NEC

UC Suite User's Guide

NDA-31705
Issue 1.0

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INTRODUCTION

Welcome to the UC Suite for the SV9100 telephone system. The UC Suite provides several telephony utilities within one versatile application. The application can be configured for use as an IP softphone or to control a physical NEC deskset. Contact center agents, enterprise workers, and operator/receptionists can all customize the UC Suite to efficiently perform the telephone functions required for their job. Through this application, a user has access to many of the standard and enhanced features of the SV9100 telephone system, whether sitting at their office desk, working in a conference room, or traveling out of the office.

IP Softphone

The softphone takes advantage of the convergence of voice and data by bringing all of the capabilities of a traditional desktop phone into the PC. Whether in the office or on the road, the softphone can deliver high-quality voice communications through a USB-connected headset or handset. The IP softphone is so versatile that is can serve as a primary desktop phone, a supplemental phone, or as a telecommuting device.

Enterprise Workers

The UC Client provides easy access to the most common functions provided by a digital phone. By using this application, users can easily manage their call handling tasks without having to switch their attention between the telephone and PC. Additional features, such as a contact directory, recording capability, and Instant Messaging, provide increased value to the NEC telephone user.

Attendant/Receptionist

An operator or receptionist can use UC Suite to easily access the most common functions required by their position. The user works more efficiently by managing their call handling tasks without having to switch their attention between the telephone and PC. Additional features, such as a company directory, recording capability, and enhanced messaging, provide additional value to the attendant position.

The UC Suite also provides several user interface options that allow the user to select the screen layout that will work best for their environment. Information about the different user interface options can be found at the following locations:

➥ *Toolbar Mode*
➥ *Window Mode*
➥ *Phone Image (SP310 Softphone)*

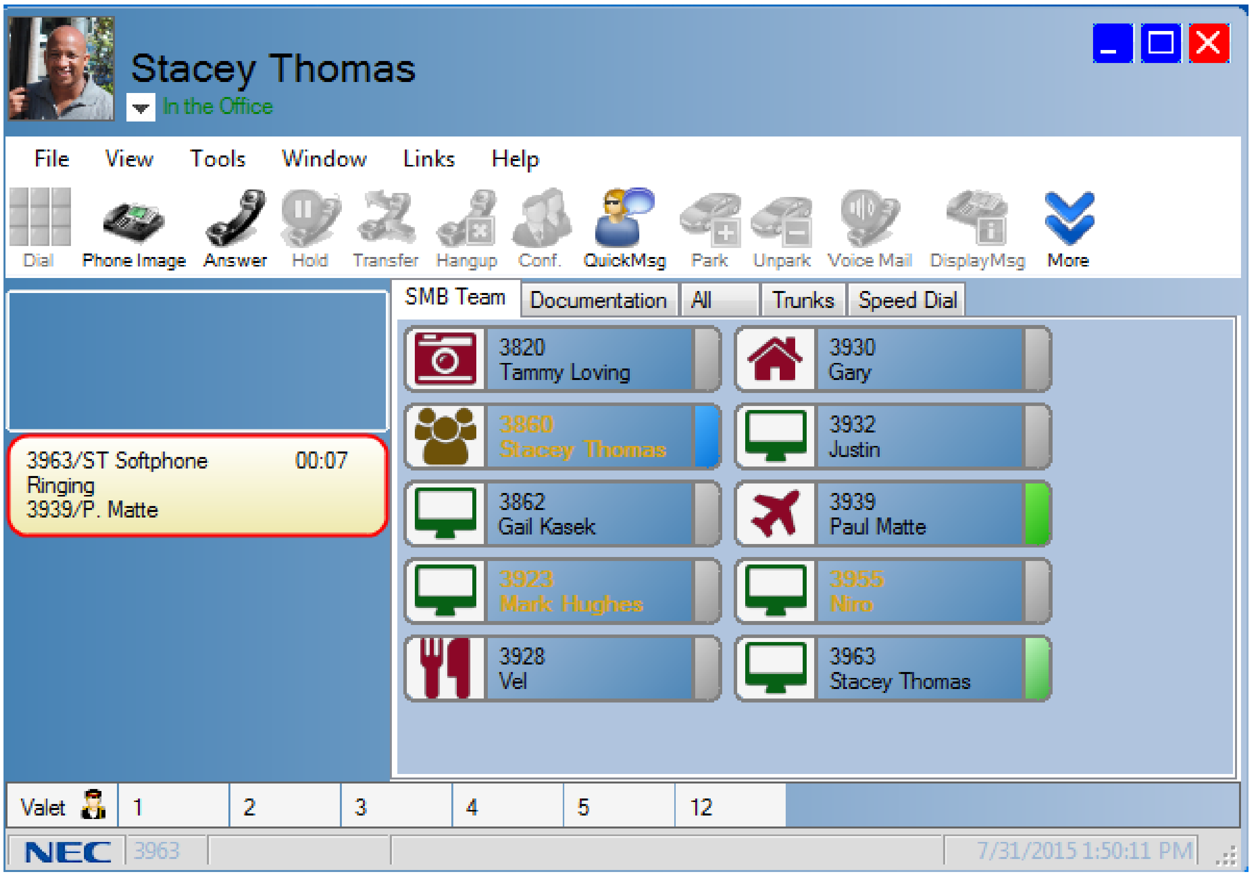
Toolbar Mode

In **Toolbar Mode** the UC Suite is displayed as a thin control panel that can be docked at either the top or bottom of the screen. This display option is valuable for users that need to utilize the majority of their screen space for other applications, yet have quick and easy access to their telephone functions.

The left side of the toolbar has a call control area that allows users to quickly answer calls, hang up, and initiate speed dials. The right side of the toolbar provides access to feature buttons for updating Presence status, transferring calls, and performing other telephony functions.

Window Mode

In Window Mode the UC Suite is displayed as a floating panel that can be easily resized to fit the user's needs. This display option is valuable for users that want to monitor the status of other users and have quick access to the complete set of application features.



The top section of the Window includes the Presence control and Contact Center state control (optional) which allow the user to easily change their status. The function toolbar is fully customizable, allowing the user to hide and re-order the buttons to best suit their needs. The Active Call displays all calls that are currently being controlled by the user. The BLF tabs allow the user to monitor the Presence and Phone status of other users on the system. The Park area at the bottom of the window allows the user to easily monitor and access the status of Park orbits on their phone system.

Phone Image (SP310 Softphone)

The **Phone Image** view provides a replica of the NEC deskset on the screen. This view is only available when the UC Suite is running in **softphone** mode.

The **Phone Image** lamps and display area will update in the same manner as the physical phone. All buttons on the phone can be pressed by positioning the mouse cursor on the desired button and pressing the mouse button.

The **Phone Image** can be modified through the **Preferences** settings to include an Add-On module or a 60-button Expansion module to the on-screen layout.

Handling Calls

The **UC Suite** provides convenient access to all of the functions required for normal call handling functions. Once a user becomes familiar with the **UC Suite** user interface, calls can be easily handled without even touching the telephone set. Almost all of the basic features, such as answering calls, originating transfers, and placing calls, can be accomplished by using the mouse, keyboard, or a combination of both mouse and keyboard input. This flexibility allows the user to manage call activity in whatever manner is most comfortable for their environment.

The basic call handling operations that can be accomplished with the **UC Suite** are as follows:

- *Answering Incoming Calls*
- *Disconnecting from a Call*
- *Placing an Outbound Call*
- *Placing a Call on Hold*
- *Retrieving a Call on Hold*
- *Transferring a Call*
- *Setting Up a Conference Call*
- *Parking/Unparking a Call*
- *Annotate a Call*
- *Auto Callback*
- *Missed Calls and Voice Mail Alerts*
- *Accessing the Company Directory*

Answering Incoming Calls

When a call arrives, the **UC Suite** generates a ringing tone and the new call is indicated on the screen. The user can answer the call using any of the following methods:

- Use the mouse to select the **Answer** function on the **Function Toolbar**.

  - OR -

- Press the assigned hotkey on the keyboard.

  - OR -

- Use the mouse to select the **Ringing** call entry within the **Active Call List**.

  - OR -

- Use the mouse to select the **Off-hook** button on the Compact Phone or Emulation Phone image.

If another call is active when a ringing call is answered, the active call is automatically placed on hold.

Disconnecting from a Call

To disconnect from an active call:

❑ Use the mouse to select **Hang Up** from the **Function Toolbar**.

- OR -

❑ Press the assigned hotkey on the keyboard.

- OR -

❑ Use the mouse to select the **On-hook** button on the Compact Phone or Emulation Phone.

Placing an Outbound Call

When the **UC Suite** is idle (no active call), you can initiate an outbound call. The **UC Suite** provides the **Dial** function to initiate a call to an external number and special dialing features for the **BLF/DSS Area** and **Directory/Contact List menu**.

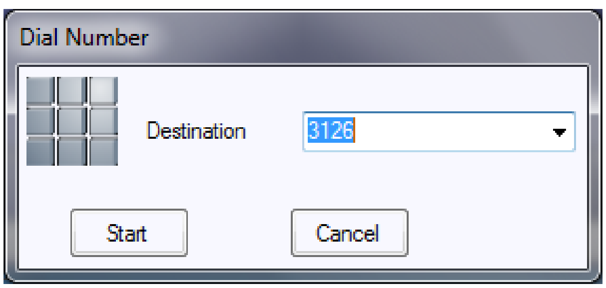
To initiate a call using the Dial function:

1. Use the mouse to select **Dial** on the **Function** Toolbar.

   - OR -

   Press the assigned hotkey on the keyboard.

2. Enter the number to be dialed in the **Destination** field within the **Dial Number menu**.



3. Select the **Start** option to place the call.

To initiate a call using a BLF/DSS or Speed Dial key:

❑ Within the **BLF/DSS Area**, use the mouse to select the station or speed dial entry to be dialed.

To initiate a call to a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry to be dialed.

   - OR -

   Double-click on the destination number cell in the Directory table. This automatically initiates dialing of the selected number.

2. If using the popup menu, select the **Dial Extension** option to place the call.

Placing a Call on Hold

To place the active call on hold:

❑ Use the mouse to select **Hold** on the **Function Toolbar**.

- OR -

❑ Press the assigned hotkey on the keyboard.

Retrieving a Call on Hold

To retrieve a call that was previously placed on hold:

❑ Use the mouse to select the held/parked call on the **Active Call List**.

If another call is active when a held call is retrieved, the active call will automatically be placed on hold.

Transferring a Call

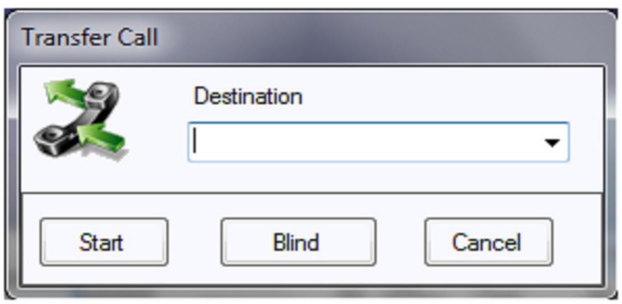
The **UC Suite** provides several different methods to initiate a transfer on an active call. The **Transfer** function can be used to initiate a transfer to an external number, while the **BLF/DSS area** and **Directory Menu** provide special features to initiate a transfer. The **UC Suite** also provides the option to perform either a supervised transfer or unsupervised (blind) transfer.

To redirect a call using the Transfer function:

1. Use the mouse to select **Transfer** on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. Enter the number to be dialed in the **Destination** field within the **Transfer Call menu**.



3. Select the **Start** option within the **Data Entry** area to initiate a supervised transfer. When the destination party answers, announce the transfer and then select **Complete**. If the destination does not answer or does not want to take the call, select **Disconnect** to reconnect to the original caller. Selecting the **VoiceMail** option while the call is ringing or busy sends the caller to the destination voicemail box.

   - OR -

   Select the **Blind** option within the **Data Entry** area to initiate an unsupervised (blind) transfer. The call is immediately routed to the specified destination.

To initiate a one-touch transfer using a BLF/DSS key:

- Within the **BLF/DSS Area**, use the mouse to select the station to receive the call. When the one-touch transfer initiates a supervised transfer, the **Transfer menu** is displayed. Select **Complete** within the **Transfer menu** to complete the transfer.
- The one-touch transfer initiated with a BLF/DSS key can be either supervised or unsupervised (blind). The type of transfer is determined by a setting in the BLF/DSS configuration screen. To change this setting, on the **Tools** menu, select **Preferences**. Then select the **Shortcuts** tab and change the setting for **One Touch Transfer**.

Using the popup menu to initiate a transfer using a BLF/DSS key:

1. Within the **BLF/DSS** Tab, use the *right* mouse button to select the station to receive the call.
2. From the popup menu, select either **Transfer - Immediate** or **Transfer - Supervised** to redirect the call.
3. If **Transfer - Supervised** is selected, the **Transfer menu** will be displayed. Select **Complete** to complete the transfer or **Disconnect** to reconnect to the original caller.

Setting Up a Conference Call

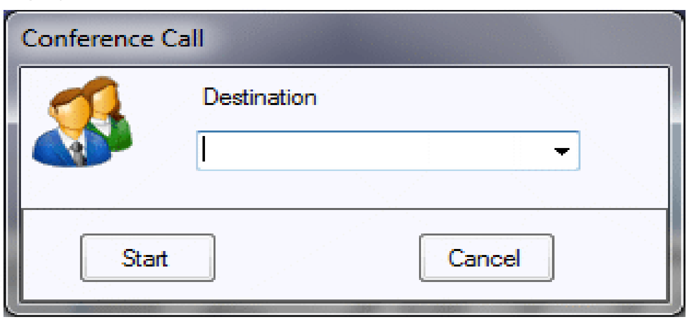
With an active call on the **UC Suite**, the user can establish a conference between the active call and a third party. Conference calls can be set up using either the **Conference** function or the **Directory menu**.

To initiate a conference using the Conference function:

1. Use the mouse to select the **Conference** function on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. Enter the telephone number of the conference party into the **Destination** field within the **Conference Call menu**.



3. Select the **Start** option within the **Conference Call menu** to initiate the conference.
4. When the destination answers, announce the conference and then select **Complete** to create the three-way conference call. If the destination does not answer or does not want to participate in the conference, select the **Disconnect** option.

To initiate a conference using the Directory Tab:

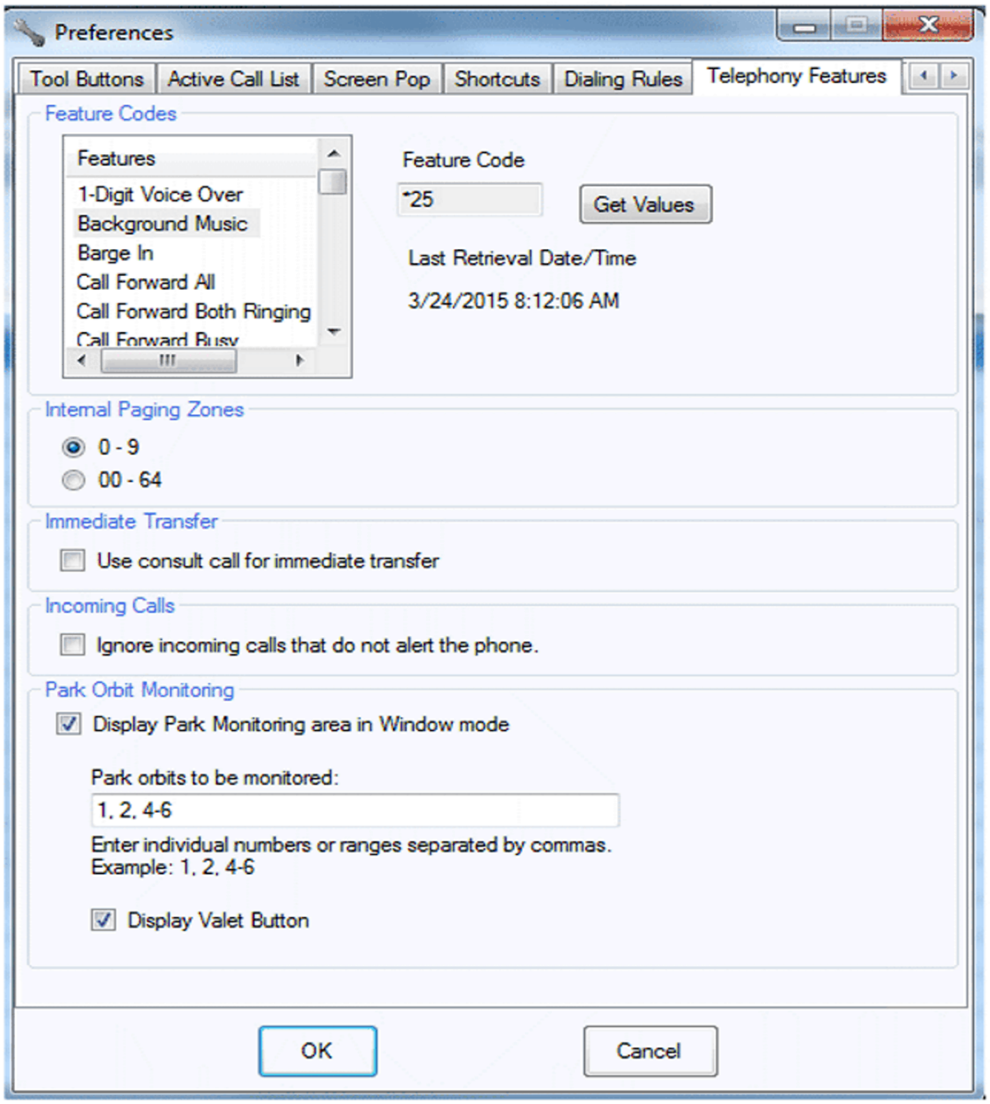
1. Use the *right* mouse button to select the directory entry to be added to the conference.
2. On the popup menu, select the **Conference** option to initiate the conference.
3. When the destination answers, announce the conference and then select **Complete** to create the three-way conference call. If the destination does not answer or does not want to participate in the conference, select the **Disconnect** option.

Parking/Unparking a Call

The **UC Suite** provides functions to transfer the active call to a park location and retrieve a call from a park location. In Window mode, you can choose to define a Park monitoring area that shows the current status of a selected set of Park locations. The Park monitoring feature can be very useful for an attendant user that frequently Parks calls for other employees.

To enable the Park monitoring area:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **Telephony Features** tab on the **Preferences** menu.



3. Select the option for **Display Park Monitoring area in Window mode**.
4. Enter the location number(s) to be monitored in the **Park orbits to be monitored** field.
5. If you want to be able to use the Step Park feature, select the **Display Valet Button** option.

To Park the active call using the Park monitoring area:

❑ Click on an empty **Park** location to send the call to that park orbit.

- OR -

❑ Position the mouse cursor on the active call and hold down the mouse button while dragging the call to the desired Park location. Releasing the mouse button parks the call in the target location.

- OR -

❑ To use Step Park, click on the **Valet** button. The active call is placed in the first available park location.

To Unpark a call using the Park monitoring area:

❑ When the phone is idle, click on a busy **Park** location to retrieve the parked call.

