Chapter 5 System Administration

The CG 2400 System and Your PC

Three basic areas of CG 2400 system administration are performed primarily from the PC:

- Monitoring and controlling calls from the Call Progress window.
- Using the Call Log window to view call histories.
- Maintaining the contacts database on the Contacts window.

Call Progress

From the Call Progress window, you can view or monitor all current call activity as well as control various call functions, including:

- Placing a call
- Transferring a call
- Making a conference call
- Rejecting a call
- Canceling any call operation
- Listening to someone leaving a voicemail message.

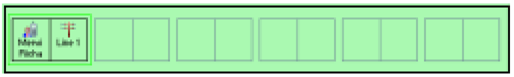
There are three possible call session combinations:

- External line to handset
- Handset to external line
- Handset to handset.

To access the Call Progress window, click the application button.

The Call Progress window is divided into three distinct areas:

System Call Activities A graphical view of any system call activities. Each pair of boxes shows a single *call session*. A call session displays the source of a call and the call destination.



Call Details The Call Details panel displays call details for whichever call session is highlighted in the System Call Activities panel. It is also the area from which you can control calls.

If you click the text display button on the bottom right corner of this panel, the panel will split, and a text description of the current call activity will display in the bottom panel.

User/Contact This panel can provide three different views of call resource information, depending on which icon is active:

 Displays all users with handsets assigned and lets you redirect or transfer an active call to any user displayed.

 Displays all mailboxes, whether or not the user has an active handset, and lets you transfer an active call to any user mailbox displayed.

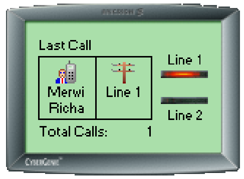
 Displays the contacts list, and lets you place a call to any contact displayed. (See “Adding and Updating Contact Records” on page107.)

Miniaturizing the Call Progress Window

You can view the Call Progress window in full-screen view or miniaturized.

To miniaturize or maximize the Call Progress window:

1. Click in the upper right-hand corner. The image will miniaturize:



2. Click and drag from anywhere on the image to reposition it on the screen.
3. Double-click anywhere on the image border to maximize the window.

Call Progress Control

There are three basic types of call you can control from the Call Progress window:

Two-party calls: Two-party calls involve only two parties: a call received from an external line, a call placed from a handset to an external line, or an internal call from one handset to another. For two-party calls, you can:

Dial Dial a call by putting the first call on hold and dialing a second number while the first call waits. When you use this feature, it turns your two-party call into a three-party call.

Transfer Transfer an existing call to another handset, to voicemail, or to an external line.

Reject Reject a call by sending the call to the rejection message, after which the caller is disconnected.

Cancel Cancel any current call operation.

Three-party calls: Three-party calls involve three parties: conference calls, or calls that have one party on hold while the handset user places or receives another call. For three-party calls in progress, you can:

Transfer Transfer the conference call to the non-originating party, which will remove the call originator without disconnecting the call.

Conference Conference a call by dialing a third party while you have an existing call on hold, then conferencing all three parties into the call session.

Reconnect Reconnect the call to the original call configuration, disconnecting the third party from the call.

Cancel Cancel any current call operation.

Incoming calls: This could be an incoming call from an external line, or an incoming call from one handset to another. For incoming calls, you can:

Redirect Redirect the incoming call to another handset or voicemail.

Listen Listen to an incoming message when a call goes to voicemail. The listen feature is only available for external calls.

Viewing Calls in Progress

Call functions available vary depending on whether the call is a two- or three-party call or an incoming call. All functions assume that you have a call in progress displayed on the Call Progress window:

Dialing an Additional Call

When an active call is displayed in the Call Progress window, you can place a call to a third party without disconnecting the parties currently engaged in the call session.

NOTE: To originate a call from the computer, see "Dialing a Contact from Your PC" on page110.

While the current call is placed on hold, the additional call can be placed to either an internal or external number.

To place an additional call:

1. Access the Call Progress window.
2. If more than one call session displays, click the desired session on the System Call Activities panel to display the call session in the Call Details panel.
3. If the new call will be to an internal number, click in the Call/Contact panel to display the active handset users. If it is to an external number, click to display the Contacts list.
4. Place the mouse cursor over the Handset icon on the Call Detail panel. A menu box will pop up.
5. Click **Dial**, then double-click the user or contact to which the new call will be placed.

