

Quick Reference Guide

Executive Insight User

5.1

This document provides quick reference procedures for Executive Insight Users

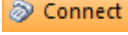
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Getting Started with Executive Insight

Start up Executive Insight

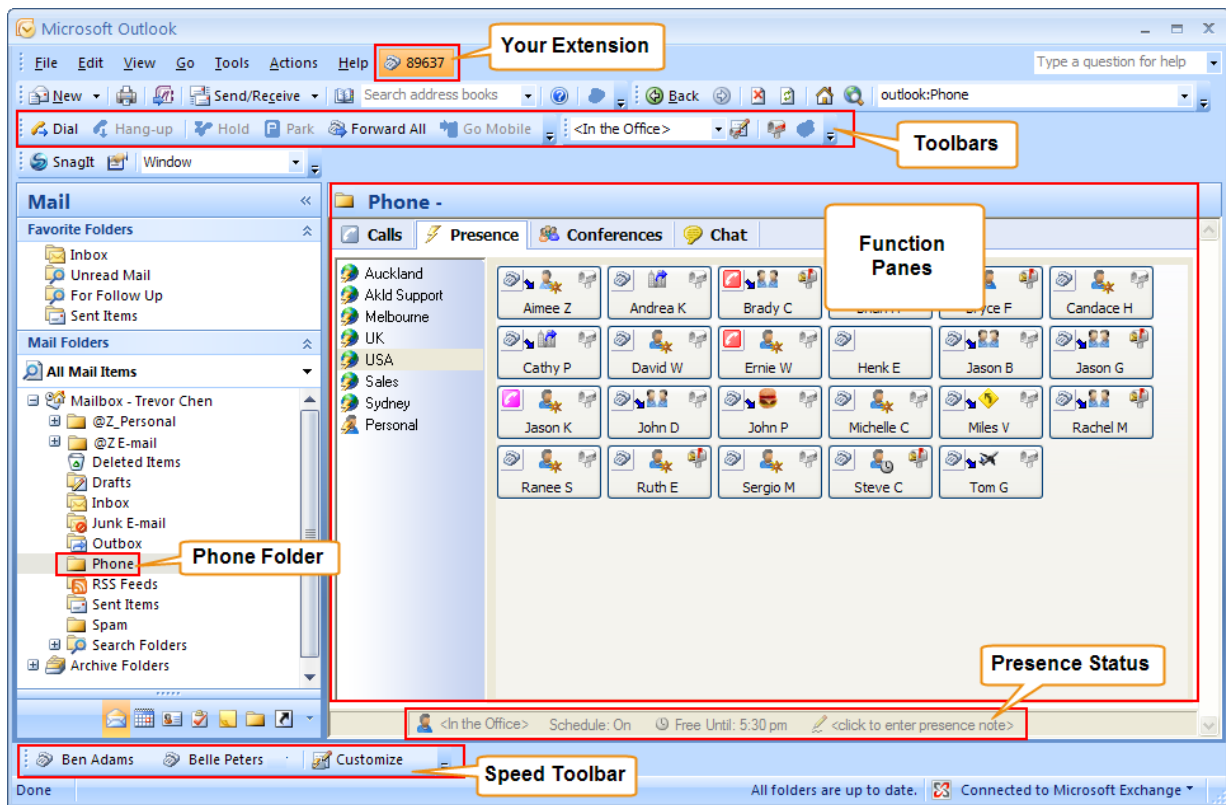
Executive Insight does not start automatically when you start Outlook. Click on the  **Connect** button at the top of the display to start Executive Insight.

You can set an option to automatically start Executive Insight. Open the **Tools>Phone** menu and check the *Load on Start* option. Executive Insight will now start automatically when Outlook is started.

Executive Insight creates a folder in the Outlook mail folders named **Phone**. You can return to the Executive Insight view at any time by opening this folder, or by clicking your extension in the menu bar.

The first time you start Executive Insight you may be prompted to complete some initial setup using the Setup wizard.