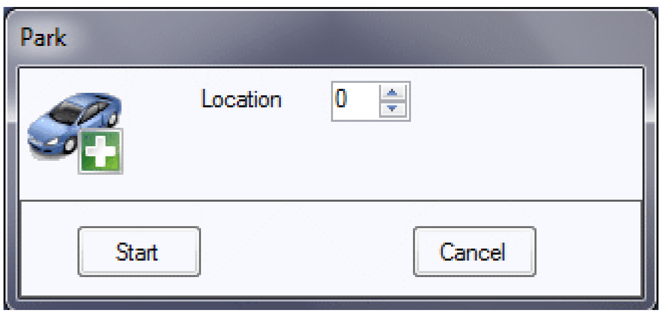
To Park the active call using the Park Call button:

1. Use the mouse to select the **Park Call** function on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.

2. Select the park **Location** (1 through 64) within the **Park Call menu**.



3. Select **Start** to transfer the active call to the park location. The **Active Call List** is updated with the information for the parked call.

4. If the park location is currently occupied, a warning message is displayed. The attendant is reconnected to the caller and allowed to select a different park location.

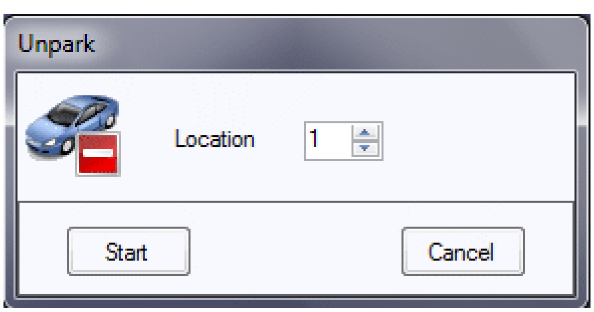
To retrieve a call using the Unpark button:

1. With the attendant console idle (no active call), use the mouse to select the **Unpark Call** function on the **Function Toolbar**.

   - OR -

   Press the **F11** key on the keyboard.

2. Select the park **Location** (1 through 64) within the **Unpark Call menu**.



3. Select **Start** to retrieve the call from the park location.

4. If the park location is currently empty, a warning message is displayed.

To retrieve a parked call from the Active Call List:

❑ With the attendant console idle (no active call), select the desired entry in the **Active Calls List**. The call will be recalled from the Park location and become the current **Active Call**.

Annotate a Call

The **UC Suite** provides the ability to associate notes with a call record. Notes can be added and modified either when a call is active or by accessing a call record within the Call Log window.

To annotate an active call:

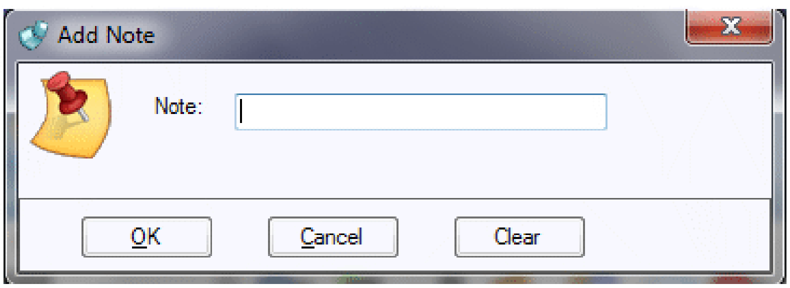
❑ Use the mouse to select **Note** on the **Function Toolbar**.

- OR -

❑ Press the assigned hotkey on the keyboard.

- OR -

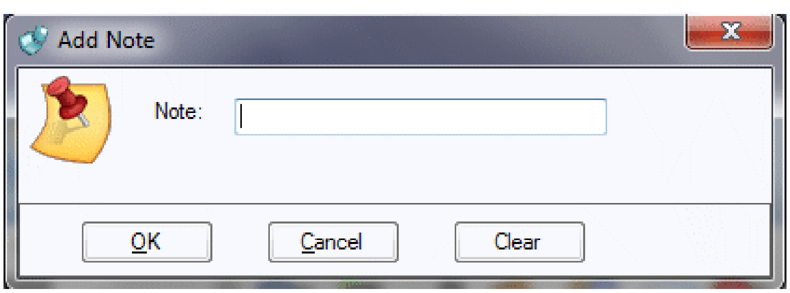
1. Press the right mouse button while positioning the cursor on the call in the **Active Call** area.
2. Select **Add/Edit Note** from the popup menu.



3. Enter the text in the **Note** field.
4. Press **OK** to save the settings.

To annotate a call record in the Call Log:

1. Press the right mouse button while positioning the cursor on the call record in the Call Log.
2. Select **Add/Edit Note** from the popup menu.



3. Enter the text in the **Note** field.
4. Press **OK** to save the settings.

Auto Callback

The **Auto Callback** function allows the user to request a callback from another extension. This function can be applied whenever the user dials an internal extension that is either busy or does not answer. After setting a callback, the destination extension will callback the local extension when the phone is idle or the user next uses the telephone.

To activate Auto Callback:

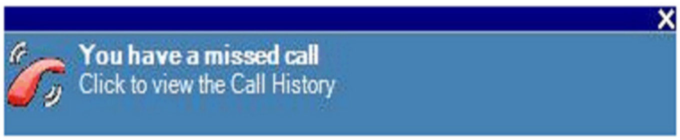
- ❑ Use the mouse to select **Auto Callback** on the **Function Toolbar**.

  - OR -

- ❑ Press the assigned hotkey on the keyboard.

Missed Calls and Voice Mail Alerts

The **UC Suite** will notify the user if there was a missed call or a new voice mail. An example of a missed call notification is shown below:



You can choose to view the Call Log from this popup or wait until later. After viewing the Call Log, the notification is deleted. An icon is also displayed in the task bar to informs you there is a notification.

To modify the Missed Calls and Voice Mail Alerts Settings:

1. On the **Tools** menu, select the **Preferences** option.
2. Click on the **Notification Settings** tab within the **Preferences** menu.
3. Select the desired display options.
4. Click on **OK** to save the selections.

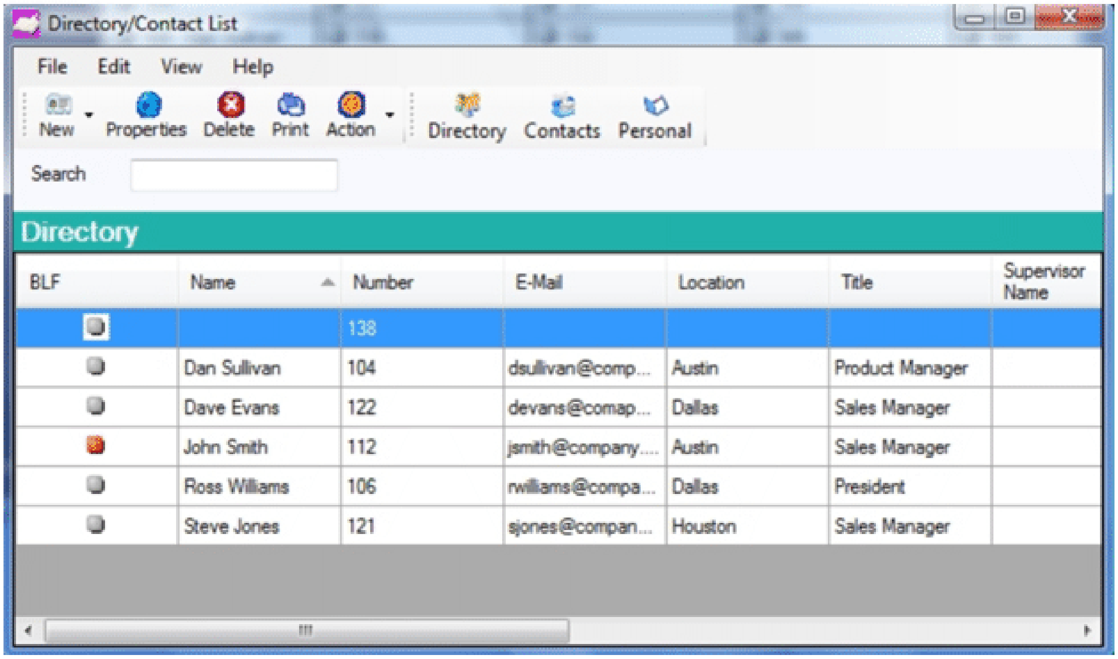
Accessing the Company Directory

The **UC Suite** provides an online company directory to assist the user in handling call activity. Every extension in an organization is included in the directory to provide the attendant with quick access to contact information and an easy method to send calls and messages to an individual. The directory is opened from the toolbar and is displayed as a separate window. The directory can also be viewed from within the Compact Phone by selecting the Directory function.

To access the Directory in Toolbar or Window mode:

- ❑ From the **Windows** option on the main menu, select **Directory**.

An example of the directory window is shown below:



Operations that can be performed on the directory include the following:

- Adding a new entry to the Directory
- Modifying an entry in the Directory
- Deleting an entry from the Directory
- Searching the Directory
- Printing the Directory
- Changing the Directory Tab Layout
- Call Handling within the Directory
- Sending a message from the Directory
- Video Calling
- Setting up a Chat
- Transferring files

These operations are further described within the Help section of the Directory window.

MONITORING THE BLF/DSS KEYS

The **UC Suite** provides on-screen BLF/DSS keys that have the same functionality as the attendant add-on module. Each key represents one phone within the system and displays the current status of the phone. The indicator on a BLF key is gray when the telephone is idle and changes to green when the telephone is in use. The BLF image also indicates when the phone is in Do Not Disturb (Red) and Forwarded (Blue). A flashing green indicator represents a ringing call. Additionally, the key provides on-touch access for dialing or transferring calls.

The system administrator can also set up BLF Groups, which are used to organize the extension list into groups of buttons. Each BLF Group is shown as a tab on the top of the BLF area on the main console screen. By selecting different tabs, the attendant is able to see the BLFs that are assigned to that group.

Operations that can be performed using the BLF/DSS keys include the following:

- ➥ *Call Handling within the BLF/DSS Buttons*
- ➥ *Changing the BLF/DSS Button Appearance*
- ➥ *Changing the Visible BLF Groups*

Call Handling within the BLF/DSS Buttons

The **BLF/DSS Area** provides easy access to several common call handling functions.

To dial an extension using a BLF/DSS key:

❑ With the attendant set idle (no active call), click on a BLF/DSS key to dial that extension.

To leave a message in a Voice Mailbox:

1. Press the *right* mouse button to select a BLF/DSS key.
2. From the popup menu, select the **Voice Mail** option.

To initiate a supervised transfer using a BLF/DSS key:

1. Press the *right* mouse button to select the BLF/DSS station to receive the call.
2. From the popup menu, select the **Transfer - Supervised** option.
3. When the party answers, announce the transfer, and then press the **Complete** button on the **Transfer** menu.
4. If the destination party does not answer or does not want to receive the transfer, press the **Disconnect** button in the **Transfer** menu to reconnect to the original caller.

To initiate an unsupervised (blind) transfer using a BLF/DSS key:

1. Press the *right* mouse button to select the BLF/DSS station to receive the call.
2. From the popup menu, select the **Transfer - Immediate** option.

To initiate an one-touch transfer using a BLF/DSS key:

❑ With an active call on the attendant phone, click on an idle **BLF/DSS** key to transfer to that extension. The transfer is either an immediate or supervised transfer, based upon the current setting in the **Tools→Preferences Shortcuts** menu.

To initiate a voicemail shortcut using a BLF/DSS key:

❑ With an active call on the attendant phone, *double-click* on a busy **BLF/DSS** key to transfer to that extension's voicemail.

NOTE *For this shortcut to be enabled, the **Tools → Preferences Shortcuts** menu must have the **Voicemail** option selected as the current double-click action.*

To initiate a Voice Over shortcut using a BLF/DSS key:

❑ With an active call on the attendant phone, *double-click* on a busy **BLF/DSS** key to place the current call on hold and initiate a voice over call to the selected extension.

NOTE *For this shortcut to be enabled, the **Tools → Preferences Shortcuts** menu must have the **Voice Over** option selected as the current double-click action.*

To initiate a Camp On shortcut using a BLF/DSS key:

❑ With an active call on the attendant phone, *double-click* on a busy **BLF/DSS** key to camp the current call on to the selected extension.

NOTE *For this shortcut to be enabled, the **Tools → Preferences Shortcuts** menu must have the **Camp** option selected as the current double-click action.*

Changing the BLF/DSS Button Appearance

To change the format of the BLF/DSS labels:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **BLF/DSS** tab on the **Preferences** menu.
3. Set the **Label Format** field to the type of information to be displayed on the BLF/DSS key. Valid formats are:
   - Extension Only
   - Name Only
   - Extension and name
4. Click **OK** to save your settings.

To change the appearance of the BLF/DSS buttons:

1. On the **Tools** menu, select the **Preferences** option:
2. Select the **BLF/DSS** tab on the **Preferences** menu.
3. Select the **BLF Appearance** field to change the button type.
   - Profile View
   - Classic View

4. Click **OK** to save your settings.

To change the order of the BLF/DSS buttons:

1. On the **View** menu, select the **Sort BLF by** option.
2. Select the **Extension** or **Name** option to resort the BLF buttons in the desired order.
3. Select the **Custom** setting to manually re-order the BLF buttons. When the **Custom** setting is active, position the mouse cursor on the **BLF** button that you want to move. Hold down the mouse button while dragging the BLF button to the new location.

Changing the Visible BLF Groups

The user can set up **BLF Groups**, which can be used to organize the extension list into groups of buttons. Each **BLF Group** is shown as a tab on the top of the BLF area on the main console screen. By selecting different tabs, the attendant is able to see the BLFs that are assigned to that group. Each console user has the ability to select which BLF groups are visible on the console.

To specify the visible BLF Groups:

1. On the **Tools** menu, select the **Preferences** option.
2. Click on the **BLF/DSS** tab within the **Preferences** menu.
3. Select the checkbox for all **BLF Groups** that are to be visible. The **Speed Dial** tab can also be enabled through this menu.
4. Select a group and use the **Move Up** and **Move Down** buttons to change the position of the tab for the selected group.
5. Click **OK** to save the BLF/DSS configuration.

Sending a Message from the BLF/DSS Buttons

The **BLF/DSS Buttons** provides functions to generate e-mails, voice mail messages, and quick messages to individuals assigned to BLF/DSS keys.

To send an e-mail using a BLF/DSS key:

1. Press the *right* mouse button to select the **BLF/DSS** key.
2. From the popup menu, select the **E-Mail** option. This will create a new mail message using your default e-mail client, with the destination set to the e-mail address of the selected BLF/DSS key.

NOTE *The e-mail address field within the Directory entry for this extension must be filled-in for this function to be enabled.*

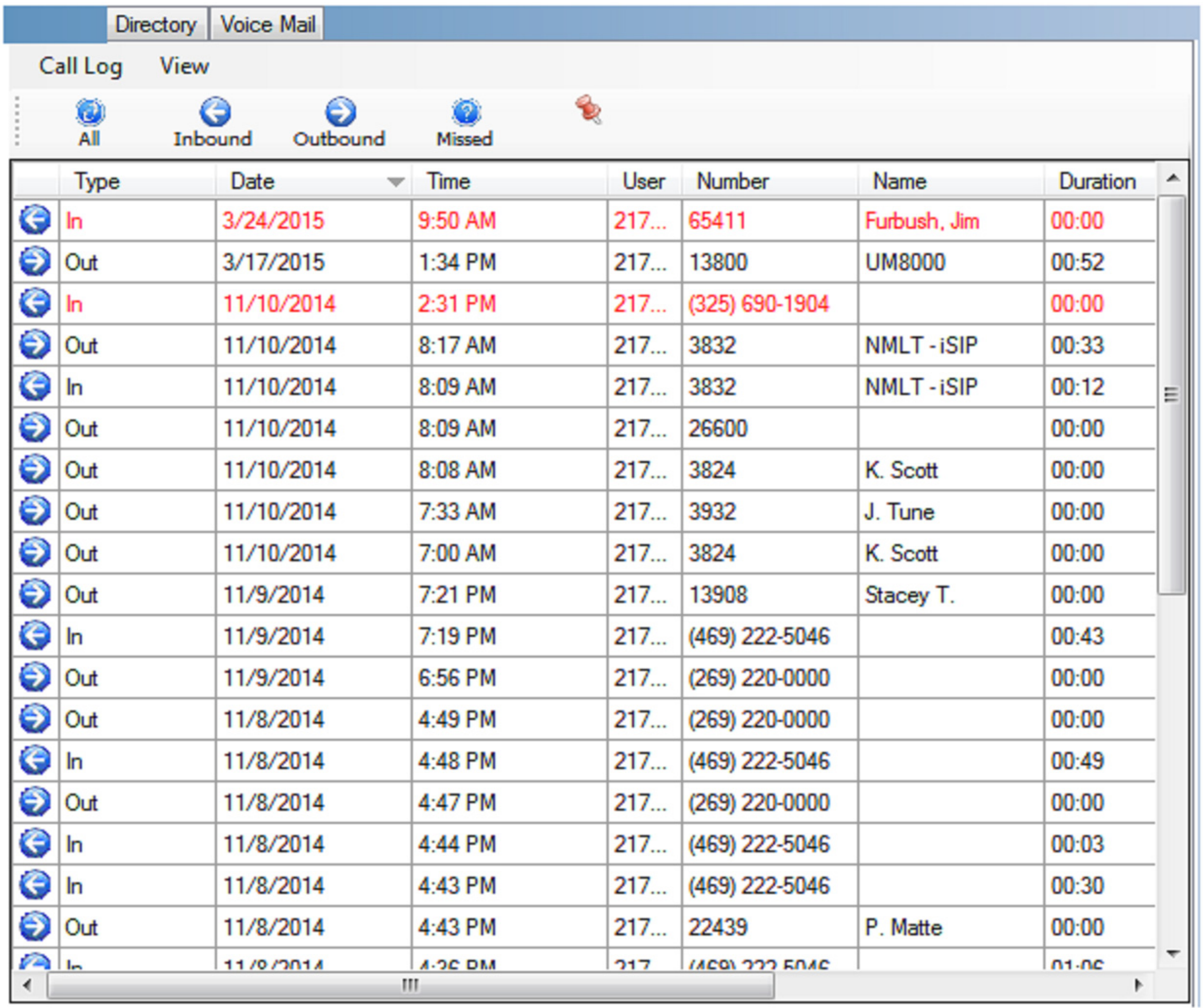
To leave a message in a Voice Mailbox:

1. Press the *right* mouse button to select the **BLF/DSS** key.
2. From the popup menu, select the **Voice Mail** option.

VIEWING THE CALL HISTORY

The **UC Suite** maintains a **Call Log**, which provides a historical trace of the user call activity. Each inbound and outbound call generates a record in the call log. This information can be used to retrieve details about specific calls and perform functions such as redialing a previous call or playing back a recorded telephone conversation.

The following image shows an example of the Call Log window.



To access the Call Log:

- ❑ From the **Windows** option on the console main menu, select **Call Log**.

  Operations that can be performed on the **Call Log** include the following:

  - ➥ Redialing a Number from the Call Log
  - ➥ Playing Back a Recorded Telephone Conversation
  - ➥ Deleting Records from the Call Log
  - ➥ Sending a Call Log record or Recording using E-Mail
  - ➥ Printing the Call Log
  - ➥ Changing the Call Log Layout
  - ➥ Archiving the Call Log

Redialing a Number from the Call Log

To redial a number:

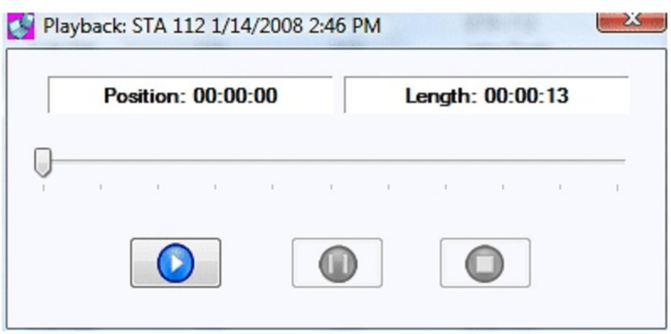
1. Press the *right* mouse button to select the Call Log record you want to redial.
2. Select **Dial** from the popup menu.