NOTE: The first party remains on hold until the new call is terminated or until you conference all parties in on the call (see "Conferencing a Call" on page98).

Reconnecting a Call

If you have two calls active from the same originator, but the calls are not conferenced, you can quickly disconnect the second call and return to the original call with the Reconnect option.

To reconnect a call:

NOTE: This option works only with a three-party call that is not a conference call.

1. Place the mouse cursor over the Handset icon on the Call Detail panel. A menu box will pop up.
2. Click **Reconnect**. The third party will be disconnected and the second party will return to active call.

Transferring a Call in a Two-Party Scenario

You can transfer a call to another handset, to voicemail, or to an external number.

To transfer a call:

NOTE: You can transfer the call to an external number only if the call is from another handset. You cannot transfer an external call to another external number.

1. Access the Call Progress window.
2. If more than one call session displays, click the desired session on the System Call Activities panel to display the call session in the Call Details panel.
3. If the call will be transferred to an internal number, click in the User/Contact panel to display the active handset users. If it is to be transferred to voicemail, click to display the Mailbox list. If the call is an internal call to be transferred to an external number, click to display the Contacts list.
4. Place the mouse cursor over the Handset icon on the Call Detail panel. A menu box will pop up.
5. Click **Transfer**, then double-click the user or contact to which the new call will be placed.

   The call will terminate from the original handset when the transfer to the new handset or voicemail is made.

Transferring a Call in a Three-Party Scenario

When you have dialed an additional number (see "Dialing an Additional Call" on page96), you have the option of transferring the new call to the second party, which will remove the call originator from the call session without disconnecting the remaining two parties.

To transfer a call in a three-party scenario:

1. With the first party connected, dial the additional number as described in "Dialing an Additional Call" on page96.
2. When the third party answers, place the mouse cursor over the handset icon on the Call Detail panel. A menu box will pop up.
3. Click **Transfer**. The call will be transferred and the originating caller disconnected.

Conferencing a Call

A conference call is where three parties can talk during a single call session simultaneously. Once you initiate a conference call, no other actions can be taken with that call other than disconnecting one or all lines.

To make a conference call:

1. Access the Call Progress window.
2. If more than one call session displays, click the desired session on the System Call Activities panel to display the call session in the Call Details panel.
3. If the third party in the conference call will be an internal number, click in the Call/Contact panel to display the active handset users. If it is to be an external number, click to display the Contacts list.
4. Place the mouse cursor over the Handset icon on the Call Detail panel. A menu box will pop up.
5. Click **Dial**, then double-click the user or contact to which the new call will be placed.
6. When the third party answers, click **Conference**. The system will automatically connect all parties.

***NOTE**: If the call originator hangs up first from the handset, the remaining parties can continue to talk.*

Rejecting a Call

You can send an active call to the rejection message while it is displayed on the Call Progress window. (For more information, see "Recording a Rejection Message" on page 63.)

To reject a call:

***NOTE:** You can only reject an incoming external call. You cannot reject an internal call.*

1. Access the Call Progress window.
2. If more than one call session displays, click the desired session on the System Call Activities panel to display the call session in the Call Details panel.
3. Place the mouse cursor over the handset icon on the Call Detail panel. A menu box will pop up.
4. Click **Reject**. The caller will be routed to the rejection message. When the message finishes playing, the call will be terminated.

Redirecting an Incoming Call

When a call comes in, you can redirect it to another handset or to voicemail from the Call Progress window.

To redirect a call:

1. Click the incoming call icon.
2. Click the handset or mailbox to which the call will be redirected.

Listening to Incoming Messages

With CyberGenie@Work, you can screen incoming messages.

To listen to an incoming message:

__NOTE__: You can only screen an incoming external call. You cannot screen a message left internally.

1. Wait until the call routes to a mailbox.
2. Place the mouse pointer over the mailbox, then click **Listen**.
3. If you want to take the call, click **Redirect**, then click on your handset. The call will ring through to you.

Call Log

The call log displays a detailed history of all calls made through the system. The summary data displayed includes:

Date Date the call was placed.

Time The time it was placed.

Duration How long the call lasted.

Caller Who originated the call.

Destination Who received the call.

You can also view detail data for each call:

Status The call's current state. For a full list of possible statuses, see the "Call Status Table" on page176.

Reason The reason for the status. For a full list of possible reasons, see the "Call Reason Table" on page177.