The Executive Insight Interface

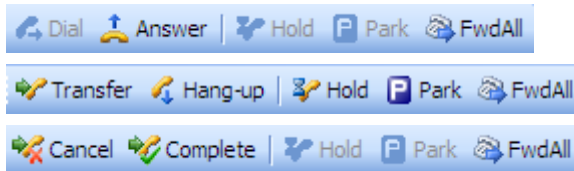


Toolbars

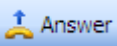

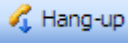


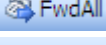
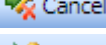
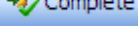
Show or hide Toolbars

1. Select *Toolbars* from the View menu and check/uncheck the items to display/hide the toolbars.

Phone Toolbar

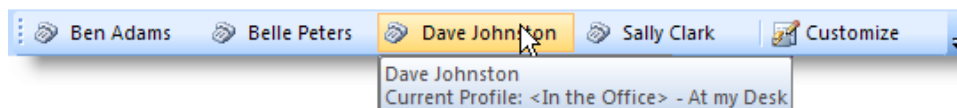


Toolbar options change dynamically based on current activity.

	Answer a call (only appears when a call is presenting)
	Dial a contact
	Hang up a call (Normally grayed out; button is available when you are on a call)
	Hold/Unhold a call
	Park/Unpark a call
	Forward all calls/Cancel Forward
	Destination Cancel - Cancel Transfer
	Complete Transfer

Speed Toolbar

Speed Buttons for frequently used Phonebook contacts can be placed on a Speed Toolbar to provide quick dialling and a visual indication of an internal user's Presence status.



Add a Speed Button:

1. Click Customize on the Speed Toolbar.
2. Select Add Speed button and using the Phonebook select the contact name and click Add Button.

Making a Call using the Speed Buttons:

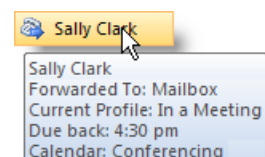
1. Click on the Speed Button of the party that you wish to call and click on the phone number or extension that you wish to dial.

Transferring a Call using the Speed Buttons:

1. Whilst on a call, click the Speed Button of the party that you wish to transfer the call to and then click on the phone number or extension that you wish to transfer the call to.

View a User's Availability:

1. Hover the mouse pointer over a Speed Button to view Presence status and their ETR, if set.

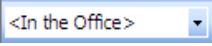





Request Availability Notification:





1. Click on the Speed Button and select:
 - *Notify Me when [Name] is back*: Use when the extension is forwarded.
 - *Notify Me when [Name] is off the Phone*: Use when the extension is busy.
2. You will receive a popup notification message.

Voice Messaging Toolbar



	View or change the current active Presence profile.
	Click to access your Mailbox setup.
	View your mailbox status. Click the Mailbox button to automatically call Voice Messaging
	Redirect an incoming call to Voice Messaging as a fax.

The mailbox button displays the mailbox status, using one of four icons:

	No messages
	1 or more ordinary messages
	Caller currently recording message.
	1 or more urgent messages.

Phonebook Functions

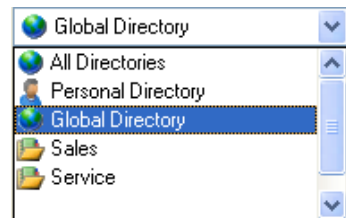
Access the Phonebook

To open the Phonebook click  on the telephone toolbar, then click  to open the Phonebook.


Search for a Contact


1. Type the contact's name in the *Look for* field. As you type the list of matches will be refined.
2. Optionally refine your search by selecting a specific search directory.
3. Select the contact's name in the *Found Contact* pane to display the associated contact numbers.

Look for



Add a new Contact


1. Select the appropriate directory from the drop-down list.
2. Click the  symbol above the *Found Contacts* pane.
3. Enter the contact details in the *New Contact* window and click OK.
4. Select the new contact in the *Found Contacts* list.

5. Click the  symbol above the *Numbers/Addresses* pane.
6. Choose a number type from the drop-down menu. Populate the 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 can not be dialled from the Desktop Application.


Note: (New Zealand only) *Area Code* does not require the leading "0" (zero).

