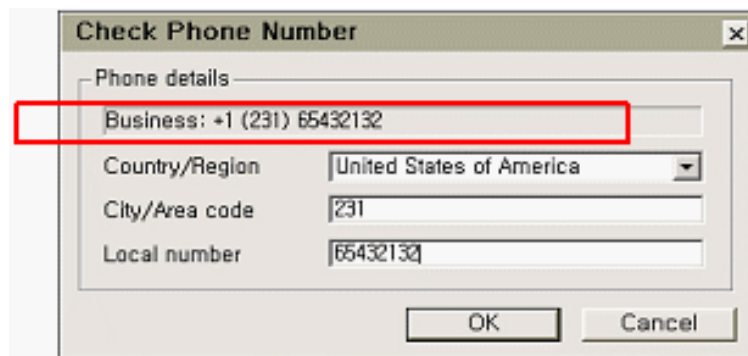


Figure 58: Register/Edit Phone Book Entry Window

To assist the user in proper entry, the Check Phone Number dialog box can be accessed by double-clicking on the desired entry box in the Register and Edit dialog box. This will reveal the Check Phone Number dialog box, [Figure 59](#).



**Figure 59: Check Phone Number Dialog Box**

#### *CONDITIONS*

- » For proper interpretation and operation, phone numbers must be entered in the correct format.
- » The “Speed No” field in the Register and Edit dialog box is the System Speed Dial bin number, if any, associated with the contact.

### **Phone Book Database Link**

The Phone Book database uses the Microsoft Access format, and an Import/Export facility is provided to use other formats including Goldmine, ACT!, Outlook and Excel. The database, ATD.mdb, must exist in the *ez-Attendant* folder along with the *ez-Attendant* executable file in order to view and modify the contents.

