ADTRAN

NetVanta Unified Communications

NetVanta ucCompanion User Guide

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Conventions

> **NOTE**
>
> *Notes provide additional useful information.*

> **CAUTION**
>
> *Cautions signify information that could prevent service interruption or damage to equipment.*

> **WARNING**
>
> *Warnings provide information that could prevent injury or endangerment to human life.*

Table of Contents

1   Getting Started

Overview

ucCompanion Versions

ucCompanion is a client program used within the ucCompanion system. ucCompanion is available in two versions:

ucCompanion	Designed for office workers who need a graphical interface to control calls at their extension, and to see the real-time status of others in their organization.
ucCompanion - Live Attendant	Designed for operators, executive assistants and department secretaries that need to provide call coverage for others. Allows users to view and control calls on all devices in the system.

> **NOTE** *The ucCompanion - Outlook Plug-in is not currently supported.*

The ucCompanion - Live Attendant and ucCompanion versions are very similar. The ucCompanion - Live Attendant version was used to create this document. Note that several features that are specific to the ucCompanion - Live Attendant are not available with the ucCompanion version. Any differences between ucCompanion - Live Attendant and ucCompanion are noted.

About ucCompanion

The following are not available in the ucCompanion version:

- There is no **Console** menu.
- There are no call filtering options.
- The Caller ID of connected call is displayed for your own extension only.

You may not set the status note for an extension other than your own.

> **NOTE** *ADTRAN recommends a minimum 1024 x 768 screen resolution, with a 16-bit color palette.*

The following sections are included in this chapter:

- *Connecting to the ucCompanion Server on page 7*
- *Setting your Area Code on page 7*
- *Setting your Password on page 8*
- *Selecting Audio Devices on page 9*

Connecting to the ucCompanion Server

When your ucCompanion client starts for the first time, the **ucCompanion PCE Connection** dialog box appears, where you must identify the name of the ucCompanion server. If you see a menu requesting the host name of the server, contact your system administrator.

Host – Enter the IP address of the main ucCompanion server.

> **NOTE** *If you mistakenly enter a wrong IP address, you can modify it later in the **Settings** > **Options** dialog. For more information, refer to Server Options on page 81.*

> **NOTE** *If you are using Windows Vista and your computer goes into sleep mode, then you may lose the connection to the Server. To regain the server connection, close ucCompanion and restart it. To prevent this issue from occurring, you may want to adjust your power options accordingly on Windows Vista. For more information, refer to Connection to the Server is Lost on page 75.*

Setting your Area Code

Your system administrator may have already configured external dialing for you. However, if this has not yet been done, then you can configure it yourself following the steps below.

> **CAUTION** *If your administrator has already configured external dialing for you, then do not modify the settings unless instructed to do so.*

In order to make external calls using ucCompanion or ucCompanion – Live Attendant, you must configure the phone and modem dialing properties in ucCompanion Client, such as setting your location's area code.

To configure dialing properties

1. From ucCompanion or ucCompanion – Live Attendant, select **Settings > Options**.

2. Select the **Number Format** tab.

> **CAUTION** *Do not change the maximum number length from the default value of 4, or the length of local phone numbers from the default value of 7.*

3. Select **Dialing Properties**.

4. If your area code is not already set then select **Edit**, and select the **Area Code Rules** tab.

5. Select **New**, and enter your area code.

6. If your area has 10 digit dialing in effect, then enable **Include the area code**. If your area has 7 digit dialing in effect, then do not enable Include the area code.

7. Select **OK**.

8. Select **Apply**, and select **OK** on the **Area Code Rules** tab.

9. Select **Apply**, and select **OK** on the **Dialing Rules** tab.

10. Select **OK** on the **Options** dialog.

Setting your Password

Creating your Password

The first time you start ucCompanion, you should create a personal password. Setting a personal password is not required, but it is recommended. It prevents another person from controlling your extension number.

> NOTE *The personal password is not the same thing as the system administrator password, which is explained in Logging in as Administrator on page 79.*

To create your password

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **My Extensions** tab. If you are logged in as administrator, none of the fields will be grayed out in the **My Extensions** tab.

3. Select the **...** button next to the **Enter Password** box. The text boxes at the bottom of the dialog box will no longer be grayed out.

4. In the **New Password** box, enter a password. Then type the new password again in the **Re-enter Password** box.

5. Select the **Change Password** button, and select **OK** to save the settings.

Changing your Password

To change your password

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **My Extension** tab. If you are not logged in as administrator, you can gain access to the grayed out settings by entering your personal password in the **New Password** field and the **Re-Enter New Password** field. If you are logged in as administrator, then the password change options will already be available.

3. Enter your personal password in the **Enter Password** field, and then select the **...** button.

4. Enter a new password in the **New Password** box. Then type the new password again in the **Re-enter Password** box.

5. Select the **Change Password** button, and select **OK** to save the settings.

Selecting Audio Devices

The ucCompanion - Soft Phone uses the sound devices as configured on your desktop computer. Refer to your system's documentation for audio device configuration. If the system sound devices are configured properly, you can access them from the ucCompanion - Soft Phone menu options. You can select the microphone, speaker, and ringer (speaker) devices to use with the ucCompanion- Soft Phone.

By default, ucCompanion uses the maximum volume level that is already selected for your system configuration, for example, for the volume control settings from your system tray, and the volume knob on your speakers. Because these settings are already configured on your system, they should also be sufficient for use with ucCompanion. However, if you find that the volume levels require adjustment, you can enable **Automatically adjust audio level**. Enabling this check box enables Automatic Gain Control (AGC) which automatically adjusts the volume levels for the devices selected.

If you do not have speakers connected to your computer, you can have ucCompanion ring your PC directly. For more information, refer to *Adjusting the Volume on page 43*.

To select audio devices

1. Right-click on the ucCompanion - Soft Phone icon in the system tray, and select **Options**.

2. Select the microphone, speaker, or ringing (speaker) devices from the drop down list of audio devices available.

3. Check Automatically adjust audio level if you want to enable AGC to automatically adjust the volume level for the device selected.

4. Check Also ring the PC speaker if your computer does not have speakers.

Launching ucCompanion - Soft Phone

The ucCompanion - Soft Phone is used in conjunction with ucCompanion and ucCompanion - Live Attendant. In order to use some of the ucCompanion features available, such as making a call, the ucCompanion - Soft Phone must be running. For more information on the ucCompanion - Soft Phone, refer to *ucCompanion - Soft Phone Overview on page 27*.

To launch the ucCompanion - Soft Phone

Select **Start > Programs > ucCompanion - Soft Phone**. The soft phone launches and you should see the ucCompanion - Soft Phone icon in the system tray in the lower right section of your monitor.

Keyboard Shortcuts

Key	Function	Key	Function
F1	Open online help	CTRL + A	Select all
F2	Hang up call	CTRL + C	Copy
F3	Make call	CTRL + F	Find
F4	Answer call	CTRL + I	Send instant message
F6	Supervised transfer	CTRL + L	Recent Call Log
CTRL + F6	Cancel Supervised transfer	CTRL + M	Add comment to call
F7	Blind transfer	CTRL + T	Change status note
F8	Send to voicemail	CTRL + T	Time and date stamp (within a status note)
F9	Hold call	CTRL + V	Paste
F10	Unhold call	CTRL + X	Cut
CTRL + F9	Park call	CTRL + Y	Redo
CTRL + F10	Unpark call	CTRL + Z	Undo
F12	Clear stuck call	CTRL + SHIFT + T	Change another's status note.
CTRL + F4	Call pickup	+ (on keypad)	Answer call
ESC	Cancel mouse drag	* (on keypad)	Hold/Unhold
UP arrow	Select next item up	/ (on keypad)	Move focus to call list
DOWN arrow	Select next item down	- (on keypad)	Blind transfer
TAB	Move focus to next	. (on keypad)	Send to voicemail

Standard Microsoft keyboard commands can also be used, in conjunction with the commands above, to process calls in ucCompanion and ucCompanion - Live Attendant.

Some commands and keyboard shortcuts may not always be available, depending on the state of calls and depending on how your system is configured.

2   Navigating ucCompanion

Overview of the Main Window
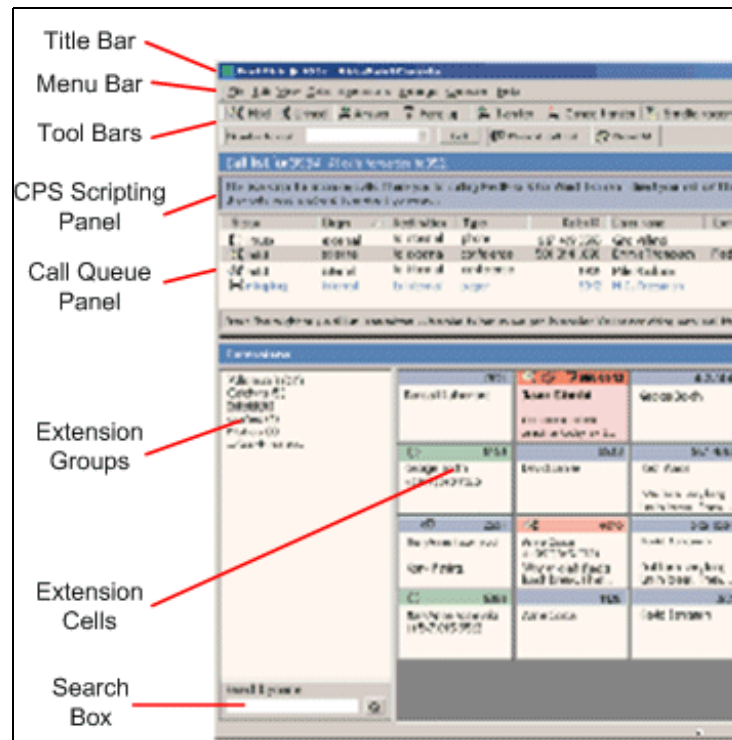
The following topics are covered in this chapter:

The Main Title Bar

The title bar is the topmost part of the main window. The title bar displays your name and the extension that the application is associated with.

Menus

The following menus are described in this section:

- File Menu
- Edit Menu
- View Menu
- Calls Menu
- Extensions Menu
- Settings Menu
- Console Menu
- Help Menu

File Menu

The following commands are available in this menu:

Admin login	Displays the **Administrative login** dialog box. Some commands are not available unless you are logged in as an administrator.
Admin logout	When logged in as administrator, this option becomes available. Selecting Admin logout automatically logs you out of the administrator profile, and returns you to the previous user profile.
Exit	Shuts down the program.

Edit Menu

The following commands are available in this menu:

Undo	Provides the ability to undo certain recent actions. The following actions may be undone: Resizing an extension cell Cutting or pasting an extension cell Changing the text in an extension cell or the call box Updating a status note
Redo	Provides the ability to redo an action that was undone. Refer to **Undo** above.
Cut	Removes something and places it into memory. An item that has been cut can be retrieved using the **Paste** command.
Copy	Places a copy of an item into memory. An item that has been copied can be retrieved using the **Paste** command.
Paste	Retrieves an item that was placed in memory using the **Cut** or **Copy** commands.
Clear Call	On occasion due to network issues, the screen will show that you are still connected to a call after you have hung up. Use this **Clear Call** command to reset the screen.

Select All   Used to select all of something. Depending on which area of the window has focus (is currently activated), the following may be selected:

Text, when in a text edit field.

Extensions, when the focus is on the extension status area.

Extension groups.

Since only one call may be selected at a time in the call list, **Select All** is not available in the call list.

Find   Causes the focus to jump to the extension search box, so an extension search may be done. Refer to *Searching for an Extension on page 59* for more information.

View Menu

The following commands are available in this menu:

Call List Panel   Check this option to display the call list panel in the main window. (The scripting area is also displayed, if it is enabled.) This performs the same function as the **-** button on the section title area of the call list.

Extensions Panel   Check this option to display the extensions panel (including the **Extension Groups** and the **Search** fields).

Reset Layout   Restores the default layout of the main window, including the following: main window size and position, toolbar positions and visibility, and window divider positions. The following are not reset: display of extensions and extension groups, and customization of the toolbars. To reset toolbar buttons, use the **Reset All** button, which is accessed by choosing **View** > **Toolbars** > **Customize** > **Toolbars** tab.

Toolbars Menu

Main   Enable this option to display the main toolbar, which contains all the call control buttons.

Calling   Enable this option to display the calling toolbar, which contains the **Number to Call** field and the **Call** button.

User   Enable this option to display the user toolbar, which contains the **Recent call log**, **Send IM**, and **Add comment** buttons.

Custom   Enable this option to display the custom toolbar, which contains any custom buttons that have been set up. Refer to *Customizing Toolbars on page 68* for more information.

Customize   Allows you to customize many aspects of the main window. Refer to *Overview of Customization on page 68* for more information.

Extensions Menu

The following extension settings apply only for the extension group that is currently selected.

Show Name   Check this option to display extension names in extension cells.

Show Dept	Check this option to display department names in extension cells. No department name will be shown if none has been set for this extension.
Show Connected Party	Check this option to display caller ID in extension cells for active calls (if Caller ID is available in your system). This option is available in the ucCompanion - Live Attendant version only.
Show Line	Check this option to display which keyline is being used on a call. This option is only available in ucCompanion - Live Attendant.
List View	If selected, the extension status area will be presented in a detailed list view, similar to Windows Explorer. Refer to *Extension Status Area on page 24* for more information.
Icon View	If selected, extensions will be displayed as a rectangular grid of cells. This is the default setting. Refer to *Extension Status Area on page 24* for more information.

Calls Menu

The availability of these commands depends on the state of the call that is currently selected in the call list. The following commands are available in this menu:

Make call	Calls the number in the call box. For more information, refer to *Searching for Caller Information on page 33*.
Send IM	Allows you to send an Instant Message to the selected extension cells. For more information, refer to *Using ucCompanion Instant Messaging on page 63*.
Answer	Answers the call that is currently selected in the call list. For more information, refer to *Answering Calls on page 29*.
Hang up	Disconnects the call that is currently selected in the call list. For more information, refer to *Disconnecting a Call on page 37*.
Call pickup	Retrieves the call that is selected in the call list. Refer to *Ringing Call Pickup on page 32* for more information.
Hold	Places the call on hold that is currently selected in the call list. For more information, refer to *Holding Calls on page 39*.
Unhold	Takes the call off hold that is currently selected in the call list. For more information, refer to *Holding Calls on page 39*.
Park	Place a call where it may be retrieved by other extensions.
Unpark	Retrieve a parked call.
Send to voicemail	Places the currently selected call in the call list directly into the mailbox number that is entered in the call box. For more information, refer to *Sending to Voicemail on page 42*.
Supervised transfer	Performs a supervised or consultative transfer of the currently selected call in the call list to the destination specified in the call box. For more information, refer to *Transferring Calls on page 40*.
Transfer	Performs a blind or direct transfer of the currently selected call in the call list to the destination specified in the call box. For more information, refer to *Transferring Calls on page 40*.