7. Click OK to store the information. Repeat steps 5 and 6 to add additional contact numbers.

Edit Contact Details

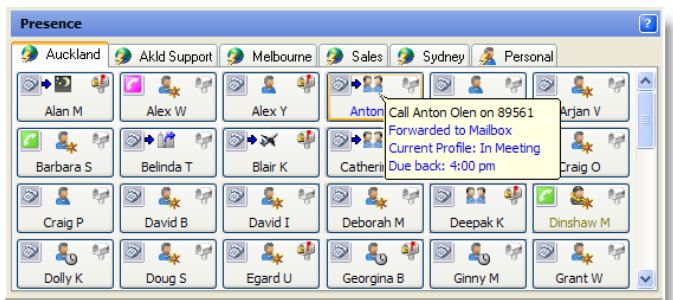
1. Select either the contact name or the contact number.
2. Click the  icon above the pane or select *Properties* from the right-click menu to edit the information.
3. Update information as required and click OK to save.

Delete Contact Details

1. Select either the contact name or the contact number.
2. Click the  icon or select *Delete* from the right-click menu to delete the information.
3. Click Yes when prompted to confirm the deletion.

Presence Functions and Buttons

Presence buttons provide real-time visual information on the whereabouts and availability of staff. If they are out of the office or in a meeting you can see when they will be back and if they are away from their desk or on a call you can request an automatic notification when they are available again. Presence buttons can also be used to initiate a call to that person. Presence buttons can be grouped and arranged on separate pages.



Presence Buttons

There are two types of Presence buttons:

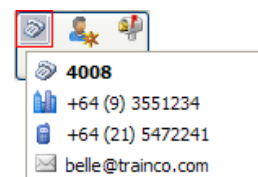
- **External** (telephone numbers outside your office)
- **Internal** (in-house extension numbers)



Internal Presence buttons enable you to view the user's extension status by viewing icons and the status tool tip. You can also perform advanced call functions for an extension using the right-click popup menu. The user's name displays in mustard text if they are logged into queues as an agent.

Left click - more numbers

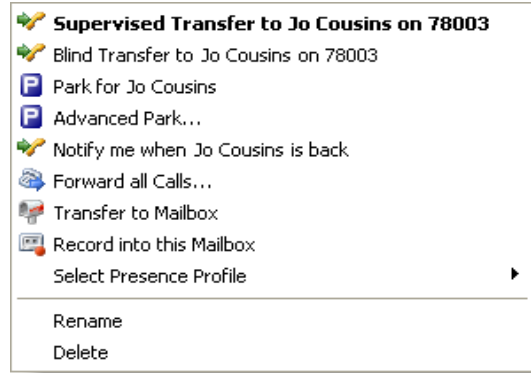
Click the phone status icon to display additional contact numbers. Click the number you wish to call.



Right click - other functions

Right-click on the Presence button to display the pop-up menu.





Note: The actual options available will depend on the type of PBX being used, how the system is setup and your enabled security permissions. Certain options will also only be visible when there is an active call on your extension.











	Call 'user' on extension	Initiate a call to the user on the designated telephone number.
	Supervised Transfer to 'user'	Transfers your Active Call to the user's extension and enables you to talk to the user before completing the transfer.
	Blind Transfer to 'user'	Transfers your Active Call to the user's extension.
	Transfer Call	Transfers your Active Call to the user's extension.
	Park for 'user'	Holds the Active Call at your extension; you can then retrieve the call.
	Advanced Park	Parks your Active Call and pages the user.
	Notify me when user' is back	A screen-pop will inform you when the user is in the office and available to take your call.
	Forward all Calls	Forwards all your calls to a specified internal or external number.
	Leave a Voice Message	Record a Voice Message for the recipient.
	Ask 'user' to call me back	The user will receive a pop-up call-back request on their return.
	Transfer to Mailbox	Transfers your Active Call to the user's Voicemail mailbox.
	Record Conversation to Mailbox	The conversation is saved to the current user's mailbox (if installed).
	Send Message to digital Phone	Send a short text message to the LCD screen of the user's digital phone.
	Select Presence Profile	Change the user's Presence profile.
	Rename	Rename the Presence button.
	Delete	Delete the Presence button.