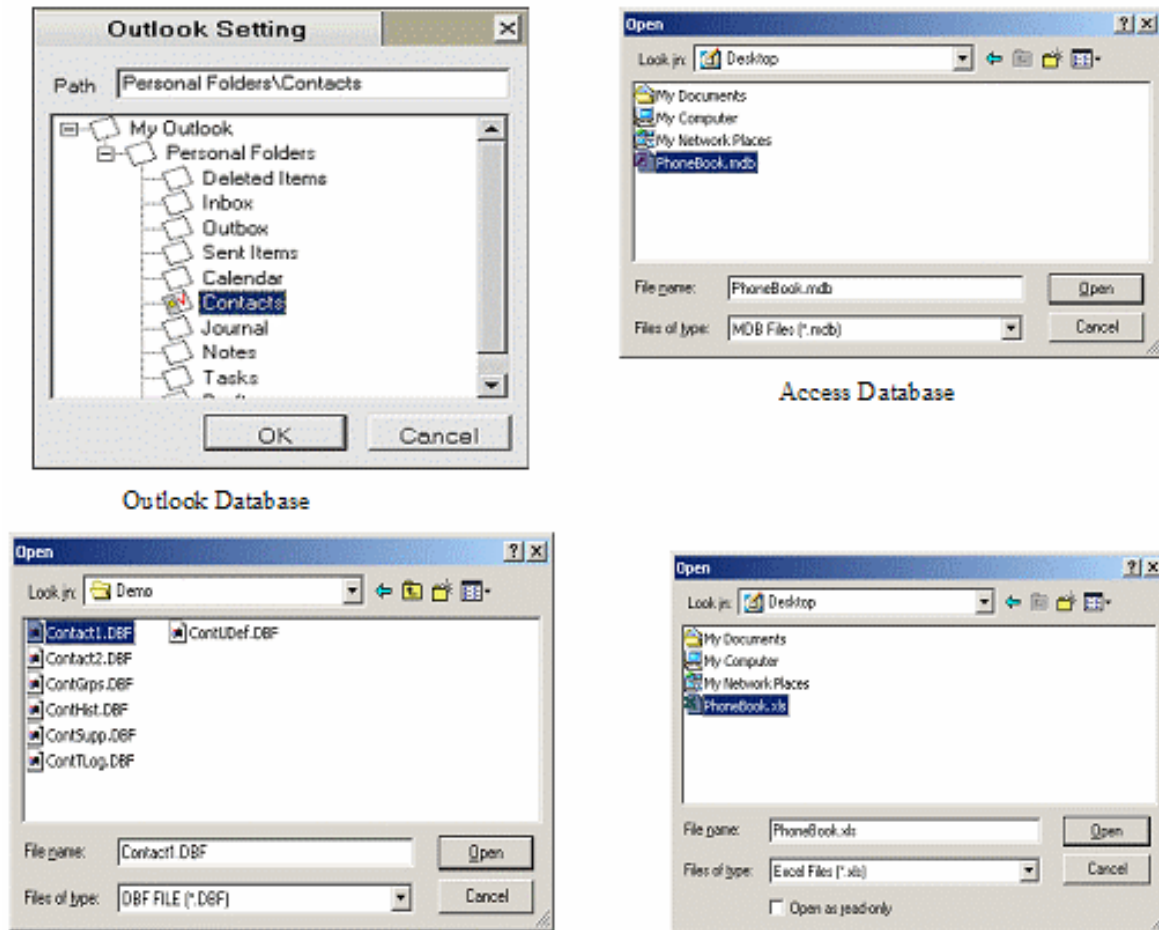
#### ***To add a new database file:***

1. From the Main Menu, select File > New DB, (a “blank” Phone Book will appear).
2. Enter the desired contact information, or select a database file to import.

#### ***To import a Microsoft Outlook contact database:***

1. From the Main Menu bar, select File > Import DB.
2. Select the proper file type from the Import DB menu, one of the windows shown in [Figure 60](#) will appear.

3. Select the desired contact database file, or change the path to locate the file if needed.

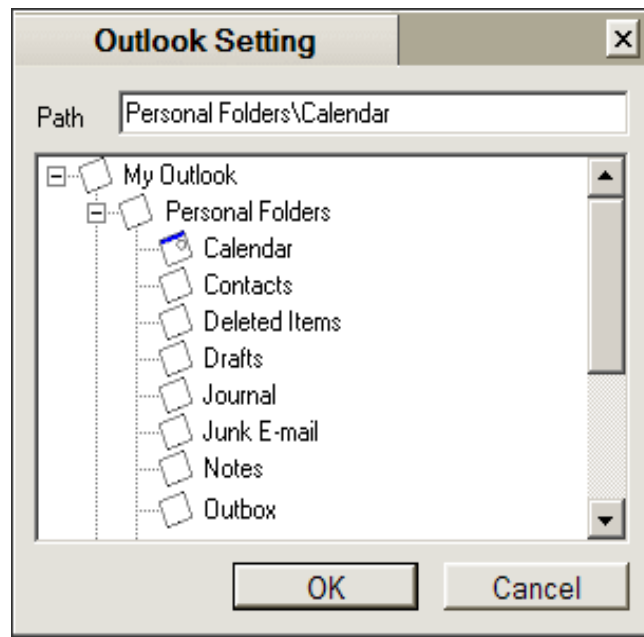


**Figure 60: Contact Database Window**

In addition to the contact database, the Outlook Schedule file can be imported manually. Normally, this file is downloaded periodically as described in [Customize Environment on page 16](#).

**To import the Outlook schedule file:**

1. From the Menu bar, select File > Import DB > Microsoft Outlook Schedule. The Outlook Setting window will appear, *Figure 61*.
2. Select the desired schedule (calendar) file from Outlook Setting window, or change the path to locate the file if needed.



**Figure 61: Outlook Setting Window - Calendar**

**CONDITIONS**

- » To use the Import/Export facility, the database can not be in use by another application. Attempts to import or export will return an Operating System error message.
- » Import or export to a GoldMine or ACT! Database file can only be accomplished if there is no user logged on the *ez-Attendant*.
- » The file extension for each file type is:
  - Outlook - not shown
  - GoldMine or ACT! - \*.DBF
  - Access - \*.mdb
  - Excel - \*.xls
- » When importing a Microsoft Outlook Schedule, only schedules for users registered in the Phone Book will be imported.

## System Speed Dial Window

ez-Attendant allows the user access to the host *Telenium<sup>IP</sup>* System Speed Dial database. The user can download the database from the host *Telenium<sup>IP</sup>* system, add or modify entries and upload selected entries. In addition the user can search the database and use entries to place calls. To access the System Speed Dial database, select the Speed radio button in the Phone Book window, [Figure 62](#).