Add comment to call	Adds a comment to the currently selected call in the call list, so that when you transfer the call, the recipient of the call has background information about the call. Refer to *Attaching Comments on page 45* for more information.
Cancel supervised transfer	Cancels a supervised transfer before the person answers. For more information, refer to *Transferring Calls on page 40*.
Recent call log	Displays the last 64 calls (both inbound and outbound) on your extension. Calls that are unanswered or not completed are also included. Double-clicking an entry in the recent call list places the number in the call box. To dial that number, select **Call**. For more information, refer to *Making a Call using the Recent Call Log on page 35*.

Extensions Menu

The following commands are available in this menu:

New Group	Displays a dialog box that allows you to create a new extension group. This custom group is only visible on your computer. For more information, refer to *Creating Personal Extension Groups on page 53*.
Edit Group	Allows you to change extension group settings.
Delete Group	Deletes the currently-selected group in the extensions group list. Only groups that you have created or search results groups may be deleted this way. Refer to *Deleting Personal Extension Groups on page 58* for more information.
New Extension	Displays a dialog box that allows you to create a new extension in the selected extension group. You may create a new extension only in an extension group you have created. For more information, refer to *Creating Personal Extension Cells on page 55*.
Edit Extension	Allows you to edit or modify a particular extension. You may only edit extensions in extension groups you have created yourself, not in system-wide extension groups.
Delete Extension	Deletes an extension. You may only delete extensions in extension groups you have created yourself, not in system-wide extension groups.
Arrange Extensions	Allows you to sort extensions by extension number, last name, or first name for the currently displayed extension (BLF) group.

Settings Menu

The following commands are available in this menu:

Set My Status Note	Allows you to set a status note. Refer to *Setting your Status Note on page 77* for more information.
Skins	Allows you to change the colors used in ucCompanion. Refer to *Changing Interface Colors on page 80* for more information.
Options	Refer to *Setting Options on page 81* for more information.

Administration Options

> NOTE
>
> *You must be logged in as an Administrator to access these menu options. Refer to Logging in as Administrator on page 79 for more information.*

Edit CPS	This command displays the CPS Editor used to create and modify call processing scenarios. Only skilled JAVA and VBScript developers should access this feature.
Busy Lamp Field	Displays the BLF Admin tool allowing administrators to setup and maintain BLF Groups. For more information, refer to the ucCompanion Installation and Administration Guide.

Console Menu

> NOTE
>
> *The **Console** menu appears only in the ucCompanion - Live Attendant version of ucCompanion.*

The commands in the **Console** menu are only available if you are logged in as Administrator. Refer to *Logging in as Administrator on page 79*.

The following commands are available in the **Console** menu:

Edit Status Note	Allows you to edit the status note of the selected cell.
Delete All Status Notes	**Caution**: This option deletes all status notes for all users in the ucCompanion system.
Call Filtering	Displays the **Call Filtering** dialog box, allowing you to setup filters that displays activity at other extensions. Refer to *Call Filtering on page 46* for more information.
Show Calls for My Extension	Set this to have only calls connected to your extension displayed in the call list. Refer to *Call Filtering on page 46* for more information.
Show Filtered Calls	Set this to have only calls that match certain criteria displayed in the call list. Refer to *Call Filtering on page 46* for more information.
Show Calls for All Extensions	Displays all calls being monitored by the ucCompanion system. This also allows you to view and manipulate these calls. Refer to *Call Filtering on page 46* for more information. USE THIS COMMAND WITH CAUTION. You can accidentally disconnect or re-route another user's call.

Help Menu

The following commands are available in this menu:

ucCompanion Help	Displays online help. ucCompanion help can be navigated using the mouse or standard Microsoft keyboard commands.

Keypad commands	Displays keyboard commands and shortcuts.
Icon legend	Displays a description of icons used in the program.
Color legend	Displays the default colors and icons used for extension cell states.
Telephone keypad	Displays a numeric keypad. As you select the buttons with the mouse, the numbers will be entered in the call box.
About ucCompanion	Displays program information.

Toolbars
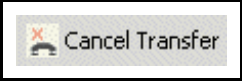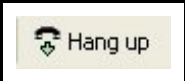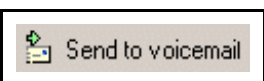
The following topics are discussed in this section:

- Call Control Toolbar
- Calling Toolbar and Call Box
- User Toolbar
- Custom Toolbar

Call Control Toolbar

The following table shows toolbar buttons and their equivalent shortcut keys.
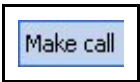
Button	Description
⚲ Answer	Answer the ringing call (F4). Refer to *Answering Calls on page 29* for more information.
⁚℩⦅ Hold	Put the call that is selected in the call list on hold (F9). Refer to *Holding Calls on page 39* for more information.
⦅ Unhold	Retrieve the call that is selected in the call list (F10). Refer to *Holding Calls on page 39* for more information.
⚲ Supervised transfer	Transfers the selected call to the number in the call box (F6), allowing you to speak with the person being called, before transferring the call to them. Once the transfer has initiated, the button changes to **Cancel Transfer**. Refer to *Transferring Calls on page 40* for more information.
⚲ Transfer	Transfer the selected call blindly, or directly to the number in the call box (F7). Once the transfer has initiated, the button changes to **Cancel Transfer**. Refer to *Transferring Calls on page 40* for more information.

Button	Description
Cancel Transfer	Hangs up on the destination party, and returns to the original call (CTRL + F6). Refer to *Transferring Calls on page 40* for more information.
Hang up	End the call that is selected in the call list (F2). Refer to *Disconnecting a Call on page 37* for more information.
Call pickup	Pickup a call that is ringing at another extension. Refer to *Ringing Call Pickup on page 32* for more information.
Send to voicemail	Send the selected call to voicemail for the extension in the call box (F8). Refer to *Sending to Voicemail on page 42* for more information.
Park	Park a call. Refer to *Parking Calls on page 44* for more information.
Unpark	Unpark call. Refer to *Parking Calls on page 44* for more information.

You can drag this toolbar and dock it vertically, rather than using it in the default horizontal position.

Calling Toolbar and Call Box
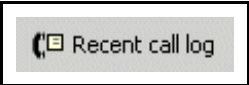
The following table shows the contents of the Calling Toolbar, and the equivalent shortcut keys.

Name	Button	Description
Call Box	Number to call	Enter a phone number, then select Make call. When you select an extension cell, its number is entered in this call box. Refer to *Searching for Caller Information on page 33* for more information.
Make call	Make call	Dials the number entered in the call box (F3). Refer to *Searching for Caller Information on page 33* for more information.

You can drag this toolbar and dock it vertically, rather than using it in the default horizontal position.

User Toolbar

The following table shows the contents of the User Toolbar, and the equivalent shortcut keys.

Name	Button	Description
Recent call log	Recent call log	View the list of recent incoming and outgoing calls (Ctrl+L). Refer to *Making a Call using the Recent Call Log on page 35*for more information.
Send IM	Send IM	Starts an instant message (Ctrl+I).Refer to *Using ucCompanion Instant Messaging on page 63* for more information.
Add comment	Add comment	Annotate a call (Ctrl+M). Refer to *Attaching Comments on page 45* for more information.
Filtered	Filtered	**Note**: This option is available in ucCompanion - Live Attendant only. Refer to *Call Filtering on page 46* for more information.

You can drag this toolbar and dock it vertically, rather than using it in the default horizontal position.

Custom Toolbar

Custom toolbars can be created to provide access to other features and services. Once created, you need to select from the list the toolbars that you wish displayed.

| Call home | Open Outlook | Make appointment |
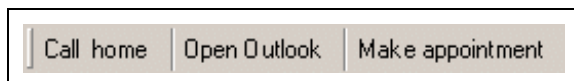
Example of Smart Buttons in the Custom Toolbar

Call List Panel

The **Call List** panel contains the following:

- Call List Title Bar
- CPS Scripting Box (if enabled)
- Call List
- Call List Status Bar

Call List Title Bar

The call list title bar is the topmost part of the **Call List**. This title bar contains a **Minimize** button that allows you to hide the call list. This title bar also displays status messages for your extension.

The Call List Title Bar

CPS Scripting Box

The **CPS Scripting** box, when displayed, can show text messages that have been associated with a call by custom scripts. Scripts must have first been created on your system.

To display the **CPS Scripting** box, go to **Settings** > **Options** > **Display** tab, and check the option **Show CPS scripting**. If configured to do so, you will see a greeting displayed in this window for the call that is ringing your extension.

Call List

The call list shows a list of current calls and their status. You can select calls here and manipulate them. To work with a call, select it in the call list. In many cases a call will remain selected in the call list, even if the focus moves to another part of the main window.

Each call consists of two *legs*, that is, two persons (or devices) participating in the conversation. When you use ucCompanion - Live Attendant in the non-filtered mode, you see both legs for all conversations. Each leg has an owner displayed in the **Internal Number** column and a remote party displayed in the **Caller ID** column. For external calls, (an external incoming call to your company, or someone from your company making an external outgoing call), you see one only leg. No leg is shown for the remote party, since ucCompanion does not monitor the remote party.

For more information about working with calls, refer to .

Timers in the Call List

The Timer column indicates the duration of calls.

- The timer starts from zero when a call (either outgoing or incoming) begins ringing.
- When the call is answered, the timer starts again at zero.
- The timer resets to zero when you place a call on hold. When you take the call off hold, the timer starts again at zero.
- When you first switch to **Show Calls for All Extensions** mode, timers for all calls reset to zero, even for calls that are already in progress. New calls that begin after this point will start at zero and will increment normally. **Show Calls for All Extensions** mode is only available in the ucCompanion - Live Attendant version.

When a call at your extension is completed, the duration of the call is recorded in the recent call log. The total duration of the call is recorded - the sum of the ringing, connected, and hold times.

Call List Status Bar

This area displays the comment attached to the call, if there is one. Refer to *Attaching Comments on page 45* for more information.

//Ted Barnes@1002 Make this customer happy!

Extensions Panel

Overview of Extensions

The extensions panel shows information about extensions (and phone trunks).
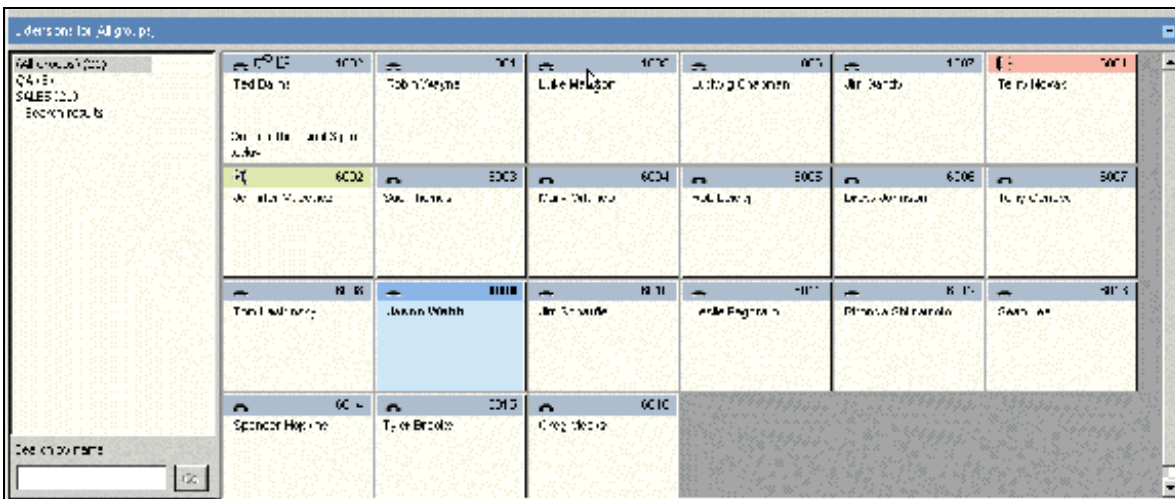
The Extensions Panel

Extension groups are shown in the left part of the window.

In the extension status area (the right part of the extensions panel), each extension is displayed as a cell.

The extension **Search** box is located in the bottom, left part of the window. It can be used to search for an extension by the name of the extension owner.

Extensions Panel Title Bar

The extensions area title bar is located at the top of the extensions area. It contains a **Minimize** button that lets you hide the whole extensions panel. This title bar also indicates which extension group is currently being displayed in the extension status area.

Extensions Panel Title Bar

Extension Groups

The extension groups area shows the extension groups in the system. These groups are set up by the system administrator, and are visible to all users of the ucCompanion system.
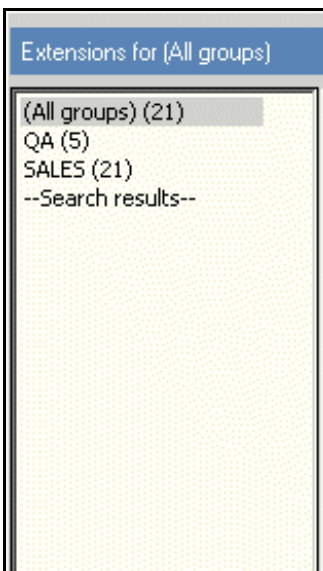
You can also create your own groups, which are only visible on your computer. Refer to *Deleting Personal Extension Groups on page 58* for more information.

Extension Status Area

The extension status area shows the extensions (and phone trunks) that are being monitored by ucCompanion. Extension cells in the extension status area show the extension number, the person the extension is assigned to, the status of the extension (busy, on hold, etc.), and whether the person is currently running ucCompanion (and can therefore receive an Instant Message).

