Quick Reference Guide

Empowered by Innovation

NEC

UC for Business
Executive Desktop

Revision History

Document No.	Release Date	Change Description
005NEC-00QRGR	04/13/11	Initial release.

Table of Contents

Introduction

Executive Desktop enables an organization to use personal phone numbers to bypass the company operator and get callers to talk directly to employees, manage internal and external calls quickly and easily from their PC, see the availability of other staff members, and store notes about special callers. Executive Desktop provides simple and intuitive Graphical User Interface (GUI) administration of a user's voice messaging mailbox as well as easy access to all mailbox functions. This guide provides step-by-step instructions on how to use the Executive Desktop product.

Log Into and Out of Desktop

Log into Desktop

1.   On the PC's Desktop, double-click the **Desktop** shortcut icon.

2.   In the **Login Name** field, type your full name (your name may automatically display after typing a few letters).
3.   In the **PIN** field, type the PIN number (initially the PIN is 2222 until you change it to a unique number).
4.   Optional: Click the **Remember Me Next Time** option to save this login information for the next time you start Desktop.

Log Out of Desktop

1.   Log out of the queues (if necessary).
2.   Use any of the following methods to log out of Desktop:
     •   Click the **Close** button (the red **X** in the upper right-side of Desktop).
     •   From the **File** menu, select **Exit**.
     •   Press **Alt** + **F4**.

Change the PIN

Note: The first time starting Desktop, the Desktop Setup wizard automatically runs and prompts to change the default PIN. Refer to the *User System Setup Quick Reference Guide* for details.
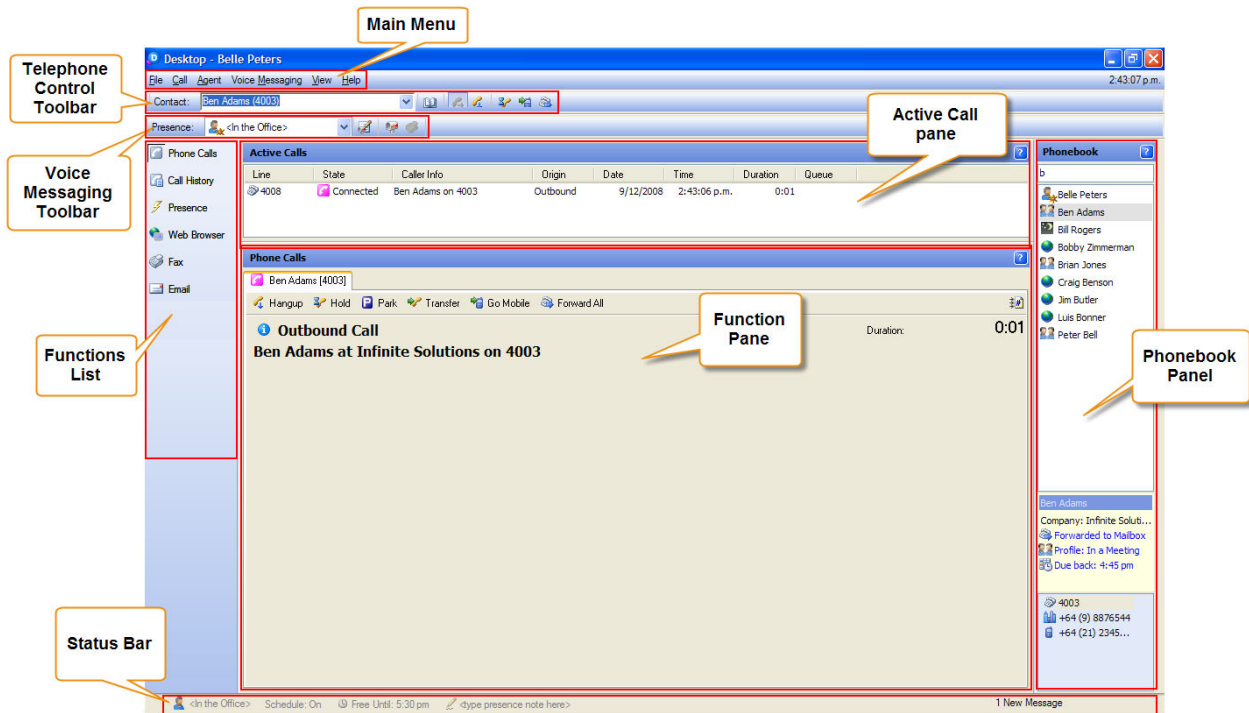
1. From the **File** menu, select **Change PIN**.