Presence Button Symbols

Phone Call Types		(Gray) Extension is idle
		(Various colors) Extension is ringing or 'offering'
		(Various colors) Extension 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)

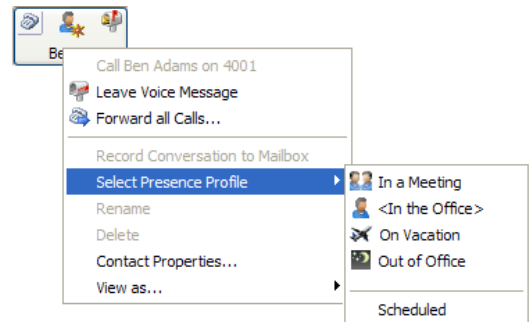
Profiles		In the Office
		In a Meeting
		Out of the Office
		On Vacation
		(Gray Head) Agent is logged in to queues

Voicemail Status		No messages
		1 or more ordinary messages
		1 or more urgent messages

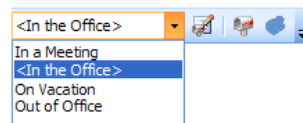
Set Presence Profile

Select and set your Presence Profile from the:

1. Presence button (right-click), or



2. Presence Toolbar.

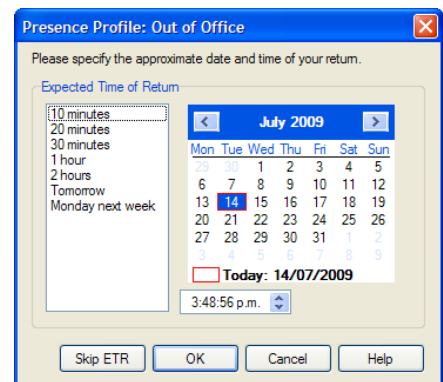


Set ETR

Your *Estimated Time of Return* (ETR) can be set for those Presence profiles used when you are not available. Selecting one of these profiles will automatically display the ETR window.

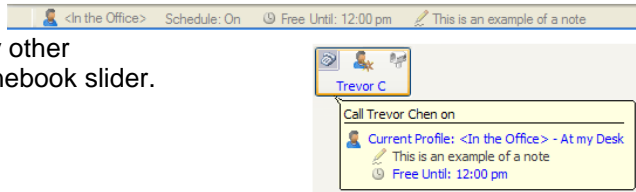
Note: Setting of ETR can be skipped unless ETR is set as mandatory in the system settings.

1. Select your date of return using the calendar function.
2. Select your approximate time of return using the standard times in the left panel or by setting the time using the clock function.
3. Click OK to save the ETR and activate the selected Presence Profile.



Presence Status

Your own Presence status is indicated in the status bar and this information can be viewed by other users via your Presence button or from the Phonebook slider.



Add a Presence Note

You can add a personal Presence note to your Status bar in Desktop, allowing you to communicate additional information about your activities and availability to your coworkers.

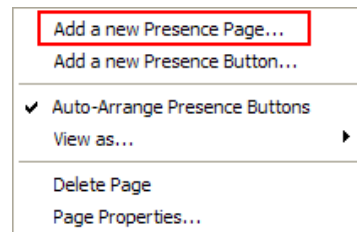
1. In the Status Bar, click on the Presence note text *<type Presence note here>*.
2. Type in your presence note in the field and press *Enter*. This Presence note will persist until you clear it or enter a new note.

Add a New Presence Page - Wizard

The *Add Presence Page* wizard can be used to create either Standard or Dynamic Presence Pages. A Dynamic Presence Page lists the contacts for a company or department automatically, while contacts on a Standard Presence Page are added and arranged manually.

Note: Only Users with System Administrator rights can add or edit Global Presence Pages.

1. To start the *Add Presence Page* wizard:
 - select *Add new Presence Page* on the *File menu*, or
 - right-click in the Presence pane and select *Add a new Presence Page*.
2. Select the *Create Personal Presence Page* option. Only administrators can create global pages.
3. Select the type of page to be created.



Standard Page Presence buttons must be added and arranged manually.
Automatic Page Presence buttons are automatically added and updated for the selected company/department.