> **NOTE** *If an extension has been set up to be monitored by ucCompanion but is now out of service or disconnected, that extension cell will be gray.*

Extension Status Area displayed in Icon View

The extension status area can also be displayed in list view as seen here:

		First name	Last name	Department	Extension	Caller ID	Caller name	Status note
		Ted	Barns		1002	1005	Luke Mad...	Out of office
		Tyler	Brooks		6015			
		Ludwig	Chapman		1006			
		Jim	Gandy		1007	6016	Greg Me...	
		Tony	Genova		6007			
		Spencer	Hopkins		6014			
		Drew	Johnson		6006			
		Tom	Lashinsky		6008			
		Sean	Lee		6013			
		Rob	Leidig		6005			
		Luke	Madison		1005	1002	Ted Barns	

*Extension Status Area displayed in List View*

States of Extension Cells

Extension cells change colors, depending on their state. A description of the states can be seen in the Color Legend window, which is accessed by selecting **Help** > **Color Legend** from the main menu.
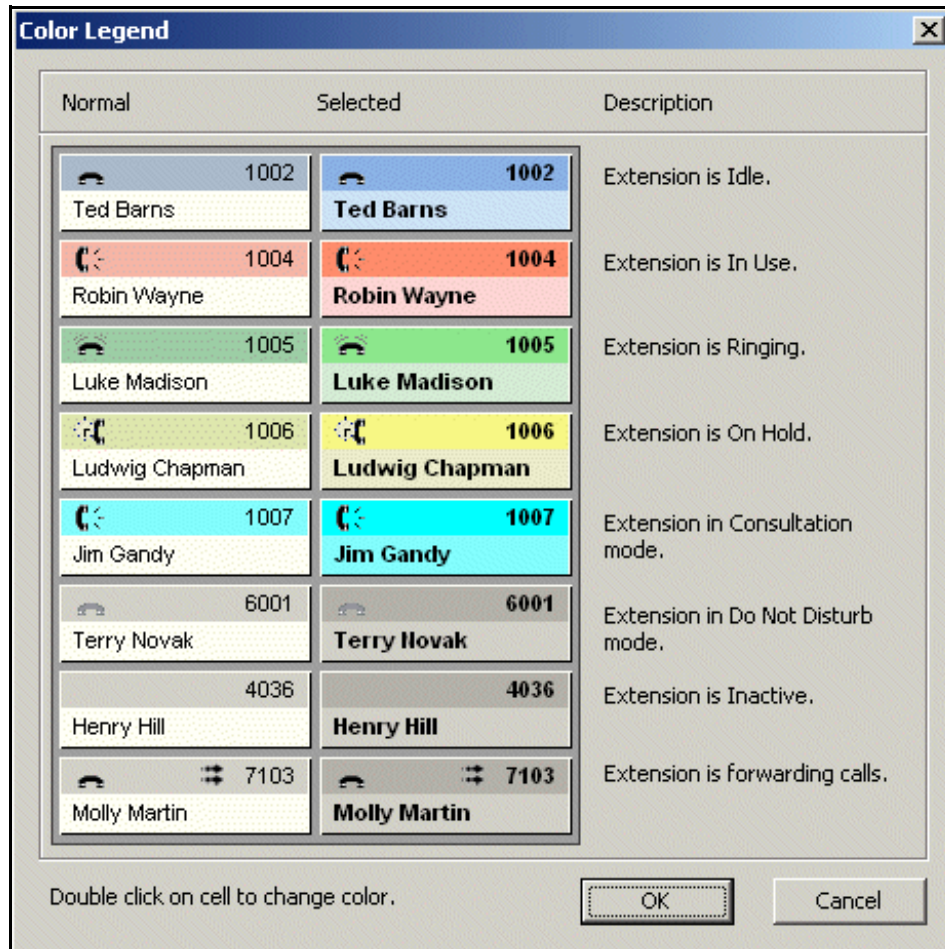
*Color Legend showing the Default color scheme*

If you change the interface colors, the Color Legend automatically updates to show your current settings. For information about changing colors, refer to *Changing Interface Colors on page 80*.

Icons in an Extension Cell
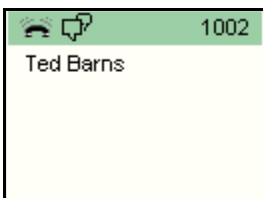
Example: Icons for Ringing and IM in an Extension Cell

The following icons can appear in an extension cell, when your display is set to Icon view (this is the default view).

Icon	Description
	Idle
	In use
	Ringing
	Hold
	ucCompanion IM (user is logged in and available to receive a ucCompanion Instant Messages)
	Status Note (extension has a status note attached)
(no icon)	The extension is not being monitored by ucCompanion.

Outbound and Inbound Call Icons

In an extension Cell (in the ucCompanion - Live Attendant version only), different icons represent inbound calls and outbound calls.


Inbound call (from 1004 to extension 6016)

Outbound call (from extension 6016 to 1005)

Extension Search Box

The extension search box is located in the lower left of the extensions panel, below the extensions gGroup list box. This search box is used to quickly find an employee using their first and/or last name as well as first few letters of their first or last name. For more information, refer to *Searching for an Extension on page 59*.
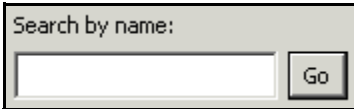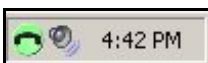

ucCompanion - Soft Phone Overview

UC client includes the ucCompanion - Soft Phone that is to be used in conjunction with ucCompanion - Live Attendant, UC server's presence-based console. The ucCompanion - Soft Phone is automatically installed with the UC client software, and uses the same authentication profile as configured for the UC client end user. For more information on using the ucCompanion - Soft Phone features, refer to *Selecting Audio Devices on page 9*, *Adjusting the Volume on page 43*, and *Muting Calls on page 40*.

Launching the ucCompanion - Soft Phone

Once launched from the **Start** menu, the ucCompanion - Soft Phone is available from a system tray icon. The ucCompanion - Soft Phone displays the current call status, and any errors that may exist, for example sign-on errors. For more information, refer to *ucCompanion - Soft Phone Call Status on page 50*.

To launch the ucCompanion - Soft Phone

1. Select **Start > Programs > ucCompanion - Soft Phone**. The soft phone launches and you should see the ucCompanion - Soft Phone icon in the system tray in the lower right section of your monitor.

2. To open the ucCompanion - Soft Phone keypad, double-click on the phone icon in the system tray . Once a call has connected, the keys are enabled on the keypad.

ucCompanion - Soft Phone System Tray Icon

Logging into the ucCompanion - Soft Phone

Logging into the ucCompanion - Soft Phone is automatic according to UC client sign-on methods. If single sign-on or Microsoft Outlook for Exchange profile is not enabled, then a default login dialogue prompts you for a user name and a password for authentication.

Using the ucCompanion - Soft Phone

> **NOTE** *The ucCompanion - Soft Phone must be used in conjunction with ucCompanion. From ucCompanion, use the **Number to call** field to dial numbers. Refer to Making a Call on page 34 for more information.*

Once a call has connected, you can use the ucCompanion - Soft Phone to enter digits or letters, for example, when prompted by an auto attendant. For more information, refer to *Entering Digits or Letters on a Connected Call on page 37*

3   Working with Calls

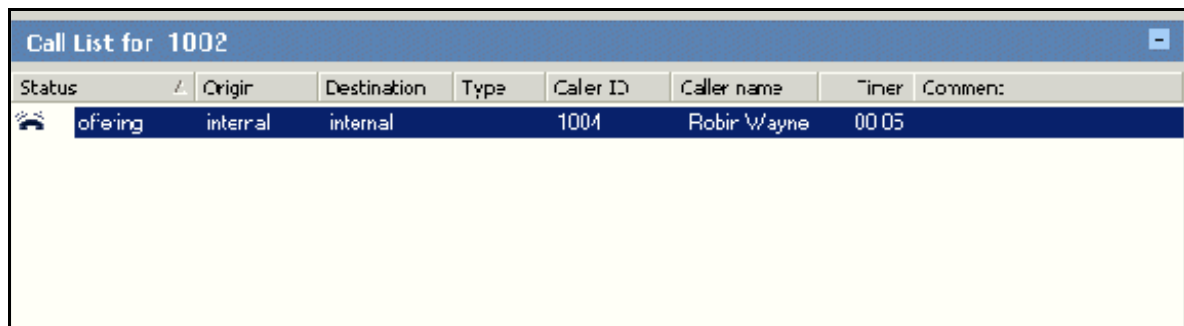The following options are available when working with calls:

- *Answering Calls on page 29*
- *Making Calls on page 34*
- *Disconnecting a Call on page 37*
- *Holding Calls on page 39*
- *Muting Calls on page 40*
- *Transferring Calls on page 40*
- *Sending to Voicemail on page 42*
- *Adjusting the Volume on page 43*
- *Parking Calls on page 44*
- *Attaching Comments on page 45*
- *Call Filtering on page 46*
- *ucCompanion - Soft Phone Call Status on page 50*
- *Working with the Notification Window on page 50*

Answering Calls

The ucCompanion - Live Attendant and ucCompanion applications were designed to provide users with flexibility when processing their calls. In high volume call processing scenarios it is not feasible to use a mouse for processing calls. Therefore, keyboard shortcuts also known as accelerator keys have been implemented for every call processing feature you may need to use. These make it possible for you to quickly answer and process calls using just your computer's keyboard.

To answer a call

When a call rings your extension, the call appears in the call list and the call status shows as **offering**. The incoming call is automatically selected.

Select the **Answer** button

Alternatively, do one of the following

- Press **F4** on your keyboard
- Double-click on the call in the call list
- Right-click on the call in the call list and select **Answer**
- From your keyboard's numeric keypad, press +.

To answer a second call using the keyboard

If you are already connected to a call and a second call comes in, do the following to answer the second call:

1. Use the Up or Down arrows keys to move to the second call in the call list.

2. Press F4 to answer the second call. The first call is automatically put on hold.

   Alternatively, using your keyboard's numeric keypad, press + to answer the call.

To answer a second call using the mouse

While still connected to your first call, double-click on the second call. This automatically places the current caller on hold and connects you to the second caller.

> **NOTE**
> *To place the second caller on hold and return to the first caller, simply double-click on the first call. This places the caller you are connected to on hold and reconnects you to the first caller. You can use this feature to jump back and forth between many calls.*

To answer a call when running in Tray Icon mode

You can choose to have your ucCompanion - Live Attendant or ucCompanion application minimized to your computer's tray (the far right side of the tasks bar). When configured this way, your ucCompanion application alerts you of new calls by displaying a small dialog in the lower right portion of your screen.

> **NOTE**
> *The Notification Window only appears if it is enabled. To enable the Notification Window select **Settings > Options > Misc > Enable Notification Window**. For more information, refer to Working with the Notification Window on page 50.*

1. If you are running in Tray Icon mode, when a call comes into your extension, a notification window appears.

2. Select the Answer icon in the popup window to answer a call.

3. When you hang up, another notification popup appears indicating that you are now disconnected.

> **NOTE**
> *For more information on Tray Icon mode, refer to Overview of Tray Icon Mode on page 81.*

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Retrieving Parked Calls

When a call is parked it is assigned a parking position number by ucCompanion. This parking position number briefly displays in the title bar of your call list when a call is parked for you.
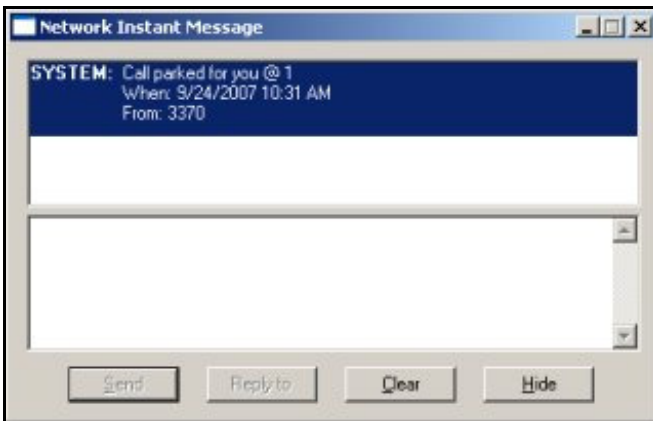

Example: The user at extension 3370 has a call parked for them in parking position 1

NOTE   *You need the position number of the parked call in order to retrieve the call.*

Depending on the settings of the user who parked the call, you may automatically receive notification that a call is parked for you.

*Example: The user at extension 3370 has parked a call at parking position 1*

NOTE   *For more information, refer to Parking Calls on page 44.*

To retrieve a parked call

1. In the call box, enter the position number where the call was parked.

The Call Box

2. Select the **Unpark** button in the main toolbar. Alternatively, you can press CTRL + F10, or select **Calls** > **Unpark** from the main menu.

 Unpark
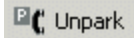
Ringing Call Pickup

Ringing Call Pickup, or call grab, allows you to answer a call that is ringing on another extension. Besides being used on offering (ringing) calls, Ringing Call Pickup may also be performed on calls that are offered to extensions that are not monitored by ucCompanion (extensions that do not have an extension cell).

> **NOTE** *Ringing Call Pickup is not the same as picking up a parked call. For instructions on picking up parked calls, refer to Retrieving Parked Calls on page 31.*

To answer a call ringing on another extension

1. When a call rings at an extension other than your own, look for the extension cell for the number that is ringing.
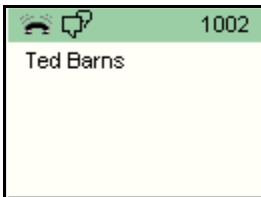
2. Select the extension cell. This enters that extension's number into the call box. You can also enter the number directly in the call box using the keyboard.

3. Select the **Call pickup** button, or press CTRL + F4. You will be connected to the call.
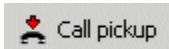
 Call pickup

Alternatively, you can right-click on the extension that is ringing, and select Call pickup.
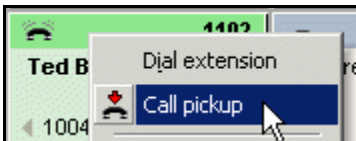
> **NOTE** *If you do not have a **Call pickup** button, contact your system administrator. The Ringing Call Pickup feature must be turned on by your administrator.*

> **NOTE** *If Ringing Call Pickup is performed on a call that has a comment attached, the comment will be lost*

Searching for Caller Information

You can enable ucCompanion to search for information on incoming callers using Windows Desktop Search and/or LinkedIn. When enabled, you can configure the search windows to open automatically when incoming calls are ringing, when incoming calls are answered, or not at all.

Using Windows Desktop Search to Find Caller Information

You can enable ucCompanion to automatically open Windows Desktop Search to search for information about incoming callers. You can configure Windows Desktop Search to open and search when incoming calls are ringing, when incoming calls are answered, or not at all.

To enable Windows Desktop Search

1. From the ucCompanion - Soft Phone system tray icon, right -click and select **Options**.

2. Select the **Screen Pops** tab.

3. From the drop down list, select whether the screen pops should be displayed automatically when an incoming call rings, when an incoming call is answered, or not at all. This also applies to LinkedIn searches if enabled.

4. If *Enable Windows Desktop Search* is grayed out, then Windows Desktop Search 3.x or later is not installed. Select the link to **Microsoft's website** to install it, and follow the instructions. When Windows Desktop Search has finished installing, you will see a search box in your system tray. Select **OK** on the Screen Pops dialog to close it. Repeat steps 1 and 2 above. Enable Windows Desktop Search should now be available.

