

FlexAttendant

User Guide

(Version 1.0.25)



The flexible way to communicate

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FLEXATTENDANT USER GUIDE OVERVIEW

Welcome to the FlexAttendant and the world of accessible and efficient call processing. This user guide will assist you in installing as well as utilizing your new software. We have made every attempt to present this information in a format that facilitates easy setup and use. First, please review the basic requirements listed below before attempting to install the FlexAttendant software. Next, follow along with the Installation section of this guide while you load and maneuver through the Wizard. Finally, take some time to read through the user sections to see all that you can accomplish using the FlexAttendant.

Now when you answer a call, you will have all the necessary information to effectively process the call. The intuitive responses of the FlexAttendant will simplify and assist each call. You will know whether an extension is busy, forwarded, or in a do not disturb mode. Contact information will be at your fingertips; use your mouse, keystrokes or speed dial buttons to speed up your response time. You may enter and refer to information relevant to daily activities by capitalizing on the memo field (e.g., out sick, in a meeting until 10AM, traveling). You will be able to take messages and immediately forward them by email. While managing conference calls, you may choose to make the list of participants available for viewing over the Internet in real time.

First impressions count. Answer every call with the confidence that your organization will be perceived as professional, efficient, and effective.

Now, let's get started.

Minimum PC Requirements:

Processor As required by the Operating System version
32 MB of RAM
50 MB free hard disk
VGA monitor w/ 800 by 600 & support of > 256 colors

Supported Platforms:

Windows 7
Windows XP Professional + Office XP default install
Windows 2000 Professional +Access 2000 +Outlook 2000 (Corporate or Workgroup mode)
Windows 98 2nd Edition + Access 2000 + Outlook 2000 (Corporate or Workgroup mode)

Telephone Requirements: Keypad with APA or iAPA

Coral System Requirements: Minimum version 11 or higher

FLEXATTENDANT USER GUIDE

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FlexAttendant Installation

System Requirements

Supported Platforms

FlexAttendant has been tested successfully on the following platforms:

- Windows 7
- Windows XP Professional + Office XP default install
- Windows 2000 Professional + Access2000 + Outlook 2000 (Corporate or Workgroup mode)
- Windows 98 Second Edition + Access2000 + Outlook 2000 (Corporate or Workgroup mode)

1. Install Access (2000 or XP) and Outlook (2000 or XP). If unavailable, see page 16 for details.
2. Populate Outlook Contacts with a few names and business phone numbers if necessary.

It is recommended that the PC be at least with 32 MB of RAM, and 50 MB of available hard drive storage. We also recommend a VGA monitor able to support at least 800 by 600 with support of greater than 256 colors.

Coral Integration

The FlexAttendant must interface to the Coral via a digital telephone or an IP (MGCP) phone. The digital phone must have a serial port with which to pass information. The Coral interfaced to the FlexAttendant must be minimum version 11 or higher.

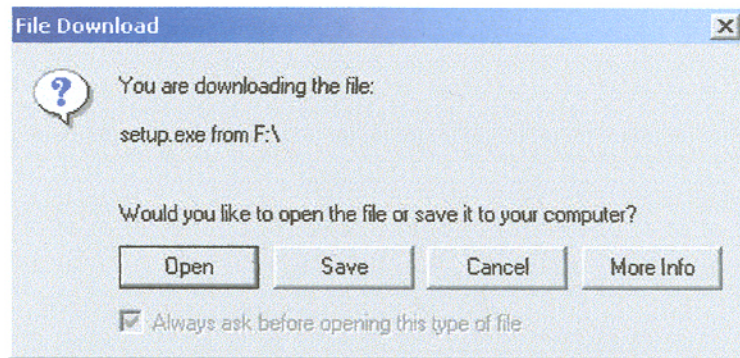
Phone Type – Coral Keypad with APA or iAPA

Coral Setup – After opening the password to the Coral system, you can simply type the word “KEY” and specify the dial number of the phone connected to the FlexAttendant, as seen in the following example. In order to send the correct data to the FlexAttendant, you must choose the option “CSTS” under the protocol type. You can go through all entries until you find PCC, or specify PCC when you are prompted for “any specific data field.”

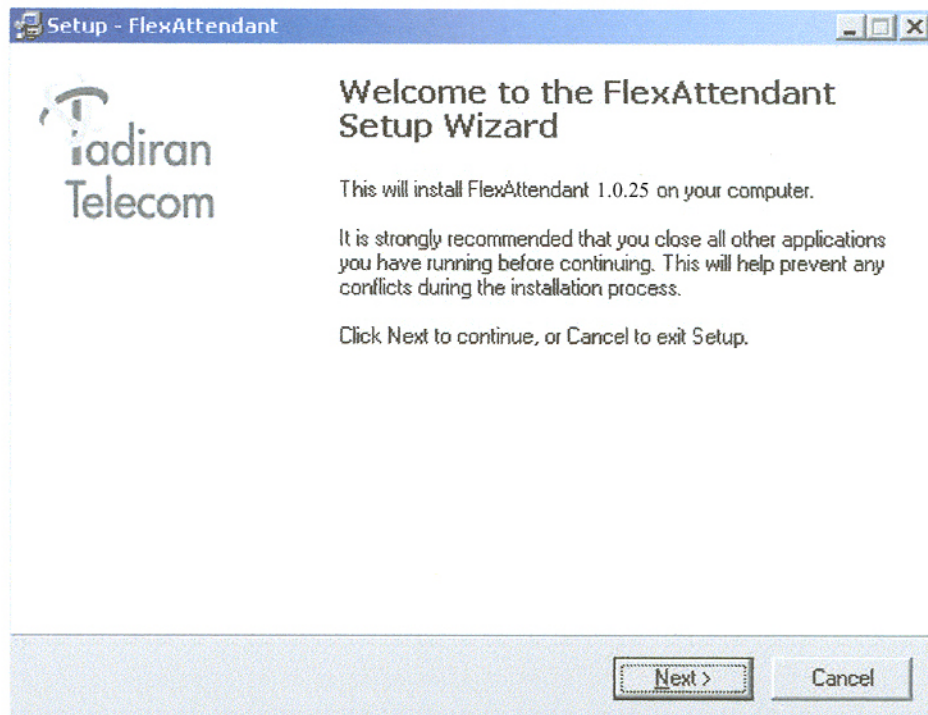
```
KEY
FROM DIAL#- 400
TO DIAL#- 400
Any specific data field (type ? for help)
pcc
KEYSET_DEF
400
-----
Protocol Types:
PCC(No/PCC/CSTS_PCC)-CSTS_PCC
```

FlexAttendant Software Installation

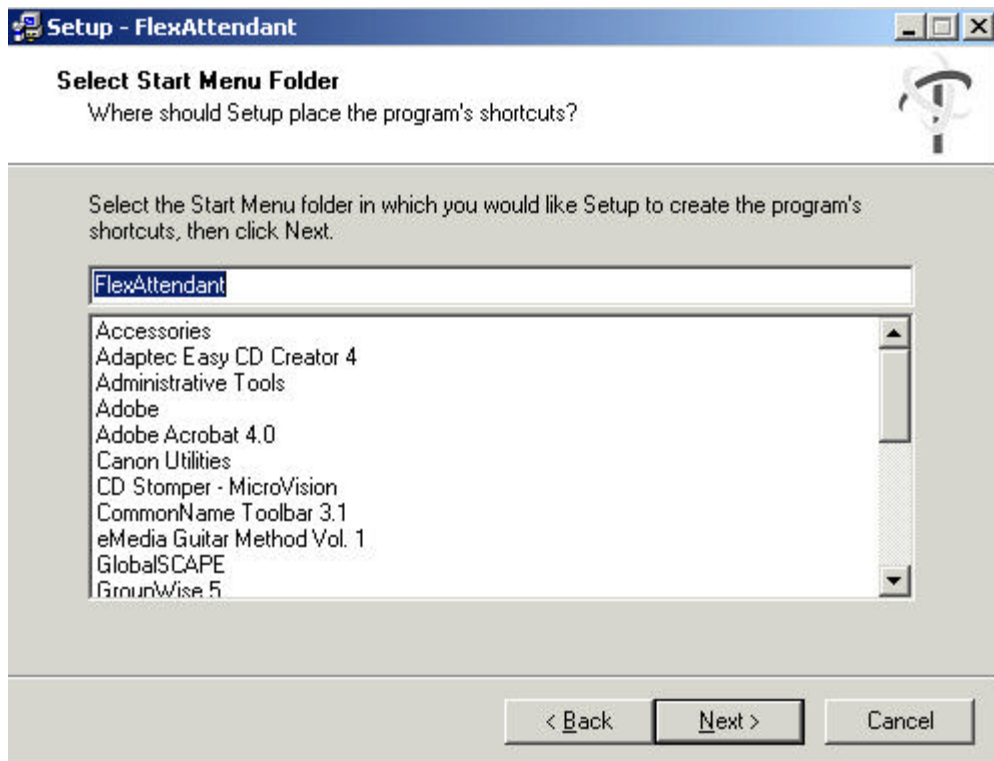
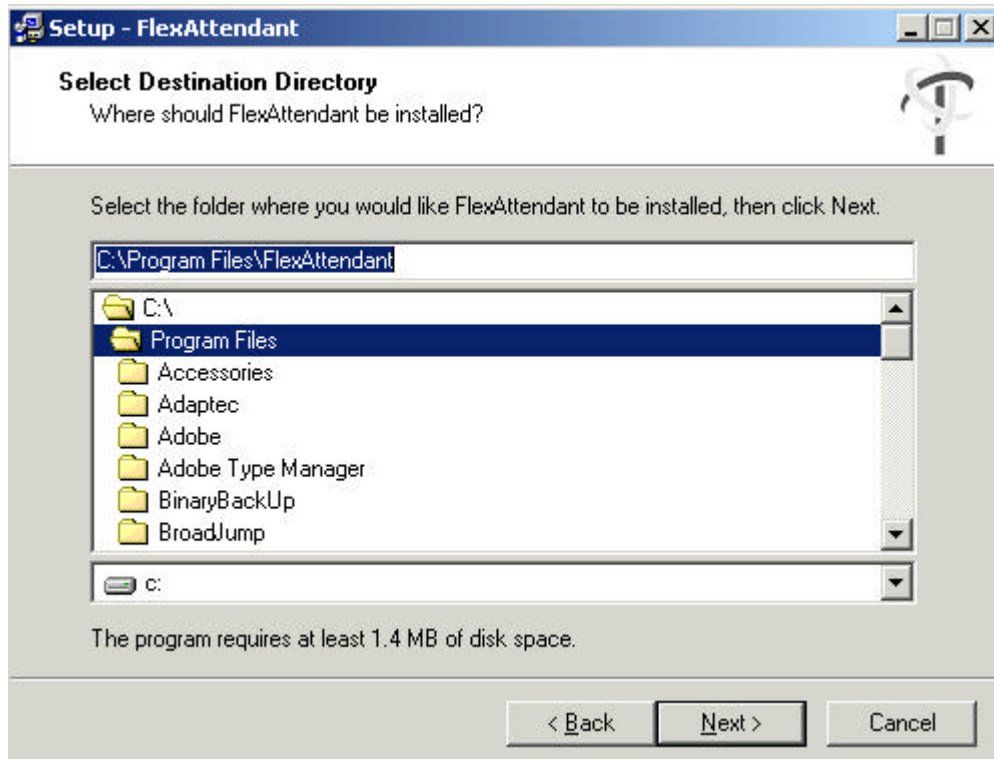
After inserting the CD with the FlexAttendant software, you will receive a screen reminding you of the PC requirements and installation procedures. Choose the highlighted option that initiates the installation process. Allow the program to be opened, not saved. This will install the software on your computer and allow you to make all the necessary definition choices.



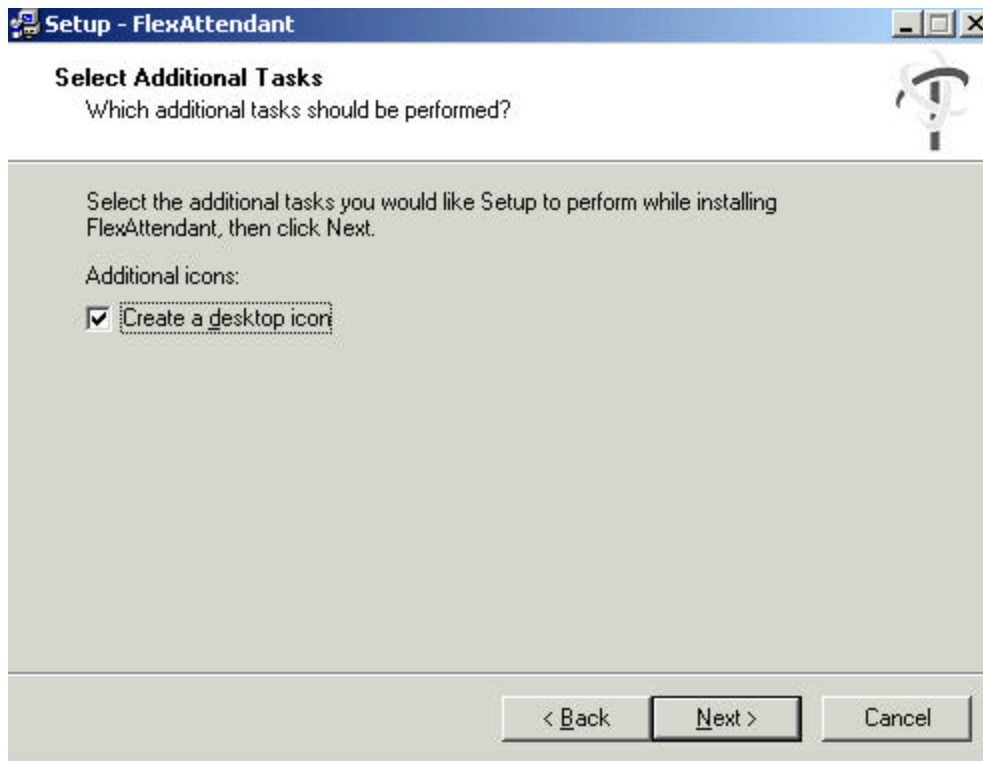
At this time, a wizard will begin the installation phase. Advance the wizard by choosing the "next" button.