2. In the **Old PIN** field, type the old PIN (the default PIN is **2222** until a new PIN is created).

3. In the **New PIN** field, type the new PIN.

4. In the **Verify New PIN** field, again type the new PIN.
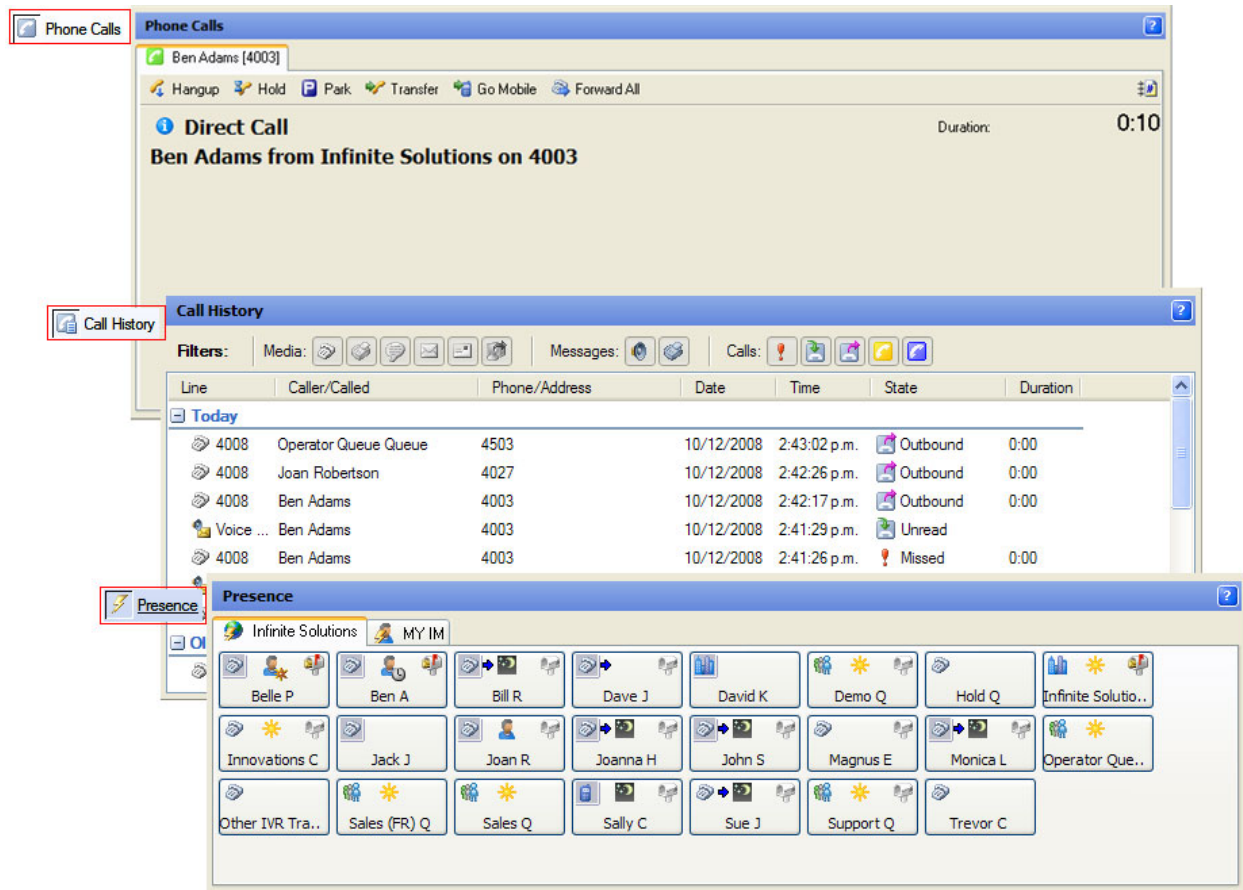
Note: Remember to enter the new PIN the next time you open Desktop.

The Desktop Interface

Phone Calls/Call History/Presence Windows

Desktop Call Functions

Make a Call

Note: Calls can also be made using the Phonebook; see "Make/Transfer a Call Using the Phonebook" on page 7.

➢ Use any of the following methods to make a call:

- Click the **Phonebook** icon, select the preferred contact name/number, and then click the **Call** button.
- Use the Presence button by either clicking the:
  - Preferred contact's Presence button to call the contact's default number.
  - **Phone Status** icon on the contact's Presence button, and then click the preferred number.
- If the contact is in the Phonebook, use the **Contact** field.
  a. In the **Contact** field, start typing the contact's name.
  b. When the system displays the contact's phone number and name, press **Enter** (or press **F4** or click the **Make a New Call** icon). A blue border is also placed around the contact's Presence button.