5. Check **Enable Windows Desktop Search**.

6. Select **OK**.

Using LinkedIn to Search for Caller Information

You can enable ucCompanion to access LinkedIn, a professional networking tool, in order to locate information about incoming callers. If you enable LinkedIn searches, you can select the **Search** field and sort type. If Caller ID provides a name, then this name is passed to LinkedIn to do a search on the name. If the Caller ID name is unavailable, then no search is performed. You can configure searches to occur automatically when incoming calls are ringing, when incoming calls are answered, or not at all.

To enable LinkedIn Search

1. From the ucCompanion - Soft Phone system tray icon, right -click and select **Options**.

2. Select the **Screen Pops** tab.

3. From the drop down list, select whether the search window should open automatically when an incoming call rings, when an incoming call is answered, or not at all. This also applies to Windows Desktop Search if enabled.

4. Check **Enable LinkedIn search**.

5. Select the **Search** field, from **Name**, **Keyword**, or **Current Company**.

6. Select the sort type from Degrees of separation, Keyword relevance, Number of connections, or Number of endorsements.

7. Select **OK**.

Making Calls

> *The ucCompanion - Soft Phone must be running in order for you to make calls. For more information on ucCompanion - Soft Phone, refer to ucCompanion - Soft Phone Overview on page 27.*

To launch the ucCompanion - Soft Phone

Select **Start > Programs > ucCompanion - Soft Phone**. The soft phone launches and you should see the ucCompanion - Soft Phone icon in the system tray in the lower right section of your monitor.

Making a Call

To make a call using the keyboard

1. Be sure that your Num Lock key is locked. Using your numeric keypad, enter the number you want to dial in the call box. When you begin entering numbers, they will appear in the call box. It is not necessary to select the call box before entering digits with the keypad.

   You can also double-click on the extension cell of the number you want to call (refer to *To make a call using the mouse on page 34* for more information). The number will be entered in the call box and place the call to the selected device.

   | Number to call | 1002 | ▼ |

2. You can also copy and paste telephone numbers from a third party application into the call box. To place a call to the number entered, select the **Make call** button, located to the right of the call box, or press **F3**. The call is initiated.

To make a call using the mouse

1. In the extensions panel, locate the extension cell containing the number you want to call. This can be an extension or off-site telephone number.

2. Right-click on the extension cell, and choose **Dial Extension** from the pop-up menu.

3. Alternatively, double-click on a Busy Lamp Field (BLF) cell to intiate a call.
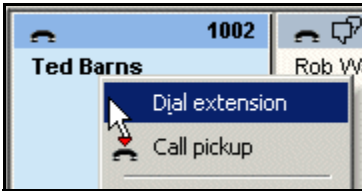
The call is initiated.

Making a Call using the Recent Call Log

The Recent Call Log displays the most recent calls (both inbound and outbound) on your extension. Calls that are not answered or not completed are also included. Double-clicking an entry in the recent call list will dial the number shown in the far-end number column.
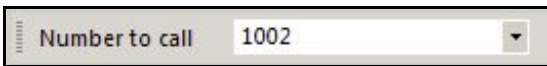
To make a call using the Recent Call Log

1. In the main toolbar, select the **Recent Call Log** button to open the **Recent Call Log**.

   ![Recent call log button]
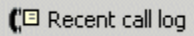
2. In the Recent Call Log, double-click an entry (or select the entry and select the **Dial** button). This puts the number in the call box in the main window, where you can edit the number if needed.
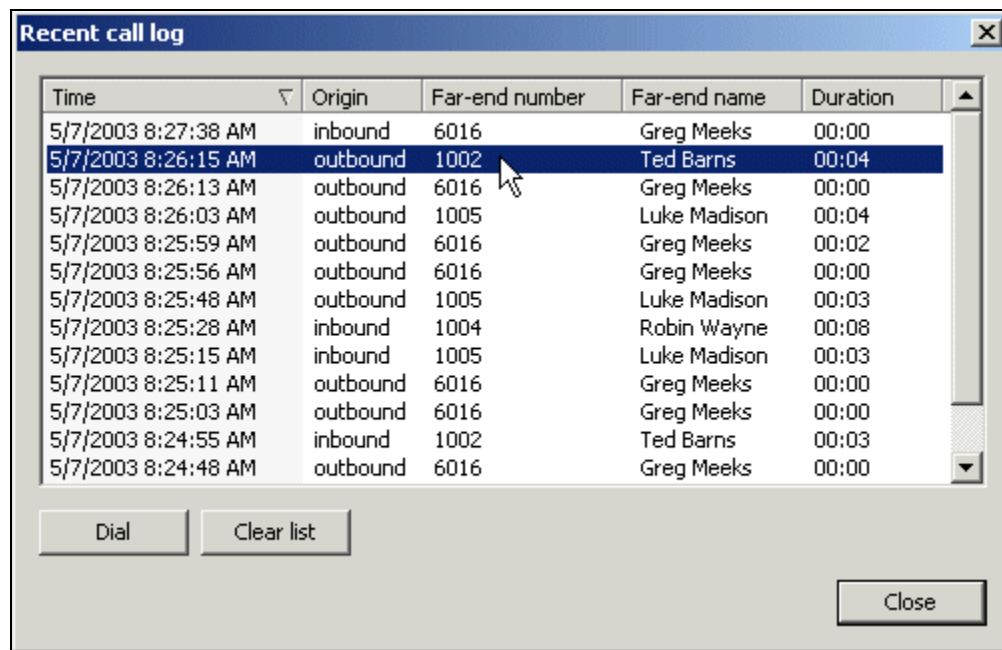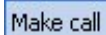

Recent Call Log

Call Box

3. To make the call, select the **Make call** button, or press F3.

   ![Make call button]

4. The number in the call box is dialed.

Entering Digits or Letters on a Connected Call

> **NOTE** *The ucCompanion - Soft Phone is used in conjunction with ucCompanion. To dial numbers, use the **Number to Call** field in ucCompanion.*

The ucCompanion - Soft Phone keypad can be used to enter digits or letters once a call is connected. For example, if your call is answered by an auto attendant, you can enter numbers or letters on the keypad to access a menu option or to enter a name to search in the company directory.

To enter digits or letters using the ucCompanion - Soft Phone keypad

1. Double-click on the phone icon in the system tray to open the ucCompanion - Soft Phone keypad. Once a call has connected, the keys are enabled on the keypad.

2. Using the ucCompanion - Soft Phone keypad, enter the numbers or letters as prompted by an auto attendant. For example, to locate "Smith" in the company directory, you would select 7-6-4-8-4, as the letters appear on the keypad.

Troubleshooting Making Calls

If you are having trouble making calls, check the following:

Is ucCompanion - Soft Phone Running?

The ucCompanion - Soft Phone works in conjunction with ucCompanion and ucCompanion - Live Attendant, and must be running in order to make calls. If ucCompanion - Soft Phone is running, you should see the ucCompanion - Soft Phone icon in your system tray. For more information, refer to *ucCompanion - Soft Phone Overview on page 27*.

To launch ucCompanion - Soft Phone

Select **Start > Programs > ucCompanion - Soft Phone**.

Can you Make Internal Calls but not External Calls?

If you are having trouble making external calls after initially installing or upgrading ucCompanion or ucCompanion - Live Attendant, then check that the dialing properties have been configured to specify your location's area code. Refer to *Setting your Area Code on page 7* for information on how to set the dialing properties.

Disconnecting a Call

You can disconnect or hang up a call, which removes the call from your menu. If you have disconnected a call, and it still appears on your menu, refer to *Clearing Calls on page 38* for more information.

To disconnect a call

1. In the **Call List**, select the call that you want to disconnect.

2. If the call is on hold, take it off hold (select **Unhold** or press F10).

3. Select the **Hang up** button (or press F2, or right-click on the call and choose **Hang Up**).

> **NOTE**
> *You cannot disconnect a trunk in the call list. If you are using ucCompanion - Live Attendant in unfiltered mode (enabled in **Console** > **Show Calls for All Extensions**) you may see trunk lines included in the call list, if your administrator has configured your system to monitor trunks. Look for a name such as "Trunk1" in the Caller Name column (ask your administrator for the actual trunk names in your system).*

> **NOTE**
> *If you have disconnected a call, but it still appears on your menu, refer to ucCompanion - Soft Phone Call Status on page 50 for more information.*

Clearing Calls

Occasionally, due to network issues, the screen may show that you are still connected to a call after you have hung up. Use the **Clear Call** command to reset the screen.

> **NOTE**
> *Clear call is not the same as disconnecting a call. That is, if the call was not previously disconnected, then selecting **Clear Call** does not disconnect the call, but it removes it from your screen.*

To clear calls from your screen

From the **Edit** menu, select **Clear Call**. Any calls that were shown as connected on your screen, are removed.

> NOTE
>
> *Alternatively, right-click on your extension cell, and select **Clear All Calls**. The keyboard shortcut to clear calls is F12.*
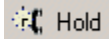
Holding Calls

To place a call on hold

1. In the **Call List**, select the call you want to hold, if it is not already selected. To select a call, select it or use the Up Arrow or Down Arrow key.

A connected call in the Call List

2. Select the **Hold** button, or press F9.

The call is put on hold.

A call on hold in the Call List

To take the call off hold, select the **Unhold** button. You can also double-click on the call in the call list, select the **Answer** button, or press F10.

Muting Calls

When you are on an active call, you can mute the call so that the caller can no longer hear you.

To mute a call

Right-click on the ucCompanion - Soft Phone icon in the system tray, and select Mute. The caller will no longer be able to hear sound from your end of the call.

To unmute a call

Right-click on the ucCompanion - Soft Phone icon in the system tray, and select Unmute. The caller will be able to hear you again.

Transferring Calls

ucCompanion and ucCompanion - Live Attendant were designed to facilitate call processing. Thus, there are several methods of transferring callers, including:

|	
Drag and Drop	Allows you to drag and drop the caller from the call list onto any Cell. This can be an extension or outside number such as a cell phone.
Numeric Keypad	Accelerator keys provide the fastest way to answer and process calls in high volume offices.

> **NOTE** *For more information on transferring calls using the menu, refer to Calls Menu on page 15. For more information on transferring calls using the toolbar button, refer to Call Control Toolbar on page 18.*

You can perform blind or supervised transfers.

- A **blind** transfer transfers the call directly, without you speaking to the person that you're transferring the call to.
- A **supervised** transfer allows you to speak with the person being called, before transferring the call to them.

To transfer calls using drag and drop

1. Make sure the extension you want to transfer to is visible in the extension status area.

2. To transfer a call:
   - To perform a *blind* transfer, drag the call from the call list, and drop it onto the extension cell of the extension you want to transfer to. The call is automatically transferred.
   - To perform a *supervised* transfer, press and hold the **CTRL** key, while dragging the call from the call list, and dropping the call onto the extension cell of the extension you want to transfer to.
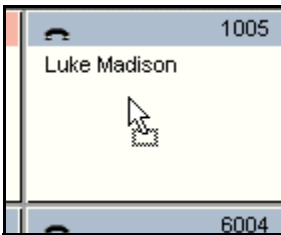
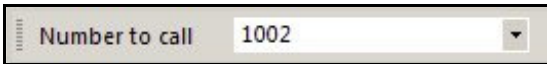*Dragging and dropping a call to transfer it*

> **NOTE** *To cancel the transfer before the person answers, select the **Cancel Transfer** button on the toolbar.*

3. To complete the supervised transfer, hang-up the call.

To transfer calls using the keyboard

Be sure that the **NUM LOCK** key is depressed on your numeric keypad, while connected to the call you want to transfer.

1. In the call list, select the call you want to transfer, using the up or down arrow keys.

2. In the call box, use the numbers on your keyboard to type the number where you want to transfer the call.

> Number to call   1002

> **NOTE** *If you enter the wrong number in the call box, use the **BACKSPACE** key to edit the number.*

3. To make a *blind* transfer, select the **Transfer** button or press **F7**.

4. To make a *supervised* transfer, select **Supervised Transfer**, or press **F6**. The call is placed on supervised hold, and the destination extension rings. Remain on the line to introduce the caller.
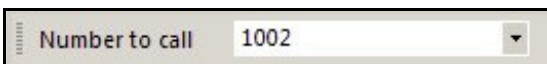
> **NOTE** *To cancel the transfer before the person answers, press **CTRL + F6** or select the **Cancel Supervised Transfer** button on the toolbar.*

5. To complete either type of transfer, hang up.

Sending to Voicemail

To send a call to voicemail

1. You must be connected to a call.

2. Make sure the call you will send to voicemail is selected in the call list. To select a call, select it or use the Up Arrow or Down Arrow keys. If you just answered an incoming call it is already selected automatically.

3. In the call box, enter the voicemail box number where you want to send the call. You can do this by selecting the extension in the extension status area, or by typing the number directly into the call box using the numeric keypad.

> Number to call   1002

> **NOTE** *If you mistakenly enter the wrong number in the call box, you can use the **BACKSPACE** key to edit the number.*

4. Select the **Send to Voicemail** button, or press F8. The call is immediately sent to voicemail. There is no need to hang up the call.

Adjusting the Volume

By default, ucCompanion uses the maximum volume level that is already selected for your system configuration, for example, for the volume control settings from your system tray, and the volume knob on your speakers. Because these settings are already configured on your system, they should also be sufficient for use with ucCompanion.

If you find that the volume levels require adjustment, you can adjust the microphone, speaker, and ringer volumes from ucCompanion. You can automatically adjust the volume levels for the devices selected, or you can manually adjust the audio device volumes using slider bars. For more information, refer to *Selecting Audio Devices on page 9*, and *Muting Calls on page 40*.

To automatically adjust the microphone or speaker volume

1. Right-click on the ucCompanion - Soft Phone icon in the system tray, and select **Options**.

2. Check Automatically adjust audio level to enable Automatic Gain Control (AGC) to automatically adjust the volume level for the device selected.

3. Select OK.

To manually adjust the microphone or speaker volume

1. Right-click on the ucCompanion - Soft Phone icon in the system tray, and select Show Audio Controls.

2. Use the slider bars to adjust the microphone or speaker volume. Note that by default the volume levels are set to the maximum level already configured for your system.

3. To mute an active call, select Mute so that the caller cannot hear you. Select Unmute to enable the caller to hear you again.

4. Close the ucCompanion Audio Controls dialog.

To adjust the ring volume

1. Right-click on the ucCompanion - Soft Phone icon in the system tray, and select **Options**.

2. Use the slider bars to adjust the ring or ring-back volume.

3. Select OK.

Parking Calls

The Call Park feature in ucCompanion allows you to put a call on hold and place it where it may be retrieved by another extension. When you park a call, ucCompanion automatically selects a parking location number and assigns it to the call. To retrieve a parked call, the user enters the number of the parking location.

> **NOTE** *For information on retrieving parked calls, refer to Retrieving Parked Calls on page 31.*

You can enable ucCompanion to automatically notify users when a call is parked for them. When you park a call, you are then prompted for the extension number of the person for whom the call is being parked. The user is then notified that a call is parked for them, so they can unpark it.