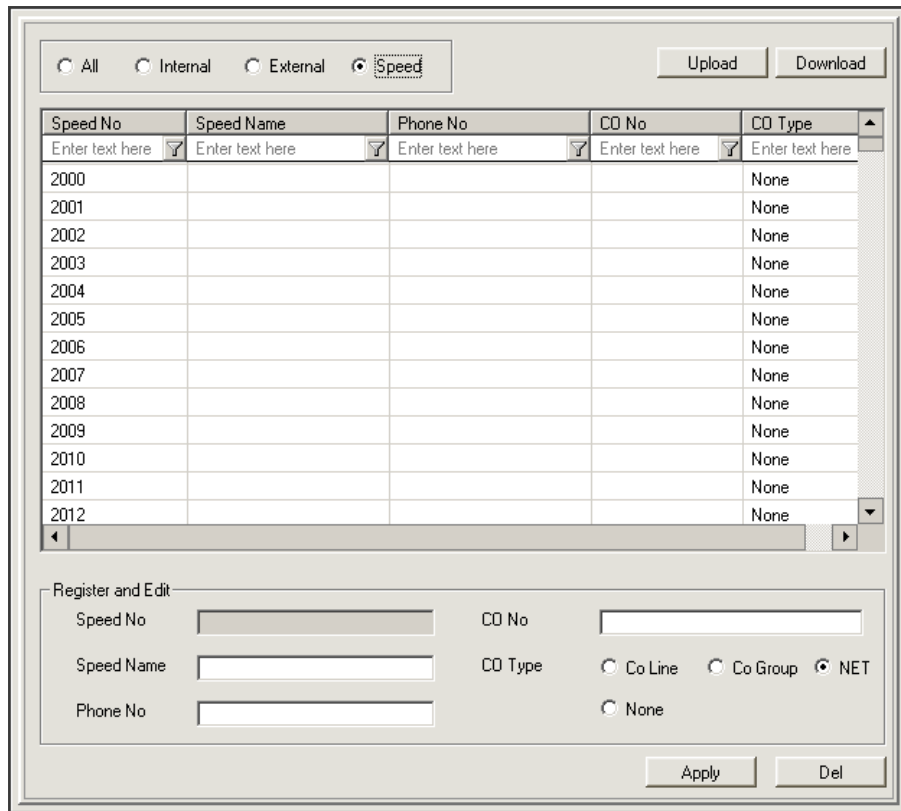


Figure 62: Speed Dial Database

The database must be downloaded before it can be viewed. To download the System Speed Dial database to the ez-Attendant, select the Download button. The *Telenium<sup>IP</sup>* will send the System Speed Dial database to the ez-Attendant. The transfer will require several minutes and will be affected by the number of Speed Dials in use, LAN and *Telenium<sup>IP</sup>* traffic, etc.

During the download process ez-Attendant displays the download status and cancel button, [Figure 63](#). Selecting this button during the download will terminate the download process.

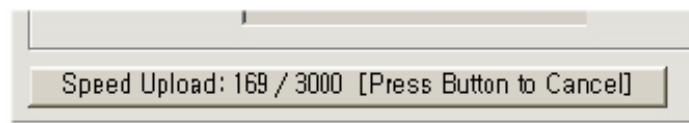


Figure 63: Download Status/Cancel Button

### To add or edit an entry:

1. Select the desired entry.
2. Enter data in the Register/Edit area, lower section of the window.
3. Select upload to send the modification to the *Telenium<sup>IP</sup>* database.

**To delete a System Speed Dial number:**

Select the desired entry and click **Delete** to remove the record.

**To search the database:**

Enter characters and/or digits in the "Enter text here" cell.

**CONDITIONS**

- » *Telenium<sup>IP</sup>* supports only one download process at a time. A second request will return the "You cannot do up/download now." error message.
- » Multiple records can be selected for upload or download using the "Shift" or "Ctrl" keys.
- » If the data entered in the System Setting for Speed does not agree with the actual connected, refer to [System Setting for LogOn on page 10](#). *Telenium<sup>IP</sup>*, upload/download is not allowed. The System Setting for Speed must be corrected. This may only be accomplished with the *ez-Attendant* in the logged off mode.