Answer a Call

➢ Use any of the following methods to answer a call:

- Pick up the phone's receiver, or press the phone's **Speaker** button.
- Use Desktop to immediately use the speaker or hands-free mode by:
  - — Pressing **Enter** (or **F2**).
  - — Clicking **Answer this Call** in the Phone Calls window.
  - — From the **Call** menu, select the **Answer**.
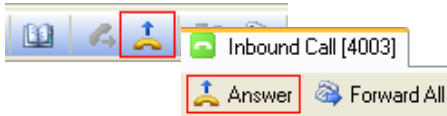

Transfer a Call

Note: Calls can also be transferred using the Phonebook; see "Make/Transfer a Call Using the Phonebook" on page 7.

➢ Use either of the following methods to transfer a call:

- In the Active Calls window, right-click the call, select **Transfer Call**, and then select the call's destination.
- In the Phone Calls window, click the **Transfer** icon and then select the call's destination.

Note: Transfer destinations can be manually entered or selected from the Phonebook.

Hold a Call

When a caller is on hold:

- No other telephone functions can be performed.
- On-hold music plays for the caller.
- The call displays in the Active Calls window.

➢ Use either of the following methods to place a call on hold:

- In the Active Calls window, right-click the call and then select **Hold Call**.
- In the Phone Calls window, click the **Hold** icon.

Park a Call

When a call is parked:

- Other telephone functions can be performed, such as making or receiving other calls.
- On-hold music plays for the caller.
- The call displays in the Active Calls window.

➢ Use either of the following methods to place a call on hold:

- In the Active Calls window, right-click the call and then select **Park Call**.
- In the Phone Calls window, click the **Park** icon.

Forward All Calls

All calls can be forwarded to either a selected number or your mailbox.

1. Use any of the following methods to forward all calls:
    *   Press **Ctrl**+**F**.
    *   Click the **Forward All** icon.
    *   From the **Call** menu, select **Forward All Calls**.
2. Either click the:
    *   **Mailbox** option to forward calls to your mailbox.
    *   **Phone** option and select a telephone number destination to forward calls to that number.
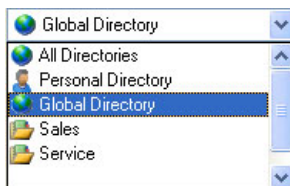3. Click **OK**.

Phonebook Functions

Access the Phonebook

➢ Use any of the following methods to open the Phonebook:

*   Click the **Phonebook** icon.
*   Press **Ctrl**+**P**.
*   From the **Call** menu, select **Phonebook**.

Search for a Contact

1. Optional: To refine the search, select a specific search directory..

2. In the **Look for** field, type the contact's name.
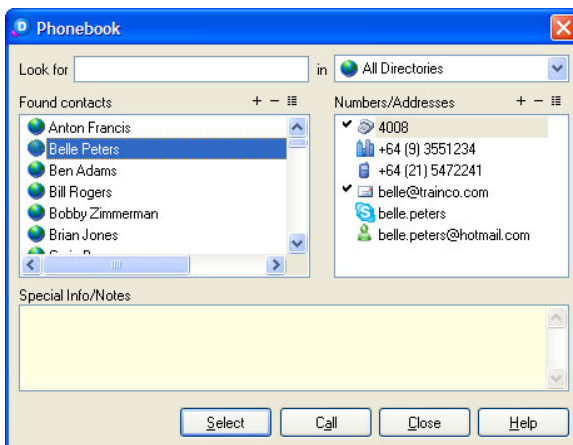
3. In the **Found Contacts** section, select the contact's name to display the associated contact numbers.

Add a New Contact

1. Click the **Phonebook** icon, and then select the directory that the new contact is to be in from the list of directories.
2. In the **Found Contacts** section, click the **Add a New Name** (**+**) icon.
3. Enter the contact's details, and then click **OK**.
4. In the **Found Contacts** section, select the new contact.
5. In the **Numbers/Addresses** section, click the **Add a New Number** icon.
6. From the **Type** menu, select the number type.
7. Enter the other required details, such as country code, area code, and number. The number must contain a country code, area code, and the actual number; otherwise it cannot be dialled from Desktop.

    Note: For New Zealand area codes, the leading **0** is not required.