Playing Back a Recorded Telephone Conversation

The **Record** function is used to capture a telephone conversation from the attendant console and save the recording on the PC. The recording is attached to the **Call Log** record and indicated by the recording icon within the **Type** field.

To playback a recording:

1. Press the *right* mouse button to select the Call Log record that contains the recording.
2. Select **Play** from the popup menu. The Playback window opens and the recording automatically starts playing.



The Playback window provides the following controls:

Slider Bar	Advances as the playback progresses. Dragging the slider changes the current playback position within the recording.
Play	Start/resume playback of the recording.
Pause	Suspend playback at the current position.
Stop	Suspend playback and set the current position to the beginning of the recording.

Deleting Records from the Call Log

To delete a single Call Log record:

❑ Select the **Call Log** record with a *right* mouse click. From the popup menu, select the **Delete** option.

- OR -

❑ Highlight the **Call Log** record and from the **Call Log** menu select the **Delete** option.

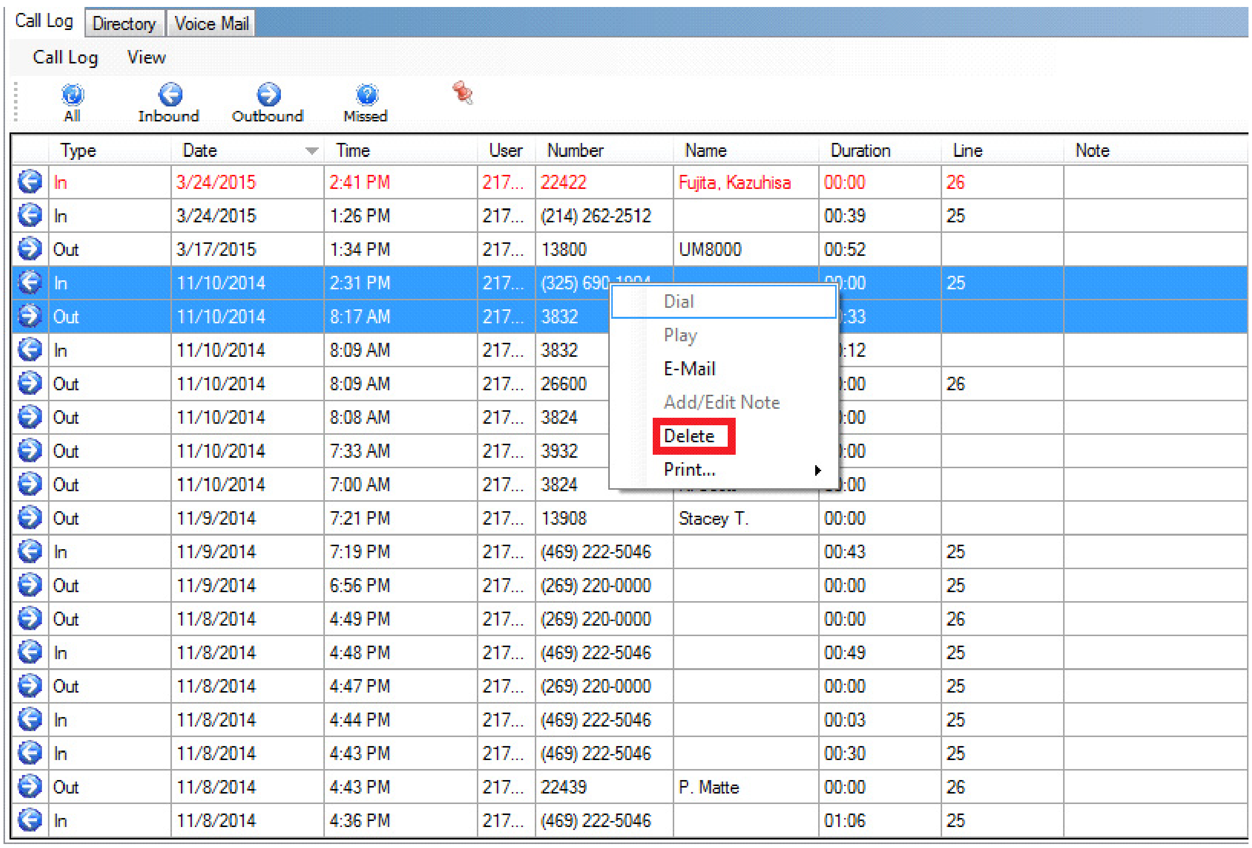
To delete a block of Call Log records:

1. Highlight the records you want to delete.

2. *Right* mouse click within the highlighted block. From the popup menu, select the **Delete** option.

   - OR -

   From the **Call Log** menu, select the **Delete** option.



Sending a Call Log record or Recording using E-Mail

To send a call log record or recording using e-mail:

1. Press the *right* mouse button to select the Call Log record you want to send.

2. From the popup menu, select the **E-Mail** option. This creates a new mail message using your default e-mail client, with the call log detail included in the body of the message. If a recording is associated with the call log record, the sound file for the recording is attached to the message.

Printing the Call Log

The **UC Suite** provides the capability to print all or part of the call history.

To print the entire Call Log:

- From the **Call Log** menu, select the **Print** option, followed by **Print All**. This sends the entire call log to the default printer.

To print selected records from the Call Log:

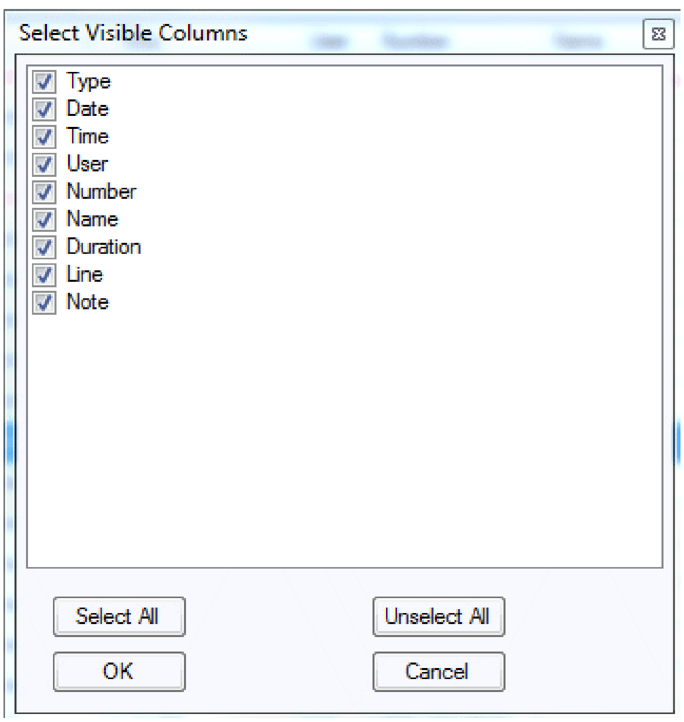
1. Highlight the records you want to print.
2. From the **Call Log** menu, select the **Print** option, followed by **Print Selected**. This causes the selected call log records to be sent to the default printer.

Changing the Call Log Layout

The **UC Suite** provides several options to change the layout of the **Call Log**. The size and location of each column can be modified and the entire **Call Log** can be sorted based upon any individual column.

To change the visible columns within the Call Log Tab:

1. On the **View** menu within the Call Log window, select the **Set Visible Columns** option.



2. Check each column that will be visible on the **Call Log**.
3. Press **OK** to save the settings.

To change the order of the columns in the Call Log:

1. Position the mouse cursor within the heading of the column to be moved.
2. Hold down the left mouse button and drag the column to the new position.

To change the width of a column in the Call Log:

1. Position the mouse cursor within the heading and on the right edge of the column to be resized. When the mouse is in the proper position, the mouse cursor will change to a double-headed arrow.
2. Hold down the left mouse button and drag the border of the column to the new width.

To sort the contents of the Call Log:

1. Position the mouse cursor within the heading of the column to use for sorting.
2. Press the left mouse button to sort the **Call Log** in ascending order based upon the contents of the selected column.
3. Pressing the left mouse button a second time will sort the **Call Log** in descending order.

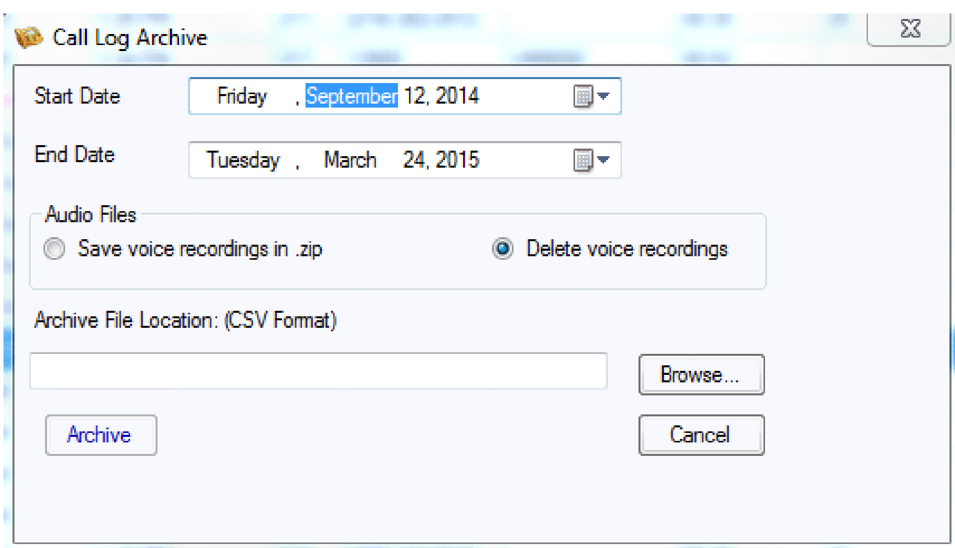
Archiving the Call Log

Regular maintenance of the **UC Suite** should include archiving of the **Call Log**. This operation is beneficial for reducing the number of call records displayed within the application, and therefore, improving access when searching for individual records. The archival process also provides a method of backing up the call history and storing the records off-line for future access.

The archive operation saves the call history to a file using Comma Separated Values (CSV) format. This format can be viewed using a standard text editor or easily imported into a database or spreadsheet program. During the archive operation, you can specify if the recorded files are to be saved or deleted. If the recorded files are saved, they are compressed into a zip file with the same file name as the archived call records.

To archive the Call Log:

1. From the **Call Log** menu, select the **Archive** option. This opens the Call Log Archive menu.



2. Select the **Start Date** and **End Date** for the archive. All call log records within this range of dates are included in the archive and removed from the **Call Log** tab.
3. Select either **Save voice recordings in .zip** to keep the recordings or **Delete voice recordings** to erase the recordings.
4. Enter the name of the archive file to be created or use the **Browse** button to select the file.
5. Press **Archive** to open the Archive/Delete from Call Log menu.
6. Press **Yes** to create the archive file.

MANAGING VOICEMAIL MESSAGES

The **UC Suite** provides access to voicemail messages, allowing you to Archive, Delete, and initiate Playback of messages. This functionality is available on NEC phone systems that are using either the InMail voicemail system or the UM8000 voicemail system.

Further information about setup and management of voicemail messages can be found at the following locations:

- ➥ *Voicemail Setup*
- ➥ *New Message Count*
- ➥ *Managing Voicemail Messages*

Voicemail Setup

The following procedures are used to setup the **UC Suite** to access either the InMail or UM8000 voicemail systems.

To enable the Voicemail functionality for InMail:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **Voice Mail** tab on the **Preferences** menu.
3. If your voicemail settings require a password to login, enable the **Password required for voicemail login** and enter your password in the **Password** field.

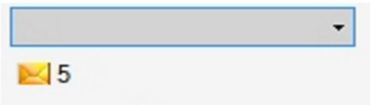
To enable the Voicemail functionality for UM8000:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **Voice Mail** tab on the **Preferences** menu.
3. Enter the **Personal ID** required to login to your voicemail.
4. Enter the **Security Code** required to login to your voicemail.

New Message Count

With the voicemail access enabled, the **Toolbar** mode and **Window** mode display the current number of new voicemail messages.

In the **Toolbar** mode the new message count is displayed below the Dial data entry area, as shown below.



In **Window** mode the new message count is displayed at the bottom of the window in the status bar, as shown below.

The new message icon only appears if there are new messages in the voicemail box. Clicking on the New Message image automatically opens the Voicemail Messages window.

Managing Voicemail Messages

The VoiceMail Messages window can be opened using one of the following methods:

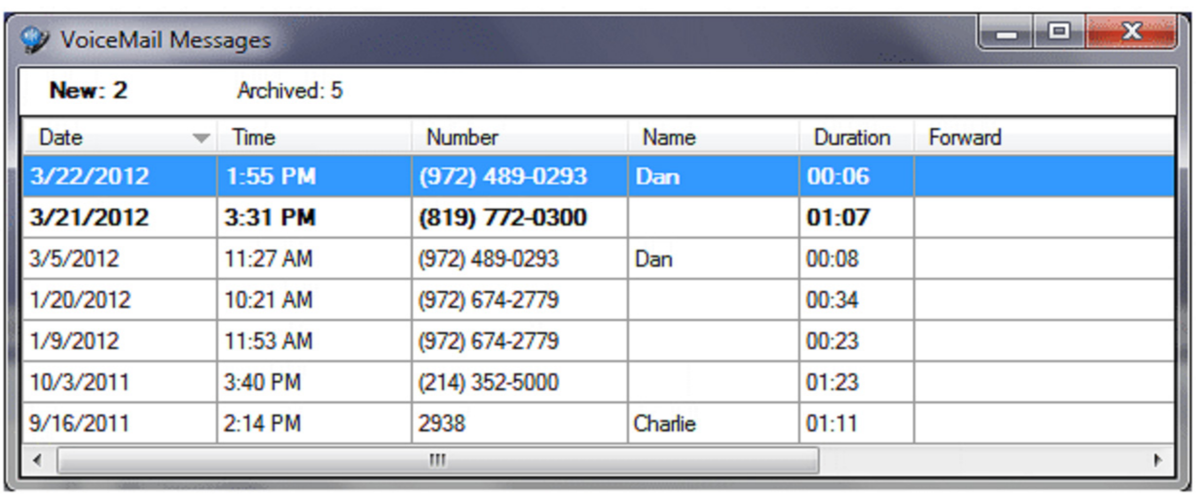
❑ Click on the **New Message** icon. 

- OR -

❑ In Window mode, from the main menu select **Window** and **Voicemail**.

- OR -

❑ In Toolbar mode, from the **File** menu select **Voicemail**.



Date	Time	Number	Name	Duration	Forward
3/22/2012	1:55 PM	(972) 489-0293	Dan	00:06	
3/21/2012	**3:31 PM**	**(819) 772-0300**		**01:07**	
3/5/2012	11:27 AM	(972) 489-0293	Dan	00:08	
1/20/2012	10:21 AM	(972) 674-2779		00:34	
1/9/2012	11:53 AM	(972) 674-2779		00:23	
10/3/2011	3:40 PM	(214) 352-5000		01:23	
9/16/2011	2:14 PM	2938	Charlie	01:11	

❑ To playback a voicemail message, double-click on the selected message or right mouse click and select **Play**.

❑ To change the status of a message to archived, right mouse click on the selected message and select the **Archive** option.

❑ To delete a voicemail message, right mouse click on the selected message and select the **Delete** option.

Using Collaboration Functions

The **UC Suite** provides several functions that allow the user to communicate and share information with other desktop users. The collaboration functions available in this product include:

- *Sharing an Application*
- *Initiating a Chat Session*
- *Sharing a Whiteboard*
- *Transferring Files*
- *Setting up a Video Call*

Sharing an Application

NOTE — *The Share function is part of the legacy Enhancement Bundle, which may not be available on all systems.*

The **UC Suite** provides several different methods to share applications. The **Share** function allows two desktop application users to view and control a common Windows application, while the **BLF/DSS area** and **Directory Menu** provide special features to share applications.

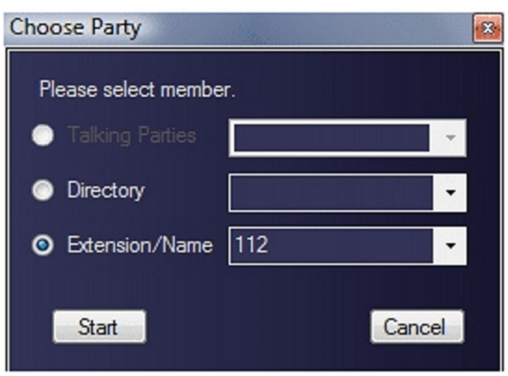
To initiate an Application Sharing Session:

1. Use the mouse to select **Share** on the **Function Toolbar**.

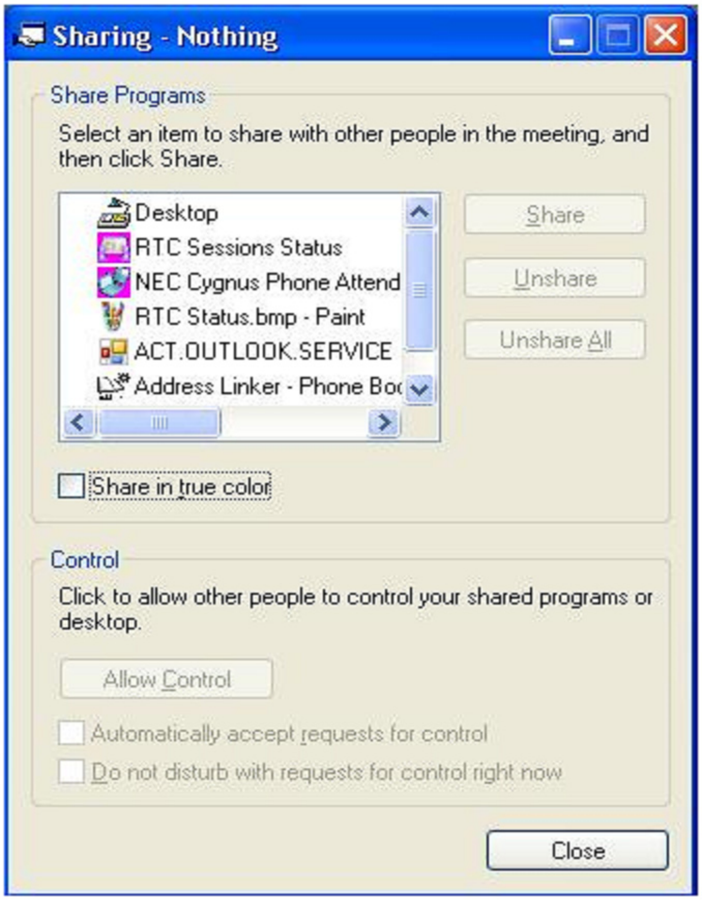
   \- OR -

   Press the assigned hotkey on the keyboard.