4. Create Standard page:
Type a name for your Presence page; go to step 10.
5. Create Automatic Page:
Select a company from the listed companies.
6. Optionally select to list all contacts or only contacts from selected departments.
Note: This step is only displayed if departments have been defined.
7. Select the department(s) to display if the department option was selected in step 6 and click Next.
8. Optionally click the checkbox and specify the number of buttons per page.
This defines a maximum number of Presence buttons per page and automatically creates an additional page when this maximum is reached.
9. Enter a name for your Presence page and click Next.
10. Verify the settings and click Finish to create the Presence Page.

Rename a Presence Page

1. Right-click in the Presence page and select *Rename this Page* from the pop-up menu.
2. Type in the new name for the page and click OK.

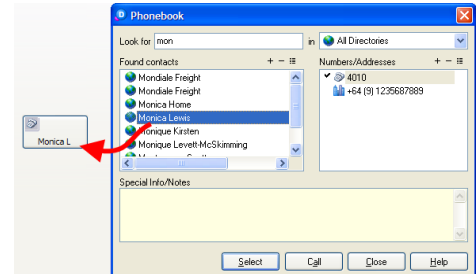
Delete a Presence Page

1. Open the page you want to delete and right-click on any blank area. Select *Delete This Page* from the pop-up menu.
2. Click Yes to confirm the deletion when prompted.

Add a Presence Button

1. Right-click on the Presence page and select the *Add a Presence button* option.
2. Select either the contact name or the contact number and click OK to create a Presence button.

Note: You can also simply drag a contact name or number from the phonebook to the Presence page to create a Presence button.



Delete a Presence Button



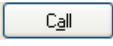
3. Right-click on the Presence button and from the pop-up menu, select *Delete*.

Managing Calls


Make a Call

You can make a phone call from your Executive Insight interface in several ways:

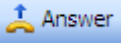
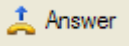
Using the Phonebook

1. Click  in the Phone toolbar.
2. Click  to open the Phonebook.
3. Locate the contact and select the number to dial, then click the  button, or press Enter.


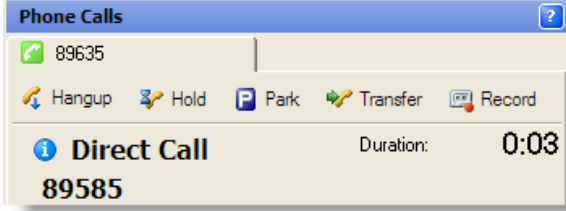
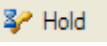

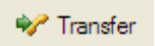
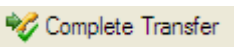
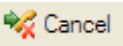
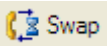
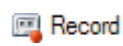
Using Presence Buttons or Speed Button

1. Click the Presence button to make a call using the default number, or
2. Click the Phone status icon  on the Presence button and click the required number, or
3. Click a speed button on the Speed toolbar and click one of the numbers.



Answer a Call

1. Click the *Answer Call* button  on the Phone toolbar, or
2. Click *Answer*  on the Phone Calls pane.

Phone Calls Pane – Active call functions

	Hang up the active call.	
	Place the active call on hold.	
	Park the active call.	
	Transfer the active call. Enter a transfer destination number.	
	Complete the transfer. (Click button or hang up the phone).	
	Cancel the transfer.	
	Swap (Connects you to your original caller, or the transfer destination.)	
	Record conversation from the active call.	

Transfer a Call using the Phonebook







1. While on an active call, click  and then click the  button to open the phonebook.
2. Select the contact you wish to transfer the call to from the *Found Contacts* list.
3. Select the contact's number from the *Numbers/Addresses* list that you wish to transfer the caller to.
4. Click the *Transfer* button to transfer the call.

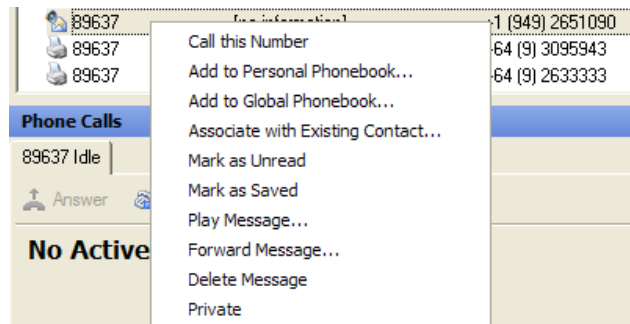
Note: To assist the transfer stay on the line until the party has picked up, otherwise release the call straight away.