8. Click **OK**.
9. To add additional contact numbers, repeat steps 5 though 8.

Edit Contact Details

1. Click the **Phonebook** icon, and then either:
    • Select either the contact name or number, and then click the **Configure this Name/Number** icon.
    • Right-click either the contact name or number, and then select **Properties**.
2. Update the contact's information, and then click **OK**.

Delete a Contact

1. Click the **Phonebook** icon, and then either:
    • Select either the contact name or number, and then click the **Delete this Name/Number** (**—**) icon.
    • Right-click either the contact name or number, and then select **Delete**.
2. When prompted to confirm the deletion, click **Yes**.

Make/Transfer a Call Using the Phonebook

1. Click the **Phonebook** icon.
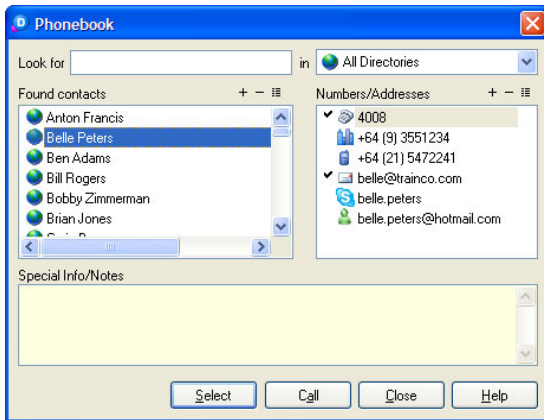
2. In the **Found Contacts** section, click the preferred contact.
3. In the **Numbers/Addresses** section, select the preferred contact's number.
4. Click the **Call** button.

> *Note:* For transfers, stay on the line until the party picks up.

Presence

Presence buttons provide real-time visual information on the whereabouts and availability of staff. If an employee is out of the office or in a meeting, the system displays the **Due Back** time. When an employee is away from the desk or on a call, you can request an automatic notification alert for when the employee is available. Use the Presence buttons to call staff. Presence buttons can be grouped and arranged on separate pages.
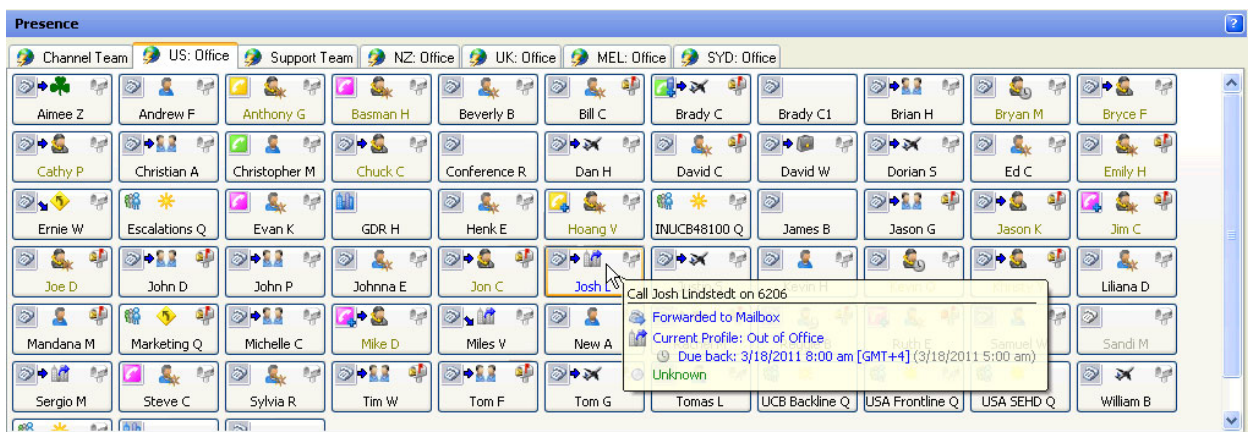
Presence Buttons

The following are two types of Presence buttons:

Tom F	James B

External = Telephone numbers outside the office.

Dorian S	Wayne M

Internal = Extension numbers in the office. Use the Internal Presence buttons to:
- View the user's extension status by viewing the icons and the status tooltip.

- Perform advanced call functions for an extension by right-clicking the icon. A user's name displays in yellow text if logged into queues as an agent.

Presence Icons

Icon	Description
Phone Call Types	
	(Gray) Extension is idle.
	(Various colors) Extension is ringing or offering.
	(Various colors) Extension is busy (on the phone).
	Extension is forwarded to another number (internal or external).
	Forwarded to voicemail.
	(Green) Inbound non-queue call.
	(Pink) Outbound non-queue call.
	(Yellow) Inbound queue call (if queuing is installed).
	(Blue) Outbound queue call (if queuing is installed).
Profiles	
	In the office.
	In a meeting.
	Out of the office.
	On vacation.
	(Gray Head) Agent is logged into the queues.
Voicemail Status	
	No messages.
	One or more standard messages.
	One or more urgent messages.