2. Select or enter an extension within the **Choose Party** menu and select **Start** to initiate an application sharing session with the specified user. The following image is displayed on the participants screen.



3. Select an application(s) that you want to share with the specified user by pressing the **Share** option.



4. Select the **Unshare** option to stop sharing an application with the specified user.

5. Press the **Close** button to terminate the Application Sharing session.

To initiate an Application Sharing Session using a BLF/DSS key:

1. Within the **BLF/DSS** tab, use the *right* mouse button to select the user with whom you will share the application.

2. From the popup menu, select **Application Sharing** to initiate the session.

To initiate an Application Sharing Session from a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry with which an application is shared.

2. From the popup menu, select **Application Sharing** to initiate the session.

Initiating a Chat Session

NOTE *The Chat function is part of the legacy Enhancement Bundle, which may not be available on all systems.*

The **UC Suite** provides several different methods to initiate a Chat Session. The **Chat** function allows you to start an instant messaging session with another desktop application user, while the **BLF/DSS area** and **Directory Menu** provide special features to initiate a chat session.

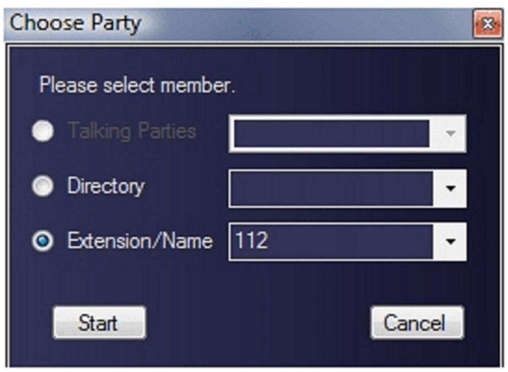
To initiate a Chat Session:

1. Use the mouse to select **Chat** on the **Function Toolbar**.

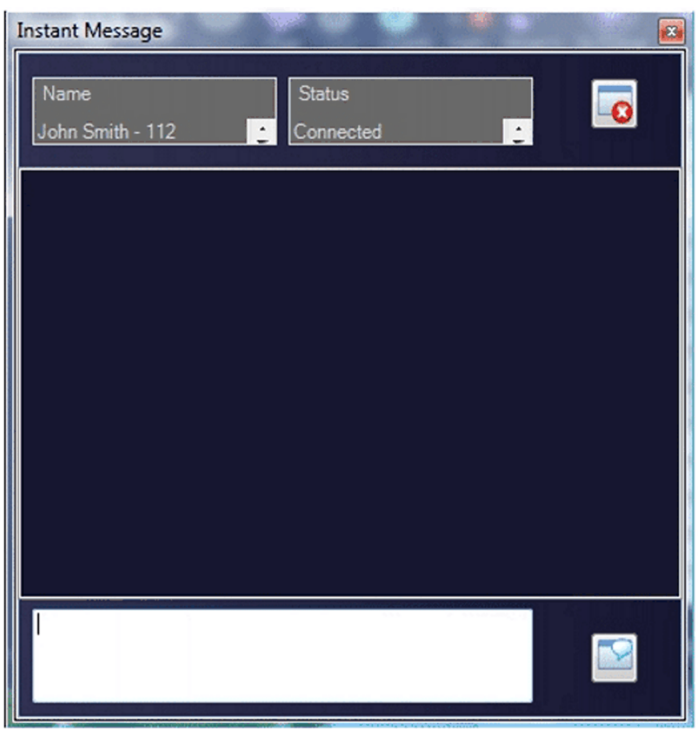
   - OR -

   Press the assigned hotkey on the keyboard.

2. Select or enter an extension within the **Choose Party** menu and select **Start** to initiate a chat session with the specified user. The following image will be displayed on the participants screen.



3. Enter text in the data entry box on the bottom of the form and press the **Send** button to transmit the text to the other user.



4. Press the **Close** button to terminate the Chat session and remove the Chat form from both user's screens.

To initiate a Chat Session using a BLF/DSS key:

1. Within the **BLF/DSS** tab, use the *right* mouse button to select the user with whom you want to instant message.
2. From the popup menu, select **Chat** to initiate the chat session.

To initiate a Chat Session from a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry with which to instant message.
2. From the popup menu, select **Chat** to initiate the chat session.

Sharing a Whiteboard

NOTE *The Whiteboard function is part of the legacy Enhancement Bundle, which may not be available on all systems.*

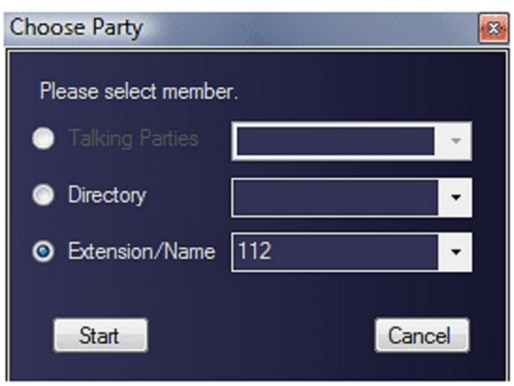
The **UC Suite** provides several different methods to initiate a Whiteboard Session. The **Whiteboard** function allows two desktop application users to share a drawing tool, while the **BLF/DSS area** and **Directory Menu** provide special features to initiate a whiteboard session.

To initiate a Whiteboard Session:

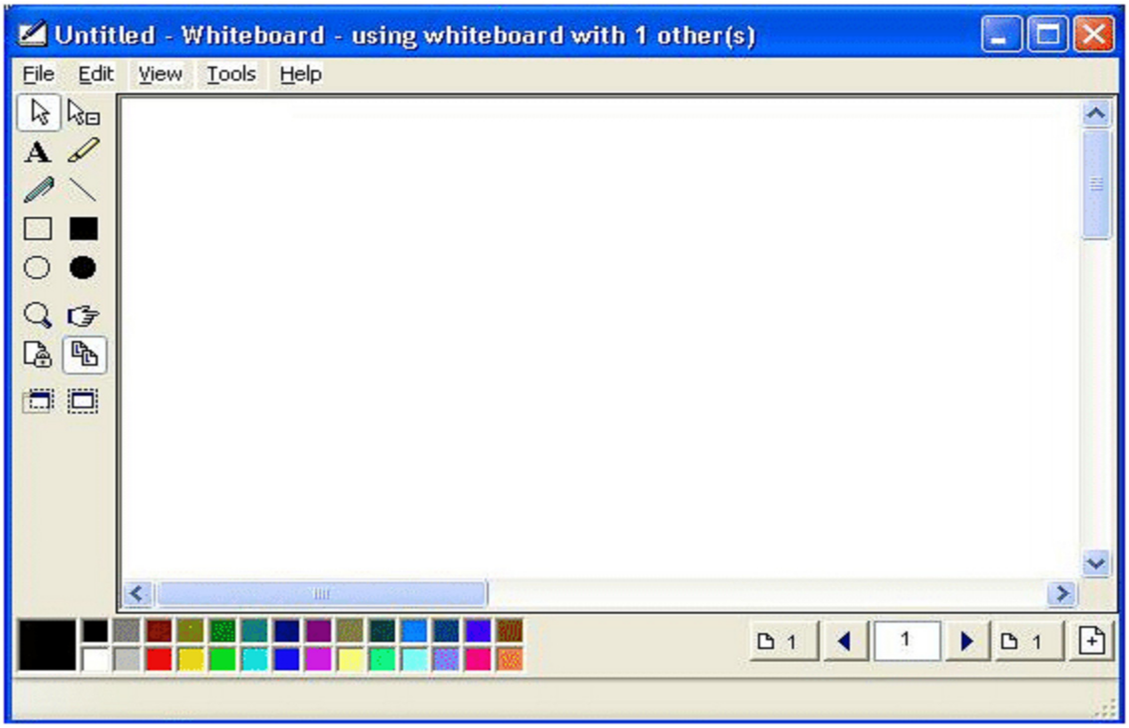
1. Use the mouse to select **Whiteboard** on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. Select or enter an extension within the **Choose Party** menu and select **Start** to initiate a whiteboard session with the specified user.



3. When a whiteboard session has been established, the following utility appears on both your screen and the other user's screens. Both you and the other user of the whiteboard session can cooperatively control the utility and view the images created with the utility.



4. Either you or the other user can close the utility independently of one another to end the whiteboard session.

To initiate a Whiteboard Session using a BLF/DSS key:

1. Within the BLF/DSS Tab, use the *right* mouse button to select the user with whom you want to share the whiteboard session.
2. From the popup menu, select **Whiteboard** to initiate the whiteboard session.

To initiate a Whiteboard Session from a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry with which you want to share the whiteboard session.
2. From the popup menu, select **Whiteboard** to initiate the whiteboard session.

Transferring Files

NOTE — *The Share function is part of the legacy Enhancement Bundle, which may not be available on all systems.*

The **UC Suite** provides several different methods to initiate a file transfer session. The **FTP** function allows you to send a file to another desktop application user, while the **BLF/DSS area** and **Directory Menu** provide special features to initiate a file transfer session.

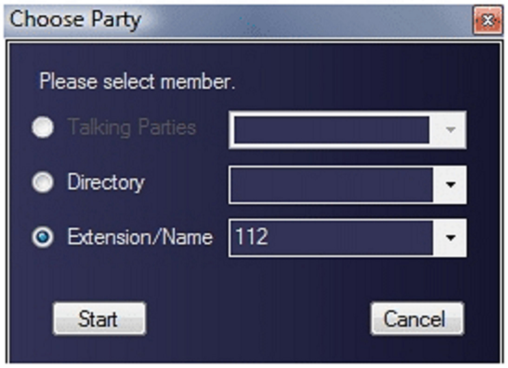
To initiate a file transfer session:

1. Use the mouse to select **FTP** on the **Function Toolbar**.

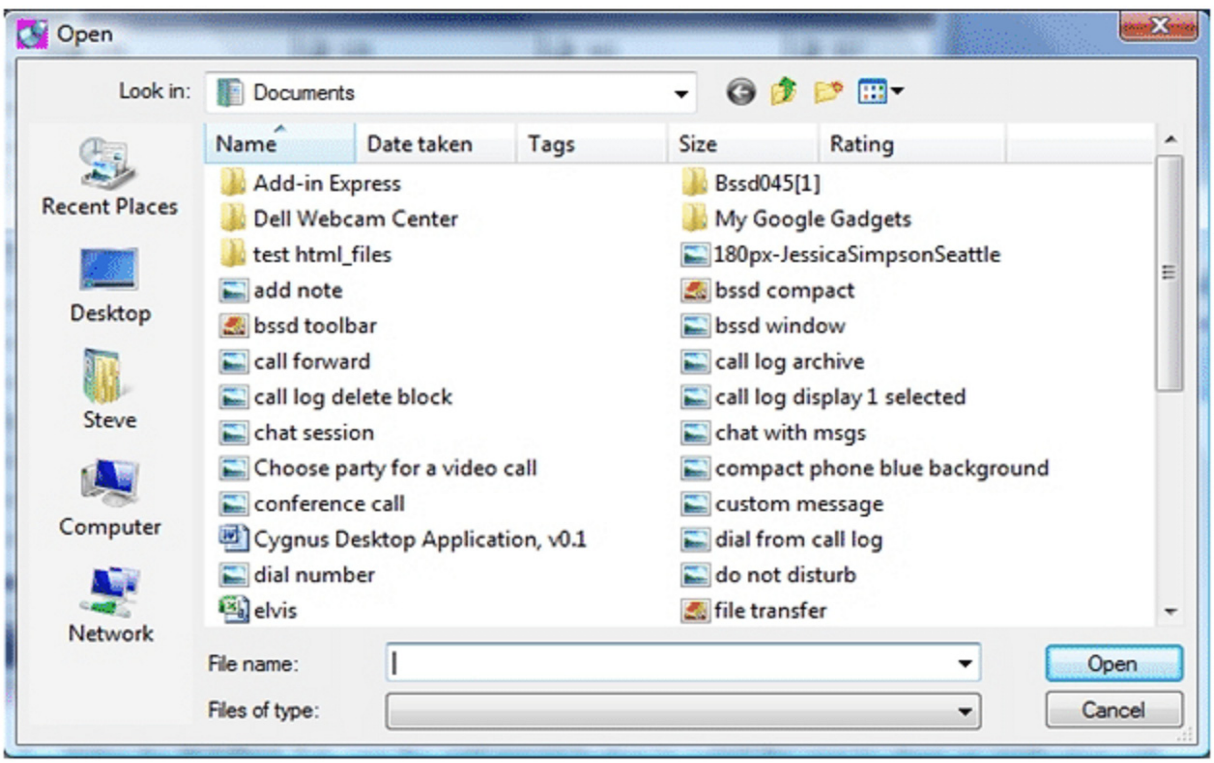
   - OR -

   Press the assigned hotkey on the keyboard.

2. Select or enter an extension within the **Choose Party** menu and select **Start** to initiate a file transfer session with the specified user.



3. After you have selected the user, the following selector screen is displayed.



4. With a file selected, press the **Open** button to begin transmitting the file to the selected user.

5. Press the **Cancel** button to terminate the file transfer session.

To initiate a File Transfer Session using a BLF/DSS key:

1. Within the **BLF/DSS** Tab, use the *right* mouse button to select the user with whom you want to share an application.

2. From the popup menu, select **FTP** to initiate the file transfer session.

To initiate a File Transfer Session from a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry to indicate where the file will be transferred.
2. From the popup menu, select **FTP** to initiate the file transfer session.

Setting up a Video Call

The **UC Suite** provides several different methods to initiate a video call. The **Video** function is used to setup a video call with another desktop application user, while the **BLF/DSS area** and **Directory Menu** provide special features to initiate a video call.

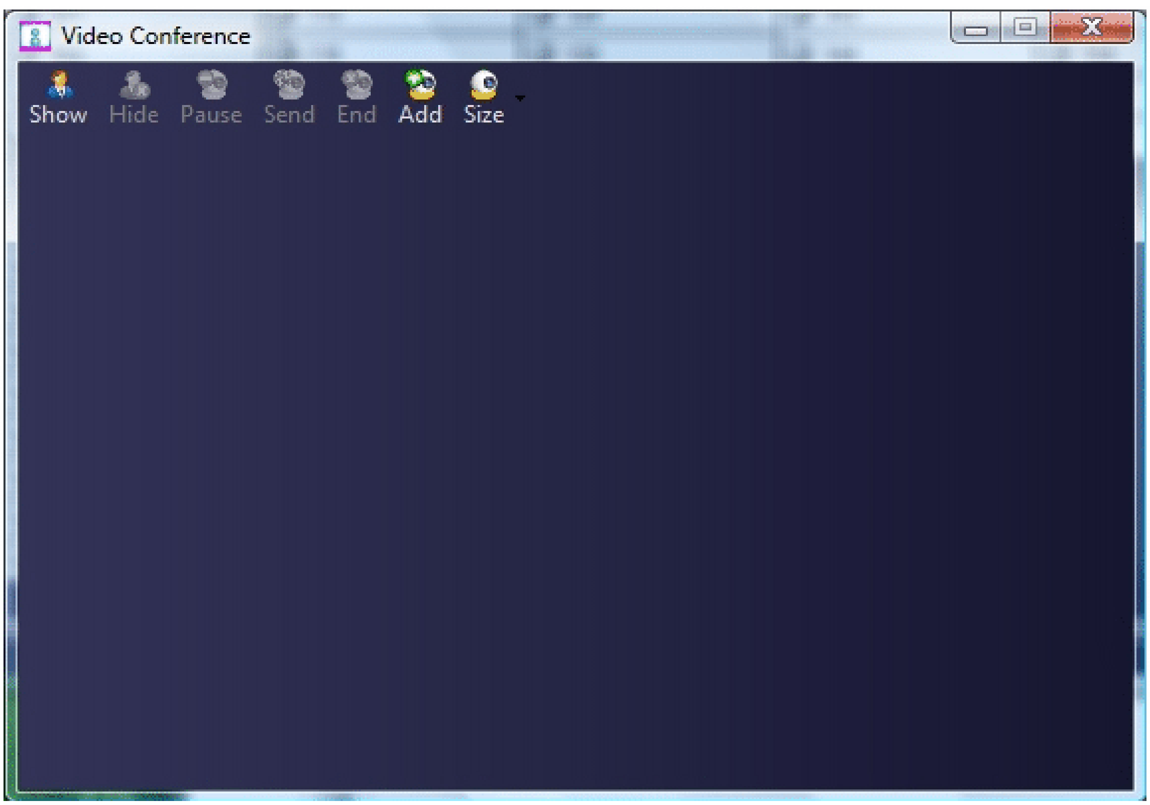
NOTE *The ability to video call from a digital telephone requires that a video camera device be installed. The Video Call features* ***will not be enabled*** *if this device and the associated device drivers are not installed on the host PC. No additional equipment is required to video call when using the softphone.*

To initiate a video call using the Video function:

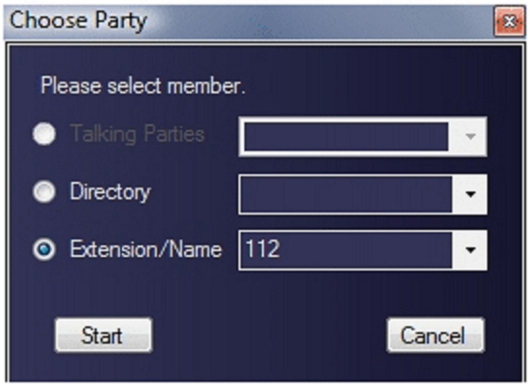
1. Use the mouse to select **Video** on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. On the Video Conference screen, select **Add** to invite a member to join the video call.



3. Select or enter an extension within the **Choose Party** menu and select **Start** to send a video call invitation. When the destination party accepts, the video call will be in progress.



To initiate a video call using a BLF/DSS key:

1. Within the BLF/DSS Tab, use the *right* mouse button to select the station to receive the video call.
2. From the popup menu, select **Video** to send the video call invitation.

To initiate a video call from a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry to receive the video call.
2. From the popup menu, select **Video Call** to send the video call invitation.

Other features during the video call:

- **Show** opens a video frame that displays the user's own video image.
- **Hide** closes the video frame that displays the user's own video image.
- **Pause** stops the video transmission of the user's video image to the other members of the video call.
- **Send** resumes the video transmission of the user's video image to the other members of the video call.
- **End** stops the video transmission and closes all of the video frames.
- **Size** allows the user to select between Large size and Small size video images.

USING NEC UC SERVICES

The **UC Suite** includes the option to install UC Services that are available for use by all **UC Suite** users. The UC services manages shared resources and provides communication facilities between user endpoints. The UC services available in this product include:

Shared Directory and Contact List provides a shared database, which includes the company directory and external contact list that can be accessed by all users.

Centralized BLF Monitoring is used to monitor the status of all stations on the system and updates are provided by the UC Services to the individual clients.

Common Trunk Labeling provides a central storage for assigning labels to trunks.