Managing Voice Messages

A Voice Message is indicated in the Calls pane by an envelope with a speaker symbol.

Play a Voice Message

1. Double click the Voice Message in the Calls pane, or Select *Play Message* from the right-click pop-up menu to listen to the message.
2. To listen to the message, select either the Phone  or Speaker  option and then the click the Play button .
3. While the message is playing, You can:
 - stop the playback 
 - adjust the volume 
 - rewind, pause or fast forward the message 
4. To save the message as a .wav file on your PC, click *Save* and use the *Save As* dialog box to save the file. This file can be played back using Windows Media Player or another compatible multimedia program.



Forward a Voice Message

Use the Forward Message option in the right-click popup menu to forward the Voice Message to a Mailbox user or a distribution list.

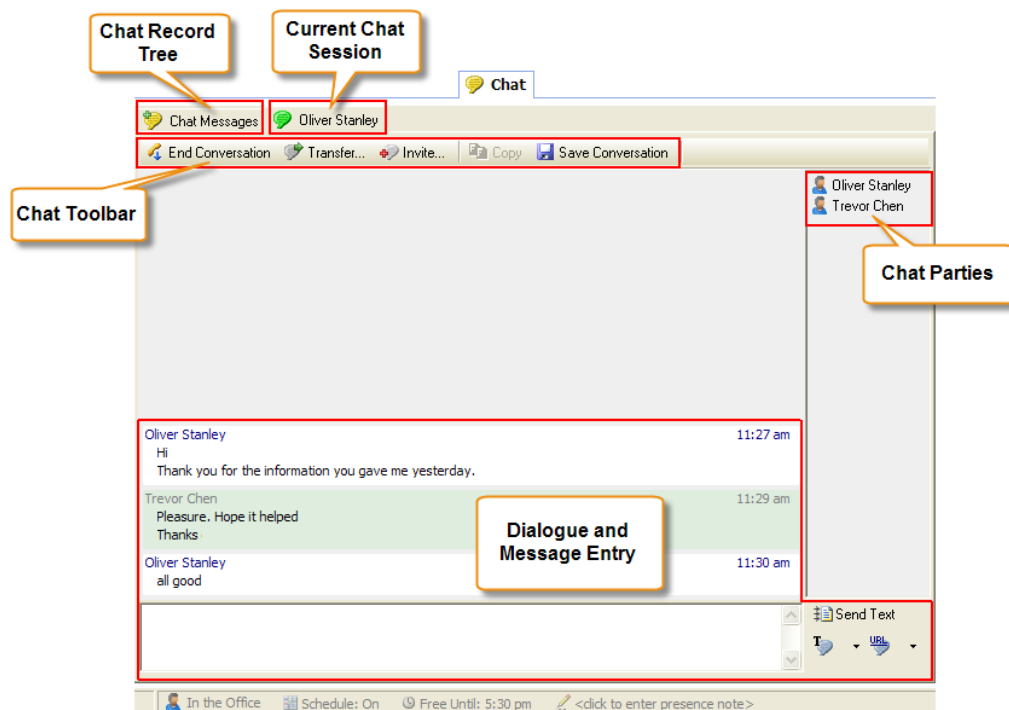
Note: If you do not check the *Keep a copy* option, the message will be deleted from your mailbox.

Delete a Voice Message

The *Delete Message* option in the right-click popup menu is used to delete a voice message.





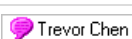

Desk to Desk Chat

Desk-to-Desk chat is used to have a 'conversation' in real time with other internal users by typing text. Click on the Chat tab in the Phone bar to open the Chat screen.