Additional Functions Using the Presence Buttons

Display Additional Contact Numbers

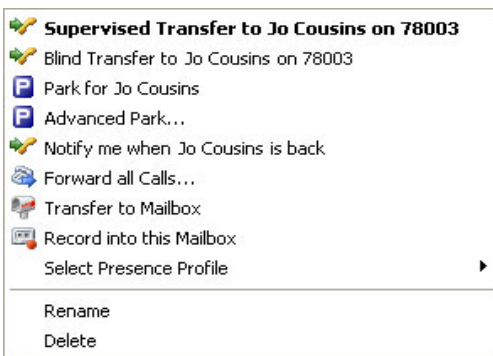1. In the Active Calls window, click the **Phone Status** icon to display additional contact numbers.

> **4008**
> +64 (9) 3551234
> +64 (21) 5472241
> belle@trainco.com
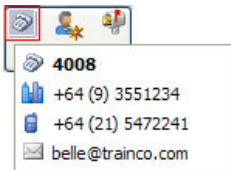
2. From the menu, select the number to call.

Right-Click a Presence Button for Additional Menu Actions

➢ Right-click a Presence button, and then select the preferred action from the menu.

> *Note:* The actual options available depend on the type of PBX being used, how the system is set up, and the enabled security permissions. Certain options are also only visible when there is an active call on the extension.

> Supervised Transfer to Jo Cousins on 78003
> Blind Transfer to Jo Cousins on 78003
> Park for Jo Cousins
> Advanced Park...
> Notify me when Jo Cousins is back
> Forward all Calls...
> Transfer to Mailbox
> Record into this Mailbox
> Select Presence Profile   ▶
> ---
> Rename
> Delete

Icon	Name	Description
	Call User on Extension	Initiates a call to the user on the designated telephone number.
	Supervised Transfer to User	Transfers the Active Call to the user's extension, and talk to the user before completing the transfer.
	Blind Transfer to User	Transfers the active call to the user's extension.
	Transfer Call	Transfers the active call to the user's extension.
	Park for User	Holds the active call at the user's extension; the user can then retrieve the call.
	Advanced Park	Parks the active call and pages the user.
	Notify Me when User is Back	A ScreenPop informs when the user is in the office and available to take the call.
	Forward All Calls	Forwards all calls to a specified internal or external number.
	Leave a Voice Message	Record a voice message for the recipient.
	Transfer to Mailbox	Transfers the active call to the user's voicemail.
	Ask User to Call Me Back	The user receives a ScreenPop callback request upon return.
	Record Conversation to Mailbox	The conversation saves to the current user's mailbox (if installed).

| Icon	Name	Description
	Send Message to Digital Phone	Sends a short text message to the LCD screen of the user's digital phone.
	Select Presence Profile	Changes the user's Presence profile.
	Rename	Renames the Presence button.
	Delete	Deletes the Presence button.
	View As	Changes the Presence buttons' appearance.

Set Presence Profile

➢ Use either of the following methods to select a preferred profile:

• The **Presence** list.

• Right-click a Presence button, and then select **Select Presence Profile**.
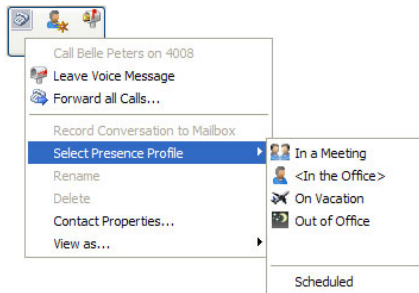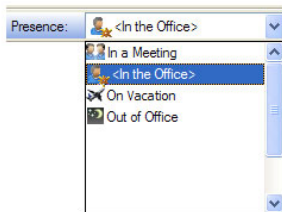
Set an Estimated Time of Return (ETR)

An Estimated Time of Return (ETR) can be set for the Presence profiles used when you are not available.

1. Select a profile, and then click the calendar function.
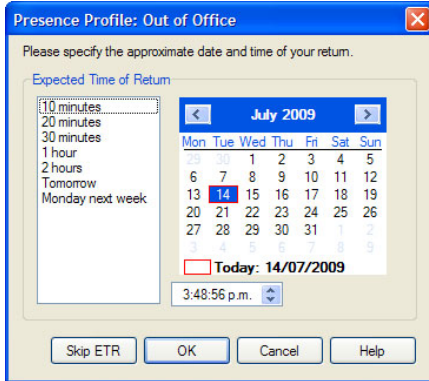

2. Select the date of return.

    Note: Unless the ETR is set as mandatory in the system settings, an ETR can be skipped by clicking the **Skip ETR** button.