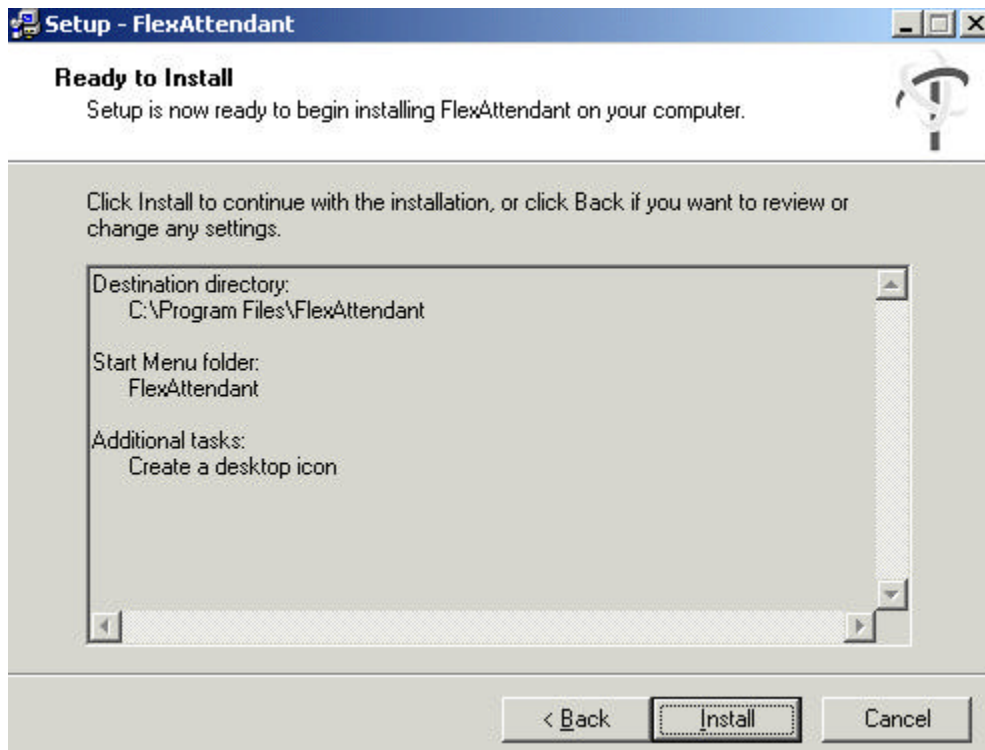
You may choose any drive or directory to install the FlexAttendant, but the screen we see here shows the default settings. We recommend that you use the default settings whenever possible.



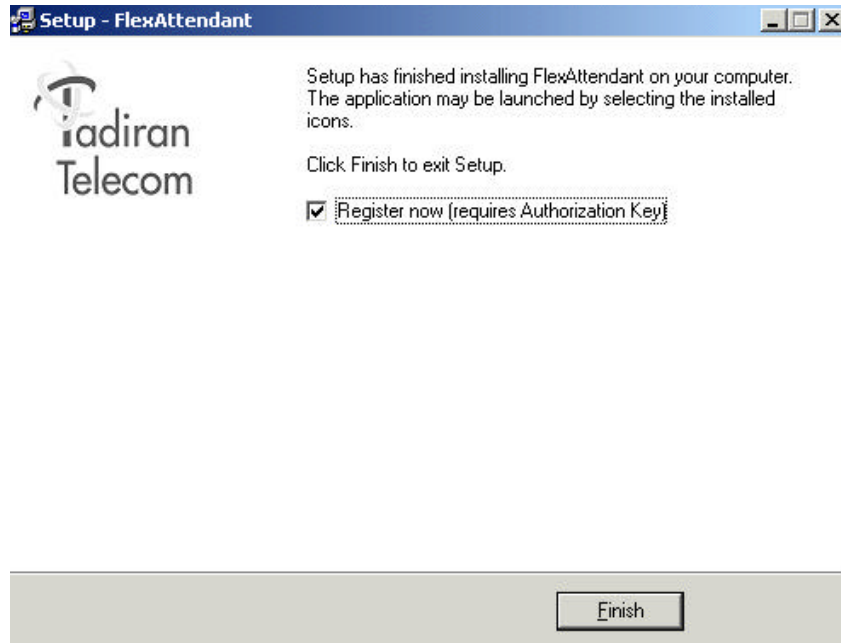
If you wish, the installation wizard will also create an icon for your desktop by which to start the FlexAttendant.



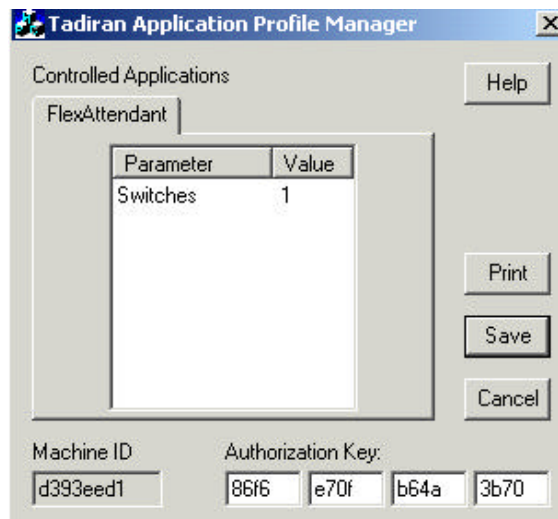
After these options have been defined, the wizard will proceed to install the software according to the choices you've made.



At the conclusion of the installation process, the wizard will ask you if you are ready to register your FlexAttendant software.



If you choose to register your software at this time, you will be given a “Machine ID” that will be required when calling to receive your authorization code. You can receive this number by contacting Tadiran Telecom Field Support. At this time, you will need to identify the customer name and SAU number of the Coral on which it will be installed. (During the installation process an algorithm is performed, which the authorization key must confirm.)



The Application Profile Manager shows two items of information that must be supplied when calling for an authorization key:

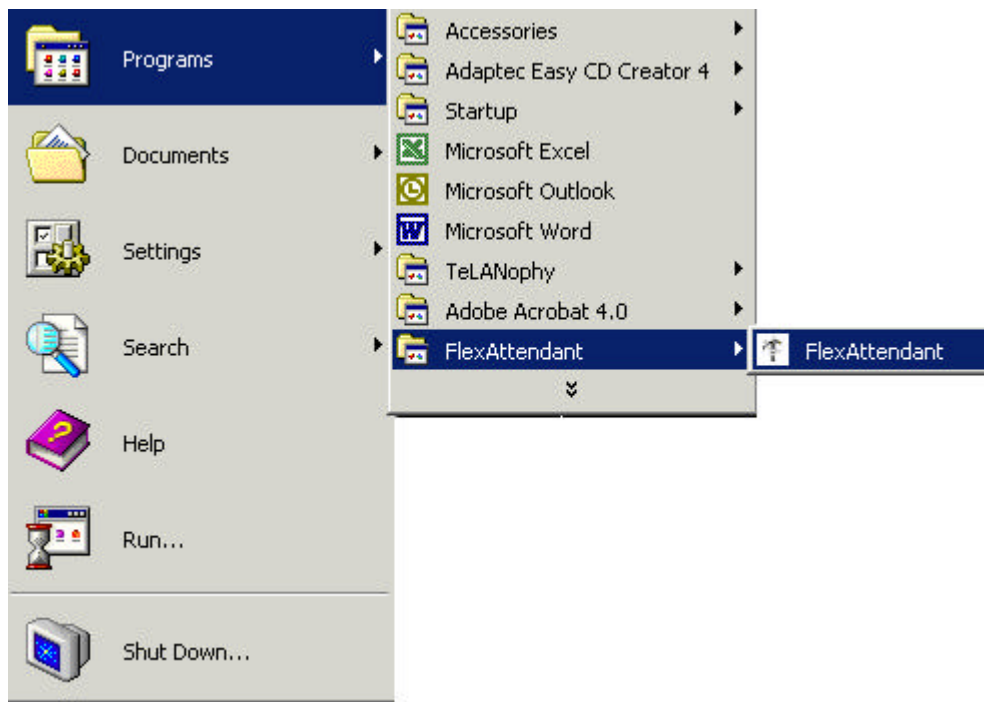
1. The maximum number of switches supported by this installation of the FlexAttendant. To increase this number prior to registration, select the row by clicking once on it, then click again

to make the Value field editable. You will need to re-register if you change this value after initial registration.

2. The Machine ID, which cannot be changed.
3. Enter the authorization key provided to you, then click save. A pop-up window saying “File Saved” indicates that your registration was successful.

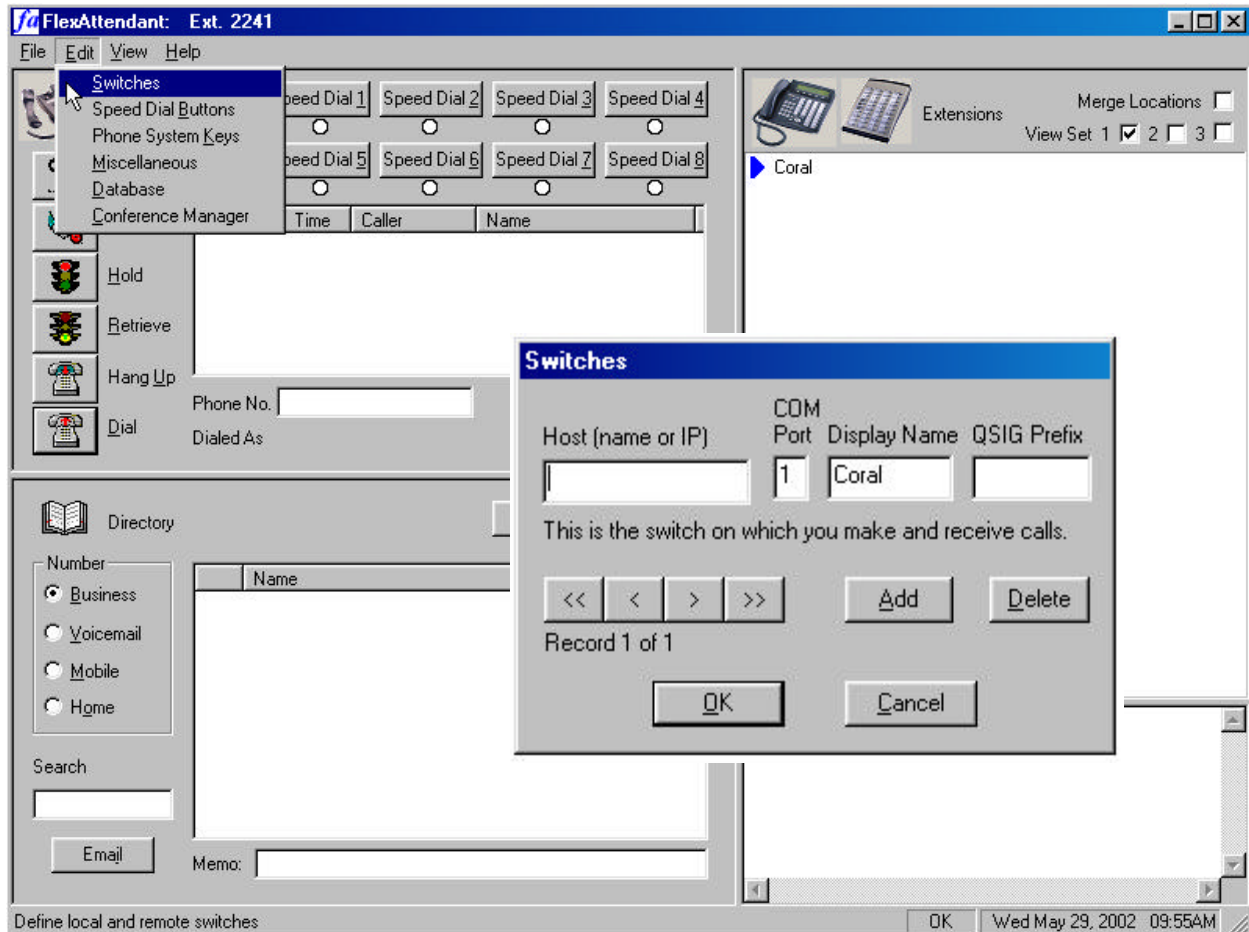
Note: You will not be able to use the FlexAttendant program until this authorization key is entered and authenticated.

Now that you have successfully installed the FlexAttendant, you may launch the application by choosing the program as seen in the program listing. If you choose to create an icon on your desktop, you may also launch the FlexAttendant from this icon.



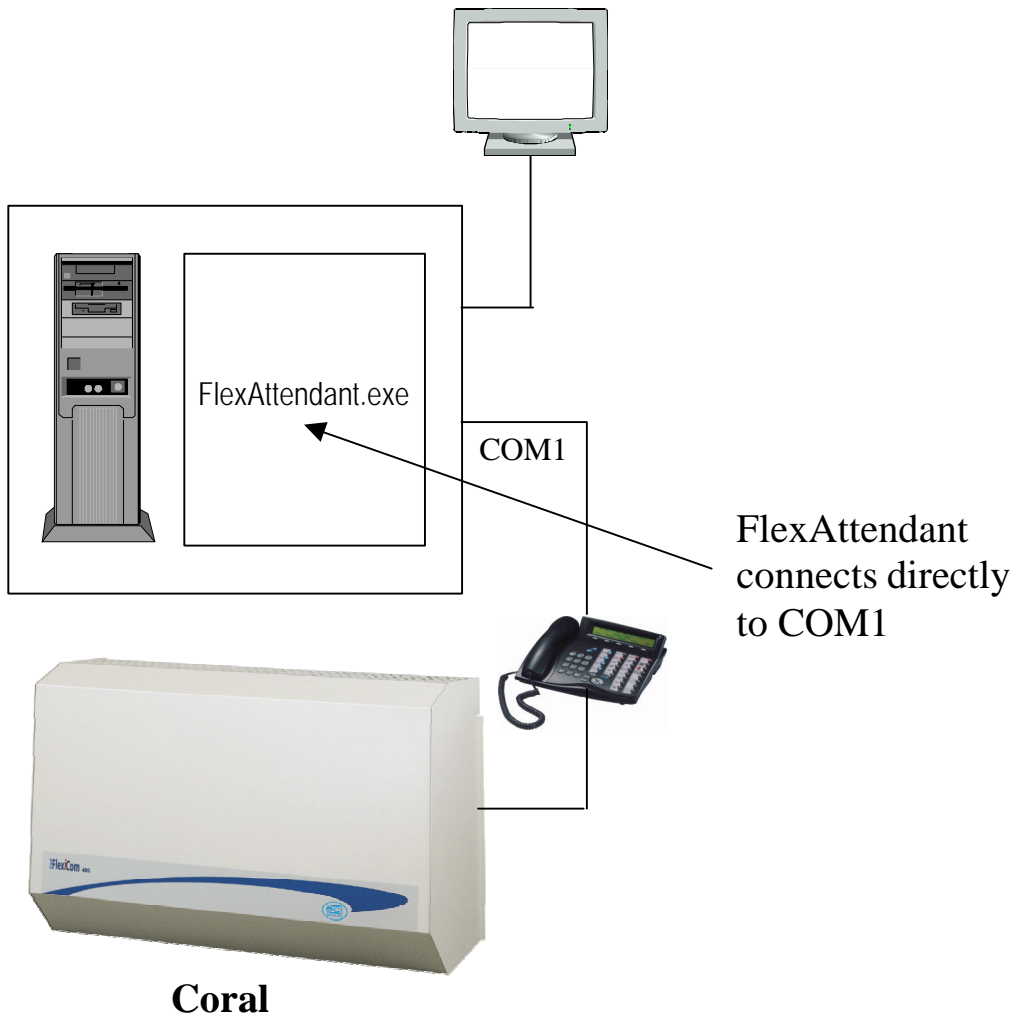
Edit Switches

A few more settings must be verified in order to make the FlexAttendant work properly. The first option is found under the edit menu as “switches.” These fields allow the user to define the different PBX that will be reporting to this FlexAttendant. It is very important to define the communications port that this PC will be using to communicate to the digital station. In this example, we have chosen COM 1.