> **NOTE** *The notification appears only if the user is configured to use Instant Messaging (IM). If a user is not configured for IM, then they will not receive a notification.*

To automatically notify users when a call is parked for them

1. Select **Settings > Options > Misc** tab.

2. Enable **Notify call parking destination (user)**, and select **OK**.

To park a call

1. You must first be connected to a call.

2. Select the **Park** button in the main toolbar. Alternatively, you can press **CTRL + F9**, or select **Calls > Park** from the main menu.
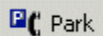
The call will be parked in the next available parking location. The number where the call is parked will briefly display in the title bar of the call list.
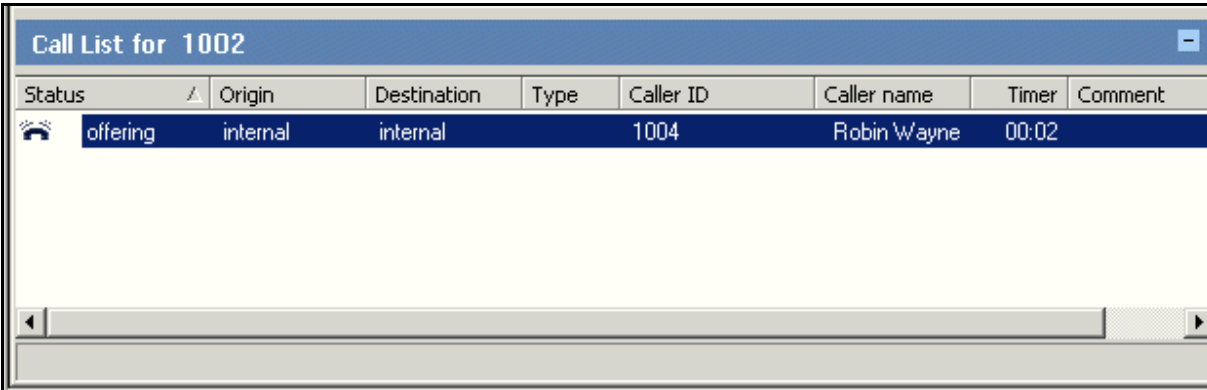

Example: The user at extension 3370 has parked a call at parking position 1

If you have enabled the setting to automatically notify users when a call is parked for them, then the parked call also briefly appears in your call list.
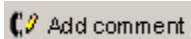
Attaching Comments

To add a comment to a call

1. Select the call in the call list. To select a call, select it or use the Up Arrow or Down Arrow key.
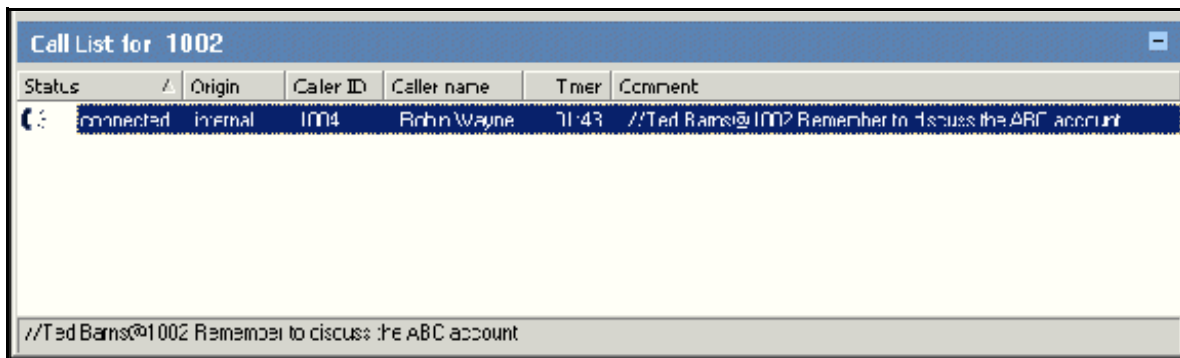

2. Select the **Add Comment** button, or press **CTRL+M**.

The **Add Comment to Call** dialog box appears.

3. Enter the comment.

4. Select **OK**. The comment appears in the call list, both in the Comment column and in the Status Bar.

NOTE   *The Add Comment feature may not be available through your phone system.*

NOTE   *If a call is transferred to you and it already has a comment attached, do not attach another comment to the call.*

Call Filtering

> **NOTE**   *Call filtering is available for ucCompanion - Live Attendant only.*

Overview of Call Filtering

ucCompanion - Live Attendant allows you to set which types of calls will appear in your call list. This is useful for when there are a lot of calls in the system. These call filtering options are not available in the ucCompanion version.

Each call consists of two *legs*, that is, two persons (or devices) participating in the conversation. When you use ucCompanion - Live Attendant in the **Show Calls for All Extensions** mode, you see both legs for all conversations. For external calls, (an external incoming call to your company, or someone from your company making an external outgoing call), you see one only leg. No leg is shown for the remote party, since ucCompanion does not monitor the remote party.

Call filtering options are accessed through the **Console** menu. The filter mode is also reflected in the calling toolbar (refer to *Calling Toolbar and Call Box on page 19* for more information).

Call Filter Modes

The **Call Filtering** option in the **Console** menu opens the **Call Filtering** dialog box (refer to the next section, *Custom Call Filter Rules on page 47*, for more information).

The three filtering settings at the bottom of the **Console** menu are described in the table below.

Setting in Console Menu	Toolbar Shows	What It Does
Show Calls for My Extension (the default setting)	The **Filtered** button is not pressed.	The call list displays only the calls that are connected to your extension. Calls that do not involve your extension are filtered out.
Show Filtered Calls	The **Filtered** button is pressed.	Your custom filtering rules are used. The call list displays only calls that meet the criteria set in the **Call Filtering** dialog box. Refer to *Custom Call Filter Rules on page 47* for more information.
Show Calls for All Extensions	The **Filtered** button is not pressed.	No filtering at all is used. The call list displays all calls throughout the system (all calls that are monitored by ucCompanion). This also allows you to view and manipulate these calls.

> **CAUTION**
>
> *Use the **Show Calls for All Extensions** setting with caution. You can accidentally disconnect or re-route another user's call.*

The default setting in the **Console** menu is **Show Calls for My Extension**, which means the **Filtered** button is not pressed down on the toolbar. In this default state, no special filtering is used. All calls connected to your extension will appear in your call list. Other calls in the system in which your extension is not involved are not shown.

Custom Call Filter Rules

When the **Filtered** button in the toolbar is in the pressed down state, the settings in the **Call Filtering** dialog box will be used to determine which calls appear in the call list.

To bring up the **Call Filtering** dialog box, select **Console** > **Call Filtering** from the main menu.

The "Always Show My Extensions Calls" Setting

The check box labeled **Always Show My Extension Calls** is located at the bottom of the **Call Filtering** dialog box. If you want to be able to see all the calls on your extension number, make sure this box is checked.

By default, **Always Show My Extension Calls** is checked and nothing else is checked. When the dialog box is in this default state, it is the same as if **Show Calls for My Extensions** were set in the **Console** menu—no special filtering is used.

The Four Main Categories for Filtering

The **Call Filtering** dialog box contains four major categories: Show By Type, Show By Caller ID Mask, Show By Group, and Show By Department.

To enable the settings in a category, the main checkbox above that category must also be checked. For example, to show internal calls select the **Internal** checkbox, which is located in the **Show By Type** category. But you also must make sure that the main **Show By Type** checkbox is checked.

If none of the main categories is enabled, and **Always Show My Extension Calls** is also not checked, no calls will ever appear in the call list while the **Filtered** button is pressed down. If you try to set this dialog box this way, you will get a message warning you that the current filter setting will hide all calls in your call list.

Filtering Settings are Inclusive

The call filtering criteria in the **Call Filtering** dialog box are inclusive. If a call matches any of the criteria specified in the this dialog box, then the call is shown in the call list. In other words, the feature uses "OR logic"—if either this or that condition is met, then the call will be shown.

Setting up Call Filtering

This section shows the steps to set specific call filtering criteria. For more general information about Call Filtering, refer to the previous sections.

### To use specific call filtering criteria

1. Go to the main toolbars, and select the **Filter** button to set it to the pressed down state (or select **Console** > **Show Filtered Calls** from the main menu).

2. From the main menu, select **Console** > **Call Filtering**. The **Call Filtering** dialog box appears.

3. If you want to see all the calls on your extension, regardless of what other criteria may be set in the **Call Filtering** dialog box, make sure the **Always Show My Extension Calls** check box is checked.

4. There are four main categories or areas in the **Call Filtering** dialog box. You can set criteria in one or more of the categories. Only one of the criteria needs to be met for a call to appear in the call list. Set one or more criteria in the four categories:

Show By Type	Check the main Show By Type checkbox. Then check one or more criteria. For example, to show only calls that are ringing or on hold, check **On Hold** and **Offering**.
Show By Caller ID Mask	Check the main Show By Caller ID Mask checkbox.Then select the **New** button at the top of the category.
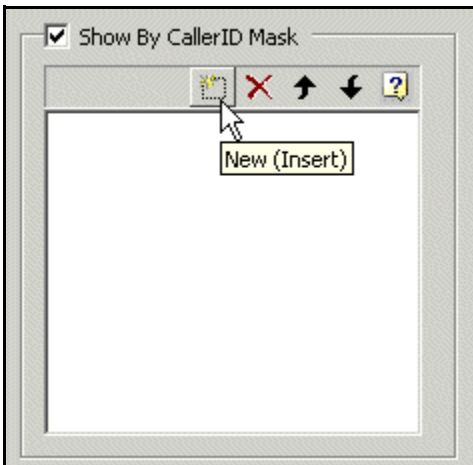
A new blank field will appear. Now enter the Caller ID pattern you want to match. Use question marks to indicate wildcard digits. For example, to show only calls that come from four-digit extensions and that begin with "20", you would enter "20??".
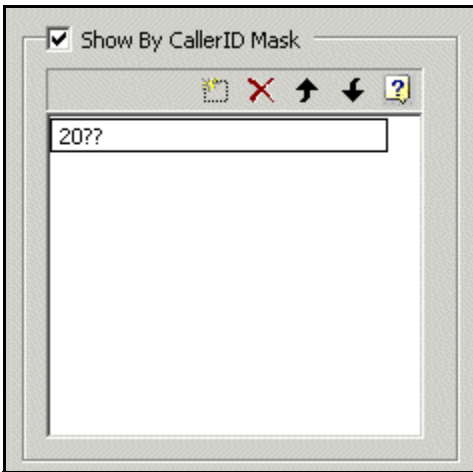
Show By Group Check the **Show By Group** check box. Then check off one or more extension groups in the list. For example, to see only calls that involve extensions in the extension group named "Sales," you would check that check box.
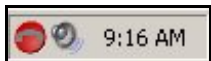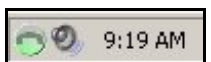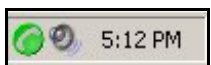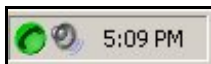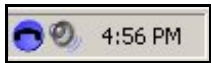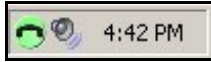

Show By Department Check the main **Show By Department** checkbox. Then check a department from the list. The department entries come from the Department (or Comment) setting in extension cells. If no departments are listed in the show by department area, then nothing for this field is currently set in any extension cells.

5. Select **OK**. Call Filtering is now set on your extension. Now only those calls that match at least one of the filter criteria you have set will appear in your call list. If you want to go back to the un-filtered view, use the **Filtered** button on the toolbar. Refer to *Call Filter Modes on page 46* for more information.

ucCompanion - Soft Phone Call Status

The ucCompanion - Soft Phone is managed through a system tray icon. The icon changes colors to represent different states, such as waiting for a call, incoming call, or active call. If you point your mouse over the ucCompanion - Soft Phone icon, then a tooltip appears to show the current state. Some of the icon colors and their corresponding states are shown below.

System Tray Icon	**ucCompanion - Soft Phone Status**
4:42 PM	Waiting for calls
4:56 PM	Incoming call
5:09 PM	Active call
5:12 PM	Mute
9:19 AM	Logging in
9:16 AM	Error (for example, not logged in)

You also see a notification window to alert you to call states, if this option has been enabled. For more information refer to the following section.

Working with the Notification Window

Overview of the Notification Window

The Notification window provides a convenient way to do basic call control when you do not want to have the full ucCompanion main window open.

Information Displayed in the Notification Window

The Notification window shows your name and extension information, as they are set in the **Options** menu for ucCompanion.

Depending on the state of your extension and calls, icons and buttons will appear in the Notification Window to indicate the following: dial tone/off hook, voicemail, ring-back, or busy. Call control buttons will appear that allow you to answer, hold, unhold, hang up, or cancel transfer. To find out what a button or icon does, hold the mouse cursor over it until the ToolTip appears.

Depending on the state of calls, other information may also be displayed, including the number of active calls, call state, and Caller ID.

Displaying the Notification Window

Enabling the Notification Window

The notification window feature is disabled by default. To enable this option select **Settings > Options > Misc**, and select **Enable Notification Window**. Refer to *Enabling Tray Icon Mode on page 81* for information about enabling and disabling these options.

Showing the Notification Window

If the Notification Window feature is enabled but the Notification Window is not currently displayed, you can show it by double-clicking the System Tray icon. Or you can right-click on the ucCompanion icon in the Windows System Tray and choose Notification Window.

If the notification window is not enabled, double-clicking the tray icon will restore the application window.

Keeping the Notification Window Open

You can "pin" the Notification Window to set it permanently in "always on top" mode. To do this select the pin icon until it points down. The icon toggles between "pinned" and "unpinned" when you select it repeatedly.


Pinned Open

Unpinned

Controlling Calls Using the Notification Window

You can use buttons that appear in the Notification Window to control calls. If a function is available for the call state you are in, a button will appear for it, such as to hang up, hold the call, etc. The buttons work the same way as the call control buttons in the main toolbar.