3. Select the approximate time of return using the standard times in the left window, or by setting the time using the clock field's up and down arrows.
4. Click **OK** to save the ETR and activate the selected Presence Profile.

Presence Status

Your Presence status is indicated in the Status Bar. The status information can be viewed by other users via your Presence button or from the Phonebook.
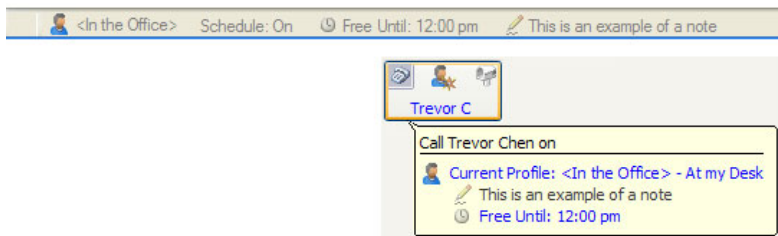
Add a Presence Note

This section describes how to add a personal Presence note to your Status Bar with additional information about activities and availability to coworkers.

1. In the Status Bar, click the Presence note text **<type Presence note here**>.
2. Type the information, and then press **Enter**. This Presence note remains until it is cleared or a new note is created.

Add a New Presence Page

Use the Add Presence Page wizard to create either Standard or Dynamic Presence pages:

*   **Dynamic** = Automatically lists the contacts for a company or department.
*   **Standard** = Manually add and arrange the contacts.

Note: Only users with System Administrator rights can add or edit Global Presence pages.

1. Use either of the following methods to start the *A*dd Presence Page wizard:
   • From the **File** menu, select **Add a New Presence Page**.
   • Right-click in the Presence window, and then select **Add a New Presence Page**.
2. Click **Create Personal Presence Page** (only administrators can create global pages), and then click **Next**.
3. Select the type of page to be created. Click either:
   • **Standard Page** to manually add and arrange Presence buttons. If chosen, proceed to the next step.
   • **Automatic Page** = Automatically adds and updates Presence buttons for the selected company/ department. If chosen, complete the following substeps.
      a. Select a company from the listed companies, and then click **Next**.
      b. Optional: Select **List Only Contacts for the Selected Departments**, and then click **Next**.

      Note: This step only displays if departments have been defined.

      c. Click the department(s) to display if the department option was selected in the previous step, and then click **Next**.
      d. Optional: Click the **Create Additional Pages** option, enter the number of buttons per page, and then click **Next**.This option defines a maximum number of Presence buttons per page and automatically creates an additional page when this maximum is reached.
4. Type a name for the Presence page, and then click **Next**.
5. Verify the settings and click **Finish** to create the Presence Page.

Rename a Presence Page

1. Use either of the following methods to rename a Presence page:
   • From the **File** menu, select **Rename this Page**.
   • Right-click in the Presence page, and then select **Rename this Page**.
2. Type the new name for the page, and then click **OK**.

Delete a Presence Page

1. Open the page to delete.
2. Right-click in any blank area, and then select **Delete this Page**.
3. When prompted to confirm the deletion, click **Yes**.

Add a Presence Button

1. Right-click in the Presence page, and then select **Add a Presence Button**.
2. Select either the contact name or the contact number (or drag a contact name or number from the Phonebook to the Presence page), and then click **OK**.
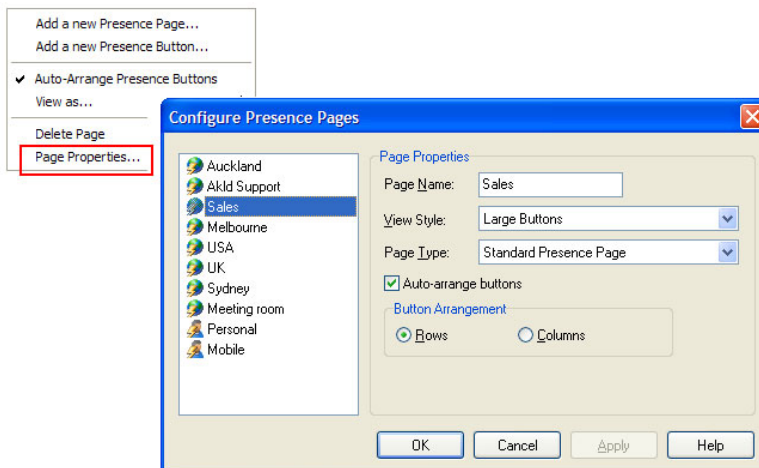
Delete a Presence Button