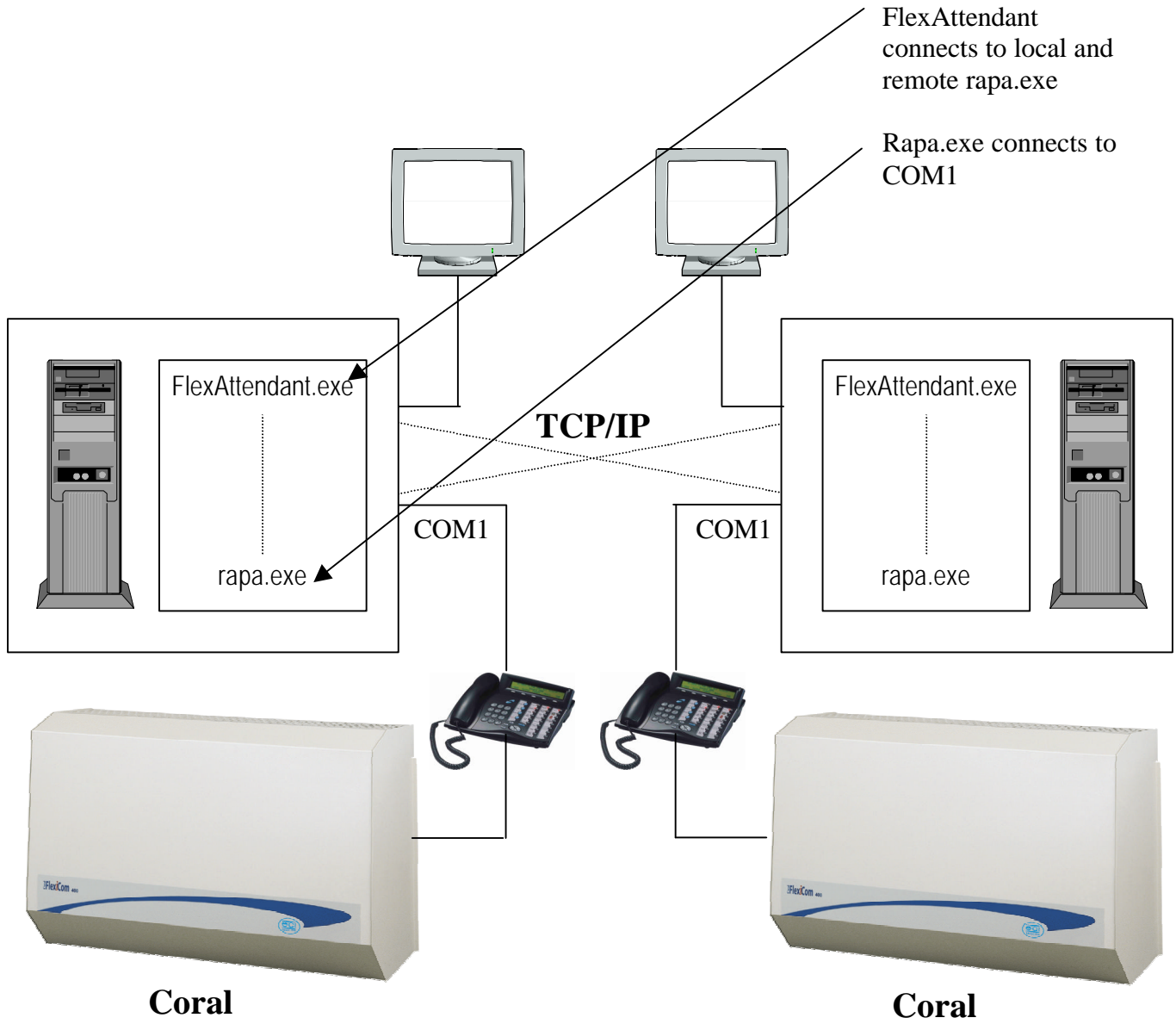


Use this dialog to configure the switches, which are controlled or monitored by the application. The first record is the controlled switch; all others are monitored. The switches may be at the same or different locations. Each switch sends and receives data through a serial link connected to an APDL, which is purely a data link, or an APA, which is a data link built into a telephone (must be used for the controlled switch). The serial link is connected either directly to a COM port on your computer, or to a COM port on a remote computer running the “rapa.exe” utility, which passes the messages in both directions over a TCP/IP socket to your computer. It follows that a TCP/IP network must be in place between your computer and the remote locations, in addition to any QSIG network.

Single Switch, Single Attendant



Multiple Switches, Multiple Attendants



Host (name or IP)

For any switch not connected directly to a local COM port, enter the host name or IP address here. Leave blank for directly connected switches.

COM Port

Enter the COM port number (1...9) for the local or remote switch.

Display Name

Enter the text to be displayed as the header for this switch in the phone status area, such as the location. To maximize screen utilization, only about the first eight characters will be visible.

QSIG Prefix

Each switch reports activity using its local dial numbers. To dial extensions on a remote switch it may be necessary to enter additional digits first. Enter the additional digits, if any, here. The application will prepend the digits so that the numbers shown in the phone status area are dialable. Leave this field blank if you have a network numbering plan in which all numbers are unique and dialable directly.

Navigation Buttons

Use the buttons to move between existing records. The first record is the Controlled switch.

Add

Click to add a new record after the current record. Then edit its fields.

Delete

Click to delete the current record.

OK

Click to confirm all your changes. The application must be restarted for the changes to take effect.

Cancel

Click to cancel all your changes.

Edit Speed-Dial Buttons

We can also define the purpose of the speed dial buttons. Each button can be used in a unique way. It can represent another station, trunk, outside number or virtually anything that the user could dial. If the content of the speed dial button is not an outside number, you will be given a busy/idle status on the associated indicator below the speed dial label.

Use this dialog to configure the dial numbers and labels of the eight speed dial buttons. You could use them for page queues or frequently-used hunt groups.

Dial

Enter the number to dial (numeric, with optional commas for dial delays).

Label

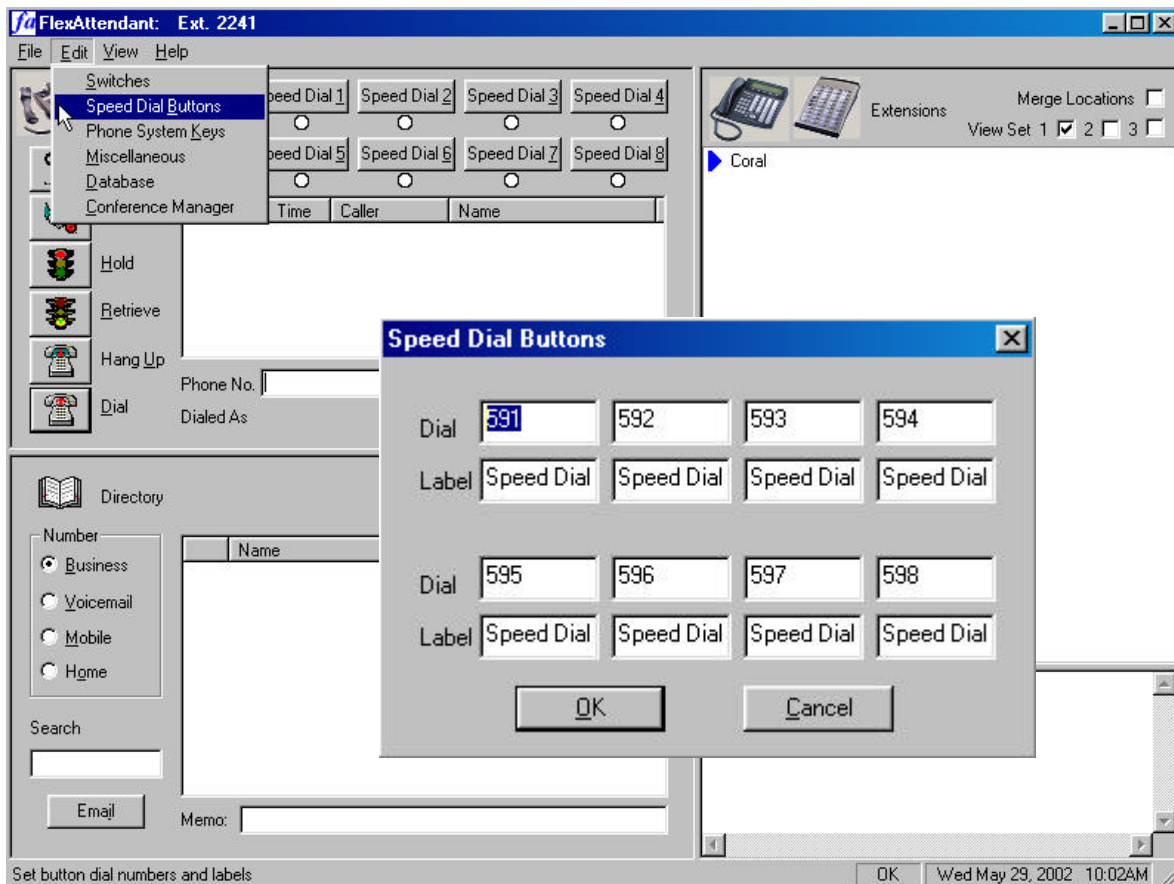
Enter the label to be displayed on the button (alphanumeric). Note that you can use an ampersand ('&') before a character to make the button a "hot key." For example, if the label is "&PageQ 590", typing Alt-P (not case-sensitive) will activate the button.

OK

Click to confirm all your changes.

Cancel

Click to cancel all your changes.



Edit Phone System Keys

In order to properly take advantage of the telephony functions built into the FlexAttendant, we must define how the “Fixed System Keys” are established. These four keys are found on the digital station, closest to the dial pad. Simply select the key location according to the question asked in this simple wizard.

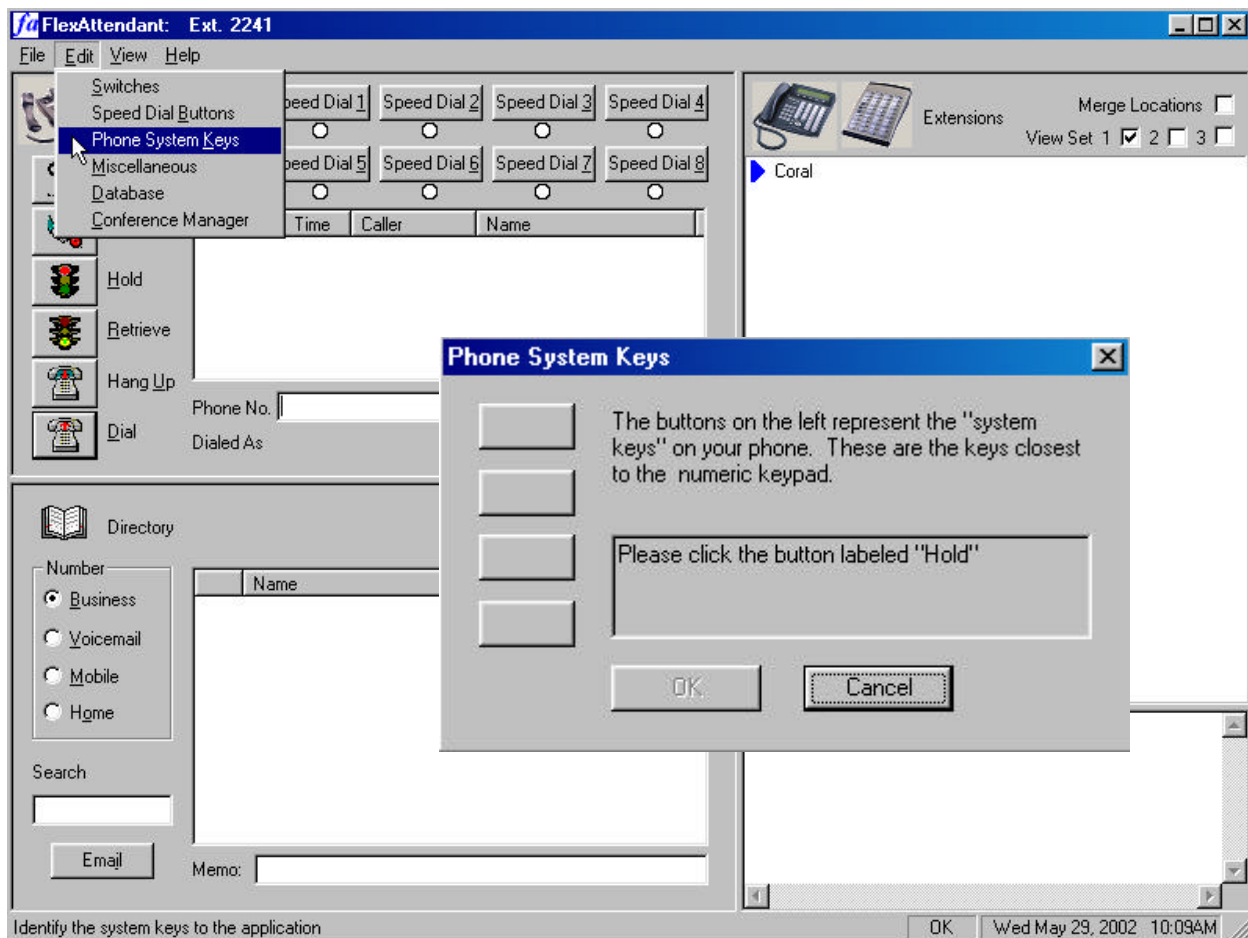
Normally, this will be set up for you during installation and should not be altered. A symptom of these settings being incorrect would be that transfers do not work. The application needs to know the location of the “fixed system keys,” which are the four buttons on your phone commonly labeled Hold, Xfer, Line and Spkr. Follow the instructions in the recessed box to provide this information.

OK

Click to confirm all your changes.

Cancel

Click to cancel all your changes.



Edit Miscellaneous

A few simple preferences must be looked at in order to allow the FlexAttendant to work in your environment. These preferences relate to the ability to present the FlexAttendant during every new call and your sorting of users by first name or last name. The user can change these definitions at any time.

Pop-up on incoming call

When checked, the application, if minimized, will pop-up when a call is delivered to your telephone.

Minimize on no calls

When checked, the application will minimize itself when there are no active or held calls at your telephone.

Name Display Format

Choose whether you want to sort and search names in the directory displayed as “firstname lastname” or “lastname, firstname.”