4   Working with Extensions

Overview of Working with Extensions

You work with extensions in the extensions panel. Refer to *Extensions Panel on page 22* for a description of the parts of the extensions panel.
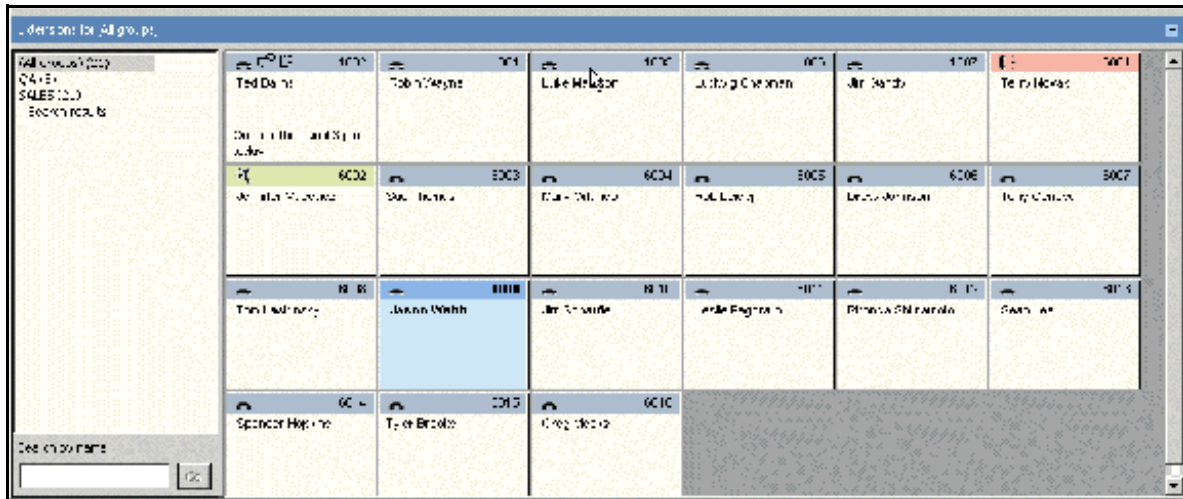
The Extensions Panel

The following topics are covered in this chapter:

Creating Personal Extension Groups

The system administrator sets up system-wide (global) groups of extensions. These system-wide extension groups automatically show up in the extensions group list, found in the extensions panel.
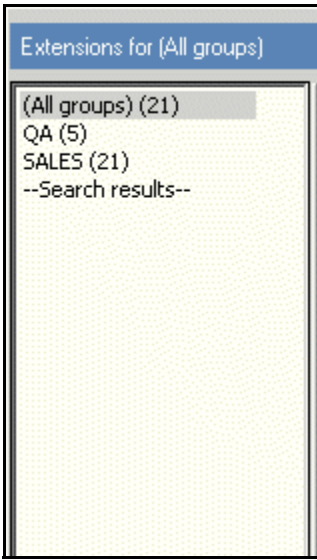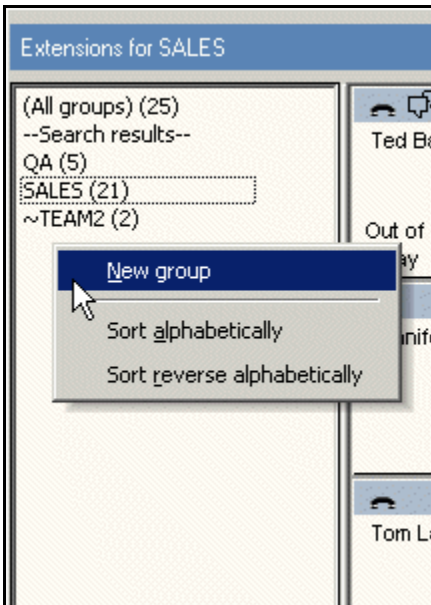
The Extension Groups List

You can also create your own personal extension groups, and then add extension cells to them. The personal extension groups and extension cells that you create are visible on your computer only.

To create a personal Extension Group

1. Right-click in the extension groups area.

2. Choose **New Group** from the menu that appears.

3. The **Group Properties** dialog box appears.

4. Enter a name for the new group, and select **OK**.

5. The new group appears in the extension groups area. You can now add personal extensions to the group you created. Refer to the next section for more information.

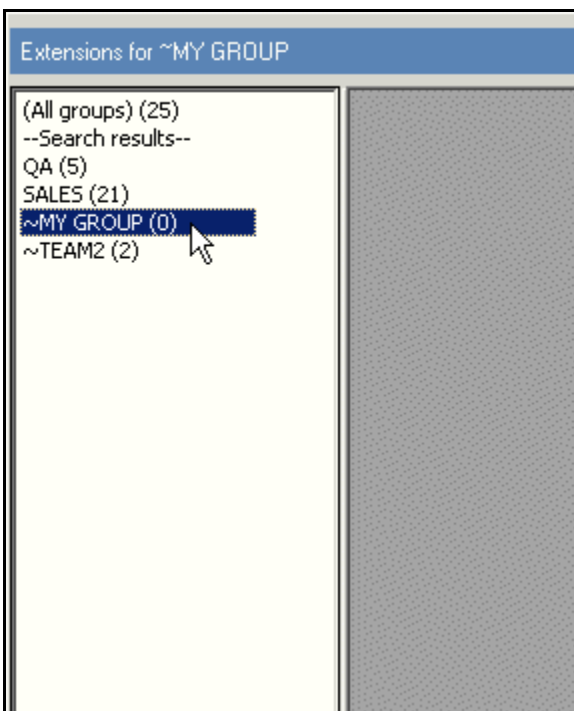# Creating Personal Extension Cells

The extension cells that you create are visible on your computer only. You can create a new extension cell only in a personal extension group that you have created. Refer to *Creating Personal Extension Groups on page 53*.

You cannot create new extension cells in the extension groups that already existed when you opened ucCompanion for the first time. These are system-wide extension groups that were set up by your system administrator.

The Extensions you create can also serve as speed dial buttons, since whenever you double-click on an Extension it is automatically dialed.
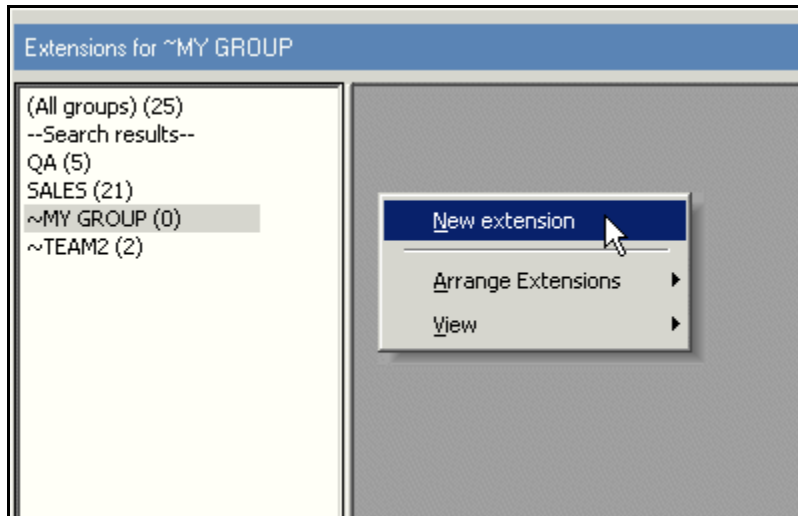
To create a personal Extension Cell

1. In the extension groups area, select the extension group where you want to add a new extension cell. This selects the extension group and displays any extension cells that are already in the group.

> **NOTE**
>
> *You can create a new extension cell only in an extension group that you have created. Refer to Creating Personal Extension Groups on page 53 for more information.*

2. Right-click on the blank (gray) area in the Extensions area, and choose New Extension.

3. The **Add Extension** dialog box appears. Fill in the **Add Extension** dialog box as follows:

Extension #	Enter a number for the new Extension, up to nine digits.
	This does not need to be a valid extension number; however, it must be a number you have not already used in any other extension cell you have created.
First Name	Enter the first name, as you want it to be displayed in the extension cell.
Last Name	Enter the last name, as you want it to be displayed in the extension cell.
Department (or a Comment)	(Optional) Enter a department name, company name, or other information you want to display in this cell. This will be displayed in the cell below the first and last name. A maximum of 12 characters is allowed.
Dialable Address	Enter a valid telephone or extension number. Enter digits, *, or # only (no other characters, spaces, hyphens, or parentheses). For outside numbers include the digits required to dial out, such as **9** and **1** and an area code; for example **916175551212**. (Your system may use a number other than 9.)
	When you select this extension cell once, the number you enter here will be placed in the call box, and you can then select Make Call to call the number. When you double-click this extension cell, the number you enter for Dialable Address will be dialed automatically.

4. Select **OK** in the **Add Extension** dialog box. The new personal extension cell has now been added to your personal extension group.

Creating Speed Dial Buttons

When you add an extension to a personal extension group you have created, this extension cell can function as a speed dial button. You can double-click on the cell to quickly call a pre-set number.
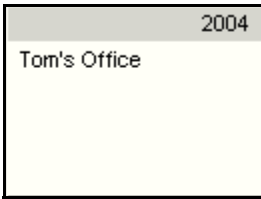
Example of a speed button

The numbers used for speed dial buttons can be either internal or external telephone numbers. Extension numbers used in speed dial buttons do not need to be monitored by ucCompanion. In other words, you can create a speed dial button to dial an extension, even if the Extension does not appear in the system-wide All Groups extension group.

Speed dial extension cells are gray (unless you have changed the default color).

The steps to create a speed dial button are the same as the steps to create a new extension cell. Refer to *Creating Personal Extension Cells on page 55* for more information.

Deleting Personal Extension Cells

You can only delete personal extensions that you have created. You cannot delete the system-wide extensions set up by your system administrator.

To delete a personal Extension

1. Select the extension group that contains the extension you want to delete.

2. Right-click on the extension you want to delete, and choose **Delete Extension**.

3. Answer **Yes** in the confirmation box that appears.

Deleting Personal Extension Groups

To delete an Extension Group

1. Right-click on the group in the extension groups that you want to delete.

2. Choose **Delete Group**.
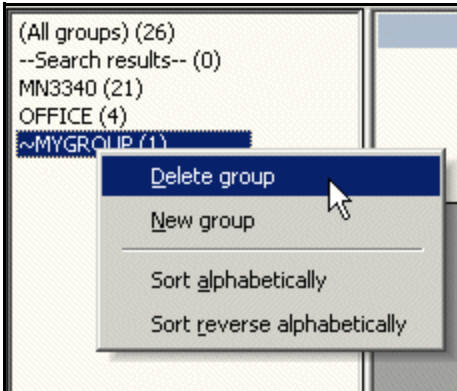
3. Select **Yes** in the message box that appears, to confirm that you want to delete the group.

> **NOTE**
>
> *You can only delete personal groups that you have created, not system-wide groups. You also cannot delete the group that results from a search.*

Changing Extension Views

Extensions can be displayed in either Icon view or List view. Icon view is the default.

Extension Status Area displayed in Icon View

|		First name	Last name ⟋	Department	Extension	Caller ID	Caller name	Status note
(⃔	🖓	Ted	Barns		1002	1005	Luke Mad...	Out of office
⌒		Tyler	Brooks		6015			
⌒		Ludwig	Chapman		1006			
⌒		Jim	Gandy		1007	6016	Greg Me...	
⌒		Tony	Genova		6007			
⌒		Spencer	Hopkins		6014			
⌒		Drew	Johnson		6006			
⌒		Tom	Lashinsky		6008			
⌒		Sean	Lee		6013			
⌒		Rob	Leidig		6005			
(⃔		Luke	Madison		1005	1002	Ted Barns	

Extension Status Area displayed in List View

To change extension views

1. If starting in Icon view, right-click in an empty (gray) part of the extension status area.

    If starting in List view, right-click in the right-most part of the extension status area, to the right of the status note column. Reduce the size of the status note column if needed.
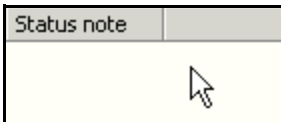
2. In the menu that appears, select either **View** > **List View** or **View** > **Icon View**. The display will change accordingly.

Searching for an Extension

You can search for an extension by using the first or last name that is associated with that extension.
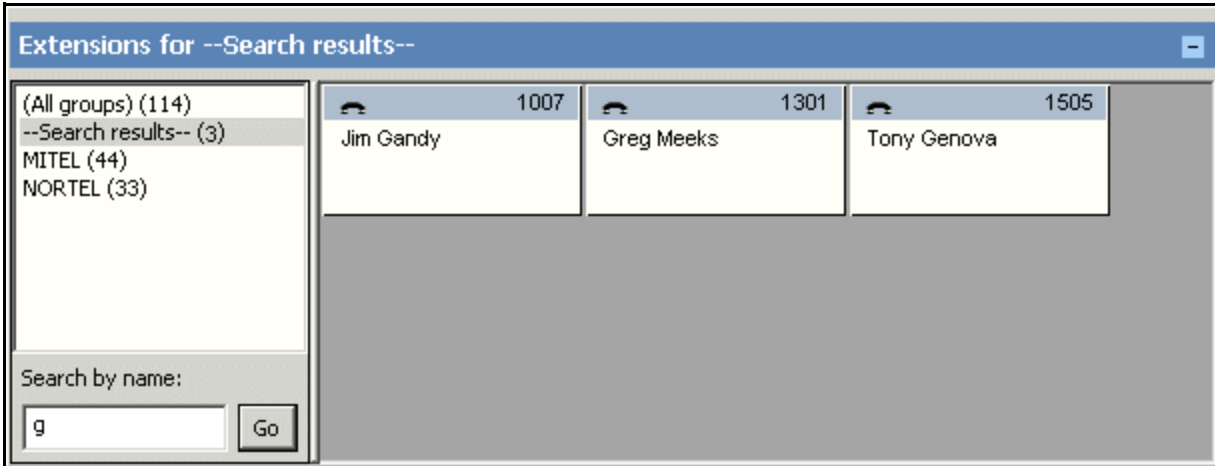
To search extensions

1. Go to the **Search By Name** box, found at the bottom of the extension groups area.

2. In the Search By Name box, enter one or more letters from the name (case does not matter).

3. The search finds all names (both first and last names) that begin with those letters, across all extension groups. The results are displayed in the extension status area.