➢ Right-click a Presence button, and then select **Delete**.
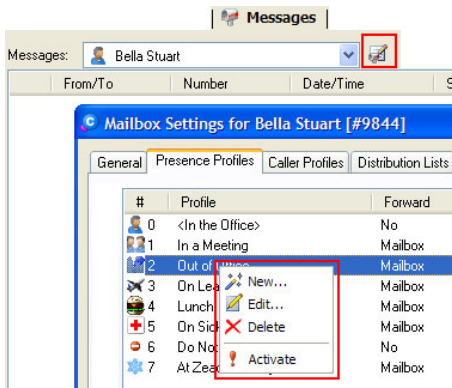
Configure Presence Pages

1. Right-click the Presence page, and then select **Page Properties**.

2. Set up the required options for the selected Presence page.
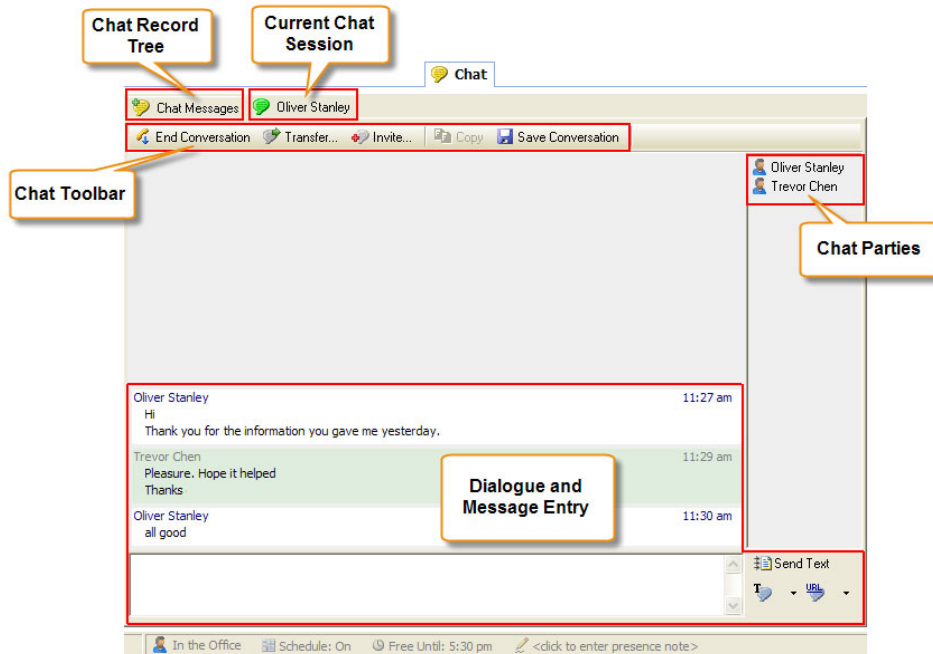3. Click **OK**.

Call Functions Using the Presence Buttons

For details on call functions using the Presence buttons, see "Display Additional Contact Numbers" on page 9.
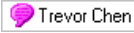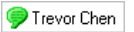
Desk-to-Desk Chat

Use Desk-to-Desk chat to have a conversation in real time with other internal users by typing text.

➢ Click the **Chat** tab to open the Chat window.

Chat Buttons

Button	Description
Initiate Chat...	Starts a new chat call to either a selected chat user or chat queue.
End Conversation	Ends the current chat call.
Transfer...	Transfers the current chat call to either a selected chat user or chat queue.
Invite...	Invites one or more chat users to join the current chat call. Invitees must accept the invite to join.
Copy	Select the chat window, and then click the **Copy** button to copy the chat window to the clipboard.
Save Conversation	Saves a transcript of the chat conversation in a text format to a specified disk directory.
Send Text	Transmits the typed text. Alternatively, press the **Enter** key.
Close	Closes the current chat window.
Chat Templates...	Adds, edits, or deletes standard chat phrases or commonly used URL links
T ▾	A list of saved text phrase. When selected, the phrase is sent directly to the other chat parties.
URL ▾	A list of saved URLs. When selected, the URL is sent as a link directly to the other chat parties.
Send Current URL	Pushes the current Desktop browser URL to the chat recipients.
Trace URL	Automatically sends a series of web page URLs while navigating using the Desktop web browser—toggles this feature on and off.

| Button	Description
Trevor Chen	Chat conversation—when pink, an outbound chat conversation.
Trevor Chen	Chat conversation—when green, an inbound chat conversation.