The actual data captured to the call log can be selected through system configuration. For more information on configuring the call log data, see "Call Log Setup" on page89.

The data in the call log can be sorted in various ways, as well as filtered and/or printed, but all data displayed is for information only and cannot be changed from this window.

The handset icon on the log indicates the type of call:

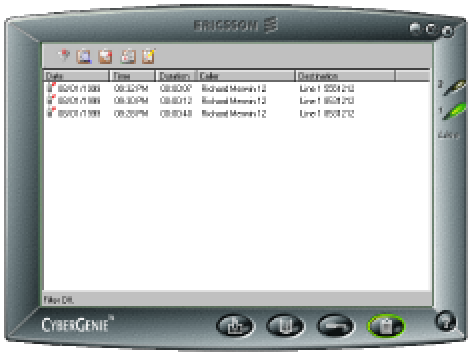
Indicates an incoming call from an external source.

Indicates an outgoing call to an external destination.

Indicates an internal call between two handsets.

Viewing the Call Log

To access the Call Log, click the application button.



When the Call Log application window is open, the CyberGenie@Work menu bar provides the following options:

Lets you filter call information.

Opens a second panel that displays call detail information for a highlighted call record.

Refreshes the display with any new call records since you've accessed the Call Log window.

Prints the call log.

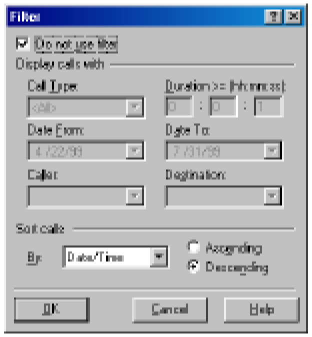
Clears all log entries.

Filtering Call Records

The default display is for all call records. You can restrict the records displayed by using the filter.

To filter call records:

1. Access the Call Log window.



2. On the menu bar, click the filter icon. A Filter dialog box opens.
3. To filter records, ensure that the **Do not use filter** checkbox is *not* checked.
4. Select from some or all of the filter options:

   Under **Call Type**, click the down arrow to select from a list of options. The default is **All**.

   Enter hours, minutes, and seconds as desired to view all calls with a **Duration** greater than the time you enter. For example, to view all calls that are more than 30 minutes long, enter **00:30:00**.

   Enter a **Date From** and **Date To** range, or click the down arrow on each date to view and select from a calendar.

   Under **Caller**, click the down arrow to view and select from a list of originating callers. Note that the source of the call is always either a user with an assigned handset for internally originated calls, or an external line number for incoming calls.

   Under **Destination**, click the down arrow to view and select from a list of call destinations.

   To choose a **Sort** order, click on the down arrow. You can also select **Ascending** or **Descending** order.
5. When done, click **OK**. Only the data selected with the filter will display.

To turn off the filter:

1. Click again.
2. Click **Do not use filter** to set the check in the box.
3. Click **OK**.

Changing Sort Order from the Log

You can also change the sort order of the call records directly from the Call Log window.

To change the sort order:

1. Access the Call Log window.
2. Place your mouse pointer over the column heading by which you want to sort.
3. Click the column heading. The data will resort based on that heading. For example, if you sort by Duration, calls with the longest duration will appear at the top of the log, with the shortest calls at the bottom.

Viewing Details

The View Detail function displays additional information about each specific call in the bottom of the main Call Log window.

To view call details:

1. Access the Call Log window.
2. On the menu bar, click . The details panel will open.
3. Scroll through the panel using the scroll bar on the right if needed.
4. Click and drag the top of the details panel to resize.
5. When done, click again to close.

Refreshing the Call Log

You can refresh the display with records of any new call since you've accessed the Call Log window.

To refresh the call log:

On the menu bar, click . The log will update with any new call records.

Printing the Call Log

To print the call log:

1. Access the Call Log window.
2. On the menu bar, click . A print dialog box will open.
3. Select the report parameters, then click **OK** to print the report.

Clearing the Call Log

You also have the option of deleting all call records from the log.

CAUTION*: Once deleted, you will not be able to recover the call log information.*

As necessary for system maintenance, a system administrator may need to clear individual logs or the entire log.

To clear the call log:

1. Access the Call Log window.
2. To clear a single log entry, highlight the record line before step 3. To clear all entries, do not highlight any lines.
3. On the menu bar, click .
4. Click Yes to confirm deletion.