**Log View**

*ez-Attendant* maintains a log of all external call activity from the host *Telenium<sup>IP</sup>* system. The Log View data can be searched, filtered, printed, saved and records deleted. Each Log View record contains the following fields:

Log View Field	Description
Status	Type of call (incoming/outgoing, internal/external)
Caller	Caller identification
Caller Name	Name of the calling party
Called	Telephone number called
Called Name	Name of the called party
DID	DID number dialed
DID Name	Name associated with DID number
Date	Date call was made
Time	Time call was placed
Duration	Duration of call in minutes and seconds (00:00)
Queue Time	Duration the call rang into the <i>Telenium<sup>IP</sup></i> system prior to answer/disconnect
I/O	Port designation
Ext/Int	External or Internal call
Ans/Noans	Answered or not answered

The Log view is selected in the Station window by selecting the Log View tab.

Status	Caller	Caller Name	Called	Called Name	DID	DID Name	Date	Time	Duration	Queue Time	I/O	Ext/Int	Ans/Noans
CO-OUT	ATD(3101)		N4143	Unknown			2006-01-30	14:24:46	00:00	00:00	0	CO	Noans
CO-OUT	ATD(3101)		N4143	Unknown			2006-01-30	14:47:33	00:00	00:00	0	CO	Noans

Figure 64: Log View Station Window

**To filter the Log View data:**

1. Select the All Logs button to assure accuracy of the database.
2. Enter a FROM and TO date, these are needed for proper search operation.
3. Select filter items from list, enter phone number for Caller/Called number, if selected.

**To search the Log View:**

Enter the text in the "Enter text here" cell.

**To place a call using an entry:**

Double-click the Caller or Called entry.

**To delete a Log View record:**

Select the desired record and press the **Del** button.

**To print a Log View:**

Select Print from the Upper Tool bar,  
-or-  
Select File on the Menu bar, and click Print.

**CONDITIONS**

- » All external calls placed or received by the system as well as internal calls to or from the *ez-Attendant* are recorded.
- » Records in the Log View are stored in the ATD.mdb file. When the records are saved using the Save as function, the records are deleted from the ATD.mdb file and stored as an \*.xls file in the file name entered.
- » Using the File menu for print allows access to the Print Setup menu.
- » The *ez-Attendant* log will store up to 10,000 call records; additional records overwrite the oldest records.

## General

### Tool Tip Display

When the mouse pointer is moved over an Upper or Lower Tool Icon, the Tool Tip window will open indicating the Hot Key combination which will activate the associated feature. Additional information is also provided when the mouse pointer is placed over an extension button in the Station window, [Figure 65](#). The information shown includes extension status, Wake-up setting, active Text message, Call forward state, and active call information.

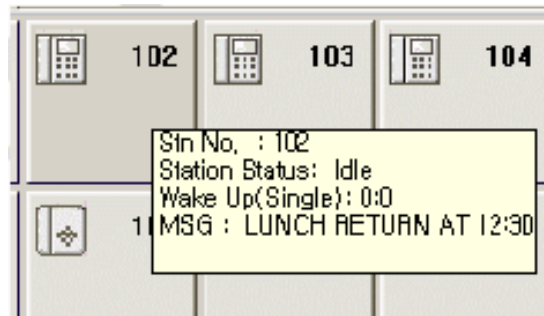


Figure 65: Tool Tip Window

#### CONDITIONS

- » The Tool Tip window is only provided with the button icon display views of the Station window.

### Record VMIB

In order to operate this feature, you must be using the *Telenium<sup>IP</sup>* VSF as your voice mail system. *ez-Attendant* can be used to access the host *Telenium<sup>IP</sup>* system VMIB so that the user may record an outgoing message for the Attendant extension. This message is played to callers who are connected to the VMIB to leave a voice mail message for the Attendant. Once connected to the VMIB, the user employs the Attendant multi-button phone handset to record the greeting.

#### **To record a greeting:**

1. Select Setting from the Menu bar.
2. Select Record VMIB from the Setting menu.
3. With the multi-button phone handset, record the greeting.