Make a Chat Call

1. Click **Initiate Chat** to start a new chat call.
2. Click either **Chat User** or **Chat Queue**, and then select the specific entry from the list.
3. Click the **Chat** button in the window, and a new conversation window opens.
4. In the message text field, type the message and then click **Send Text** (or press the **Enter** key) to transmit the typed text. An outbound chat call shows as waiting in the Active Calls window until the recipient answers the call.

End a Chat Call

1. Click **End Conversation**.
2. Optionally, click **Save Conversation** to save a transcript of the chat conversation in a text format to a specified disk directory.
3. Click the **Close** button to close the conversation window.

Answer a Chat Call

1. When a new chat call message displays, either click:
    *   **Accept** to answer the chat call, and then navigate to the Chat window by clicking the **Chat** tab.
    *   **Show Call** to display the Chat window, and then click **Accept**.
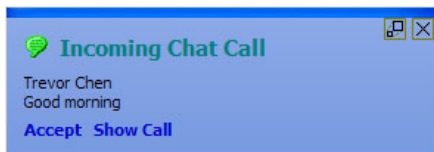
2. In the message text field, type the reply message and then click **Send Text** (or press the **Enter** key) to transmit the typed text.

Transfer a Chat Call

1. Click **Transfer** to transfer the current chat call.
2. From the list, select a chat user or queue.
3. Optionally, click the **Include Current Chat Conversation** option to give the recipient access to the prior dialogue.
4. Click **Transfer** to complete the call transfer.

Invite Additional Chat Participants

1. Click the **Invite** icon.
2. Select one or more chat users to join the current chat call.
3. Optional: Click the **Include Current Chat Conversation** option to give the invitees access to the prior dialogue.
4. Click the **Invite** icon to send the invitations. Invitees must accept the invite to join.

Private Chat

When there are three or more chat participants, you can have a private chat with a selected participant.

1. Right-click the participant's name.
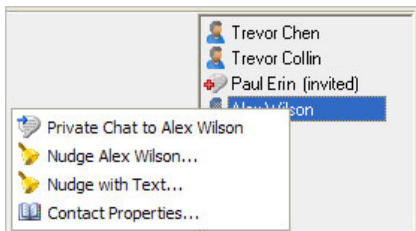
2. From the menu, select **Private Chat to [name]**. A new chat window opens to enable the private chat session.

Chat Messages

The Chat Messages feature provides an organized listing of chat conversations and chat users. Select the required category and then use the right-click menu to access the available functions for the selected chat session or user.

Help: For more details on Chat Messages and additional functions and configuration settings, refer to the online help.
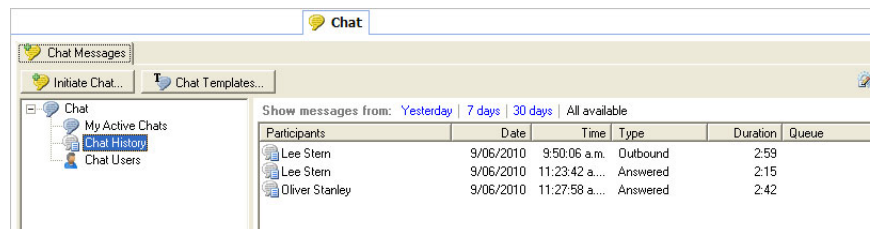
Create and Use Templates

Use the Desktop Agent templates to save and use commonly-used phrases and URLs when chatting.

Create Template

1. Click the **Chat Templates** icon.
2. Click either the **Phrases** or **Links** tab in the Templates window. The existing entries that display can be edited or deleted.
3. Click **Add** and enter a suitable label and the associated text or URL.
4. Click **OK**.

Use Template

1. Click the down arrow for either of the following icons:
   - **Chat Templates**
   - **URL**
2. Select the required item from the menu.

   The text phrase is automatically sent to the other chat parties. The URL is pushed to the other chat parties.

   Note: When a URL is received in:
   - Desktop, the URL shows as an active link and the built-in Web Browser automatically opens the web page.
   - Executive Insight, the URL shows as an active link.

Additional Chat Functions

➢ Refer to the online help for additional less-frequently used functions and configuration settings.

Empowered by Innovation

NEC