Expire Call Log records after ___ days

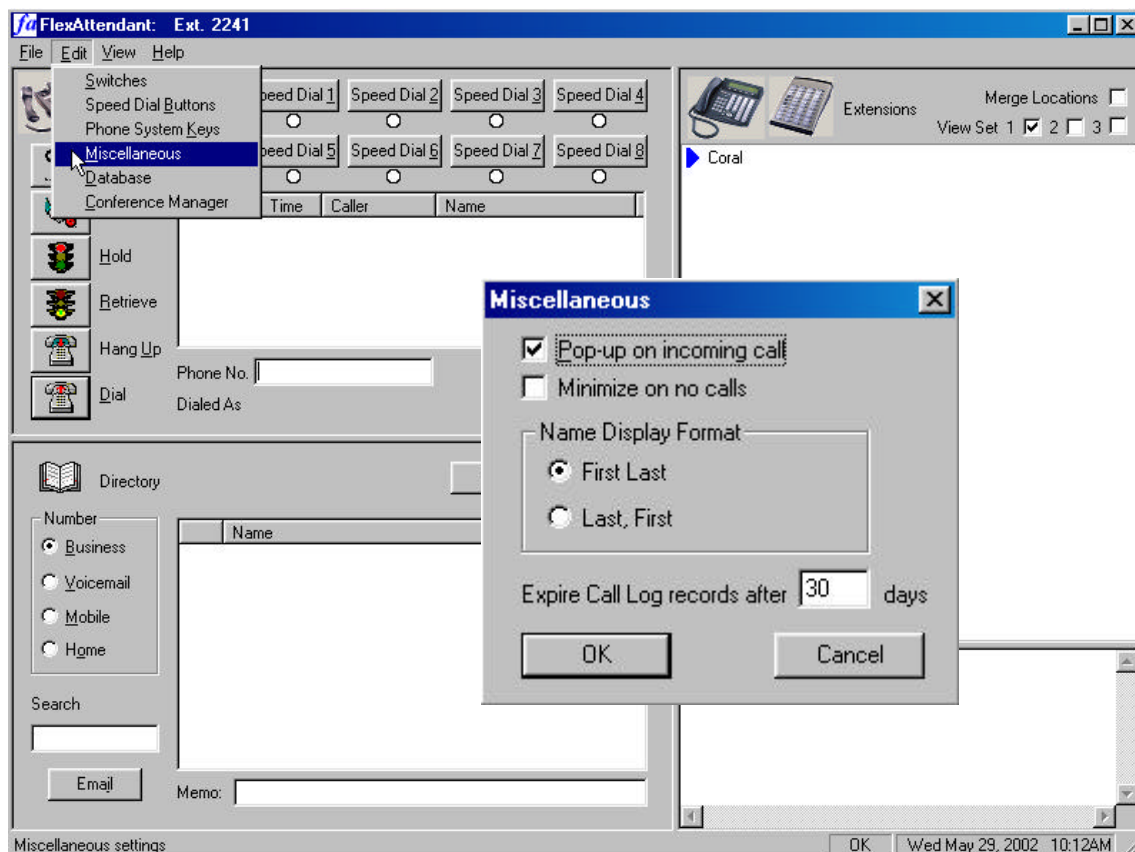
The system purges Call Log records older than the specified number of days to prevent the database from growing indefinitely. Once purged, there is no way to retrieve them.

OK

Click to confirm all your changes.

Cancel

Click to cancel all your changes.



Edit Database

This dialog controls the database underlying the Directory. The last and probably most important definition to be made is deciding the choice of database to use for the FlexAttendant. Your choices are:

- Microsoft Outlook address book
- Microsoft Access database
- Unique database that you may create

Integration

Select “Outlook (Automation Interface)” to use the default Outlook Contacts folder as the directory. The folder is referenced using an Automation interface.

Select “Outlook (Linked Access Table Interface)” to use an Outlook Contacts folder as the directory. The folder is referenced indirectly, through a Microsoft Access database.

Select “None (standalone)” to use a built-in Access table as the directory.

For more detail, see Integration Specifics on the following pages.

Database Path / Browse

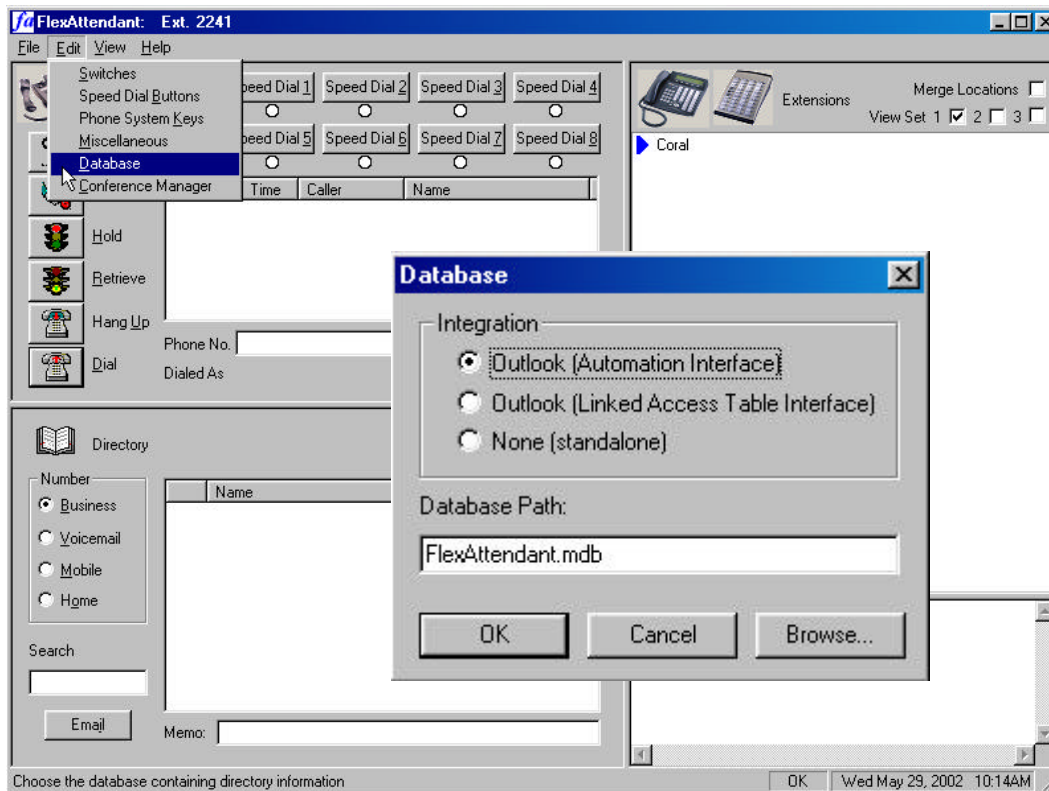
Type or browse to the Access database underlying the directory. Note that the Access database is used even with Outlook integration.

OK

Click to confirm all your changes. The application must be restarted for the changes to take effect.

Cancel

Click to cancel all your changes.



Integration Specifics

Integration refers to the use of a third-party application to manage the directory. Currently, two types of integration to Microsoft Outlook and a “standalone” integration, based on Microsoft Access, are available.

Outlook – Automation Interface

The Automation Interface uses the default Outlook Contacts folder. No special setup is required. Startup is slower than the Linked Table interface but performance is otherwise similar.

FlexAttendant fields map to the identically-named Contact fields, except:

FlexAttendant Name	Outlook Name
Voicemail phone number	Other phone number
Memo	User Field 1

Outlook – Linked Access Table Interface

This is an indirect interface. In a Microsoft Access database, a linked table exposes selected Contacts fields. A query converts the table to a view acceptable to FlexAttendant, which accesses the fields through the Microsoft Jet database engine. This method is actually faster than the Automation Interface.

The exposed Outlook fields are determined by the wizard, which creates the link and cannot be changed. Typically, the link has to be recreated at installation time to suit the user’s particular Outlook environment, including the possibility of selecting a non-default Contacts folder. Sometimes, the query has to be modified as well. This cannot be done with the Access Runtime shipped with FlexAttendant – a “full” Microsoft Access must be installed on the user’s machine. After re-linking, FlexAttendant fields normally map to the identically-named Contact fields, except:

FlexAttendant Name	Outlook Name
Voicemail phone number	Pager phone number
Home phone number	Home2 phone number
Memo	User Field 1

Note the differences from the Automation Interface, which makes them not immediately interchangeable.

Detailed instructions for setting up this interface follow.

1. In the installation folder, open FlexAttendant.mdb. Attempt to open the Contacts table. If successful, go to step 6.
2. Delete the Contacts table. Go to File -> Get External Data ->Link Tables.
3. In “Files of type:” select Outlook(). Choose an Outlook Contacts folder to link; it may be in different locations depending on your configuration.
4. Call the linked table “Contacts” if prompted.
5. You should now be able to open the Contacts table. If still unsuccessful, try linking a different Contacts folder.
6. Go to the Queries tab and attempt to open the Directory query. If successful, go to step 8.
7. Apparently, different Outlook configurations export different Contacts fields. Resolve problems by modifying the query design for Directory. Map fields according to the list that follows. In the query design grid, the names are in the row headed “Field:” separated by ‘:’ if they differ:

Contacts name	Directory name	Notes
First	First Name	
Last	Last Name	
Department	Department	
Phone	Phone_Ext	
Pager Phone	Phone_Voicemail	No voicemail field in Outlook
Mobile Phone	Phone_Mobile	
Home2 Phone	Phone_Home	Outlook does not export Home Phone
Email Address	Email Address	Contacts may have "E-mail Address" (with hyphen)
User Field 1	Notes	Use alternative such as "Primary" if User Field 1 is absent

- Open the Directory query and note the speed at which the rows populate. This will affect the startup time of the FlexAttendant application.

Standalone Integration

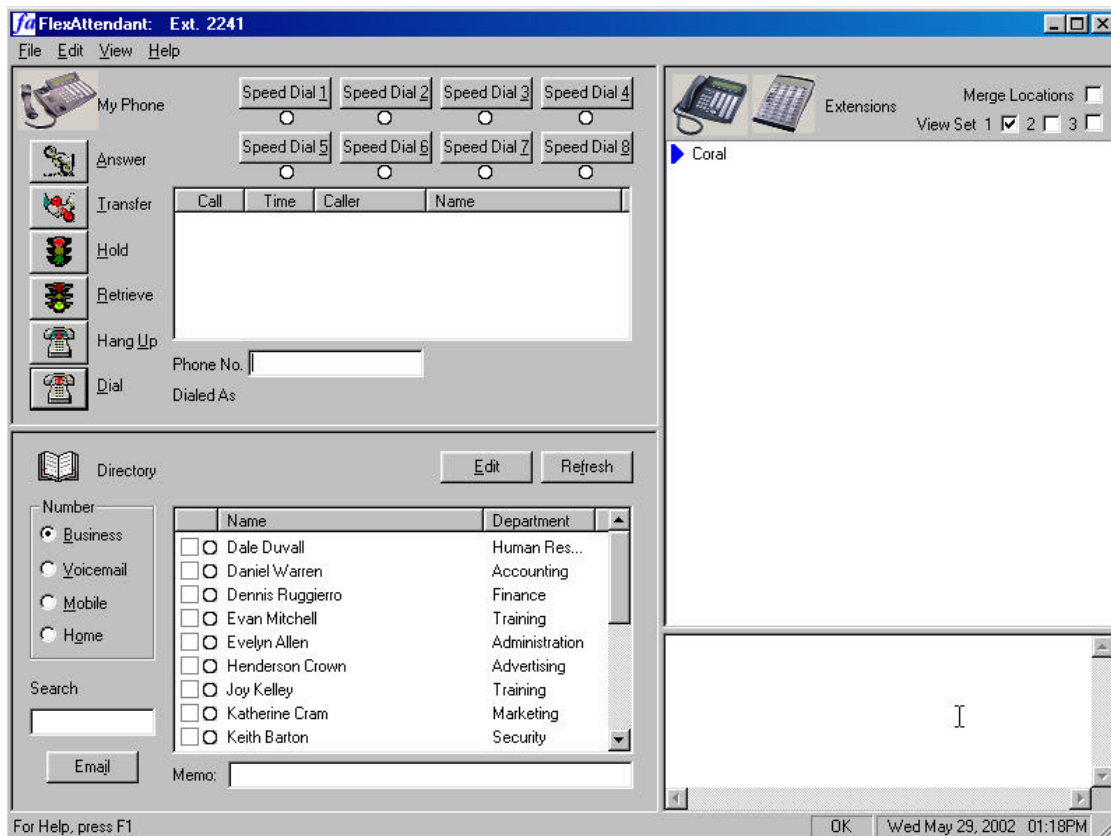
This integration uses a Microsoft Access table as the directory. It will work using the Access Runtime shipped with FlexAttendant, and does not require any other Microsoft Office applications to be installed.

Installation if Access and/or Outlook are not available

If Outlook is not available, or there are performance or other issues, the application can run using only the supplied Access database. To activate this mode, after installation go to Edit->Database and select Integration = None.

If Access is not available, please install the Access 2000 Runtime from the \Runtime directory of the distribution media. Install to the default location.

This screen shows a database that has been populated using Microsoft Outlook.




Dialer Configuration

In order to take advantage of dialing from the database in the FlexAttendant, you must configure your Windows dialer. This can be accessed from the Control panel. You need to define the local area code, as well as the dial access code, typically 9.

Edit Location [?] [X]

General | Area Code Rules | Calling Card

 Location name:

Specify the location from which you will be dialing.

Country/region: Area code:

Dialing rules

When dialing from this location, use the following rules:

To access an outside line for local calls, dial:

To access an outside line for long-distance calls, dial:

Use this carrier code to make long-distance calls:

Use this carrier code to make international calls:

To disable call waiting, dial:

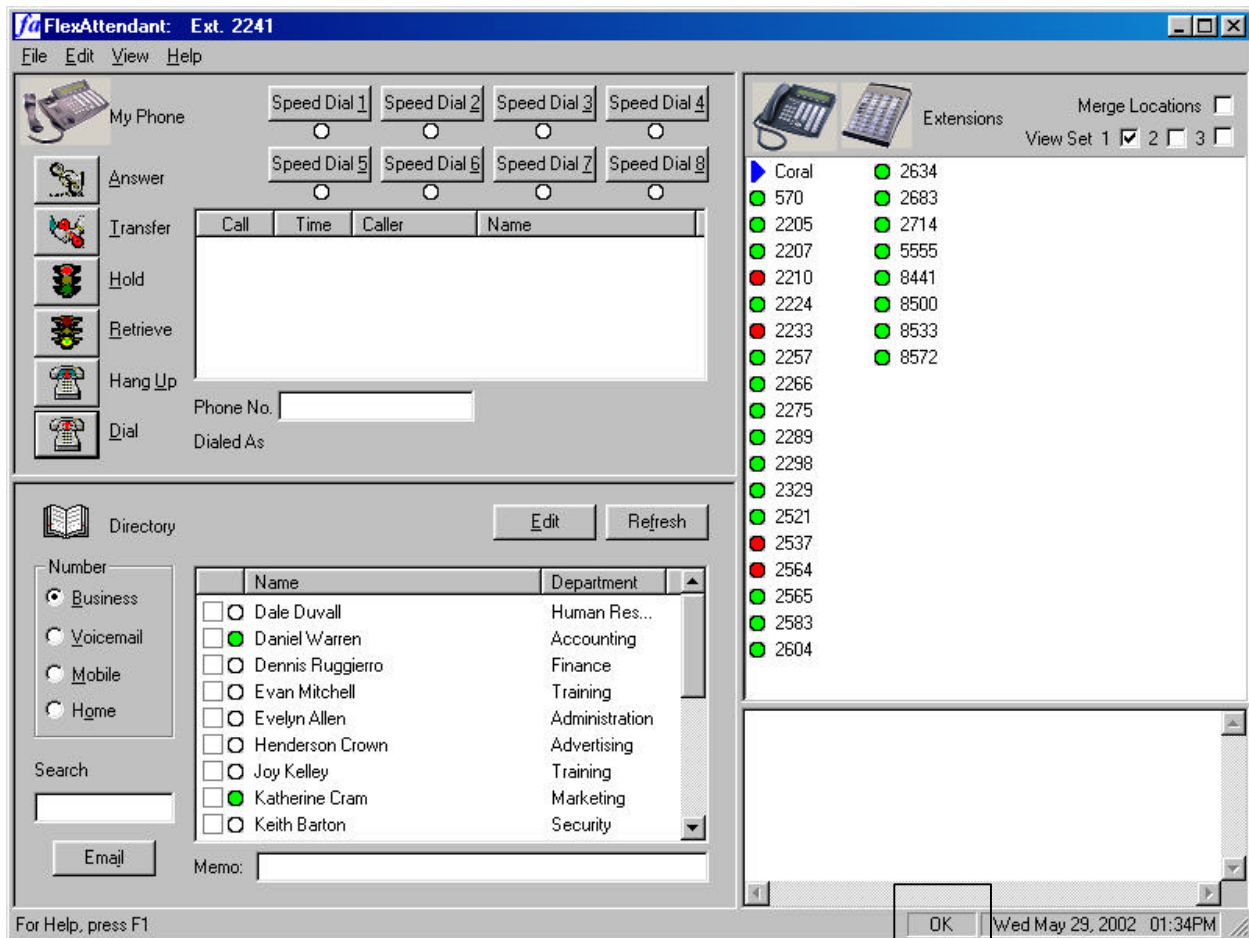
Dial using: Tone Pulse

OK Cancel Apply

Troubleshooting

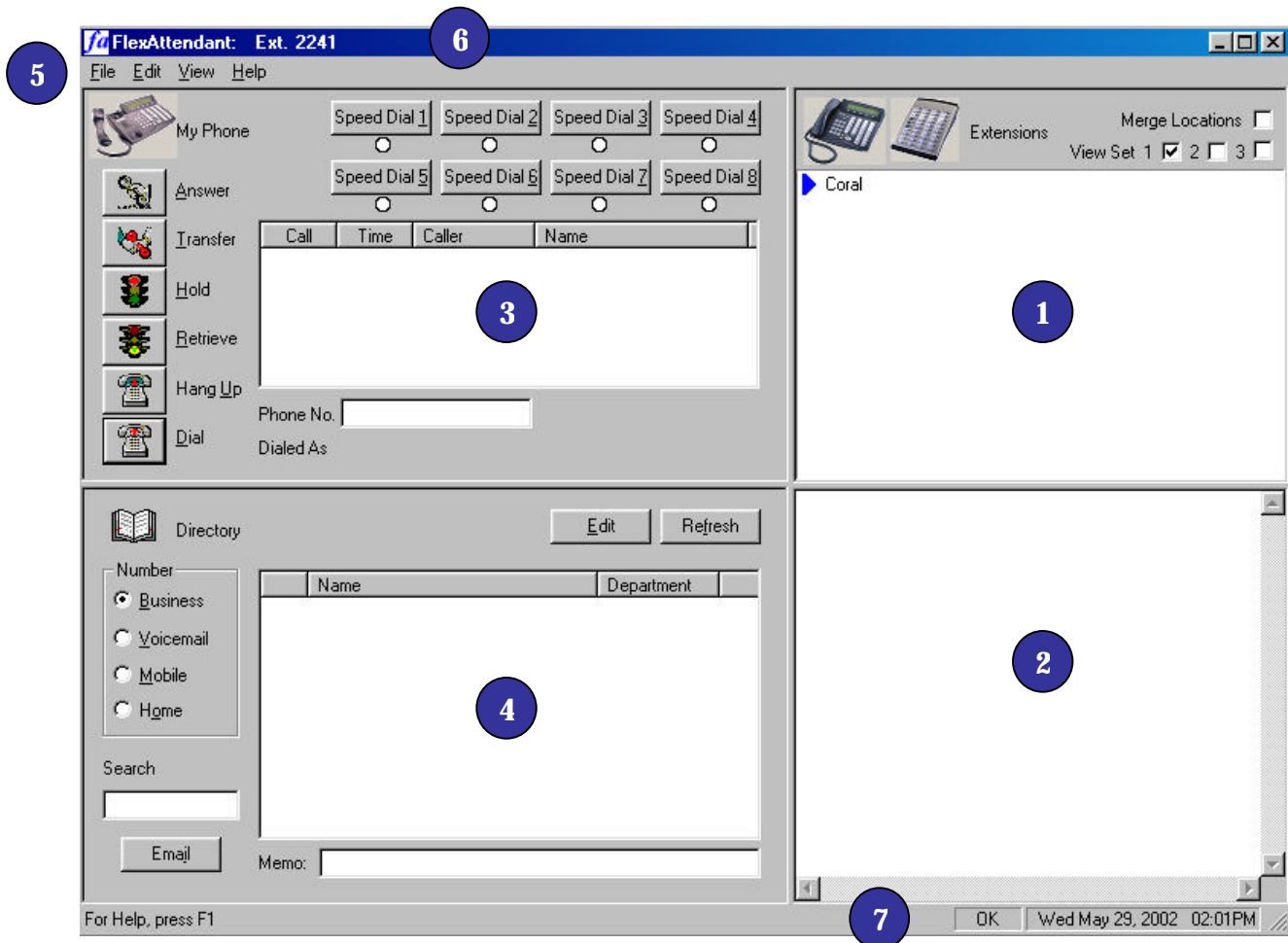
If the FlexAttendant fails to function properly, check the following items.

1. Power is present on the digital phone supporting the FlexAttendant. This can be verified by unplugging the line cord to the phone. If external power is present, the display will remain even though the phone has been disconnected. If the display goes blank when unplugged, verify a valid power source and restart the FlexAttendant.
2. Verify that the cable between the PC and the digital phone is in place. This cable should be straight through, without any modifications.
3. Verify that the correct “com” port has been chosen in the “switches” setup.
4. Verify the correct Coral Generic Software.
5. Verify the correct port definition.



6. Verify communication between the FlexAttendant and the Coral. In the picture above, you will see a status window highlighted. If this window indicates a problem, one or more switches are not communicating properly.

MAIN SCREEN UPON STARTUP

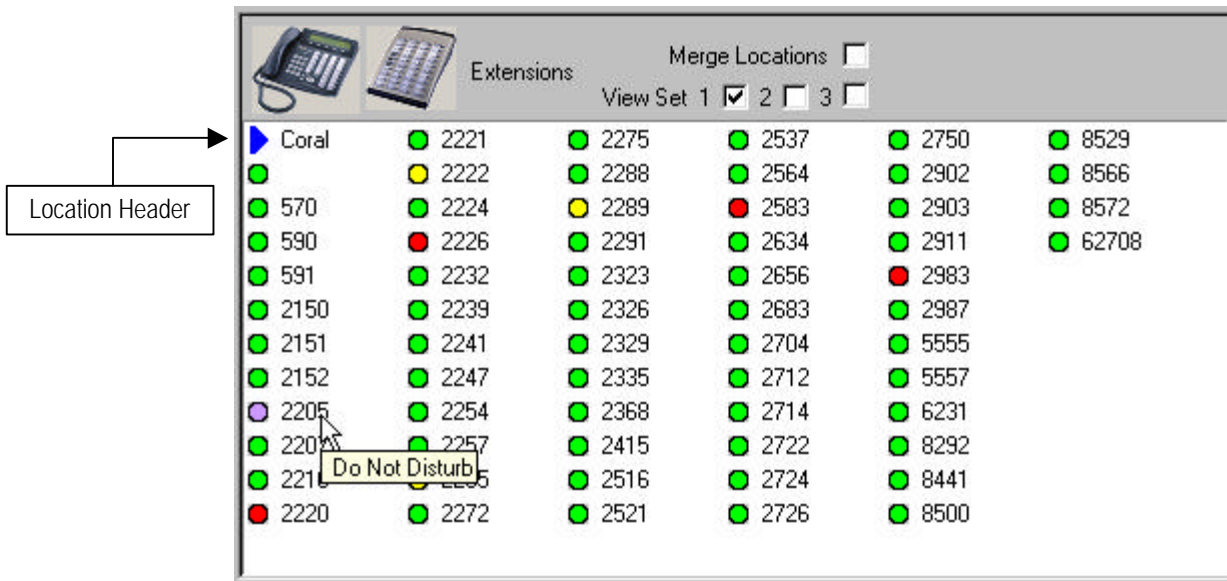


The main screen upon startup will appear almost identical to the screen above.¹ You will notice that the screen has been identified by section for easy reference. Take a moment to identify each of the following sections:

- ❶ Busy/Idle Display – This area shows the status of telephone extensions (e.g., busy, idle, forwarded, do not disturb).
- ❷ Scratch Pad – Use this area for notes.
- ❸ My Phone – This area of the screen is concerned with the management and monitoring of calls on your telephone.
- ❹ Directory – This area of the screen provides contact information and allows you to monitor phones by user's name instead of by number.
- ❺ Menu Toolbar – File, Edit, View, Help
- ❻ Title Bar – Windows and dialog boxes may be moved by dragging the title bars.
- ❼ Status Bar – The left side of the status bar describes actions of menu items as you use the arrow keys to navigate through menus. The right side of the status bar indicates the status of the data connection to your telephone. (OK = Connection is okay. Problem = Disconnected, check the wiring and external power to the phone.) Further to the right, the day, date and time are indicated.

¹ For the purposes of this user guide, the speed dial labels have been renamed for easy identification. Your startup screen will have different default labels for the speed dial buttons. In addition, the title bar will read "FlexAttendant Ext. xxxx." "xxxx" being the attendant's extension.

BUSY / IDLE DISPLAY SCREEN



The Busy/Idle Display shows the status of telephone extensions.

Legend:

- Green = Idle
- Blue = Forwarded to Voicemail
- Purple = Do Not Disturb
- Red = Busy
- Yellow = Forwarded to Another Number

Extensions are automatically added to the display as activity occurs on them. Click on an extension to load its number for dialing, or double-click to dial immediately. Hover the mouse over an extension to see a 'tooltip' with textual information (e.g., busy, idle, fwd, do not disturb).

View Sets: The FlexAttendant application always adds new numbers to View Set 1. Right-click an extension number and click an unchecked option to make the extension a member of a different View Set. Make an extension a member of more than one View Set simultaneously by holding down the Ctrl key while clicking on the Set number. Use sets to selectively hide or display groups of dial numbers. For example, extensions for a particular department may be displayed by themselves, or special device port numbers may be assigned to a separate View Set and then permanently hidden. Check a box to view, or uncheck to hide extensions that are members of the matching View Set number. You may select multiple View Sets at once.

Merge Locations: This feature applies to businesses with multiple switches. Normally, the different monitored locations (switches) are separated; each location has a Location Header followed by its extension numbers in numerical order. Check this box if you prefer to view all the extension numbers as a single sorted list without regard to location.

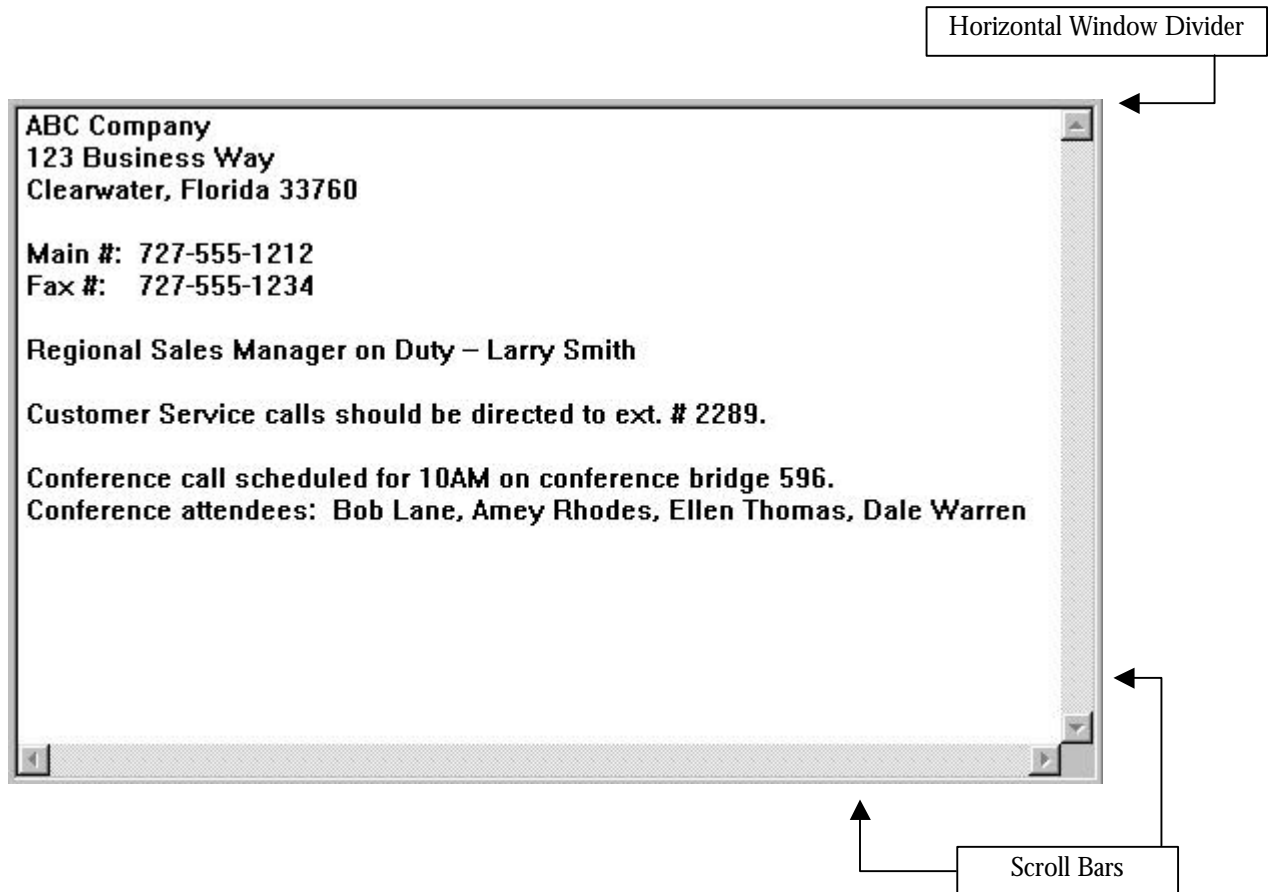
Location Headers: Headers may be renamed using the menu toolbar.



The following procedure opens a dialog box with fields that effect system settings. If you are not comfortable with making changes and understanding their impact, please consult your supervisor for assistance.

From the menu toolbar – click on Edit – click on Switches – place cursor in the 'Display Name' field – enter the name you want for the Location Header – click on OK. Your changes will take effect after the application is restarted.

SCRATCH PAD



This area is useful to the attendant in that it can contain quick reference information necessary to facilitate the various tasks of the position. Use this area for key information such as company name, address, website, main phone numbers, recent changes in personnel, or notes to yourself or other attendants covering the same duties.