## Multiple ez-Attendants

The *Telenium<sup>IP</sup>* can support up to five (5) *ez-Attendants* which are assigned in the Attendant Group or ICM Tenant Group programs of the *Telenium<sup>IP</sup>*, PGM codes 164 and 120 respectively. When multiple Attendants are assigned, separate *ez-Attendants* can be logged on to each Attendant extension assigned in the host *Telenium<sup>IP</sup>* database.

## Flexible Button Programming

Using the Setting menu, the *ez-Attendant* user can assign functions to the Flex buttons of multi-button phones connected to the *Telenium<sup>IP</sup>* system. Flex button assignment is similar to the *Telenium<sup>IP</sup>* Admin Program 115 and is managed in the Flex Buttons Setting dialog box.

### To assign Flex buttons:

1. From the Main Menu, select Setting/Flex Buttons Setting, [Figure 66](#).
2. Enter the desired Station Range.
3. To download the Flex button data, click **Read** and select the desired Flex Button.
4. To view the Flex Button assignment dialog box, click **Setting**, [Figure 67](#).
  - a. Select the button Type from the drop-down menu.
  - b. Enter any Data required for the button type assigned.
  - c. Click **Apply** or **OK** to store the new data.

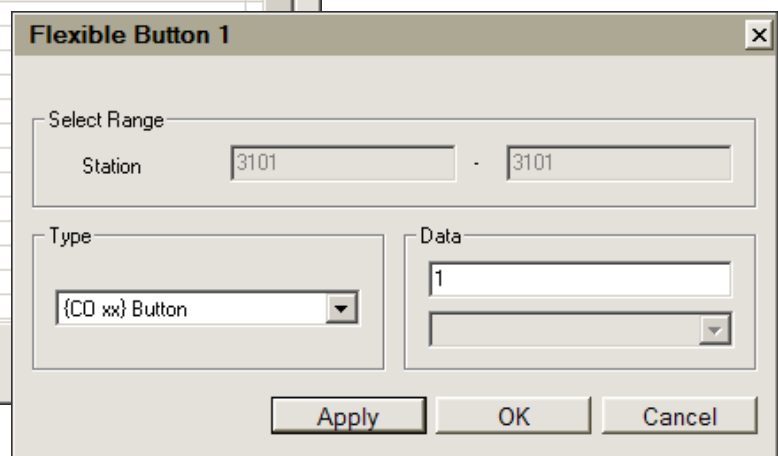
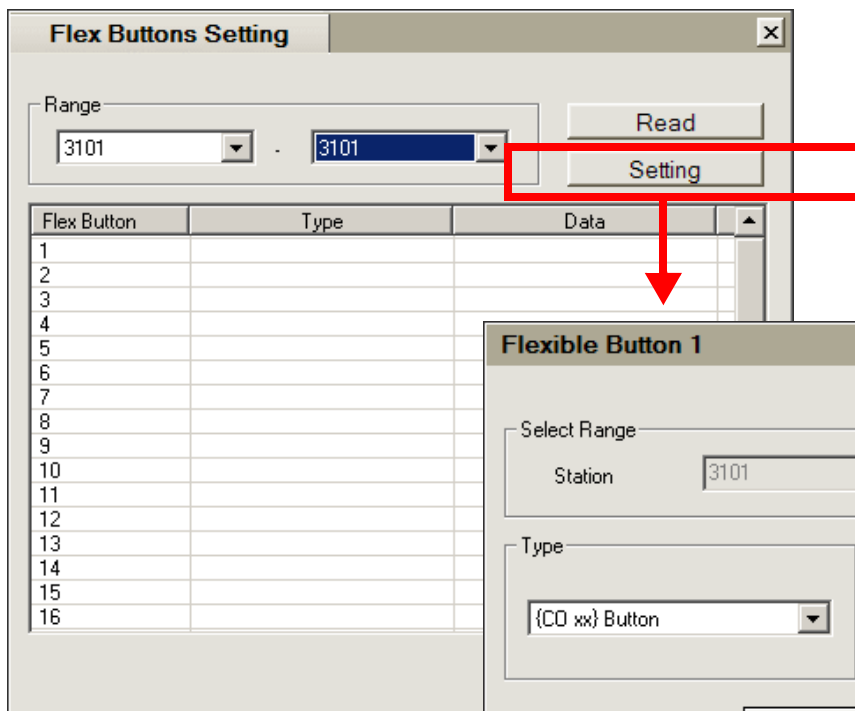