Messaging manages the delivery of messages and responses from attendant level users to end user desksets and is used to customize the set of predefined messages and responses on local PCs. The messaging operations that can be accomplished include:

- ❑ Instant Messaging with another UC Suite user
- ❑ Sending a Phone Message
- ❑ Customizing Messages and Responses

Presence is used to maintain and report the availability, location, and other information of individual employees in the company directory. The presence operations that can be accomplished include:

- ❑ Setting up Presence Details
- ❑ Viewing the Presence Settings

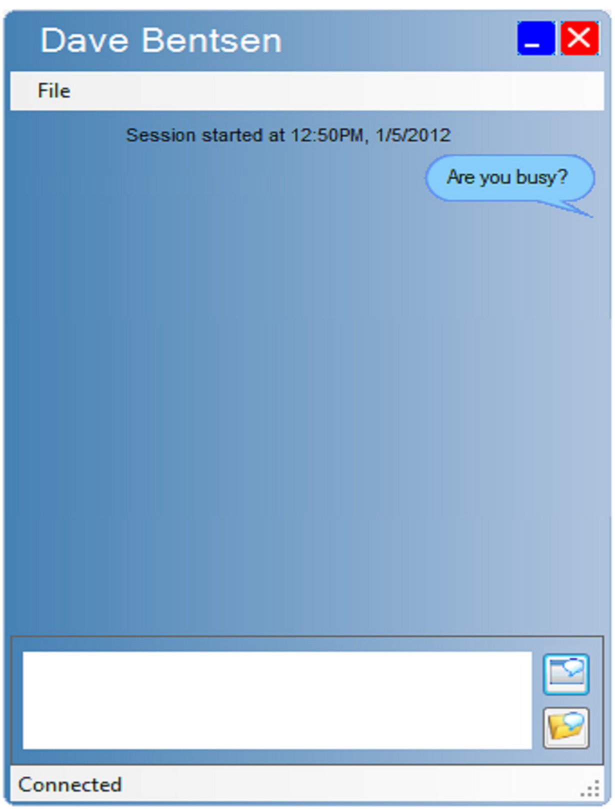
Communicating with Instant Messaging

UC Suite provides an Instant Messaging (**IM**) feature that allows desktop clients to hold private chat sessions on their PCs. The IM feature is a valuable communication tool that allows you to exchange information with another user while they are on the phone, in a meeting, or otherwise unable to take a call.

The **Instant Messaging** feature requires that **NEC UC Services** is installed and active. In addition, a user must have the privilege set within SV9100 system programming to allow access to the **IM** feature.

To initiate an IM session with another user:

1. Select the **IM** button from the function toolbar and select an available user or right mouse click on the desired user and select the **Instant Message** option.

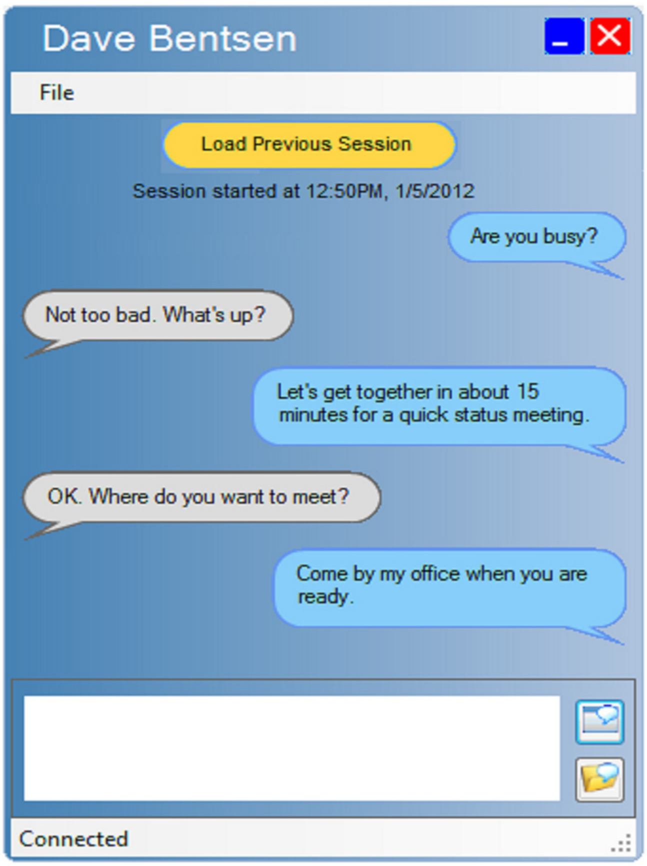


2. Enter the message in the data entry area and press the **Send** button to deliver the message.

3. Responses received from the other user will be shown in the history area.

4. The **Save** button can be used to save the IM session to a text file.

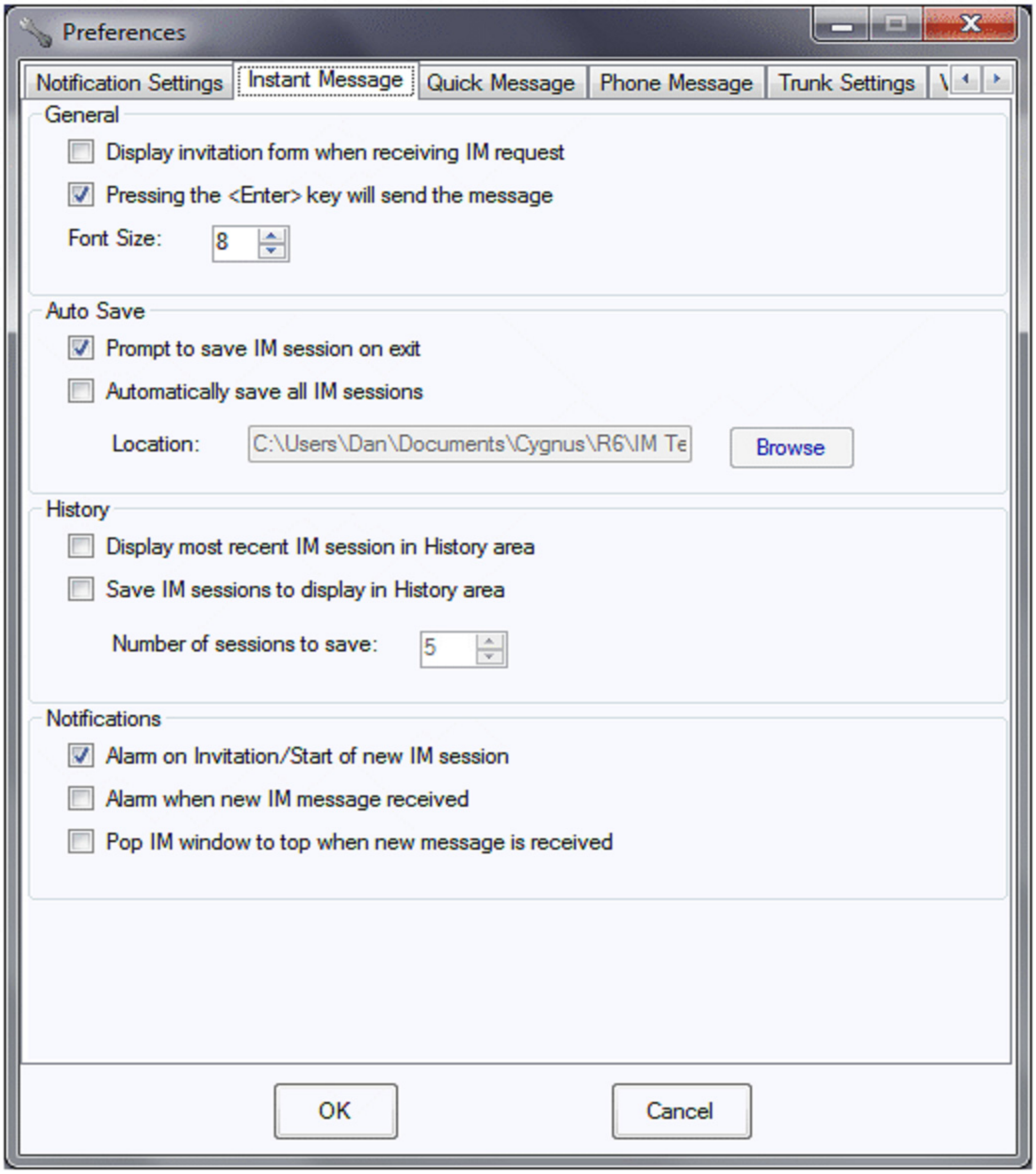
5. Message from previous **IM** sessions with this user can be loaded by clicking on the **Load Previous Session** button.



To change default settings for Instant Messaging:

1. From the **Tools** menu, select the **Preferences** option.

2. Select the **Instant Message** tab on the **Preferences** menu.



3. Select the **Display invitation form when receiving IM request** option if you want to accept IM requests before the IM window is opened. If this option is not selected, the IM window will open automatically when a user starts an IM session with you.

4. Enable the **Pressing the <Enter> key will send the message** option if you want the Enter key to initiate a Send. If this option is disabled, the Send button must be used to deliver the IM message.

5. The **Font** option will change the size of the text font in the IM window.

6. The **Auto Save** options control if the user is prompted to Save the IM messages at the end of every session or if the IM sessions are automatically saved.

7. The **History** settings allow the user to control if previous messages from earlier sessions with this user are shown.

8. The **Notification** options control the alerts and actions that occur for IM sessions and messages.

Sending a Phone Message

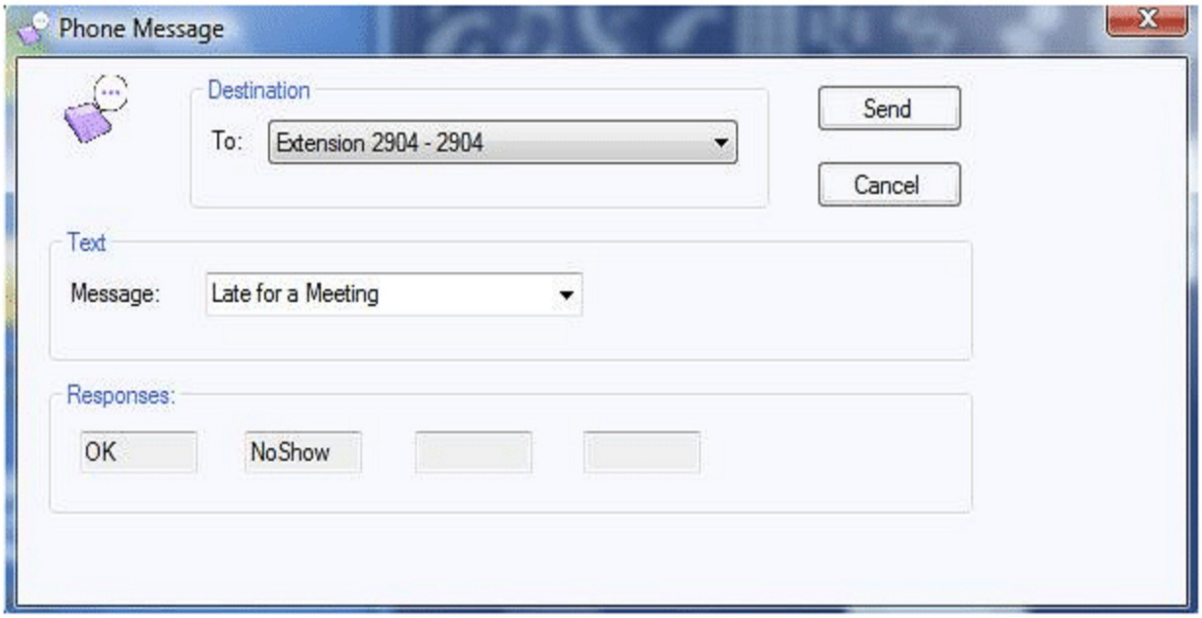
The **UC Suite** provides several different methods to send a Phone Message. The **Phone Message** function allows the user to send a message to a telephone, while the **BLF/DSS area** and **Directory Menu** provide special features to initiate a phone message.

To initiate a Phone Message:

1. Use the mouse to select **Phone Msg** on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.



2. Select an extension within the **Destination** menu, then select the desired message from the **Text** menu.
3. Select **Send** to send the phone message to the specified telephone. The message is displayed on the participants telephone and waits for the user to select a response.
4. The response is displayed in the Call Area of the message sender.

To send a Phone Message using a BLF/DSS key:

1. Within the **BLF/DSS** tab, use the *right* mouse button to select the user who receives the message.
2. From the popup menu, select **Phone Message** to initiate the message.

To send a Phone Message from a Directory entry:

1. Within the **Directory menu**, press the *right* mouse button to select the directory entry to receive the message.
2. From the popup menu, select **Phone Message** to initiate the message.

Customizing Messages and Responses

The **UC Suite** maintains the set of predefined messages and responses at the local PC for each attendant. These messages and responses can be selected later for use in a phone message.

To modify the selectable Messages and Responses:

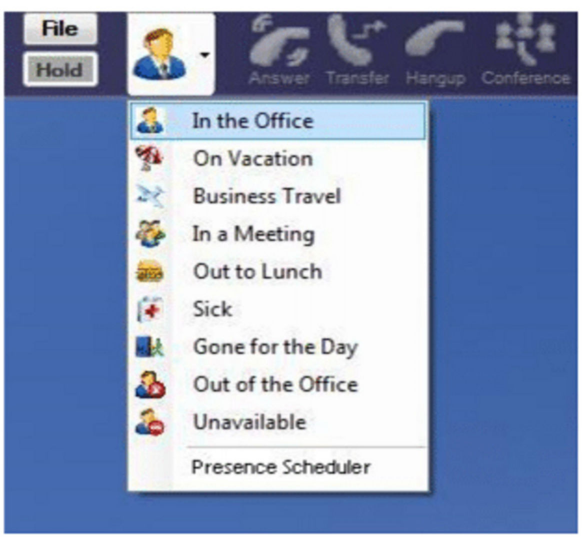
1. On the **Tools** menu, select the **Preferences** option.
2. Click on the Phone Message tab within the **Preferences** menu.
3. Add **New** or **Delete** existing messages and responses.
4. Click on **OK** to save the selectable messages and responses.

Setting Up Presence Details

The **UC Suite** provides different methods to easily setup **Presence** details. In addition, Attendant Level users with the appropriate permission are allowed to update the Presence details for all other users.

To initiate Presence Setup in Toolbar Mode:

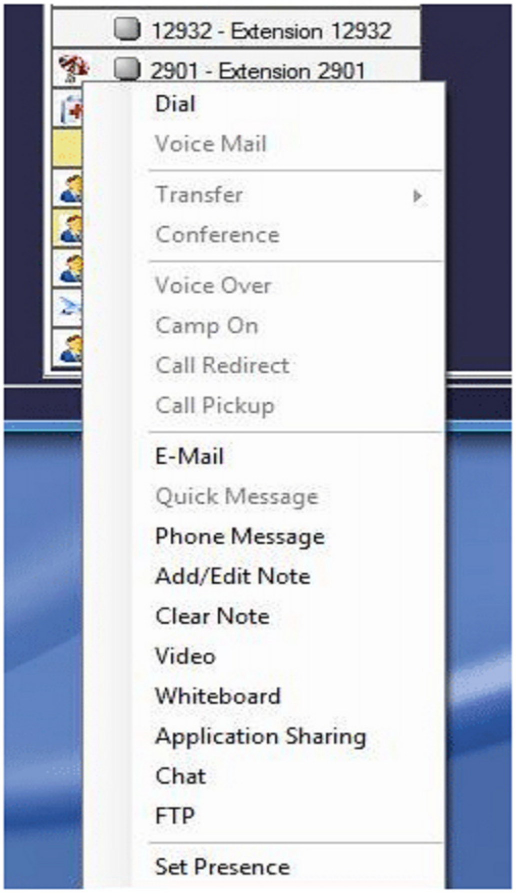
1. Use the mouse to select the **Presence** icon on the **Function Toolbar**.
2. Select the desired Presence State or select **Presence Scheduler** to set up Presence states for future events.



To initiate Presence Setup in Window Mode:

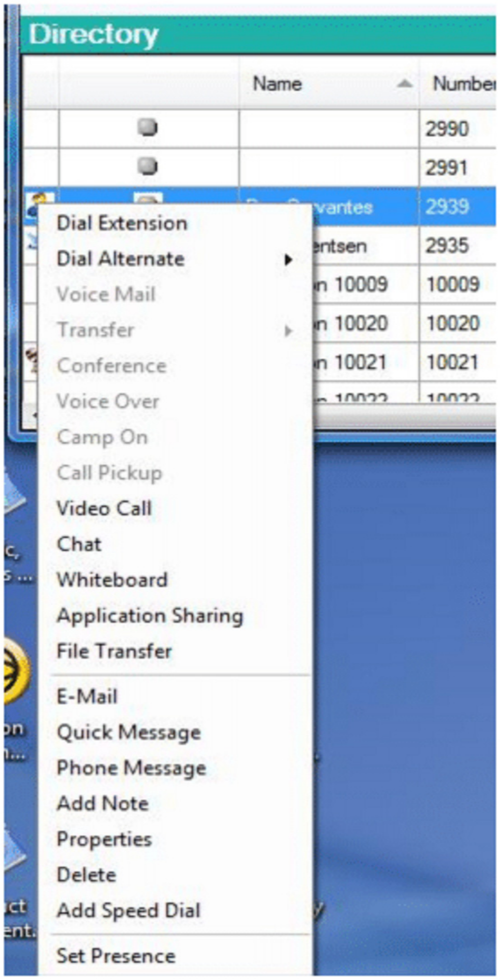
1. Within the **BLF/DSS** tab, use the right mouse button to select an extension for Presence.
2. When the menu is displayed on the participants screen, select **Set Presence** from the bottom of the list.

   You can also *right* mouse click on the Presence State, displayed in the lower left-hand corner, to change your own Presence state.



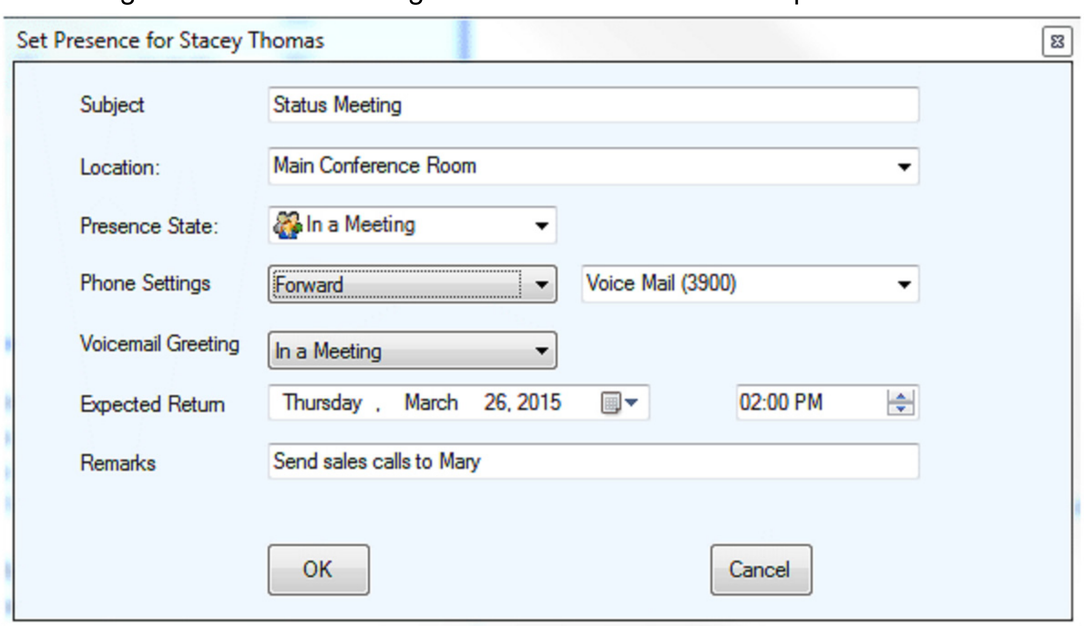
To initiate Presence Setup in Directory View:

1. Within the Directory menu, use the right mouse button to select an entry to set Presence.
2. Select **Set Presence** from the bottom of the menu.