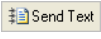


Chat Toolbar buttons and Controls




	Click to start a new chat call to either a selected chat User or Chat Queue.
	Click to end the current Chat call.
	Click to Transfer the current chat call to either a selected Chat User or Chat Queue.
	Invite one or more chat users to join the current chat call. Invitees must accept the invite to join.
	Select the chat dialogue and click the Copy button to copy to the clipboard.
	Save a transcript of the chat conversation in a text format to a specified disk directory.
	Click to transmit the typed text. Alternatively simply press the keyboard Enter key.
	Close the current chat pane.
	Add, edit or delete standard chat phrases or commonly used URL links

	Select saved text phrases from the drop-down list. These are sent directly to the other chat parties.
	Select saved URLs from the drop-down list. These are sent as links directly to the other chat parties.
	Push your current Desktop browser URL to the chat recipients.
	Automatically send a series of web page URLs as you navigate using the Desktop web browser. The Trace URL button toggles the feature on/off.
	Pink - Outbound Chat conversation
	Green - Inbound Chat conversation


Make a Chat Call

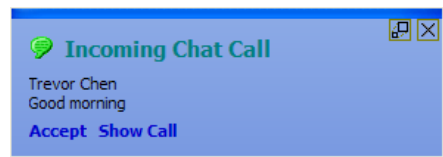
1. Click the  button to start a new chat call.
2. Select either the *Chat User* or *Chat Queue* option and then select the specific entry from the drop-down list.
3. Click the Chat button in the dialog window. A new conversation pane opens.
4. Type in the message in the message text field, then click  or simply press the keyboard *Enter* key to transmit the typed text. An outbound chat call will be shown as waiting in the *Active Calls* pane until the recipient answers the call.


End a Chat Call

1. Click the  button.
2. Optionally, click the  button to save a transcript of the chat conversation in a text format to a specified disk directory.
3. Click the  button to close the conversation pane.


Answer a Chat Call

1. When a new chat call pop-up message is displayed:
 - Click *Accept* on the pop-up message to answer the chat call, and then navigate to the *Chat* pane by clicking on the *Chat* tab, or
 - Click *Show Call* on the pop-up message to display the Chat pane, and then click the  button.




2. Type in the reply message in the message text field, then click  or simply press the keyboard *Enter* key to transmit the typed text.

Transfer a Chat Call

1. Click the  button to transfer the current chat call.
2. Select a chat User or Queue from the drop-down list. Optionally check the *Include current chat conversation* box to give the recipient access to the prior dialogue.
3. Click the *Transfer* button to complete the call transfer.

Invite Additional Chat Participants

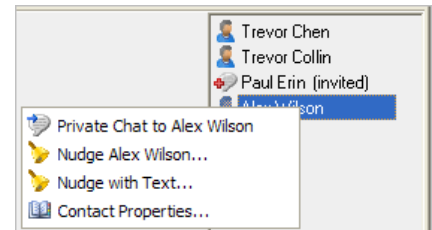
1. Click the  button to access the *Invite Participants* screen.

2. Select one or more chat users to join the current chat call. Optionally check the *Include current chat conversation* box to give the invitees access to the prior dialogue.
3. Click the *Invite* button to send the invitations. Invitees must accept the invite to join.

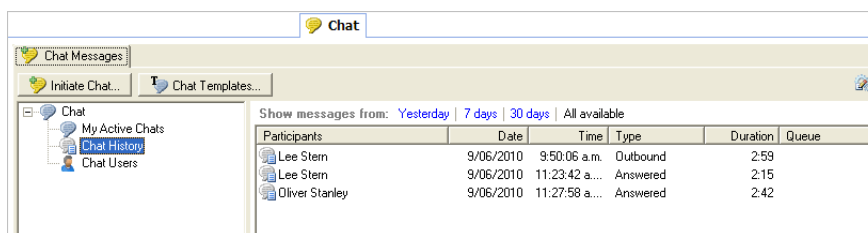
Private Chat

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

1. Right-click on the participant name and select the *Private Chat* option.
2. A new chat window opens to enable the private chat session.



Chat Messages




Chat Messages provides an organised 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. Refer to the online help for more details.



Create and Use Templates

Templates enable you to save and use commonly used phrases and URLs when chatting.

Create Template

1. Click the  button
2. Choose either the *Phrases* or *Links* tab in the Templates dialog window. Existing entries are displayed and 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. Open the drop-down list of either  or  and select the required item from the list.
2. 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 – it is shown as an active link and the built-in Web Browser automatically opens the web page.

Executive Insight - it is shown as an active link.

Additional Chat Functions

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

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