Figure 66: Flex Buttons Setting Dialog Box

Figure 67: Flex Button Assignment

### CONDITIONS

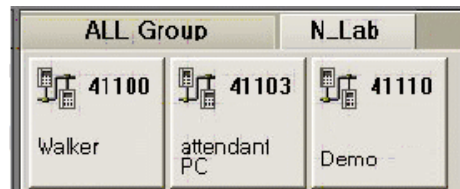
- » The Flex button data shown in the Flex Buttons Setting dialog box is representative of the lowest station number in the range entered.
- » The conditions of the *Telenium<sup>IP</sup>* system apply to *ez-Attendant* Flex Button assignments.

## Networki ng

*ez-Attendant* can operate in a network environment where multiple *Telenium<sup>IP</sup>* systems are interconnected over an IP network.

*ez-Attendant* may also call unregistered network stations by including "n" as a prefix to the network station number when using the Search box to place the call.

Network stations may also be assigned to a 'network group'. A network group is assigned under the Group Setting dialog box with the prefix "N\_", refer to [Station Window Display Groups on page 13](#). For example, a network group would be assigned the group name "N\_Labs", as shown in [Figure 68](#). Any network station can then be assigned to the network group including stations from different nodes of the network.



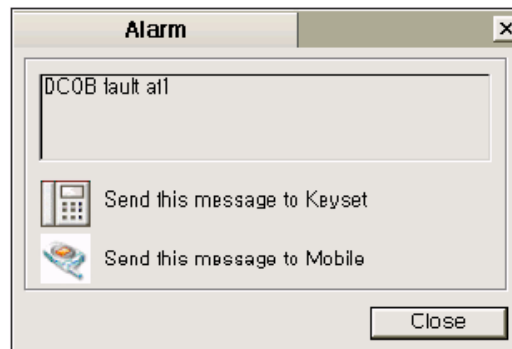
**Figure 68: Network Station Group**

### CONDITIONS

- » A maximum of 50 stations for each network node can be registered in *ez-Attendant*.

## Alarm Information Window

Alarms from the host *Telenium<sup>IP</sup>* system are sent as a pop-up, [Figure 69](#), to *ez-Attendant* as well as the LCD of the Attendant multi-button phone.



**Figure 69: Alarm Information Window**

When received, the *ez-Attendant* user may send the Alarm message to another extension or Mobile user as an SMS message.

### CONDITIONS

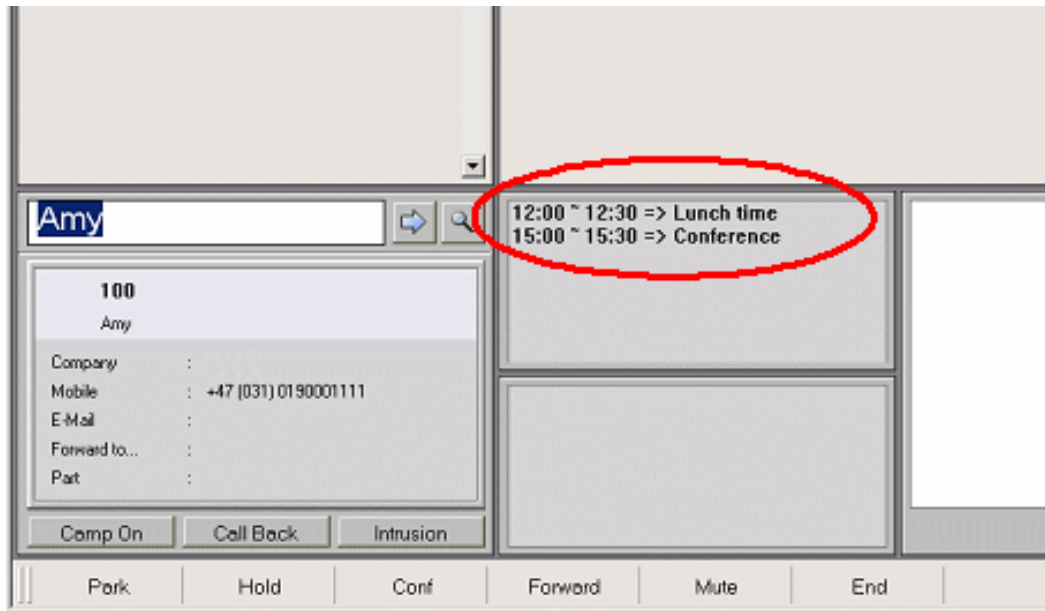
- » Alarm messages are subject to the conditions of the host *Telenium<sup>IP</sup>* system.