To set details for a Presence State:

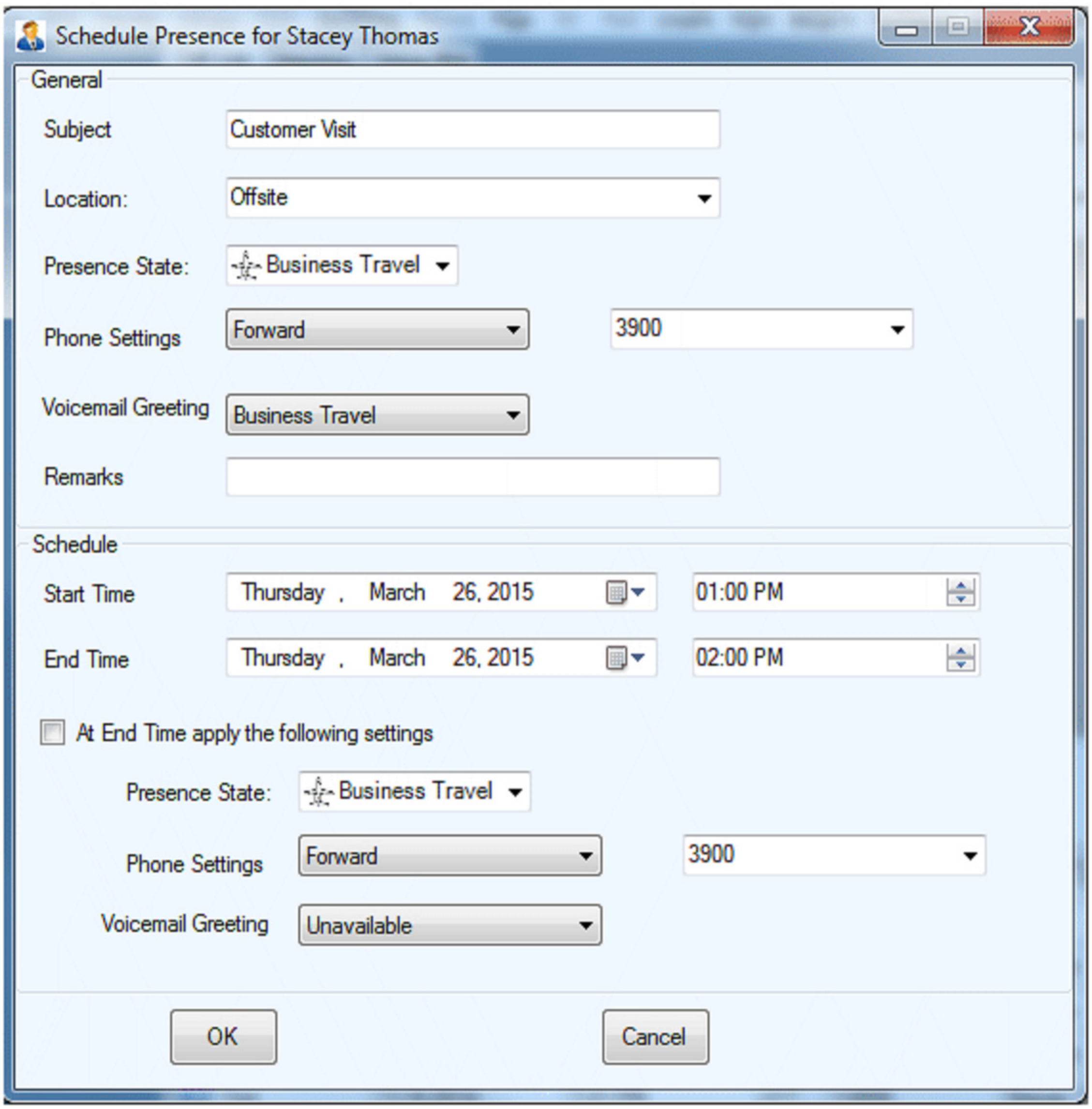
The following form is used to change the Presence Details for a particular state.



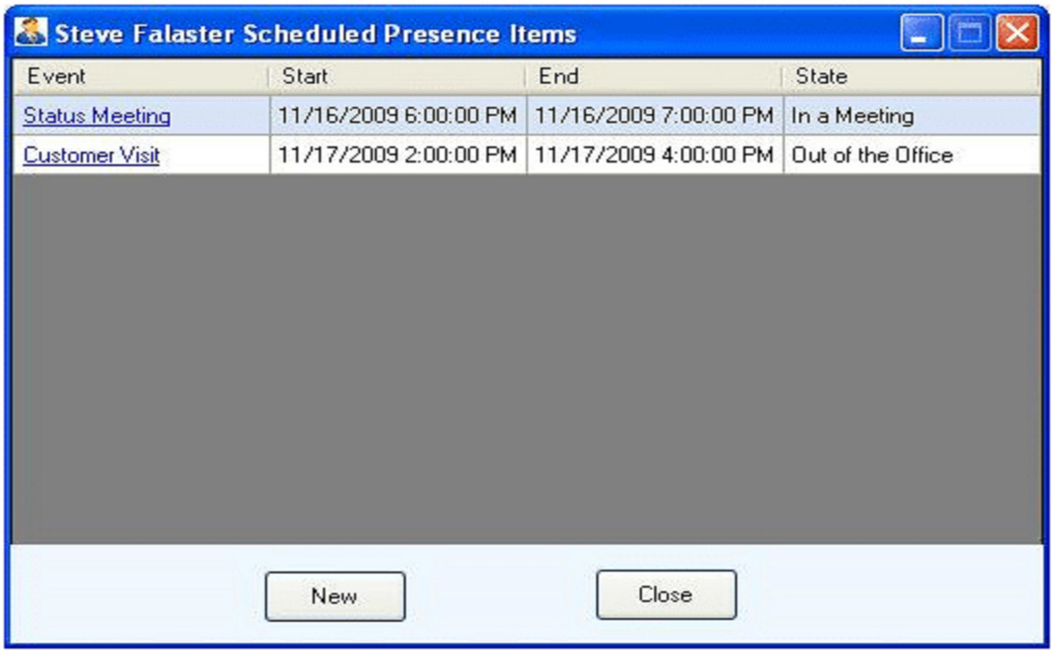
- The **Subject** field can be used to provide a descriptor for the Presence event.
- The **Location** field can be used to specify where the individual will be at this time.
- The **Presence State** specifies the current Presence setting.
- The **Phone Settings** can be used to automatically Forward the phone or set to Do Not Disturb. If the Forward option is selected, the Forward destination is specified in the following field.
- The **Expected Return** fields allow the user to specify the date and time that event is scheduled to end.
- The **Remarks** field can be used to add any additional information that the user would like to relay to other users.

To schedule a Presence event:

1. Select the **Presence Scheduler** option from the Presence menu. The set of currently defined Presence events is displayed.



2. Select **New** to create a new Presence event.



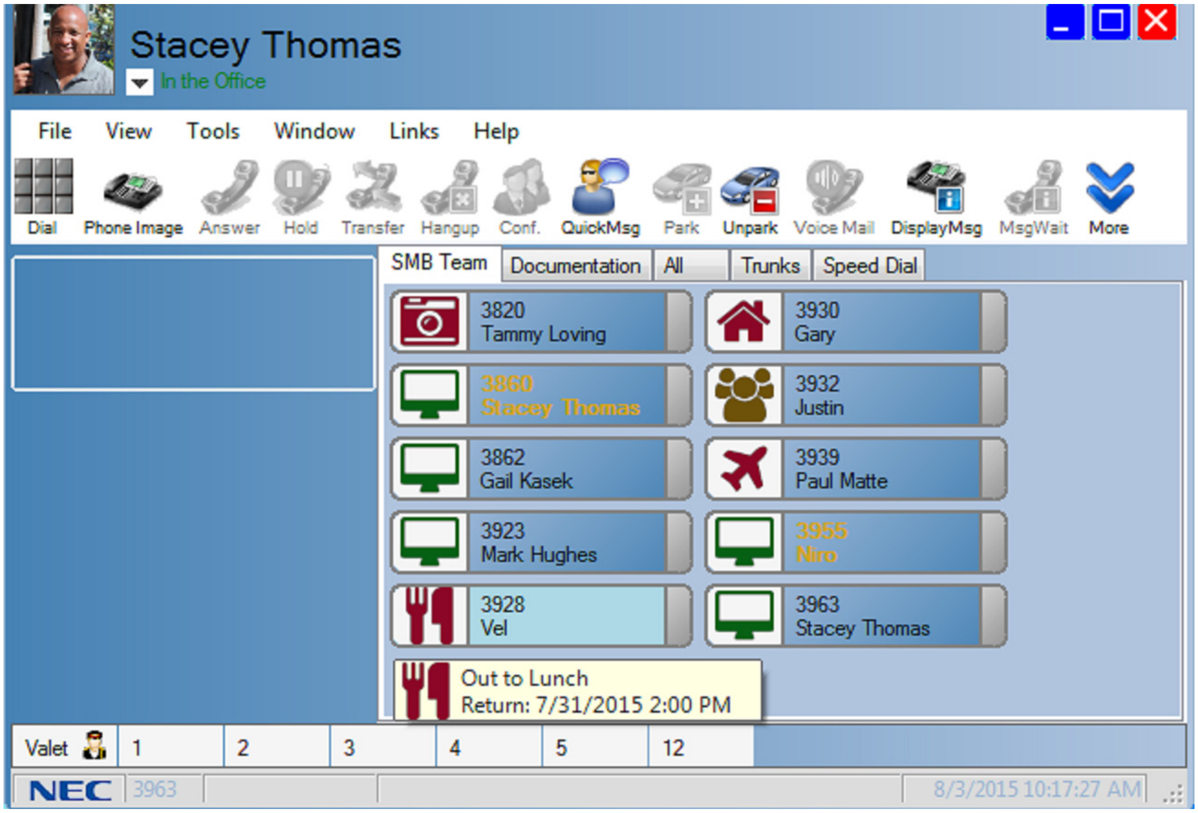
- The **Subject** field can be used to provide a descriptor for the Presence event.
- The **Location** field can be used to specify where the individual will be at this time.
- The **Presence** State specifies the Presence setting associated with this event.
- The **Phone Settings** can be used to automatically Forward the phone or set to Do Not Disturb. If the Forward option is selected, the Forward destination is specified in the following field.
- The **Remarks** field can be used to add any additional information that the user would like to relay to other users.
- The **Start Time** specifies the data and time that the Presence event begins.
- The **End Time** specifies the date and time that the Presence event terminates.
  Checking the "**At End Time . . .**" box allows the user to automatically change the Presence state and Phone settings when the event expires.

Viewing Presence Settings

The **UC Suite** provides different methods to view the Presence Settings. In Window mode, the **BLF Panel** for Attendant Level users displays each entries current Presence state. In Toolbar or Window modes, the user can view the Company Directory to display the current Presence states.

To View Presence from the BLF Panel:

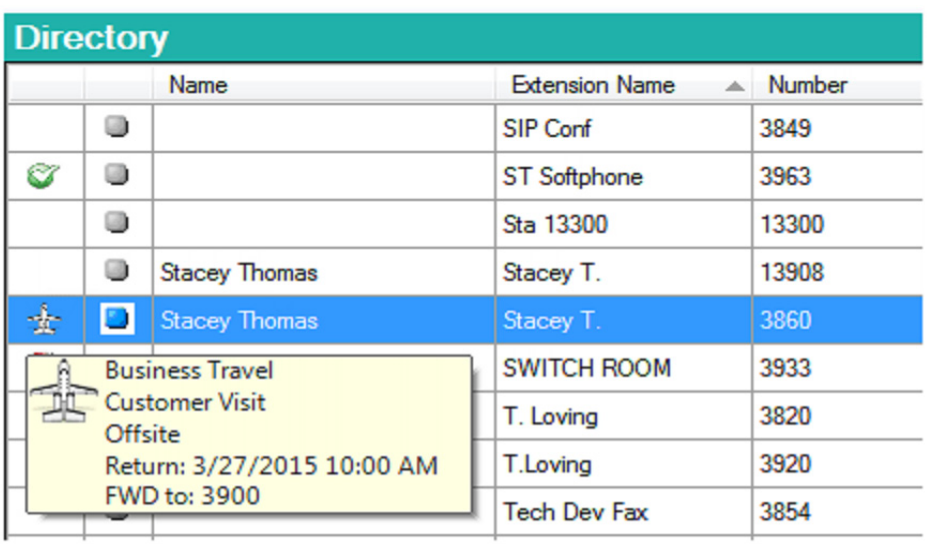
Use the mouse to hover over an entry to display a popup that shows the details of the Presence Setting. An example is shown below:



The details displayed include the Location, Return Date and Time, Call Forward information (if set), and any Special Instructions (if specified).

To View Presence from the Company Directory:

❑ Select **Directory** from the Function Toolbar to display the Company Directory. The current Presence States will be shown as individual fields as shown below and will display details by hovering the mouse over an entry:



USING ADDITIONAL DESKTOP FEATURES

The **UC Suite** provides several supplementary features that assist the user in their everyday tasks. The additional features of the product include:

- *Recording the Active Call*
- *Accessing the Paging System*
- *Playing a Personal Greeting*
- *Using Contact Center Features*
- *Forwarding the Telephone*
- *Setting the Telephone System to Night Mode*
- *Screen Pop a Contact*
- *Using the Speed Dial List*
- *Setting a Custom Message*
- *Playing Background Music*
- *Setting Do Not Disturb*
- *Dialpad*
- *Switching Login Modes*
- *Toggling the Phone Image*

Recording the Active Call

The **UC Suite** provides the ability to record the active call and save the recording as a file on your PC. This file can then be played back within the application or e-mailed as a WAV file to another user. Recordings are associated with individual entries in the **Call Log** and can be accessed within the **Call Log Tab**.

NOTE

The ability to record calls from a digital telephone requires that a CTI device be installed in the deskset. The Recording features ***are not*** *enabled if this device and the associated device drivers are not installed on the host PC. No additional equipment is required to record when using the softphone.*

To start recording a call:

- Use the mouse to select **Record** on the **Function Toolbar**.

  - OR -

- Press the assigned hotkey on the keyboard.

  When a call is being recorded, the label on the **Record** button changes to **Stop** on the **Function Toolbar**.

To stop a recording:

- Use the mouse to select **Stop** on the **Function Toolbar**.

  - OR -

- Press the assigned hotkey on the keyboard.

  - OR -

- Use the mouse to select **Hang Up** on the **Function Toolbar**.

- OR -

❑ Press the assigned hotkey on the keyboard.

If recording is stopped and restarted on the same call, the individually recorded sessions will be combined into a single file.

If a call that is being recorded is placed on hold, the recording will automatically be restarted when the call is retrieved from hold.

To automatically record all calls:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **Recording** tab on the **Preferences** menu.
3. Select the **Record All Calls** option.
4. Select **OK** to save the new setting.

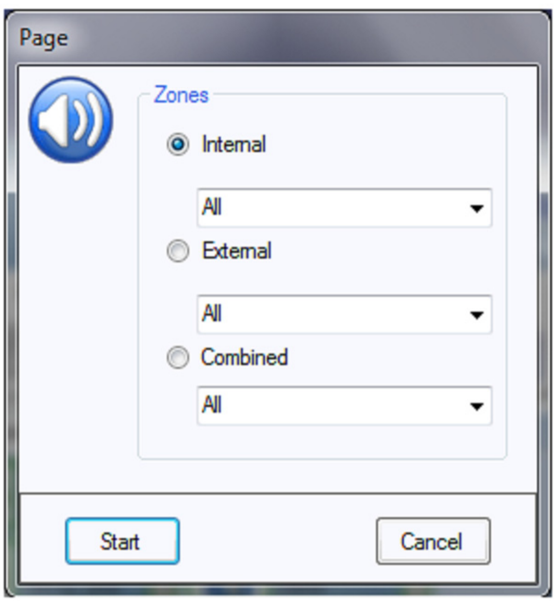
Accessing the Paging System

To send a Page:

1. Use the mouse to select **Page** on the **Function Toolbar**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. Select the type of page to be generated: **Internal**, **External**, or **Combined**.



3. Select the paging zone within the selected category.
4. Select the **Start** button to initiate the page.
5. Announce the page.
6. Select the **Hang Up** option to disconnect from the paging system.

Playing a Personal Greeting

The **UC Suite** can be setup to automatically play a personal greeting to the caller on every incoming call. The greeting can be heard by both the caller and user and is only played for external calls. This feature can be used to present a professional appearance to customers by delivering an accurate and consistent greeting with each call.

NOTE *The ability to play a personal greeting requires that a CTI device be installed, when using a digital telephone. The Personal Greeting features will not be enabled if this device and the associated device drivers are not installed on the host PC. The softphone does not require any special hardware to support the Personal Greeting feature.*

To setup a personal greeting:

1. Record a greeting using a utility such as the Windows Sound Recorder and save the file on the attendant PC.
2. On the **Tools** menu, select the **Preferences** option.
3. Select the **Personal Greeting** tab on the **Preferences** menu.
4. Select the option **Enable Voice Greeting** on the **Personal Greeting** menu.
5. Specify the file name of the recording to be used, or press the **Browse** button to select a file.
6. Press **OK** to save the settings.

Using Contact Center Features

The **UC Suite** integrates with the SV9100 Contact Center to provide agent functions, queue monitoring functions, and alerting of abandoned calls.

Agent Functions

The **UC Suite** can be setup to allow a Contact Center Agent to control their status. When enabled, the agent is able to Login, Logout, enter Wrap mode, and change their status to Off Duty. For this control to be available, the agent must have the Login, Wrap, and Off Duty buttons programmed on their softphone or deskset phone.

To enable the Agent functions:

1. On the **Tools** menu, select the **Preferences** option.
2. On the **Preferences** menu, select the **Contact Center** option.
3. Select the **Enable ACD agent features** to allow the user access to the ACD function set.
4. Setup the options to specify whether an Agent ID code and/or AIC are required for this user to login.

To change agent status:

1. In **Toolbar** and **Window** modes, the Agent state is shown on a large button, similar to the Presence status.
2. Clicking on the Agent status button will open a drop down menu that allows the user to select their new state. Only the states that have corresponding buttons on the user softphone or deskset are displayed.

Monitoring Functions

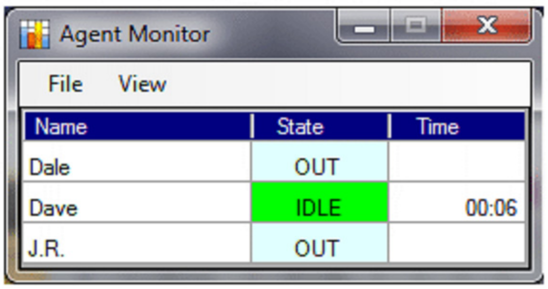
The **UC Suite** can be setup to allow authorized users to monitor the current status of contact center agents and queues. The user must have the appropriate privileges set within the SV9100 system programming to have access to these features.

To enable the ACD Monitoring functions:

1. On the **Tools** menu, select the **Preferences** option.
2. On the **Preferences** menu, select the **Contact Center** option.
3. Enter the **IP Address** and **Port Number** to allow communication with the **Contact Center Server**.