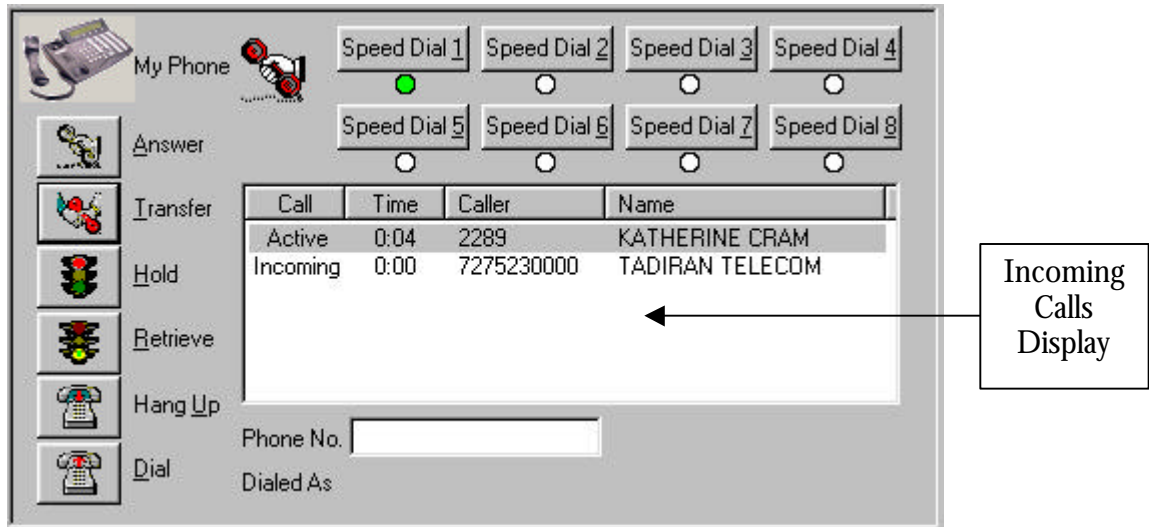
You may use standard shortcut keys for cutting, copying and pasting text.

Ctrl+X = Cut
Ctrl+C = Copy
Ctrl+V = Paste

Use the scroll bars to view the contents of the Scratch Pad if necessary.

Adjust the viewing size by moving the horizontal window divider.

MY PHONE SECTION



Incoming Calls Display

This area lists inbound calls, with the most recent call at the top of the list. For each call, the following information will be displayed.

- State of the call
- Time since the state last changed
- Caller ID number, if available
- Caller ID name, if available

Select a call by clicking on it, or accept the system's selection, and press either Enter, Alt+A or click on the Answer button.

Phone No. Field

This entry field is used to enter a phone number to be called. You can enter a number by:

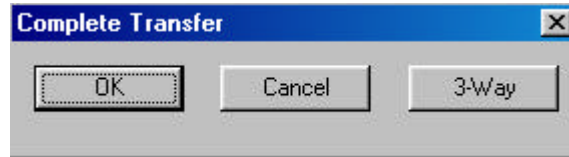
- Typing it directly into the field
- Clicking on a number in the Busy/Idle Display
- Selecting an entry in the Directory

Dialed As Field

This field shows the number as it will actually be dialed by the system. If this is incorrect, you should check the Dialing Rules setup on your computer.

Answer Button – Click this button to answer an incoming call. The system will pickup the oldest call first. If there are multiple incoming calls, you can click on the call you want to answer first, and then click on the Answer button.

Transfer Button – Once you have an active call, enter the requested phone number in the Phone No. field¹ and press the Transfer button. A 'Complete Transfer' dialog box will appear.



Either choose OK to complete the transfer, or Cancel to retrieve the call. You may wait for the called party to answer before completing the transfer so that you may announce the call (conversation will occur between the attendant and called party only). In addition, when the called party answers, the '3-Way' conferencing option becomes available.

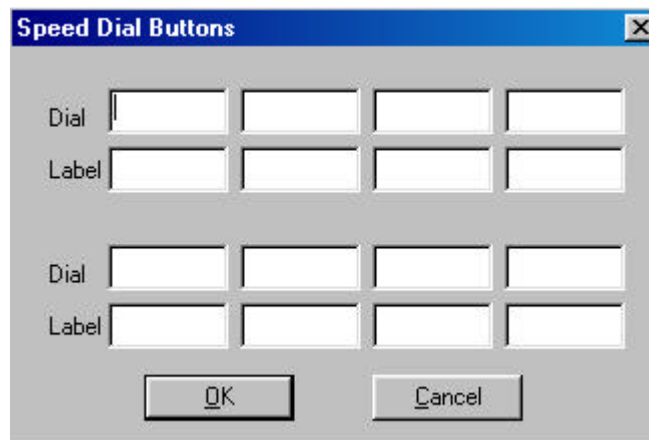
Hold Button – Click this button to put the currently active call on hold.

Retrieve Button – Click this button to retrieve the selected held call from hold.

Hang Up Button – Click this button to hang up the currently selected call.

Dial Button – Click this button to place an outgoing call to the number displayed in the Phone No. field.

Speed Dial Buttons – These customizable buttons provide one-click dial and transfer capability. To program the Speed Dial buttons, right-click on any one of the Speed Dial buttons. A Speed-Dial Buttons dialog box will appear.²



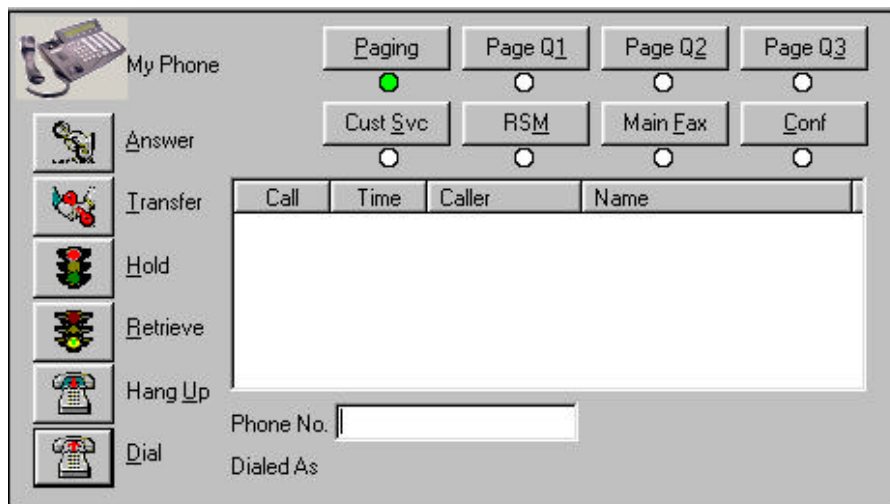
¹ Refer to the Alternate Keystrokes table at the end of this section.

² Your dialog box may be populated with default information.

Enter the numbers you want dialed in the Dial field. Enter the name for the Speed Dial button in the Label field. To create a shortcut for a Speed Dial button, insert an ampersand ('&') before the letter or number you want as the shortcut key. In the following example, you will notice that an ampersand ('&') has been placed before specific letters and numbers in the Label field.



Notice that when the changes are accepted the Speed Dial buttons reflect the new label and there is an underscore beneath the shortcut key.



In this example, you can type Alt-P (not case-sensitive) and the “Paging” Speed Dial button will be activated.

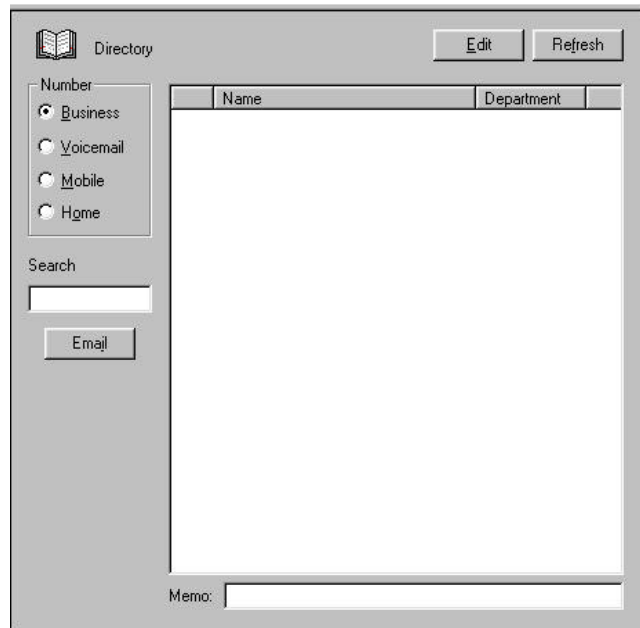
NOTE: The following letters have already been assigned as shortcut keys: A, B, D, E, F, H, M, O, R, T, U, V. The following table offers a variety of alternate keystrokes for basic phone tasks.

ALTERNATE KEYSTROKES

Action	Keystroke 1	Keystroke 2	Keystroke 3
Answer a call	Enter*	Alt+A	Click on the <u>A</u> nswer button
Transfer a call		Alt+T	Click on the <u>T</u> ransfer button
Hold a call		Alt+H	Click on the <u>H</u> old button
Retrieve a call on hold	Enter*	Alt+R	Click on the <u>R</u> etrieve button
Hang Up a call		Alt+U	Click on the <u>H</u> ang <u>U</u> p button
Select a number to dial			Click on the extension in the Busy/Idle Display, or Click on the name in the Directory, or Enter the number in the Phone No. field
Dial a selected number	Enter*	Alt+D	Click on the <u>D</u> ial button

* = Depending on current call status.

DIRECTORY SECTION

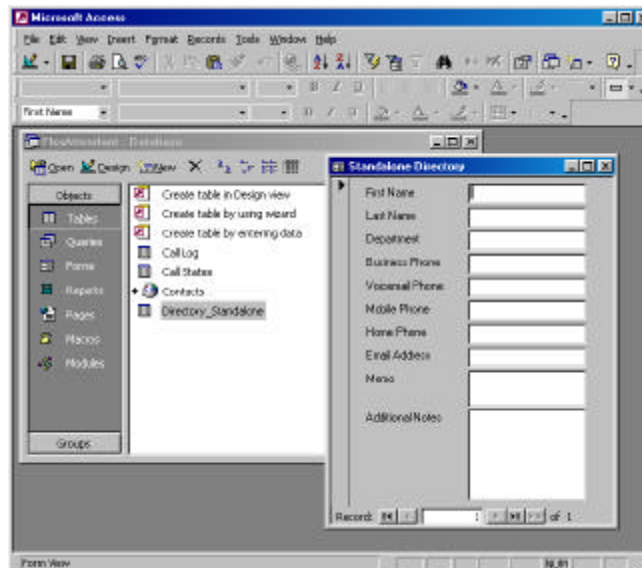


The Directory section makes contact information accessible with a click of the mouse, by a few keystrokes in the Search field, or scrolling up and down. You will be able to choose various alternate numbers from one named entry. And, when a directory entry is highlighted, the phone number automatically appears in the Phone No. field for quick dialing. If you have an email client configured,¹ then you have the additional option to email an individual with a message.

The above screen shot shows an empty database because the FlexAttendant has been loaded onto a PC without Outlook.² So, let's get started by populating the directory with some information.

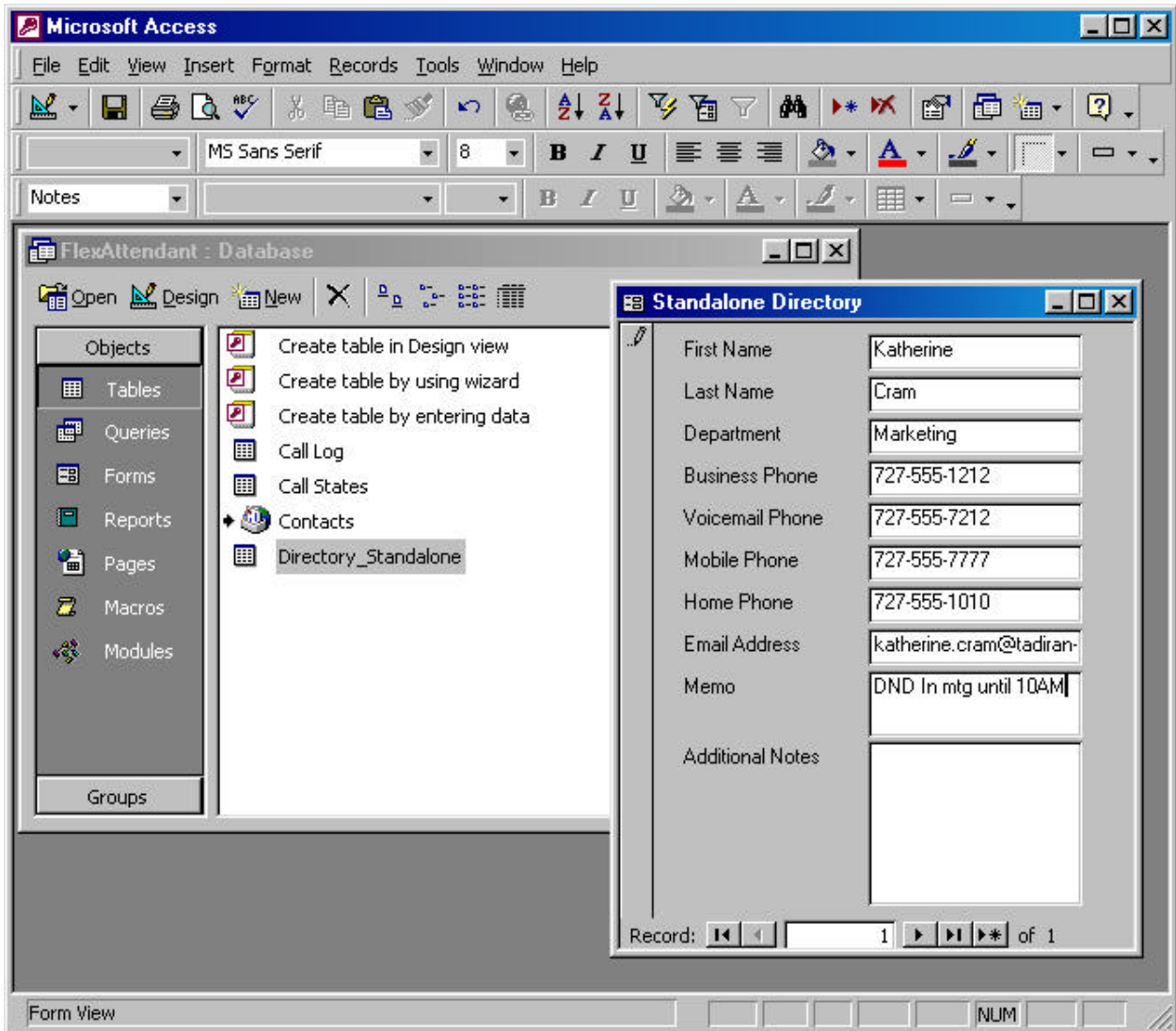
Start by clicking on the Edit button.

The following graphic shows the Access application upon activation of the Edit button.



¹ See the online Help for detailed setup of the email button.

² See the Database Integration section of this user guide.



Start entering directory information in the Standalone Directory dialog box. As you tab through the fields, you will eventually bring up Record 2, and so on. Consult your Access user guide for further instructions on utilizing this application.