---

## Shared MS Outlook Schedules

### *Outlook Database*

*ez-Attendant* can display the schedules of registered users maintained in a shared Outlook database. The Outlook database must be located in an Exchange server. The schedule information is shown in the Schedule window when a user name is entered in the Search box on the *ez-Attendant* main screen, and the Search icon is selected, [Figure 70](#).



**Figure 70: User Schedule Display**

- The shared database can be imported to the *ez-Attendant* database manually as described in [Phone Book Database Link on page 48](#).
- The database may also be imported automatically based on the settings as described in [Customize Environment on page 16](#).
- In either case, all schedules in the path defined will be imported for all registered users for both attendees and hosts.

## Outlook Setup in Exchange Server

To operate properly, users must maintain schedules in a Public folder in an Exchange Server. The following scenario shows the set-up of the Outlook Public folders in the Exchange server.

### Example

1. Run the MS Outlook program.
2. Create a folder named "Schedules" to contain appointments.
3. Under the Schedules folder, create a folder for each user.

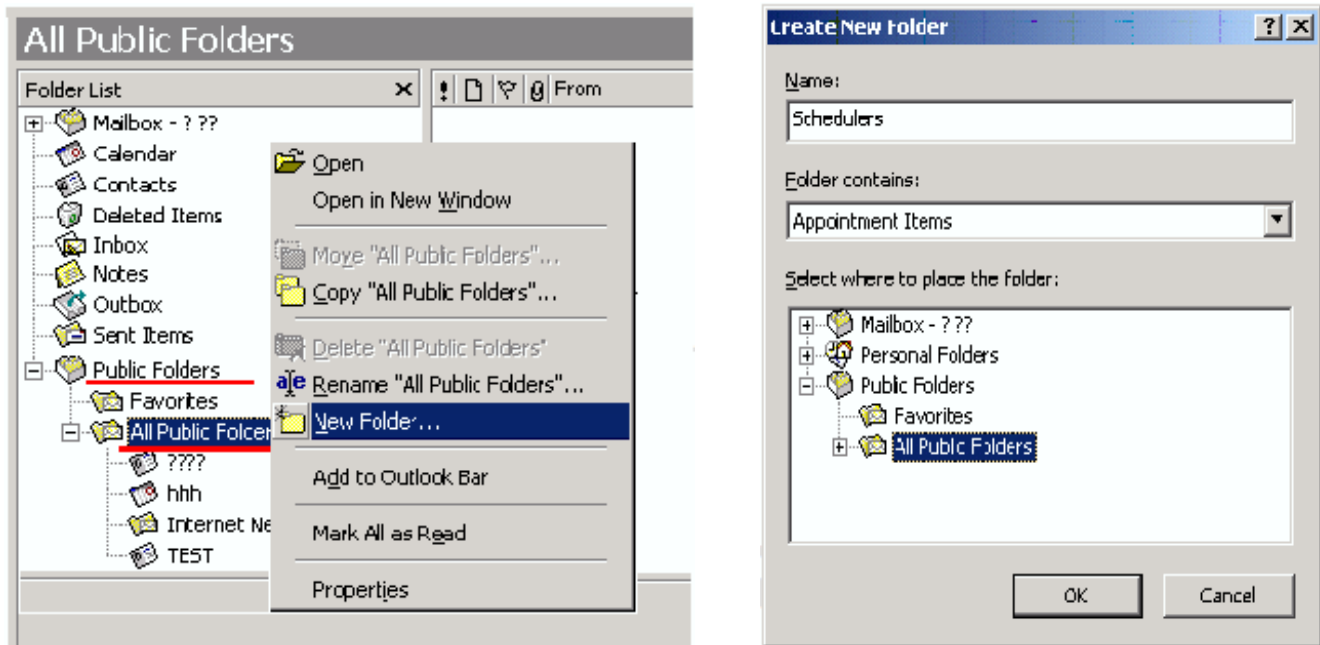
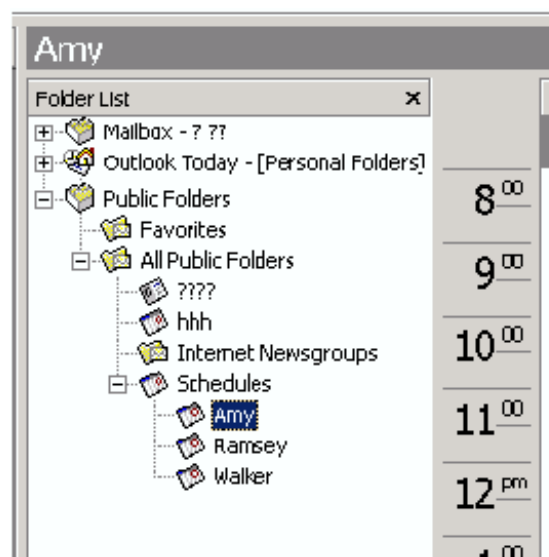