Sorting Extension Groups

To sort the list of Extension Groups

1. Right-click anywhere in the extensions group area.

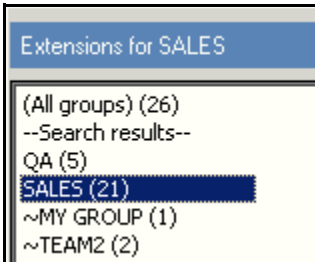2. Choose **Sort Alphabetically** or **Sort Reverse Alphabetically** from the menu that appears.
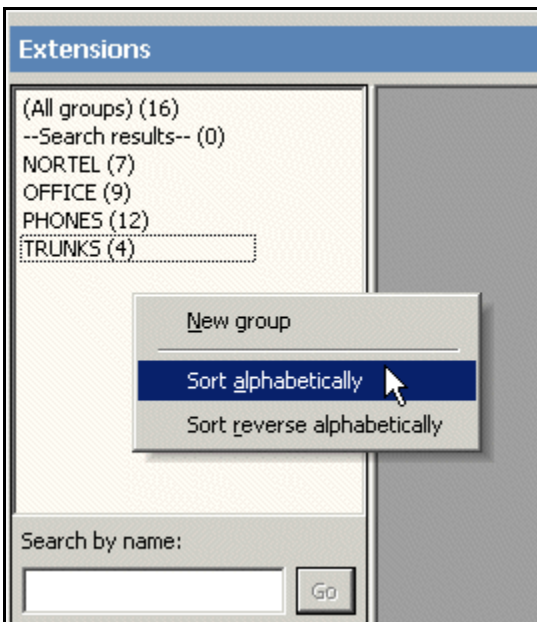
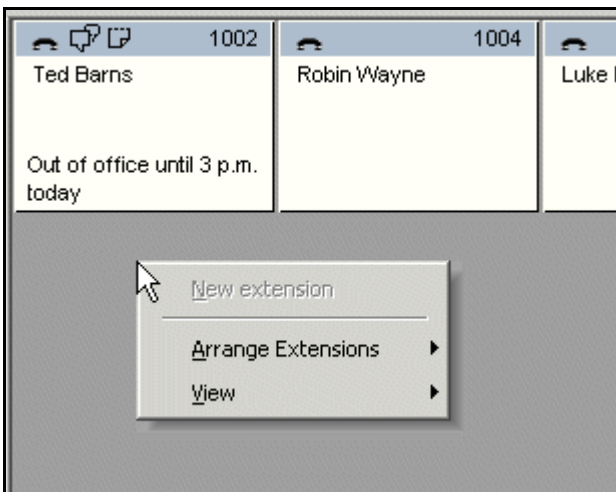3. The list of extension groups is sorted accordingly.

Sorting Extensions

To sort extensions while in Icon View

1. Select the extension group that contains the extensions you want to sort.

2. Right-click in the extension status area, in a gray area (not on an extension cell).

3. In the menu that appears, move the mouse cursor to **Arrange Extensions**. A submenu appears. Select a sort option from the submenu. The extensions are sorted accordingly.

To sort extensions while in List View

1. With the extension status area set to List view (select **View > Extensions > List View**), select a column head, for example first name.

2. Extensions are sorted in descending order. If you select the heading again, it sorts in ascending order.

Expanding the Extensions Panel

You can choose to expand the Extensions Panel by hiding the **Call List** and the **CPS** panel (if it is open).

To expand the Extensions Panel

1. Go to the **Call List** title bar and select the **Minimize** button on the right end. This hides the **Call List** panel.
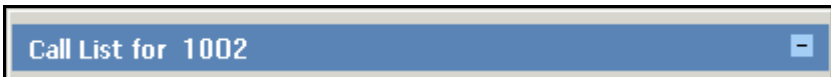
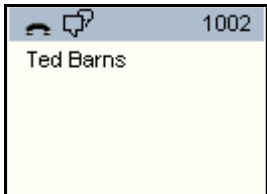*The Call List title bar, with the Minimize button*

2. To show the **Call List** panel again, select the **Maximize** button on the end of the call list title bar.

5   Instant Messaging

Using ucCompanion Instant Messaging

Overview of ucCompanion Instant Messaging

ucCompanion Instant Messaging provides an easy way to send and receive text messages from within ucCompanion clients. You can tell when ucCompanion IM has been enabled by looking at extension cells in the extension status area:

Instant Messaging	Icon	Icon as Seen in Extension Cell
ucCompanion Instant Messaging		

For more information refer to the following sections:

- *Sending an Instant Message on page 63*
- *Replying to a Message on page 66*
- *Clearing the History on page 67*
- *Sticky Notes on page 67*

Sending an Instant Message

To send a message using ucCompanion Instant Messaging

1. Make sure ucCompanion Instant Messaging is enabled in your system. Refer to *Using ucCompanion Instant Messaging on page 63* for more information.

2. Before you send the instant message, check that the ucCompanion IM icon appears at the top of the recipient's extension cell.


ucCompanion Instant Messenger icon
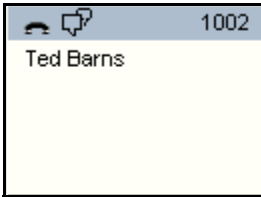
ucCompanion Instant Messenger icon in an Extension Cell

The IM icon shows that the person has launched a ucCompanion program and is able to receive ucCompanion instant messages. If no IM icon appears, you can still send the IM, but the user will not receive it until they start up ucCompanion. This is called a Sticky Note.

3. To begin an instant message, right-click on an extension cell and choose **Send IM** or enter the extension number in the call box, and then do any one of the following:

   • Select the **Send IM** button.
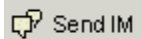
   • Press CTRL + I.
   • Choose **Calls** > **Send IM**.

> *You can send a single instant message to more than one person. First select all the recipients by holding down the CTRL or SHIFT keys while selecting their extensions. Use SHIFT + click to select a group of consecutive extensions. Use CTRL + click to pick out individual (non-consecutive) extensions. To send the instant message select the* ***Send IM*** *button, or use one of the other methods described above.*

4. When the Network Instant Message window appears, type your message in the lower portion of the window. Then select the **Send** button.
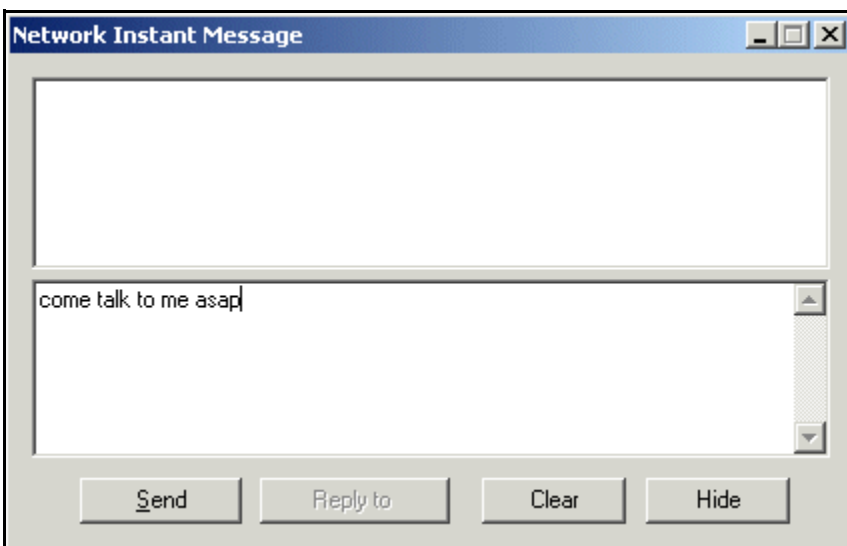
5. The message is instantly popped onto the recipient's screen (if they are logged on), allowing them to respond. The following example shows how the recipient will see your instant message:
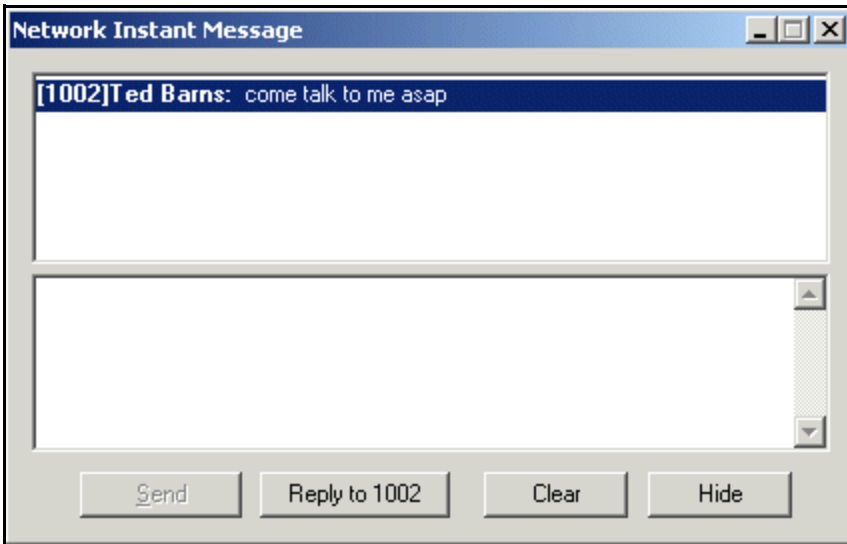
> **NOTE**   *Instant Messages should be less that 255 characters. Otherwise only the first line of the message will be sent.*

6. If the person replies to you, the Network Instant Message window will pop up again. The example below shows how a reply will appear on your computer. You can now type a response and select Send again, if you wish.
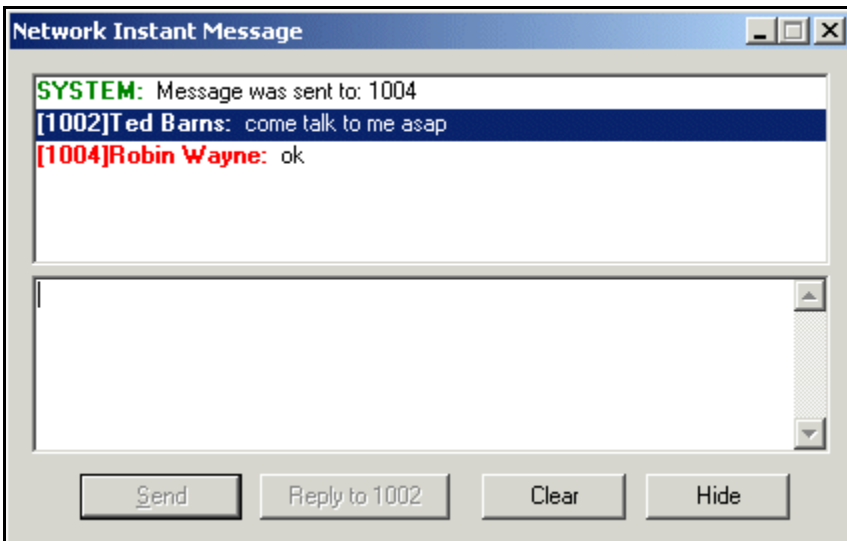
Replying to a Message

To reply to a message sent through ucCompanion Instant Messenger

1. When you receive an instant message, the Network Instant Message window will appear.
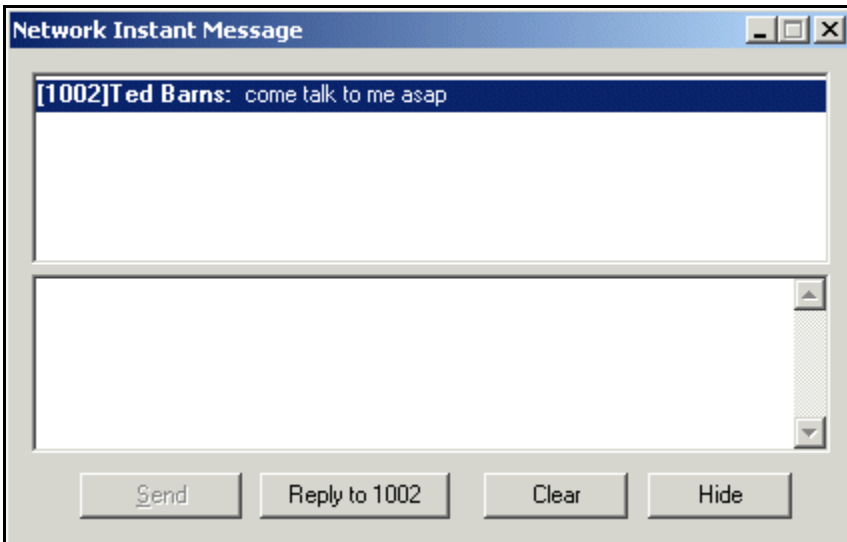
2. Type a reply in the bottom pane of the Network Instant Message box.
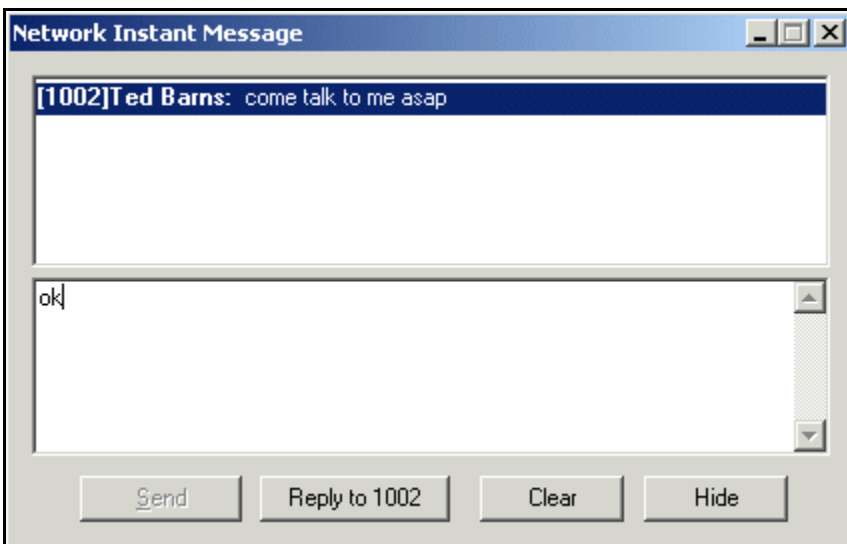
3. If more than one person (sender) appears in the top part of the window, select the person to whom you want to reply.

4. Select the **Reply** button. (The **Reply** button will not become active until you type some text).

Clearing the History

To clear the IM history

To delete past messages from the Network Instant Message window, select the **Clear** button at the bottom of the window.

Sticky Notes

If you send an Instant Message to someone who is not logged into ucCompanion, your message immediately pops up the next time they log in. This is called a Sticky Note. Sticky Notes are a good way to make sure someone gets a message when they begin work for the day or when they return to their computer.

6   Customizing the Interface

Overview of Customization

You can customize the toolbar and keyboard commands. Customization options are accessed through selecting **View** > **Toolbars** > **Customize**. Refer to the following sections for information on customizing ucCompanion:

Customizing Toolbars

The following sections describe how to customize your toolbars.

Changing Buttons

To add buttons to the toolbar

1. Choose **View** > **Toolbars** > **Customize** > **Commands** tab.

2. Select a category of commands in the Categories area. These categories correspond to the standard menus.

3. In the commands area, select and drag a command to a toolbar, and release the mouse. A new button appears on the toolbar for that command.

4. Select the **Close** button.

To move or remove buttons from the toolbar

1. Choose **View** > **Toolbars** > **Customize** > **Commands** tab.

2. As long as the **Customize** dialog box remains open, you can freely move and remove buttons. To move a button, drag it to a new location on the toolbars. To remove a button, drag it over the **Customize** dialog box and release the button. The button disappears.