Contacts

CyberGenie@Work lets you maintain a list of contacts. You can use this information to place calls from the Call Progress application window or from your handset through CyberGenie.

If you use Microsoft Outlook or another MAPI-compliant email software package, CyberGenie@Work can read the entries in your existing phonebook, and you can add names and addresses from the Contacts application window. If you don't use another application, you can create a contact list directly in CyberGenie@Work.

Whether your contacts list is created in Outlook or CyberGenie@Work, several fields are added to the database that provide special features only available with CyberGenie:

Speech recognition Lets you flag an entry in your contacts list so that a user can ask CyberGenie to dial a number, and CyberGenie will recognize the name and dial it based on your spoken command.

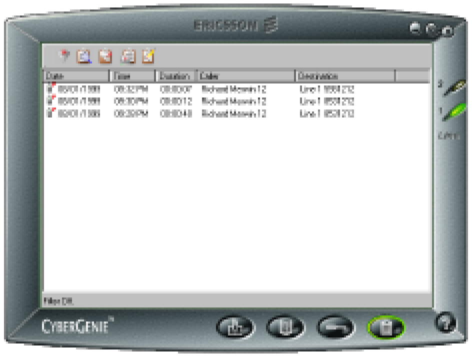
Pronunciation You can enter the name phonetically to ensure that CyberGenie understands the name and pronounces it correctly.

Download to handset Lets you flag a contact record for downloading to your handset directory. The handset can store up to 100 names and phone numbers. (For more information, see "Downloading the Phonebook to Your Handset" on page 145.)

Alias A nickname for this contact (for example, *Uncle George*) that CyberGenie will recognize for speech access.

Display name The name that shows on the handset display when this contact is called.

To access the Contacts window, click the menu button.



Indicates that a contact is activated for speech recognition.

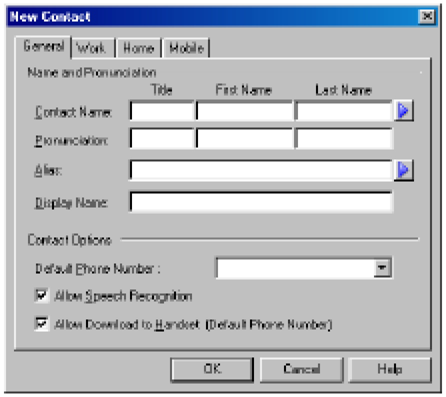
Indicates that a contact has been flagged for handset download.

Adding and Updating Contact Records

New contact records can be added at any time. A contact record requires a minimum of first or last name, and one phone number.

To add a new contact—General data:

1. Access the CyberGenie Contacts window.
2. On the menu bar, click . The New Contact window will open, with the **General** tab on top:



3. Enter the following data:

Title (optional)

First Name and/or **Last Name** At least one must be entered.

__NOTE:__ For tips on how to improve CyberGenie's pronunciation and understanding of contact names, see "CyberGenie Pronunciation" on page171.

Pronunciation (optional) If you plan to use this contact name with the speech recognition feature, click beside the Last Name field to test CyberGenie's pronunciation. If the name is not pronounced correctly, enter the name phonetically (as it sounds) under **Pronunciation**. For example, you could enter the name "Kaellagh Reilley" as **KAYla RYElee**.

Alias (optional) A nickname for this contact. For example, *Uncle George*. If you enter an alias, CyberGenie will hear either the alias or the contact's proper name. If you have duplicate names in the contact list, this is a way around getting the wrong contact when using CyberGenie speech recognition feature.

Display Name (optional) The name entered here will display on the user's handset when a handset is assigned to that user. Note that if you leave this field blank, the user's name will be the default display.

Default Phone Number to Dial Out Used as the default destination number when a handset user uses speech recognition to dial a contact without specifying a different call destination. This defaults to the first phone number entered, but can be changed at any time.

Allow Speech Recognition Click to activate the speech recognition feature for this contact.

Allow Download to Handset Click to allow this contact name and number to be downloaded to a handset.

To add a new contact—Phone numbers:

__NOTE__: You may need to insert a pause for some phone numbers. For example, some phone systems require you to dial an extension after a short greeting. A comma signals the system to pause for 3 seconds. The pause character is only available when the system is online.