Figure 71: Outlook Scheduler Folders

After creating folders for all users, the Schedules folder tree will appear as shown.



---

## Program Information

### *Local Language*

The following illustration shows the text file used for the displays of menus, tool bars, etc. Using a text editor, a Local Language can be supported. (c:\ezattendant\Install\pcatdlls.txt)

```

pcatdlls.txt - Notepad
File Edit Format View Help
LLS
; ez Attendant for TeleniumIP Systems
; first column string -> symbol (unique string)
; second column string -> English

;=====
;== MAIN FRAME WINDOW MAIN MENU ==
;=====

#menu_file "File"
#menu_file_log_on "Log On"
#menu_file_log_off "Log Off"
#menu_file_new_db "New Database"
#menu_file_new_mdb "New Microsoft Access..."
#menu_file_new_excel "New Microsoft Excel..."
#menu_file_import_db "Import DB"
#menu_file_import_outlook_contact "Microsoft Outlook Contact..."
#menu_file_import_outlook_schedule "Microsoft Outlook Schedule..."
#menu_file_import_goldmine "GoldMine..."
#menu_file_import_act "ACT!..."
#menu_file_import_mdb "Microsoft Access..."
#menu_file_import_excel "Microsoft Excel..."

#menu_file_export_db "Export DB"
#menu_file_export_outlook_contact "Microsoft Outlook Contact..."
#menu_file_export_goldmine "GoldMine..."
#menu_file_export_act "ACT!..."

```













### *Logon Error Messages*

The following messages may appear should the logon process fail, see [Log on on page 20](#).

- No Lock key for *ez-Attendant*. Please Contact your local dealer!
- Telenium<sup>IP</sup>* System is initializing.
- Same attendant number already logged on by another one.
- ATD port is not available: There is no available attendant. All attendants are logged on.
- The number sent is not valid ATD number: Check the PGM 164.
- "This agent attendant is not logon to dummy station."-> the station to use agent attendant is not logged on.
- "This dummy station can not be logon to the system." The dummy station number cannot be log on.

## ez-Attendant Icons





### Station Window Icons

	DKTU-Busy (blue)		DKTU-Idle (white)
	SLT-Busy (blue)		SLT-Idle (white)
	WHTU-Busy (blue)		WHTU-Idle (white)
	DND State		Forward State
	Network STN-Busy (blue)		Network STN-Idle (white)
	Network STN-DND		Pre-selected Message, (Button Icon only)

### Queue Window Icons

	ICM Incoming (yellow)		CO Incoming (green)
	Attendant Recall (red)		Hold Recall (green)
	Park Recall (orange)		Transfer Recall (blue)
	Park		Hold State

### CO Line Status Icons

	Invalid CO Line		Idle CO Line
	Transfer Hold CO Line		Busy CO Line