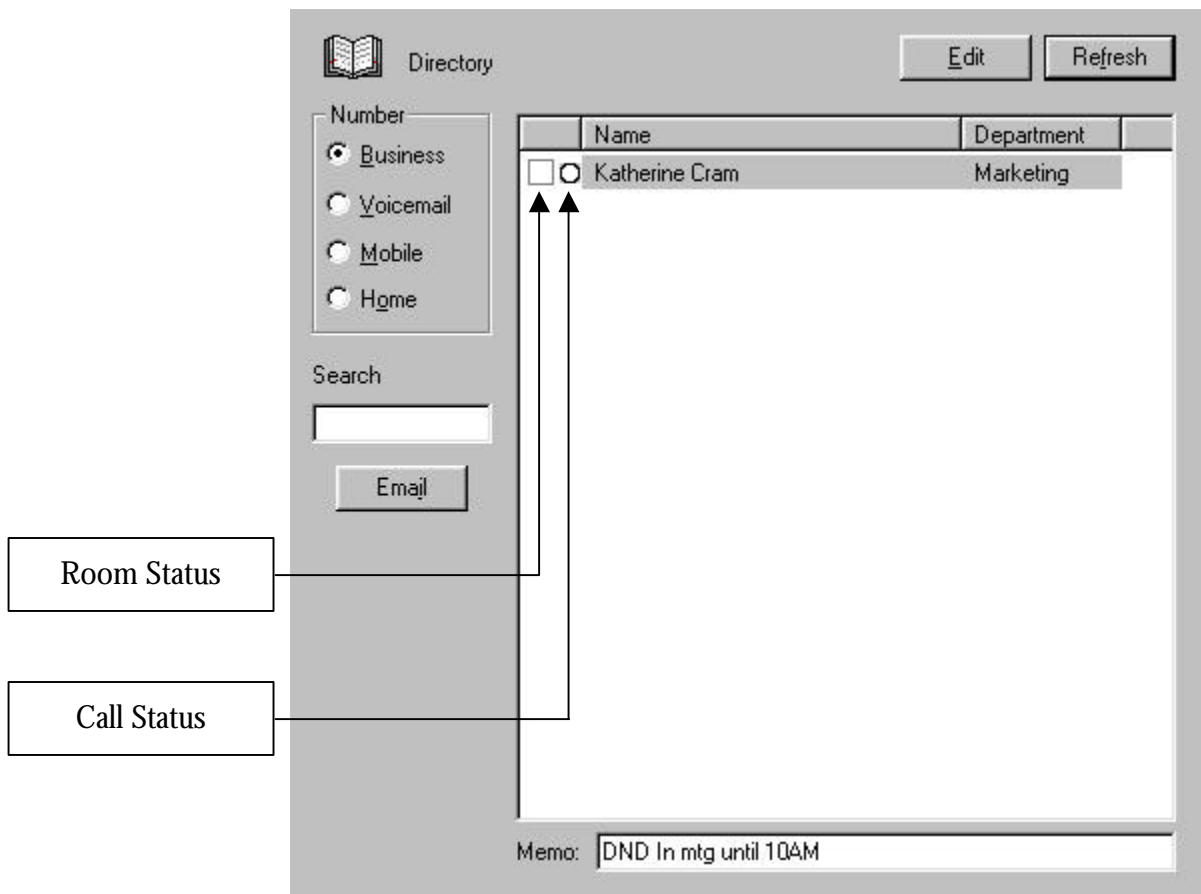
NOTE 1: It is **not** necessary to enter prefix numbers (i.e., '9'-727-555-1212). However, if necessary, the prefix setting can be changed by accessing your PC's dialing rules in Microsoft Windows.

NOTE 2: The memo field can be used to enter information relevant to daily activities. Notice that this entry makes note in the memo field that Katherine has requested that she not be disturbed because she will be in a meeting until 10AM. This notation in the memo field will also appear in the Directory display. (See next screen shot.)

Once you have completed any adds or changes, exit out of the Microsoft Access dialog box, and click on the Refresh button to update the FlexAttendant Directory.



Any changes to the Access application's default settings (e.g., adding fields) will not be recognized by the FlexAttendant. As a result, the manufacturer cannot support these changes.



When you click on the entry, the number in the Business field will appear in the Phone No. field for quick dialing. After you have clicked on an entry, you may click on the various Number types to choose between the Business, Voicemail, Mobile, or Home numbers for quick dialing.

Once you have selected the individual and type of phone number, the number will be automatically loaded into the Phone No. field – ready for dialing.

If there has been activity on the extension since the application was started, the status indicator to the left of the name will show the status as in the Busy/Idle Display.

The box to the left of the call status indicator is checked according to the Coral feature “Room Status 1.” See online Help for details.

You can use the mouse or the following keystrokes to navigate through the directory.

Scroll bar (This will appear on your screen once your directory listings have exceeded the available viewing space.)

Up and Down Arrow keys

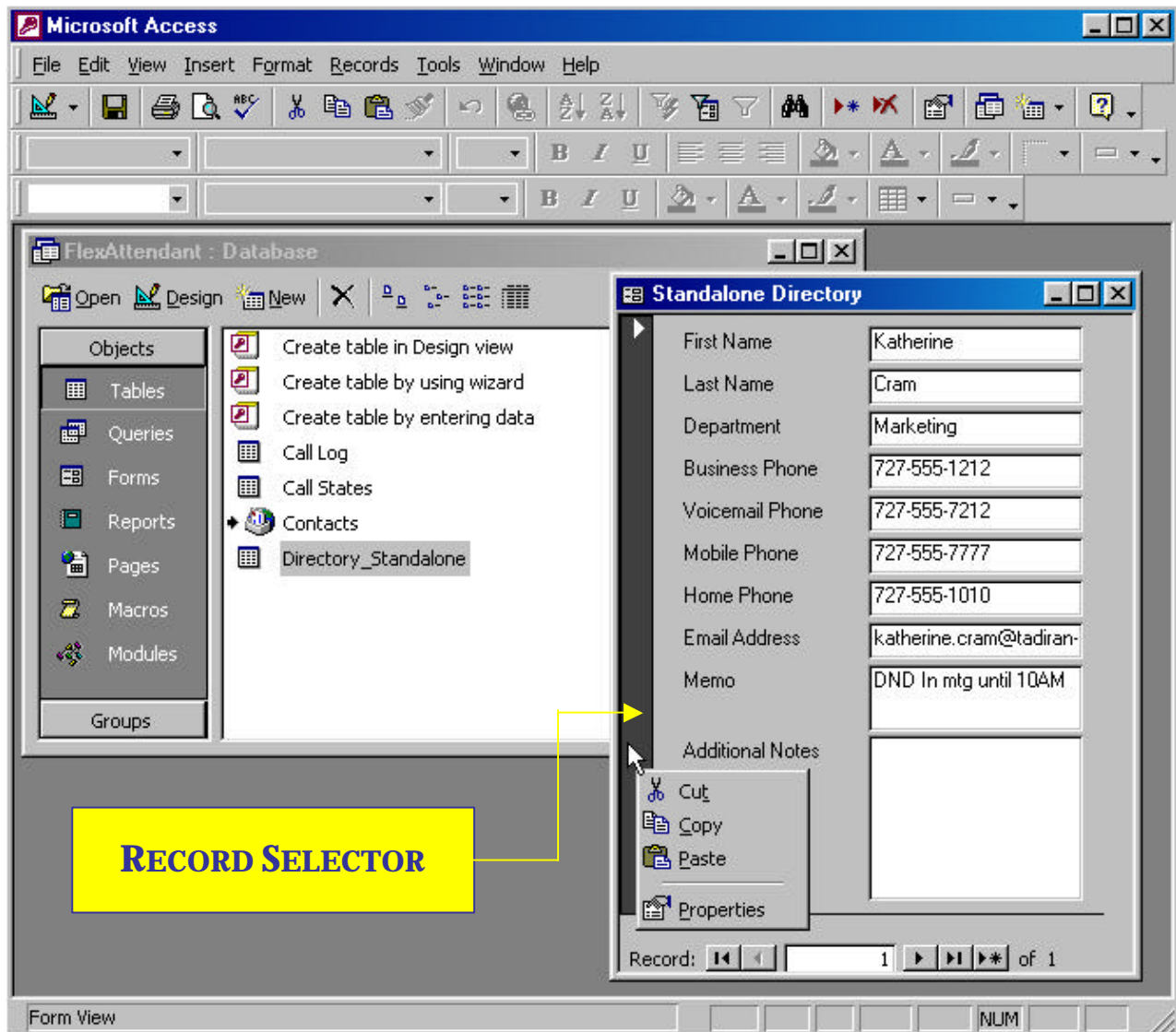
Page Up and Page Down keys

Ctrl+ Page Up and Ctrl+ Page Down

Click on a header to sort the list; click a second time to reverse the sort order.

The Search field provides quick access to individuals in the Directory. Type a full or partial name in the Search field to find a person.

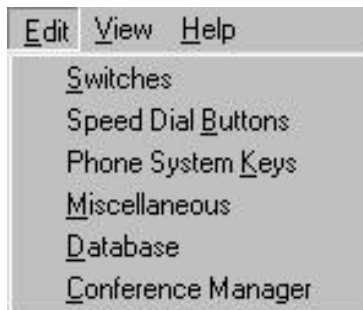
Click on the Edit button to make changes to multiple entries, or doubleclick on a name to edit that person's record only. To copy, cut or paste a Directory entry, click on the Edit button, find the record you wish to affect, click on the 'record selector,' right-click and proceed using the shortcut menu. (See next screen shot.)



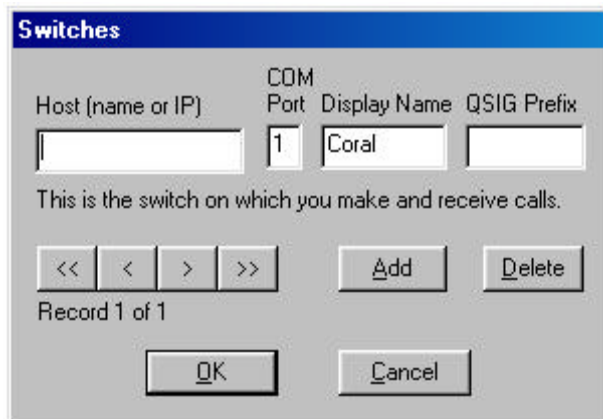
MENU TOOLBAR



The File menu offers an Exit command, which closes the FlexAttendant application.



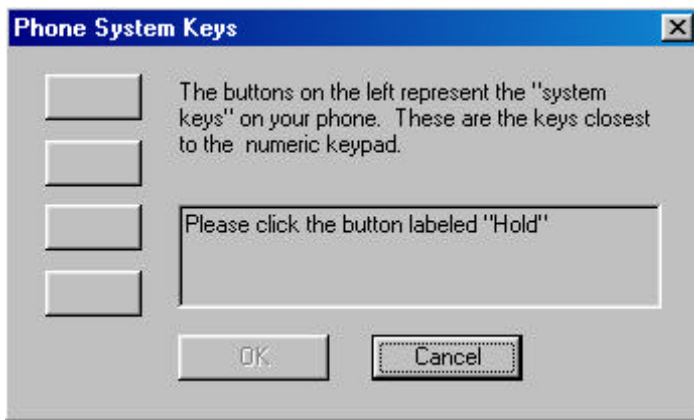
The Edit menu offers the following selections: Switches, Speed-Dial Buttons, Phone System Keys, Miscellaneous, Database, and Conference Manager. Let's briefly review each of the choices.



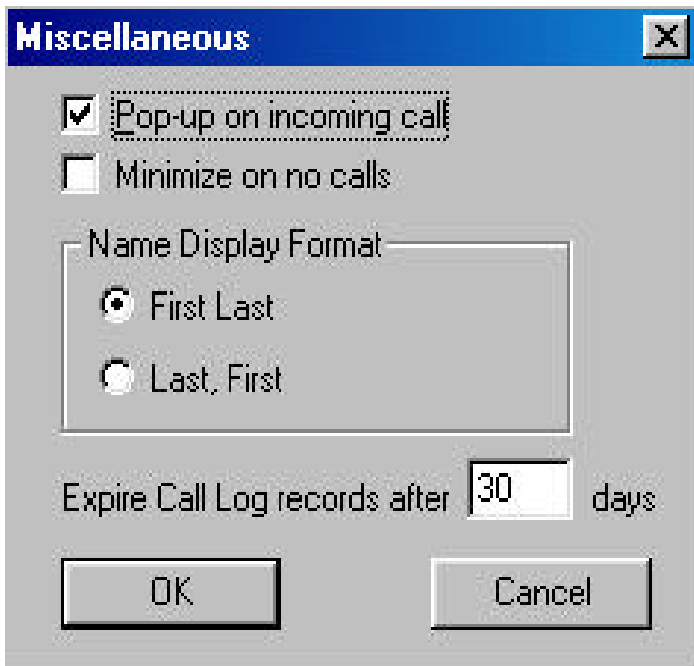
Switches – Use this dialog box to configure the switches, which are controlled or monitored by the application. The first record is the controlled switch; all others are monitored. Refer to 'edit switches' in the Help Topics for more information on this dialog box.



Speed-Dial Buttons – See the instructions in the My Phone section of this user guide.



Phone System Keys – Normally this will be set up for you during installation and should not be altered. A symptom of these settings being incorrect would be that transfers do not work. The application needs to know the location of the “fixed system keys,” which are the four buttons on your phone commonly labeled Hold, Xfer, Line, and Spkr. Follow the instructions in the recessed box to provide this information.

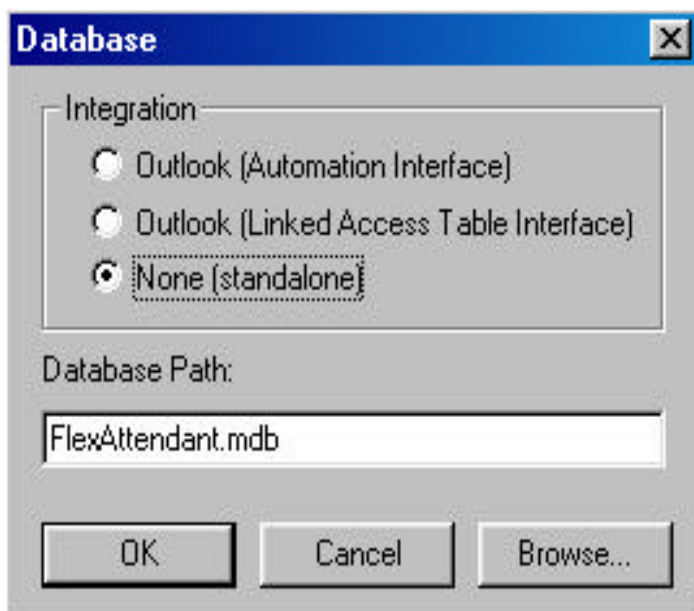


Miscellaneous – This dialog box is for miscellaneous settings.
Pop-up on incoming call. When checked, the application, if minimized, will pop-up when a call is delivered to your telephone.

Minimize on no calls. When checked, the application will minimize itself when there are no active or held calls at your telephone.

Name Display Format. Choose whether you want to sort and search names in the directory displayed as “firstname, lastname” or “lastname, firstname.”

Expire Call Log records after ___ days. The system purges Call Log records older than the specified number of days to prevent the database from growing indefinitely. Once purged, there is no way to retrieve them.



Database – This dialog box controls the database underlying the Directory.

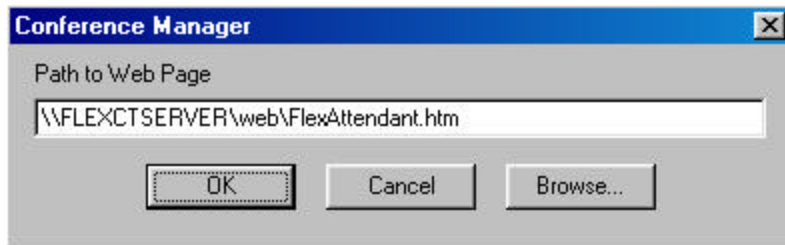
Integration. Select “Outlook (Automation Interface)” to use the default Outlook Contacts folder as the directory. The folder is referenced using an Automation interface.

Select “Outlook (Linked Access Table Interface)” to use an Outlook Contacts folder as the directory. The folder is referenced indirectly, through a Microsoft Access database.

For more detail, see Integration Specifics in the Help Topics.