To view the status of the ACD agents:

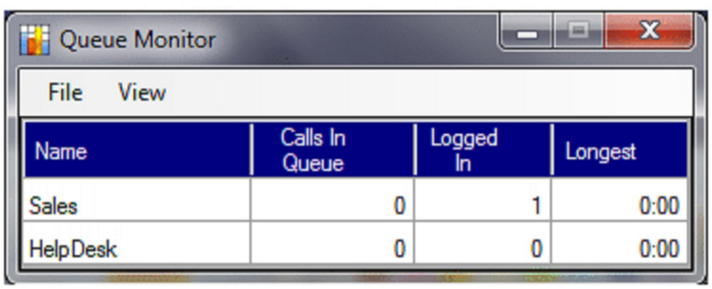
1. On the **Window** menu, select the **Agent Monitor** option.



2. On the **View** menu, choose **Select Agents** to change the list of agents that are being monitored.

To view the status of ACD queues:

1. On the **Window** menu, select the **Queue Monitor** option.



2. On the **View** menu, choose the **Select Queues** option to change the list of queues that are being monitored.

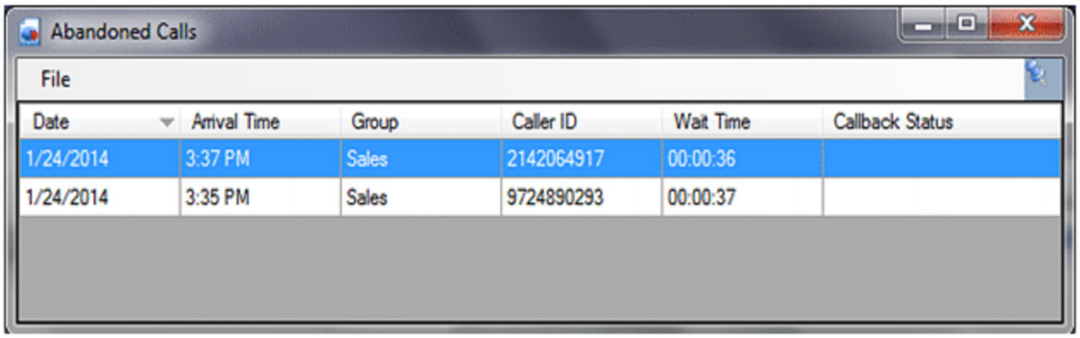
3. On the **View** menu, select the **Set Thresholds** option to change the values that control when the color of the **Queue Monitor** entries will change.

Abandoned Call Alerts

The **UC Suite** can be setup to allow a desktop user to be alerted when callers hang-up while waiting in an ACD queue. These abandoned calls are summarized in a table format, allowing the user to dial back the caller. Only calls that include Calling Line ID (CLID) are included in the abandoned call list.

To enable Abandoned Call Alerts:

1. On the **Tools** menu, select the **Preferences** option.
2. On the **Preferences** menu, select the **ACD Agent** option.
3. Select the **Enable Alerts** option within the **Abandoned Call Alerts** section.
4. Select the queues from the **Active Queues** list that are to be monitored.
5. Select the **Audible Alert** option to have a tone generated for each new abandoned call.
6. Select the **Popup Alert** option to have a popup message appear for each new abandoned call.
7. When an abandoned call is detected, an alert symbol will appear in the notification area of the application window. Clicking on the alert symbol will open the Abandoned Calls table. An example of this table is shown below.



8. A right mouse click on an entry in the **Abandoned Calls** list opens a submenu that allows you to **Dial** the selected caller or **Delete** the record from the list.

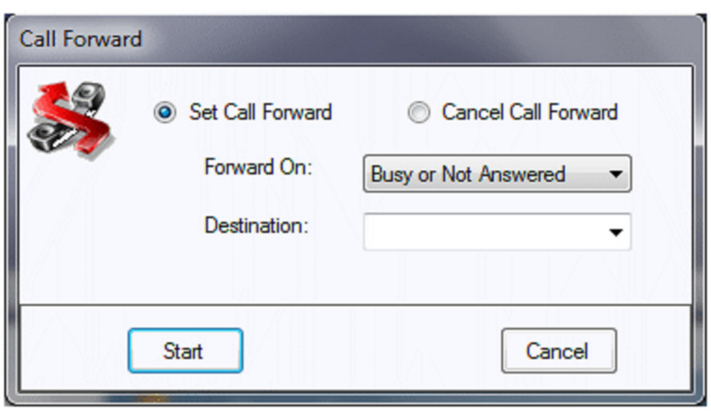
Forwarding the Telephone

To forward the telephone:

1. On the **Function Toolbar**, select **Call Forward**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. On the Call Forward menu, select **Set Call Forward.**



3. Select the conditions and destination for forwarding calls.
4. Select **Start** to initiate the call forward setting.

To cancel the forward function:

1. On the **Function Toolbar**, select **Call Forward**.
2. On the Call Forward menu, select **Cancel Call Forward**.
3. Select **Start** to cancel the call forward setting.

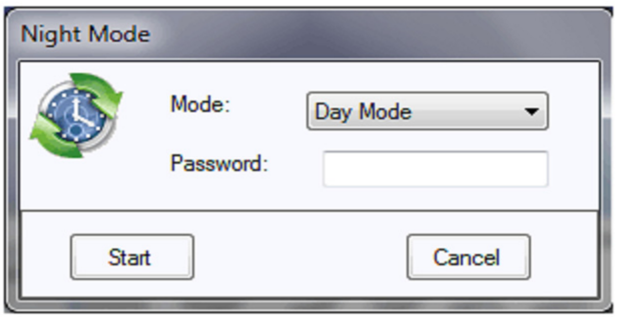
Setting the Telephone System to Night Mode

To set the system in Night Mode:

1. Press the **Night** button on the **Function Toolbar** when the attendant phone is idle.

   - OR -

   Press the assigned hotkey from the keyboard when the attendant phone is idle.
2. Select the **Night Mode** option from the **Mode** list.



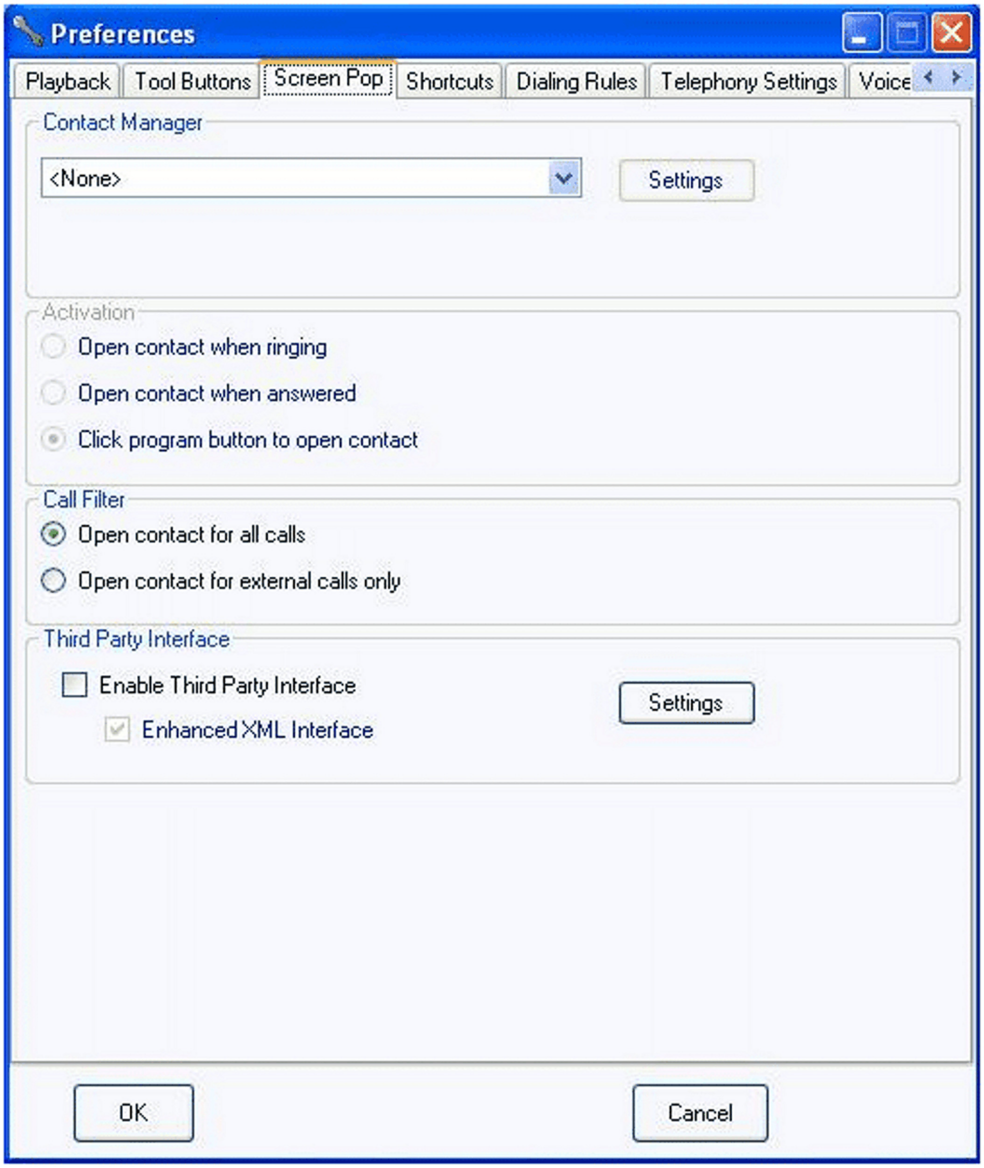
3. Enter the **Password**, if required.
4. Select **Start** to begin the Night Mode operation.

Screen Pop a Contact

The **UC Suite** provides the ability to automatically popup a screen from a contact manager program when a call is received. This capability requires that the telephone system delivers calling line identification to the desktop. With this function enabled, the **UC Suite** uses the calling line ID to lookup the associated contact within a designated contact manager program.

To setup to screen pop contacts:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **Screen Pop** tab on the **Preferences** menu.



3. Select the **Contact Manager** that is installed on the local PC from the drop down list.

   - If **Goldmine** is selected, then pressing the **Settings** button allows you to specify the Search method to use for locating contacts.
   - If **Time Matters** is selected, then pressing the **Settings** button allows you to specify the format for the phone numbers stored in the database.
   - If **Browser-based CRM** is selected, then pressing the Settings button allows you to specify the web address to be accessed.

4. In the **Activation** area, specify if the screen pop should occur when the phone is ringing or after the call is answered.

5. In the **Call Filter** area, specify if the screen pop should occur for all calls or only incoming external calls.

6. If the Contact Manager integration uses the custom **Third Party Interface**, then select the check boxes to enable the interface and **Enhanced XML Interface**.

7. Press **OK** to save the settings.

Using the Speed Dial List

Speed Dial buttons provide the user with an efficient method of initiating calls to frequently dialed numbers. The **Speed Dial** list is accessible as a tab within the BLF area of the main screen. Numbers are added to the **Speed Dial** list from the **Directory**, **Contacts**, or **Personal** contacts lists.

To add an entry to the Speed Dial list:

1. Open the Directory window and select the **Directory**, **Contacts**, or **Personal** list.
2. Press the *right* mouse button to select the **Directory** entry to add to the **Speed Dial List**.
3. From the popup menu, select the **Add Speed Dial** option.

To initiate a call from the Speed Dial list:

❑ Use the mouse to click on an entry in the **Speed Dial** list.

- OR -

❑ Press the right mouse button to select an entry in the **Speed Dial** list and then select **Dial**.

To remove an entry from the Speed Dial list:

1. Press the *right* mouse button to select the **Speed Dial** entry.
2. From the popup menu, select the **Remove** option.

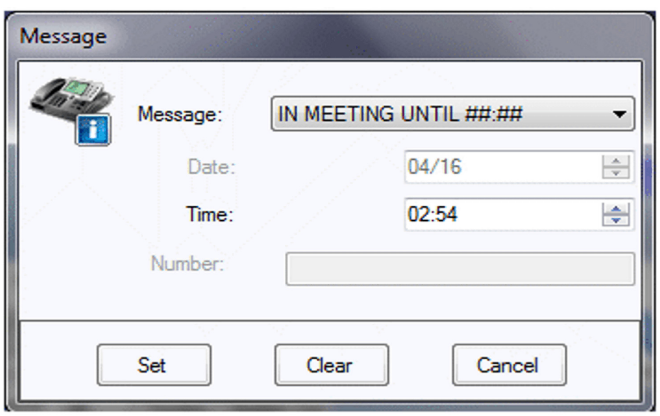
Setting a Custom Message

To add a custom message:

1. On the **Function Toolbar**, select **Cust Msg**.

   - OR -

   Press the assigned hotkey on the keyboard.
2. On the Message menu, select a pre-defined message.



Valid values are:

- IN MEETING UNTIL
- MEETING ROOM
- COME BACK

- PLEASE CALL
- BUSY CALL AFTER
- OUT FOR LUNCH BACK
- BUSINESS TRIP BACK
- BUSINESS TRIP
- GONE FOR THE DAY
- ON VACATION UNTIL
- 10 User Defined Messages

3. Select or enter the **Date, Time, and Number** values based upon the message selected.

4. Select **Set** to initiate the custom message.

To cancel the Custom Message function:

1. On the **Function Toolbar**, select **CUST MSG**.

2. Select **Clear** to cancel the custom message.

Playing Background Music

The **Background Music** function sends audio from a music source to the user's telephone. When this function is enabled, the music is played whenever the phone is idle.

To activate Background Music:

- Use the mouse to select **Background Music** on the **Function Toolbar**.

  - OR -

- Press the assigned hotkey on the keyboard.

Setting Do Not Disturb

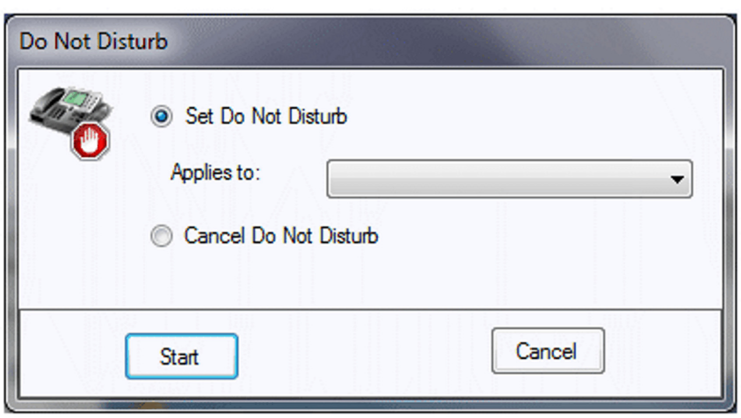
To set the system in Do Not Disturb mode:

1. On the **Function Toolbar**, select **DND**.

   - OR -

   Press the assigned hotkey on the keyboard.

2. On the Do Not Disturb menu, select **Set Do Not Disturb**.



3. Select the **Applies to** conditions for blocking incoming calls. Valid values are:
   - All Calls
   - Outside Calls
   - Paging/Intercom/Fwds/Transfers
   - Call Forwards
4. Select **Start** to initiate the do not disturb setting.

To cancel the Do Not Disturb function:

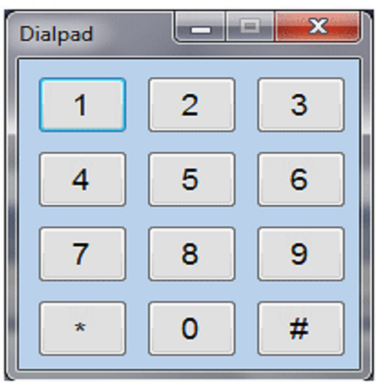
1. On the **Function Toolbar**, select **DND**.
2. On the Do Not Disturb menu, select **Cancel Do Not Disturb**.
3. Select **Start** to cancel the do not disturb setting.

Dialpad

The **Dialpad** allows the user to simulate pushing buttons on the telephone dial pad. This feature can be useful if the user needs to enter key presses when interacting with an automated response system, for example.

To access the Dialpad:

1. On the **Window** menu, select the **Dialpad** option.
2. Use the mouse to click the desired buttons or press the corresponding key on the PC keyboard.



Switching Login Modes

The **Switch Login Mode** function allows the user to switch the application from running in softphone mode to CTI mode or from CTI mode to softphone mode. In order for this function to be supported, the user must be setup in the SV9100 system programming with extensions for the deskset and softphone.

To activate Switch Login Mode:

- ❑ Use the mouse to select **Switch Login Mode** on the **Function Toolbar**.

  - OR -

- ❑ Press the assigned hotkey on the keyboard.

Toggling the Phone Image

The **Toggle Phone Image** function allows the user to display or hide the Phone Image while in softphone mode only.

To activate Toggle Phone Image:

- ❑ Use the mouse to select **Phone Image** on the **Function Toolbar**.

  - OR -

- ❑ Press the assigned hotkey on the keyboard.

CUSTOMIZING THE DESKTOP APPLICATION

The **UC Suite** offers several configuration options that can be used to customize the look and performance of the product.

The following operations are available to customize the application:

- ➥ *Resizing the Main Window*
- ➥ *Changing the BLF/DSS Button Appearance*
- ➥ *Changing the Tool Buttons Appearance*
- ➥ *Changing the Visible BLF Groups*
- ➥ *Changing the Call Log Layout*
- ➥ *Changing Audio Settings in Vista*
- ➥ *Changing the Profile Photo*
- ➥ *Changing the Window Color Scheme*
- ➥ *Profile Sharing*
- ➥ *Pinning Windows*

Resizing the Main Window

The **UC Suite** main window can be resized using the standard Windows resizing controls. Some of the common resizing techniques are:

- ❑ Position the mouse cursor on the left or right edge of the menu frame, hold down the left mouse button and drag the border to change the width of the menu.
- ❑ Position the mouse cursor on the top or bottom edge of the menu frame, hold down the left mouse button and drag the border to change the height of the menu.
- ❑ Position the mouse cursor on a corner of the menu frame, hold down the left mouse button and drag the corner to change the dimensions of the menu.
- ❑ Press the **Restore/Maximize** icon in the menu title bar to change the size of the frame.

Changing the BLF/DSS Button Appearance

To change the format of the BLF/DSS labels:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **BLF/DSS** tab on the **Preferences** menu.
3. Set the **Label Format** field to the type of information to be displayed on the BLF/DSS key. Valid formats are:
   - Extension Only
   - Name Only
   - Extension and name
4. Click **OK** to save your settings.

To change the appearance of the BLF/DSS buttons:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **BLF/DSS** tab on the **Preferences** menu.
3. Select the **BLF Appearance** field to change the button type.
   - Profile View
   - Classic View
4. Click **OK** to save your settings.

To change the order of the BLF/DSS buttons:

1. On the **View** menu, select the **Sort BLF by** option:
2. Select the **Extension** or **Name** option to resort the BLF buttons in the desired order.
3. Selecting the **Custom** setting allows you to manually re-order the BLF buttons. When the **Custom** setting is active, position the mouse cursor on the BLF button that you want to move. Hold down the mouse button while dragging the BLF button to the new location.

Changing the Tool Buttons Appearance

To change the layout of the Tool Buttons:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **Tool Buttons** tab on the **Preferences** menu.
3. Select the Tool Buttons desired from the available list, position them, and set the image size.
4. Click **OK** to save your settings.