1. Click the **Work** tab to open the next window, then enter the contact's work information. All fields on this window are optional.
2. Click the **Home** tab to open the next window, then enter the contact's home information. All fields on this window are optional.
3. Click the **Mobile** tab to open the final window, then enter the contact's mobile phone and pager information. All fields on this window are optional.
4. If desired, return to the **General** tab and select the **Default Phone Number to Dial Out**.
5. When done, click **OK** to save the record.

To edit a contact:

1. Access the CyberGenie Contacts window.
2. Click to highlight the contact record to be edited and double-click the contact record, *or* click on the menu bar, *or* right-click on the contact name, then click **Open**.
3. Type over existing data. Refer to the procedures on adding a contact above as needed.
4. When done, click **OK**.

To remove a contact:

1. Access the CyberGenie Contacts window.
2. Highlight the contact record to be removed.
3. On the menu bar, click , *or* right-click the contact record, then click **Remove**.
4. Click **Yes** to confirm deletion.

Editing a Contact Directly

You can use the standard Windows interface rules for copy, cut, and paste on a single field while in the Contacts window.

To cut, copy, or paste a field:

NOTE*: Refer to your Windows help for more information on cut, copy, and paste procedures.*

1. To highlight a single field, click the field, then click a second time. Note that this is two clicks, not a double-click.
2. Right-click to open a dialog box, or use the Windows keyboard shortcuts.
3. Move the cursor to the field where you want to paste or copy. Repeat step 2.

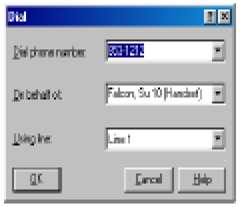
Dialing a Contact from Your PC

While the Call Progress window provides ways of manipulating calls already in progress, you can originate a new call from the Contacts window.

To dial a contact:

1. Access the CyberGenie Contacts window.
2. Click to highlight the name of the contact to be dialed.
3. On the menu bar, click , or right-click the contact name, then click **Dial**. A dialog box opens.

Verify or change the following data:



Dial phone number The number to be dialed. If incorrect, click the down arrow to view and select from a dropdown list of numbers for this contact.

On behalf of The handset user to whom the call will be routed. If incorrect, click the down arrow to view and select from a dropdown list of handset users.

Using line The line on which the call will be placed. The default is Auto Select. If you have only one analog line connected to the base station, your only option will be Line 1.

4. When done, click **OK** to initiate the call. It will be directed to the selected handset.

Activating Speech Recognition

When a contact name is flagged for speech recognition, a handset user can ask CyberGenie to dial a number, and CyberGenie will recognize the name and dial it based on the spoken command.

There are three ways you can activate or deactivate speech recognition for a contact:

- From the **Add Contact** or **Edit Contact** panels, under the **General** tab (described starting on page107).
- By clicking the contact name to highlight, then clicking (activate) or (deactivate) on the menu bar.
- By right-clicking the contact name, then clicking either **Activate Speech Recognition** or **Deactivate Speech Recognition**.

Enabling Download to Handset

When a contact name is enabled for downloading to a handset directory, a handset user can download the contact and default number to the handset for quick reference. A handset can store up to 100 names and numbers. (For more information, see *Chapter 7: Calls from the Handset*, under "Calls from the Handset Phonebook" on page 145.)

There are three ways you can enable or disable a record for downloading to a handset:

- From the **Add Contact** or **Edit Contact** panels, under the **General** tab (described starting on page 517).
- By clicking the contact name to highlight, then clicking (activate) or (deactivate) on the menu bar.
- By right-clicking the contact name, then clicking either **Enable Download to Handset** or **Disable Download to Handset**.

Changing the Sort Order for the Contacts List

You can change the sort order of the contacts list to more quickly find specific contact information.

To change the sort order:

1. Access the Contacts window.
2. Place your mouse pointer over the column heading by which you want to sort.
3. Click the column heading. The data will re-sort based on that heading. For example, if you sort by Company, all contacts with no company will display first, then contacts will be grouped by company, in alphabetical order.

Changing Your Contacts View

CyberGenie@Work provides two different views for your contacts list:

Spreadsheet The default view, where each record displays on a single line.

Business card A second panel opens over the spreadsheet, and displays a single record at a time in a business card layout.

To change your contacts view:

1. Access the CyberGenie Contacts window.
2. Right-click on a contact record, then click **Show Business Card**. The view will change.
3. To return to spreadsheet layout, repeat steps 1 and 2.