Select “None (standalone)” to use a built-in Access table as the directory. **Database Path.** Browse. Type or browse to the Access database underlying the directory. Note that the Access database is used even with Outlook integration.

CONFERENCE MANAGER

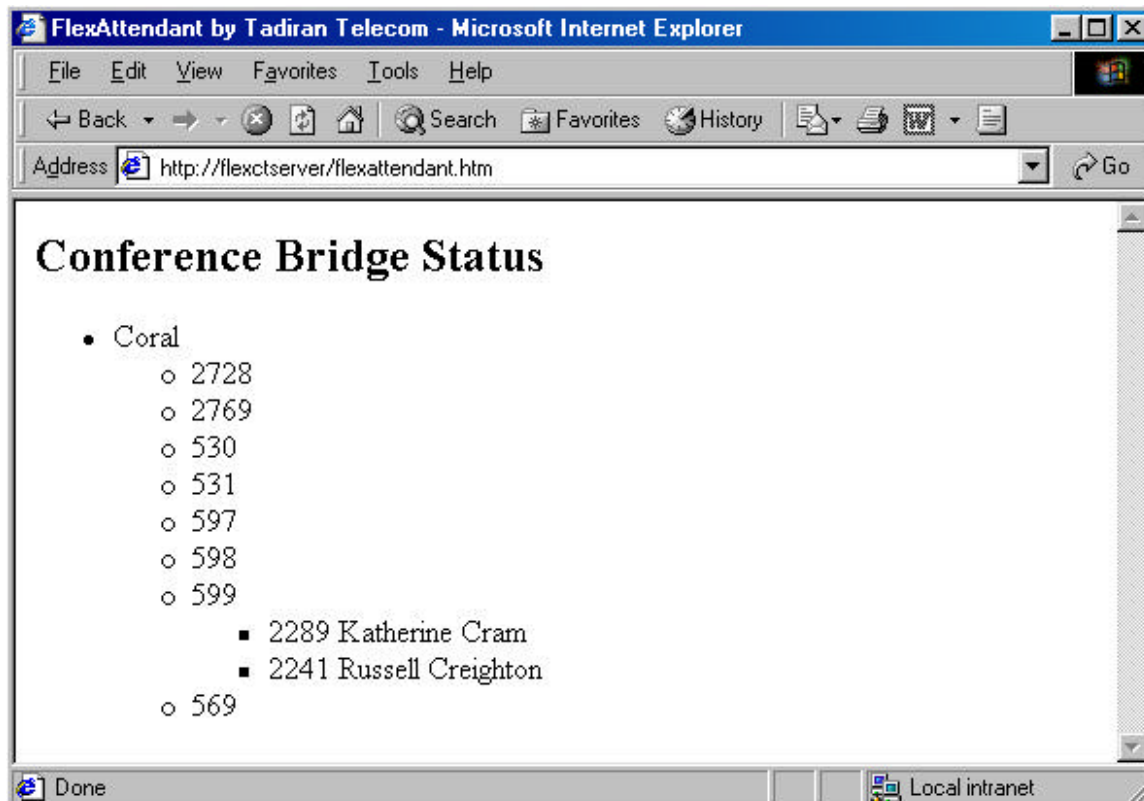


Conference Manager – Edit Conference Manager has the ability to write an HTML file (web page) that, when viewed using a web browser, shows the same information as the View Conference Manager window. This would allow local or remote conference participants to see who is on the conference. The web page, while being viewed, updates automatically.

Click on the the Browse button and use the open dialog box to specify the destination path to the web page. It must be in a location supported by an HTTP server (IIS, Apache, etc.), and can be on the local or a networked machine (mapped drive or UNC path). Be sure that you have write access to the path. The target directory must exist. If the path is blank, no file is written.

FlexAttendant has no knowledge of or control over the operation of the HTTP server itself. If the file path is valid but no HTTP server is running, the file will be written and updated, but not accessible to browsers.

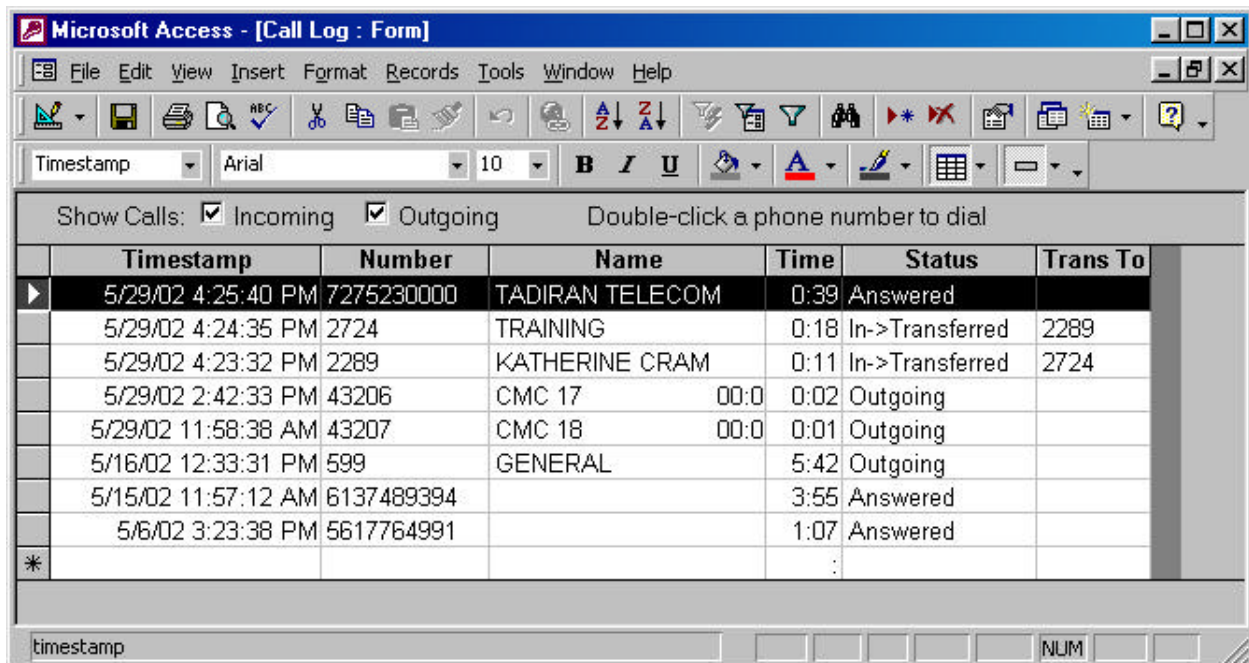
The template for the Web page is installed as FATemplate.htm. You may customize this as desired.



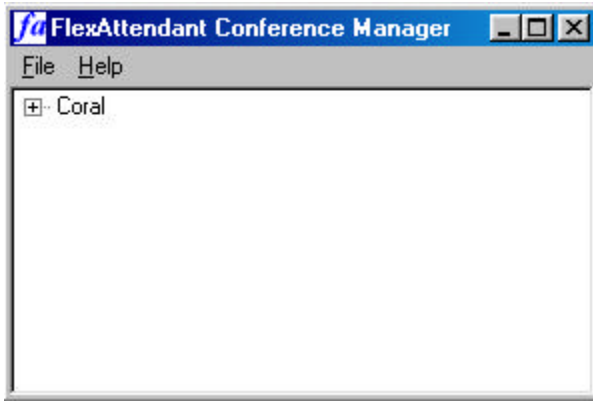


The View menu offers the following selections: Status Bar, Call Log, and Conference Manager. Let's briefly review each of the choices.

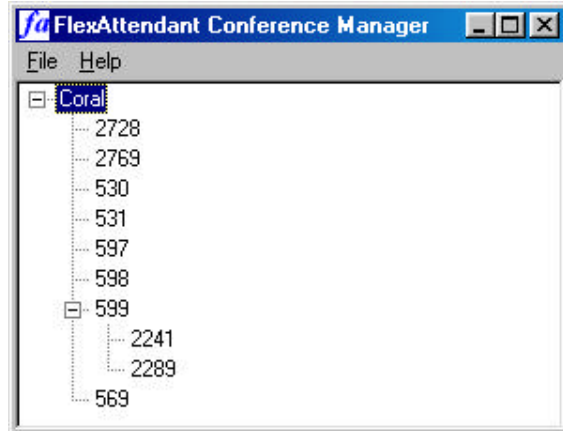
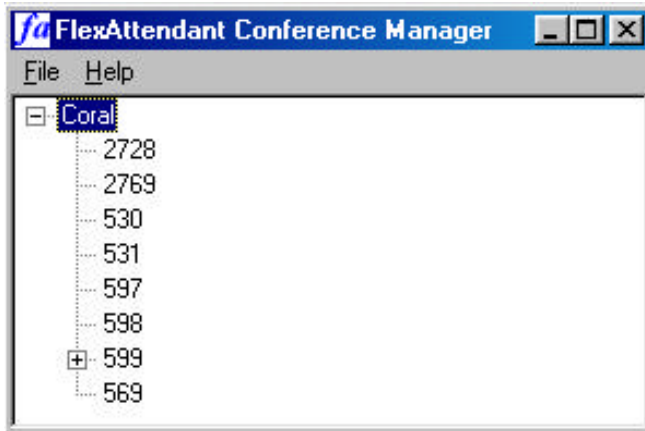
Status Bar command – Use this command to display and hide the Status Bar, which describes the action to be executed by the selected menu item or depressed toolbar button, communication status, and date and time. A check mark appears next to the menu item when the Status Bar is displayed.



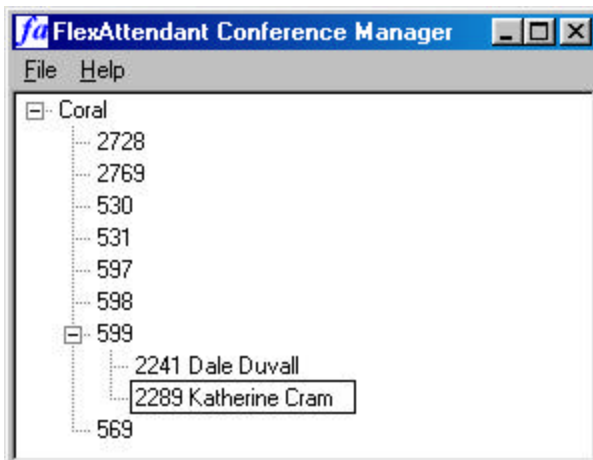
Call Log – View the log of recent incoming and outgoing calls. If you missed an incoming call, you can call back by double-clicking the caller's number. Refer to your Microsoft Access user guide to print reports.



Conference Manager – If your switches have one or more Conference Bridge (CNF) cards, you can use this window to monitor and control conference calls. (These are distinct from three-way calls not involving a conference bridge.)

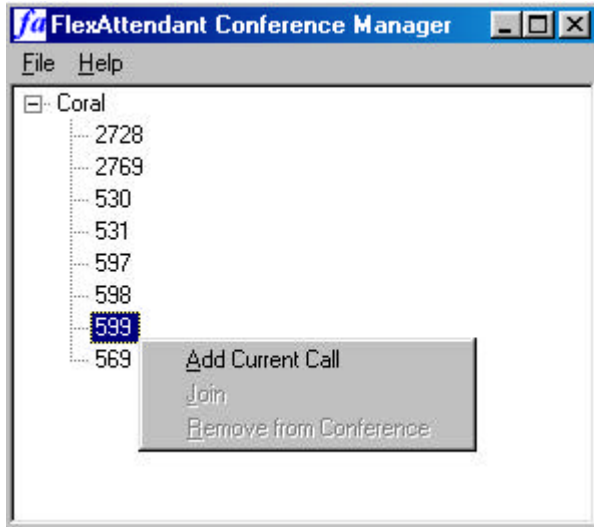


These windows show the locations, dial numbers (and names, if listed in the Directory) of conference bridges. Active bridges can be expanded to show the conference participants. External calls are only identified by a trunk number unless you used FlexAttendant to add them to the conference (see below).

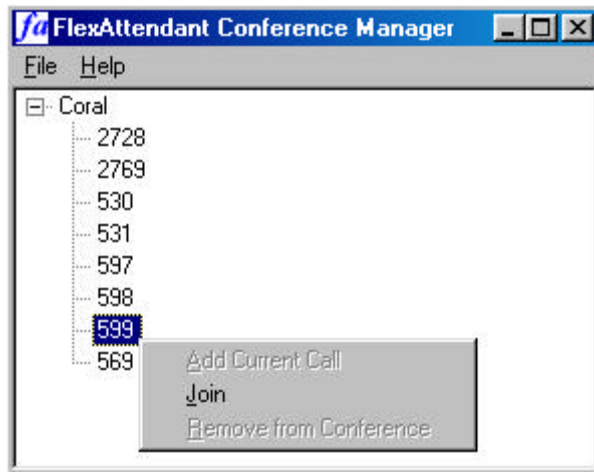


NOTE: To maintain the changes to the conference participant's fields make sure to minimize the dialog box rather than exiting it. Closing/exiting the Conference Manager dialog box will revert the fields to their original data.

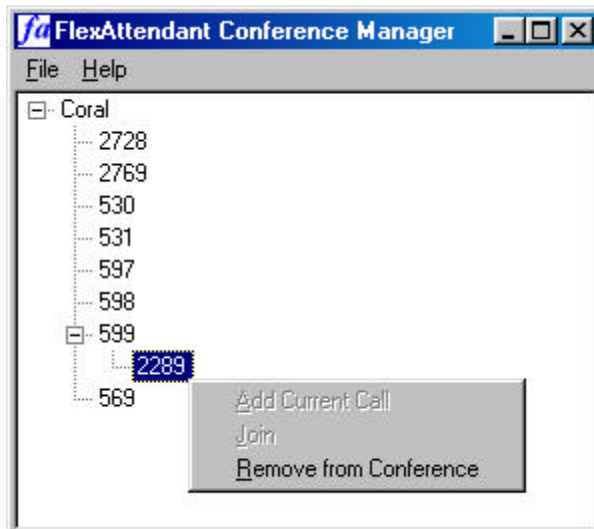
Click once to select, then again to edit the displayed text for a location, bridge or participant. You may prefer to see names in addition to, or instead of, dial numbers.



If there is an active call at your phone, right-click on a conference bridge to add (transfer) the remote party to the conference.



If there is no active call, you can join (add yourself to) the conference. Right-click on a conference bridge and click on Join.



Right-click on a conference participant to remove the caller from the conference.



The Help menu offers an extensive index of Help Topics, which can be useful in understanding the most basic to the most advanced workings of the FlexAttendant. Please utilize the Help Topics whenever you have questions about the FlexAttendant. Or,



Use the Context Help command to obtain help on some portion of the FlexAttendant. The mouse pointer will change to an arrow and question mark. Then click somewhere in the FlexAttendant window. The Help topic will be shown for the item you clicked.

Tadiran Telecom
Business Systems Ltd.

International Headquarters
Tadiran Telecom Business Systems Ltd.
18 Hasivim St., P.O.Box 450
Petach-Tikva 49105, Israel
Tel. +972-3-9262000, Fax. +972-3-9262310

USA Headquarters
Tadiran Telecom, Inc.
4 Tri Harbor Court
Port Washington, NY 11050
Tel. +1-516-632-7200, Fax. +1-516-632-7210

Visit us at our website <http://www.tadirantele.com>
Email: coral@tadirantele.com

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