Changing the Visible BLF Groups

The user can set up **BLF Groups**, which can be used to organize the extension list into groups of buttons. Each BLF Group is shown as a tab on the top of the BLF area on the main console screen. By selecting different tabs, the attendant is able to see the BLFs that are assigned to that group. Each console user has the ability to select which BLF groups are visible on the console.

To specify the visible BLF Groups:

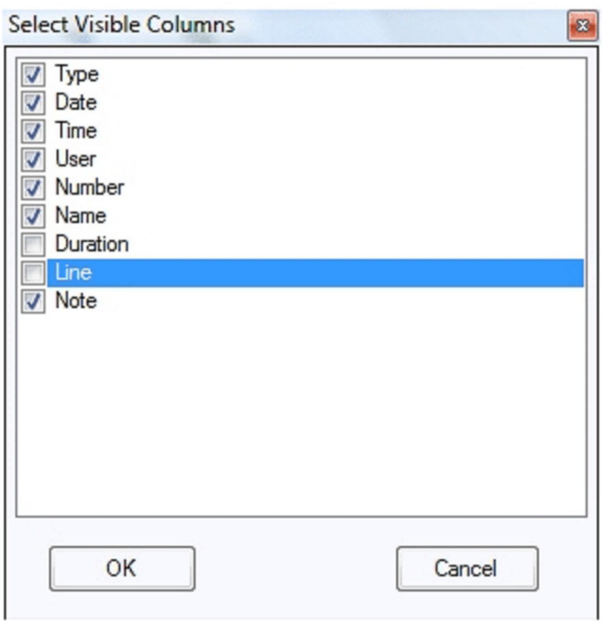
1. On the **Tools** menu, select the **Preferences** option.
2. Click on the **BLF/DSS** tab within the **Preferences** menu.
3. Select the checkbox for all BLF Groups that you want to be visible. The **Speed Dial** tab can also be enabled through this menu.
4. Select a Group and use the **Move Up** and **Move Down** buttons to change the position of the tab for the selected group.
5. Click on **OK** to save the BLF/DSS configuration.

Changing the Call Log Layout

The **UC Suite** provides several options to change the layout of the **Call Log**. The size and location of each column can be modified and the entire **Call Log** can be sorted based upon any individual column.

To change the visible columns within the Call Log Tab:

1. On the **View** menu within the Call Log window, select the **Set Visible Columns** option.
2. Check each column that will be visible on the **Call Log**.



3. Press **OK** to save the settings.

To change the order of the columns in the Call Log:

1. Position the mouse cursor within the heading of the column to be moved.
2. Hold down the left mouse button and drag the column to the new position.

To change the width of a column in the Call Log:

1. Position the mouse cursor within the heading and on the right edge of the column to be resized. When the mouse is in the proper position, the mouse cursor changes to a double-headed arrow.
2. Hold down the left mouse button and drag the border of the column to the new width.

To sort the contents of the Call Log:

1. Position the mouse cursor within the heading of the column to use for sorting.
2. Press the left mouse button to sort the **Call Log** in ascending order based upon the contents of the selected column.
3. Press the left mouse button a second time to sort the **Call Log** in descending order.

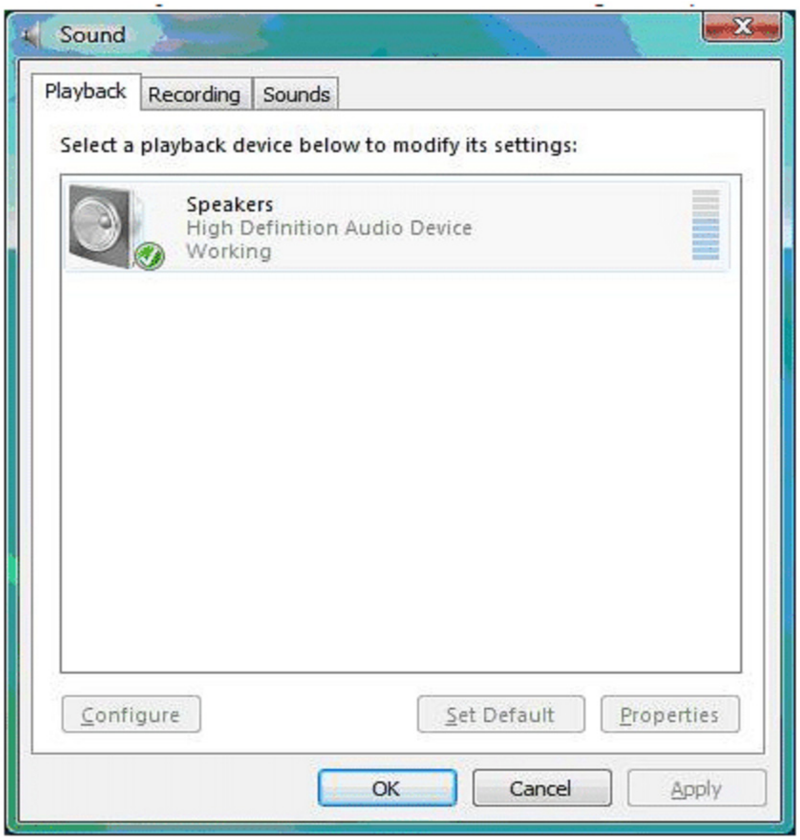
Changing Audio Settings in Vista

Successful operation of the softphone within Vista requires that the audio properties be set to a supported format. The default settings for the audio device must be set within the range of values shown in the following table.

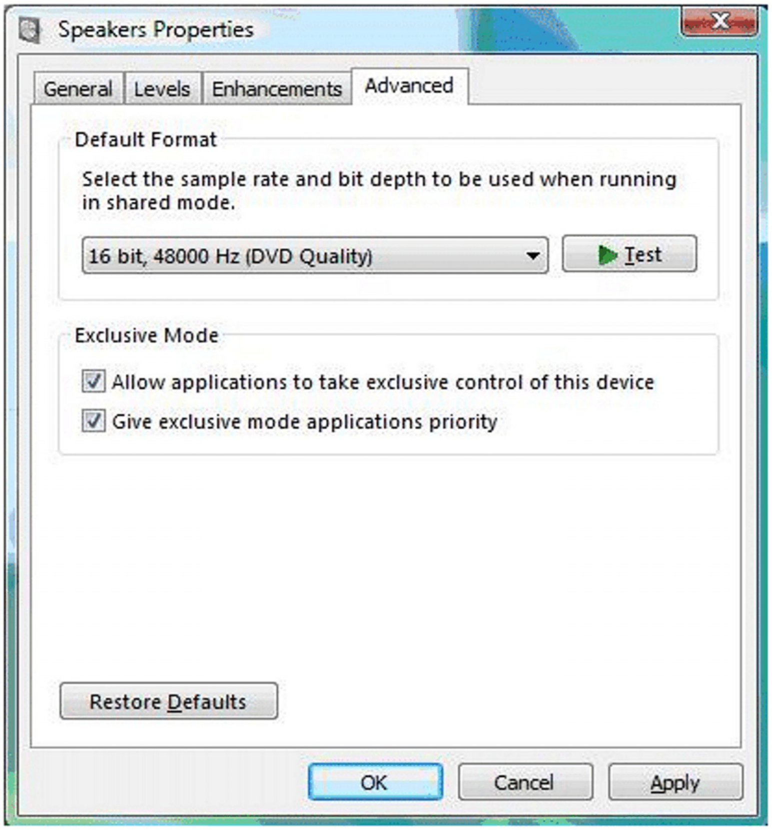
Sampling frequency (Hz):	8000 / 16000 / 32000 / 48000
Quantization bit:	16 bit
Channel:	all values supported

To change the audio properties for the Playback device:

1. On the Windows **Control Panel**, select the **Sound** option.
2. On the **Playback** tab, select the device to be changed and press the **Properties** button.



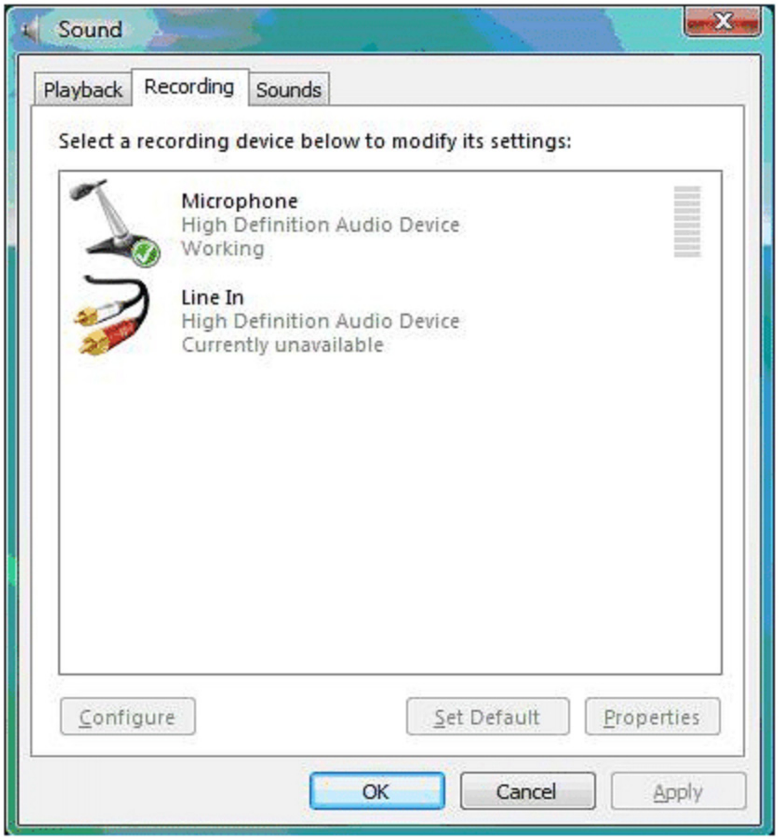
3. Select the **Advanced** tab and set the default format to a supported setting.



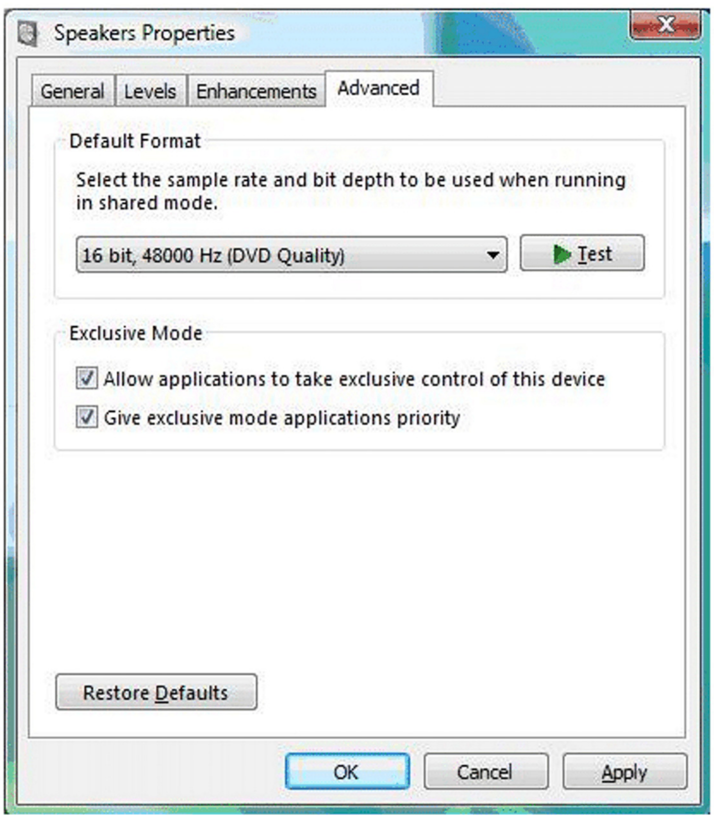
4. Select **OK** to save the settings.

To change the audio properties for the Recording device:

1. On the Windows **Control Panel**, select the **Sound** option.
2. On the **Recording** tab, select the device to be changed and press the **Properties** button.



3. Select the **Advanced** tab and set the default format to a supported setting.



4. Select **OK** to save the settings.

Changing the Profile Photo

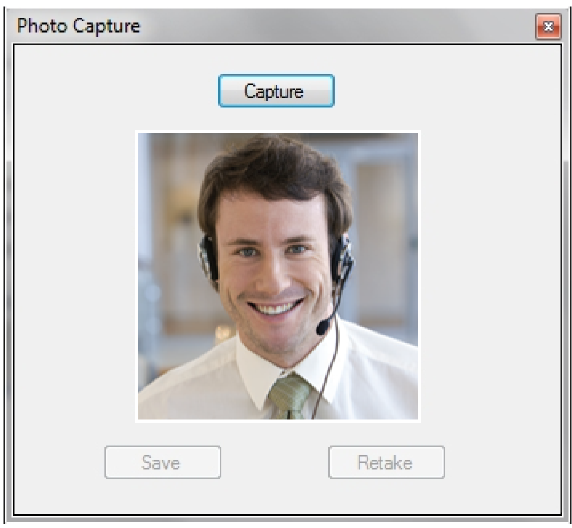
UC Suite allows each user to upload a photo to be used as their profile picture. The Profile Photo is displayed as part of the Instant Message (IM) window and within the BLF/DSS buttons within Profile View.

To select an image file to use as the current Profile Photo:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **General** tab.
3. Select the **Browse** function within the **Profile Photo** area. Use the browse function to select the photo file to be used as the Profile Photo.
4. Press **OK** to save the photo.

To capture a Profile Photo using a webcam:

1. On the **Tools** menu, select the **Preferences** option.
2. Select the **General** tab.
3. Select the **Photo Capture** function within the **Profile Photo** area.



4. Select the **Capture** button to create a photo image from the webcam. The **Save** button uses the captured photo for the profile.

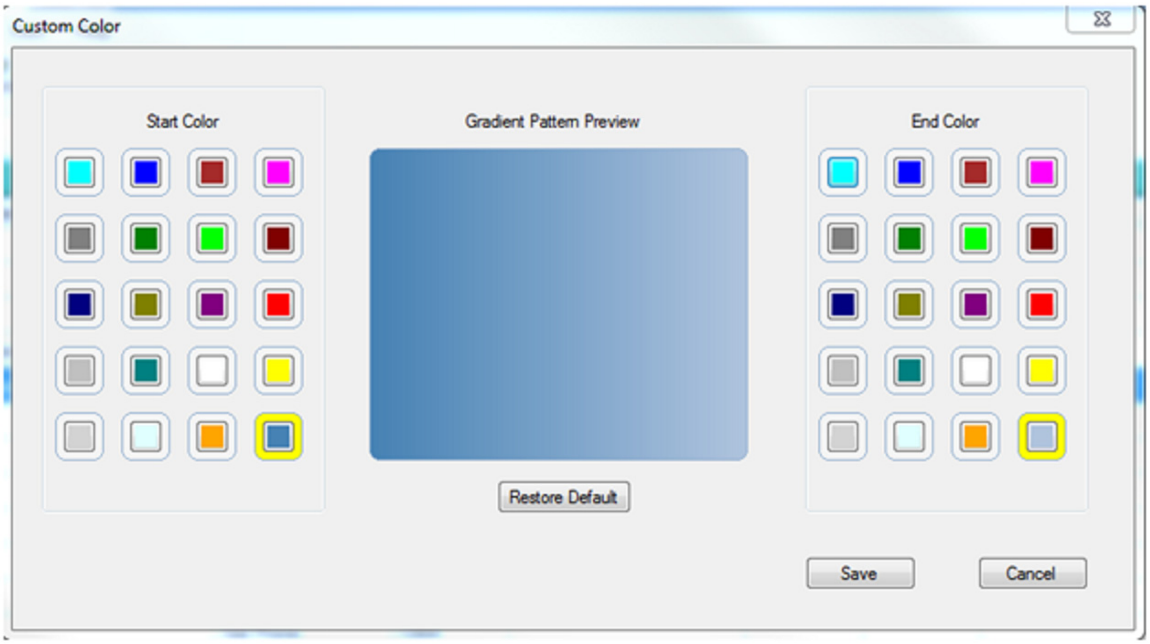
   Select the **Retake** button to discard the captured photo and activate the webcam to take another photo.
5. Press **OK** to save the photo.

Changing the Window Color Scheme

UC Suite allows each user to customize the color scheme of the Standard Window. You can select from a template of colors to create a variety of colorful window effects.

To change the Window mode color scheme:

1. On the **Tools** menu, select the **Color Selection** option.
2. The color scheme for the Window mode uses a gradient pattern that transitions from a start color to an end color. On the Custom Color menu select a **Start Color** and an **End Color**.



3. Verify the desired effect shown in the **Gradient Pattern Preview**. Press the **Save** button to apply the specified color selection.
4. To restore the color scheme to the factory settings, select the **Restore Default** button within the **Color Selection** menu.

Profile Sharing

NOTE

***Profile Sharing** requires **NEC UC Services** to be installed and running.*

UC Suite allows a user to save a copy of their Preferences and application settings for use by other desktop users. This utility is valuable for the system administrator that needs to setup multiple UC Suite clients with the same configuration. In this case, the administrator would progress through the settings and configure the first client as desired. The Profile for this user would then be saved on the **NEC UC Services** system. As the administrator accesses each subsequent UC Suite client, the saved Profile could be applied to the new user. This process would relieve the administrator from having to re-enter the same settings at multiple workstations.

To save a Profile:

1. On the **Tools** menu, select the **Profiles** option.
2. Select the **Save** option and specify a name for the saved Profile.

To apply a Profile:

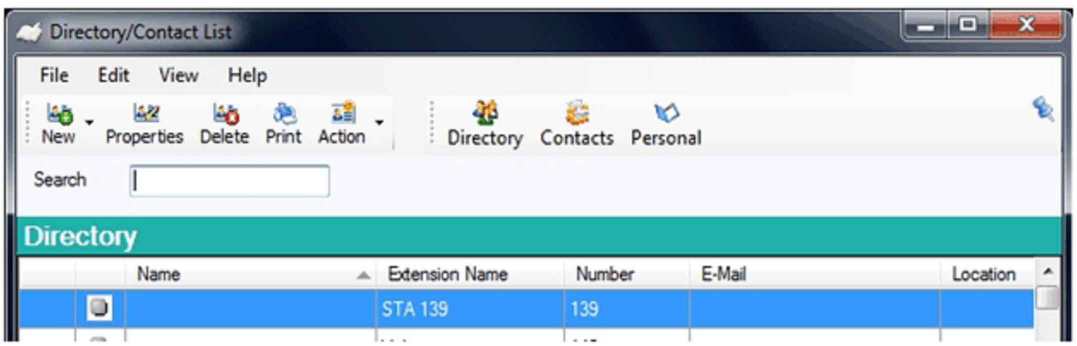
1. On the **Tools** menu, select the **Profiles** option.
2. Highlight the Profile name in the list that is to be applied.
3. Select the **Apply** option to copy the saved Profile into the UC Suite client.

Pinning Windows

UC Suite allows the Directory window, Call Log window, and Voicemail Message window to be pinned to the BLF area in Window mode. When pinned, these individual windows are displayed as separate tabs within the BLF area.

To pin a window to the BLF area:

❑ On the **Directory, Call Log, or Voicemail Message** window, click on the **Pin** icon to attach the selected window to the BLF area.



To unpin a window from the BLF area:

❑ On the **Directory, Call Log, or Voicemail Message** tab, click on the Unpin icon to detach the selected window from the BLF area.