3. When you are finished, select the **Close** button.

Changing Toolbars

To hide a toolbar

1. Choose **View** > **Toolbars** > **Customize** > **Toolbars** tab.
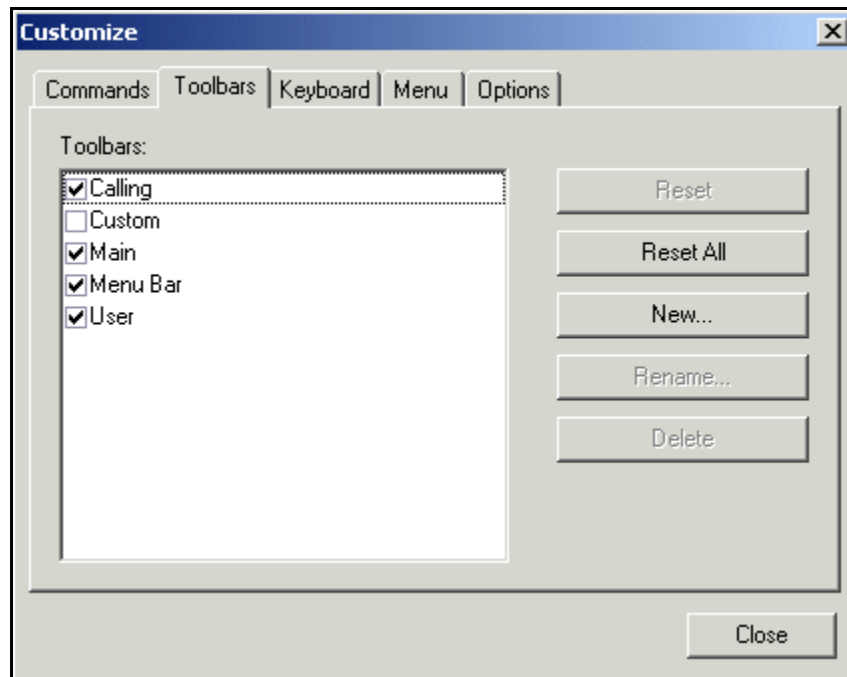
2. Uncheck the box next to the toolbar you want to hide. The toolbar disappears from the main window.

3. Select **Close**.

> **NOTE**   *You cannot hide the **Menu Bar** toolbar. Also, you cannot uncheck/check the **Calling** and* *Custom toolbars.*

To create a new toolbar

1. Choose **View** > **Toolbars** > **Customize** > **Toolbars** tab.

2. Select the **New** button. The **Toolbar Name** dialog box appears.

3. Type a name for the toolbar, and select **OK**. An empty, truncated toolbar appears.

4. Drag the new toolbar to a position with the other toolbars.

5. Select **Close**.

6. Add buttons to the toolbar, as desired. Refer to *Changing Buttons on page 68*.

Customizing Toolbar Tips

To add a space between buttons, open the **Customize** dialog box and drag the button slightly away from its neighbor. To remove the spacer, hold down the Alt key while dragging slightly toward the neighbor button.

To copy a button, hold down CTRL while dragging the button slightly to the left or right.

Use the **Rename** and **Delete** buttons in the **Customize** dialog box to rename and delete toolbars.

Customizing Key Assignments

To change the keystrokes for a command

1. Select **View** > **Toolbars** > **Customize** > **Keyboard** tab.

2. Select a category from the Category list. These categories correspond to the standard menus, and contain all the commands in that menu.

3. Select a command from the **Commands** list. This is the command for which you will change the keystrokes. If there is currently a keystroke set to invoke that command, it will appear in the Current Keys box on the right in the dialog box.

    To assign new (additional) keystrokes to this key, select the Press New Shortcut Key box. Then press the key or combination of keys you want to use to invoke that command. Select the **Assign** button. If the keys are already assigned to another command, the name of that command will be displayed below. You cannot use those keystrokes until you remove them from the command that is already using them.

    To remove keystrokes for that command, select the command in the Current Keys box and select the **Remove** button.

    To reset all key assignments back to the original defaults, select the **Reset All** button.

4. When you are finished, select the **Close** button.

Customizing Menus

To customize the menus

1. Select **View** > **Toolbars** > **Customize** > **Menu** tab.

2. Many of the features in this dialog box are not currently available. However you can do the following:

    Use the **Reset** button to set menus back to defaults.

    Use the **Menu Animations** list to change menu animations.

Use the **Menu Shadows** check box to enable/disable display of shadows behind menus when they are displayed. You can add, move, or delete the commands that appear in menus. To do this, switch to the **Commands** tab, open a menu, and change drag commands to and from the **Commands** tab.

> **CAUTION**
>
> *While the **Customize** dialog box is open, you can remove entire menus. However, this is not recommended. Never remove the **View** menu, which would prevent you from accessing the **Customize** dialog box and prevent you from resetting back to the defaults.*

Customizing Miscellaneous Options

To change options

1. Select **View** > **Toolbars** > **Customize** > **Options** tab.

2. Check or uncheck the following options in this dialog box:

Show ScreenTips on Toolbars	Shows tool tips over a button, when the mouse is left to hover over the button.
Show Shortcut Keys in ScreenTips	Includes the key assignment for a command as part of button tool tips.
Large Icons	Displays larger buttons in the toolbars.

3. Select **Close** when you are finished.

7   Troubleshooting

Overview

Occasionally problems may occur where ucCompanion, ucCompanion - Live Attendant, or ucCompanion - Soft Phone do not work as expected. Refer to the following sections to determine possible causes and solutions for errors that may occur.

*   *Unable to Manage Calls on page 72*
*   *Unable to Make Calls on page 73*
*   *Unable to Remove Calls on page 74*
*   *Connection to the Server is Lost on page 75*

> **NOTE**   *The possible causes and solutions noted are not an exhaustive list.*

Unable to Manage Calls

Windows Firewall Prevents Users from Managing Calls

Symptoms

*   You can launch ucCompanion or ucCompanion - Live Attendant.
*   You can launch ucCompanion - Soft Phone, and it registers.
*   You can see incoming ringing calls, but you are unable to answer them.
*   You cannot make calls.

Cause

Occasionally, Windows Firewall may prevent users from being able to manage their calls. This is most likely to occur following an initial installation or upgrade of ucCompanion. For security reasons, Windows Firewall blocks programs and services from running on your machine, except for those programs or services which have been enabled as exceptions and thus are allowed to run.

If Windows Firewall is enabled on your local computer, and ucCompanion - Soft Phone is launched for the first time by a user without administrative privileges, or with prompting turned off, then Windows Firewall prevents ucCompanion - Soft Phone from running, which results in the user not being able to manage calls.

Solution

To configure Windows Firewall to allow ucCompanion - Soft Phone

1. Select **Start > Settings > Control Panel**.

2. Double-click on **Windows Firewall**.

3. Select the **Exceptions** tab.

4. Enable **ucCompanion - Soft Phone**, and select **OK**.

Unable to Make Calls

If you are having trouble making calls, check the following sections for possible causes and solutions.

Unable to Make Any Calls

ucCompanion - Soft Phone isn't Running

Symptoms

You cannot make any calls, internal or external.

Cause

The ucCompanion - Soft Phone works in conjunction with ucCompanion and ucCompanion - Live Attendant, and must be running in order to make calls. If ucCompanion - Soft Phone is running, you should refer to the ucCompanion - Soft Phone icon in your system tray. For more information refer to *ucCompanion - Soft Phone Overview on page 27*.

Solution

To launch ucCompanion - Soft Phone

Select **Start > Programs > ucCompanion - Soft Phone**.

Unable to Make External Calls

Area Code has not been Configured

Symptoms

You can make internal calls, but not external calls.

Cause

If you are able to make internal calls, but not external calls, then it's possible that the area code has not been configured in the dialing properties. This is most likely to occur after initially installing or upgrading ucCompanion or ucCompanion - Live Attendant. Refer to *Setting your Area Code on page 7* for more information on dialing properties.

Solution

> **CAUTION**   *If your administrator has already configured external dialing for you, then do not modify the settings unless instructed to do so.*

To configure dialing properties

1. From ucCompanion or ucCompanion – Live Attendant, select **Settings > Options**.

2. Select the **Number Format** tab.

> **CAUTION**   *Do not change the maximum number length from the default value of 4, or the length of local phone numbers from the default value of 7.*

3. Select **Dialing Properties**.

4. If your area code is not already set then select **Edit**, and select the **Area Code Rules** tab.

5. Select **New**, and enter your area code.

6. If your area has 10 digit dialing in effect, then enable **Include the area code**. If your area has 7 digit dialing in effect, then *do not* enable Include the area code.

7. Select **OK**.

8. Select **Apply**, and select **OK** on the **Area Code Rules** tab.

9. Select **Apply**, and select **OK** on the **Dialing Rules** tab.

10. Select **OK** on the **Options** dialog.

Unable to Remove Calls

Symptoms

You have disconnected from a call, but it still appears on the screen.

Cause

Occasionally, due to network issues, the screen may show that you are still connected to a call after you have hung up. Use the **Clear Call** command to reset the screen.

> **NOTE** *Clear call is not the same as disconnecting a call. That is, if the call was not previously disconnected, then selecting Clear Call does not disconnect the call, but it removes it from your screen.*

Solution

To clear calls from your screen

Select **Edit** > **Clear Call**. Any calls that were shown as connected on your screen are removed.

> **NOTE** *Alternatively, right-click on your extension cell, and select **Clear All Calls**. The keyboard shortcut to clear calls is F12.*

Connection to the Server is Lost

Connection to the Server is Lost when Windows Vista goes into Sleep Mode

Symptoms

• ucCompanion displays that it has lost the connection to the Server
• All Busy Lamp Fields (BLFs) have been removed
• You are running Windows Vista
• This occurs after your computer has gone into sleep mode and then has been reactivated

Cause

If you are using Windows Vista and your computer goes into sleep mode, then you may lose the connection to the Server, and it does not automatically reconnect when the computer is reactivated.

Solution

To regain the server connection, close ucCompanion and restart it.

Prevention

To prevent this issue from occurring, go to the Windows Vista Control Panel, and adjust the power options to avoid going into sleep mode.

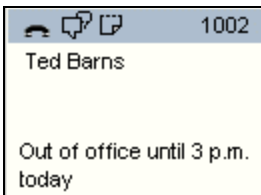> NOTE   *For more information, refer to Connecting to the ucCompanion Server on page 7.*

8   Other Features

Refer to the following sections for information on other features:

Setting your Status Note

You can insert a text status note into your extension cell that is visible to all ucCompanion users.

Status Note in an Extension Cell

To set a Status Note

1. Right-click on your extension cell and select **Edit status note**

    Alternatively:

    - Select **Settings > Set My Status Note** from the menu bar.
    - Press **CTRL + T**

    The status note window appears.

2. Enter a new message, or select an existing message:

    - Type a short message, up to 250 characters, in the lower portion of the window.
    - Select an existing message from the *Predefined Notes* section. The message automatically appears in the lower portion of the window.

3. To add a time and date stamp to the message, press **CTRL + T**.
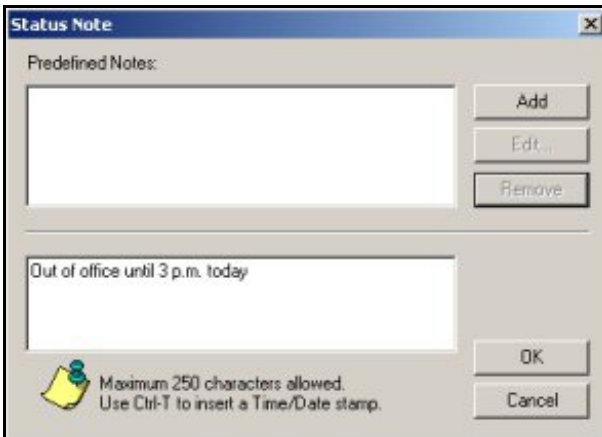
4. Select **OK**. The status note is added to your extension cell, and is visible to all users in the system.
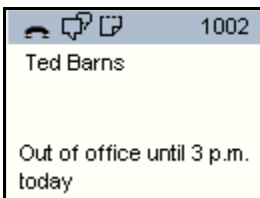
An icon also appears in your extension cell, indicating that you have a status note.

Status Note icon

5. To change or delete your status note, repeat the steps above to open the status note window again, and change or delete the text.

Editing a User's Status Note

In ucCompanion - Live Attendant you can edit the status notes of other users. You can edit the status notes for global speed dials, that is, extensions of any group type (for example, tenant, system-wide, or normal) that are created using the Busy Lamp Field (BLF) Administration. However, you cannot edit the status note for extensions created in local extension groups, for example, local speed dials that you have created.

To edit a user's Status Note

1. Right-click on the extension cell of the user whose status note you want to edit, and select **Edit status note**.

2. Enter a new message, or select an existing message:
   • Type a short message, up to a maximum of 250 characters, in the lower portion of the window.
   • Select an existing message from the *Predefined Notes* section. The message automatically appears in the lower portion of the window.

3. If you want to add a time and date stamp, press **CTRL-T**.

4. Select **OK**. The status note is added to the extension cell, and is visible to all users in the system. An icon also appears in the extension cell, indicating that the user has a status note.

5. To change or delete the status note, repeat the steps above to open the status note window, and change or delete the text.

Logging in as Administrator

Logging in as the administrator provides access to restricted features, such as changing your extension number, global extension administration, and server connection options.

To log in as administrator

1. On the menu bar, select **File > Admin login**. If **Admin login** is grayed out, you are already logged in as administrator. This displays the **Administrative login** dialog box.

2. Enter the Server password in the **Enter Password** box. If you do not know the administrative password, contact your system administrator.

To change the Administrative Password

1. From the menu bar, select **File > Admin** login.

2. Enter the current administrative password in the **Enter Password** box. This is the password that was created when the ucCompanion Server (PCE server) was installed.

3. Enter a password in the **New Password** box. Then re-enter the same password in the **Re-Enter Password** box.

4. Select the **Change Password** button.

5. Select **OK** in the confirmation box that appears.

To Log Out as Administrator

Select **File > Admin logout**.

Changing Interface Colors

You can customize the colors used in ucCompanion - Live Attendant. The color scheme used is called a skin.

To change interface colors

1. In the ucCompanion **Console** menu, select **Settings > Skins**. The **Skin Editor** dialog box appears.

2. If you want to use a pre-configured skin, go to the **Choose Skin** drop-down list and choose a scheme other than Default. Select **OK** to close the Skin Editor and apply the new scheme. If you want to make general changes to the colors of extension cells only, go to **Choose Skin** and choose **Standard**. Select **OK** to close the Skin Editor. Then choose **Help > Color Legend**. In the Color Legend, double-click on the cells to change their colors. Select **OK** to close the Color Legend and apply the new cell colors.

   If you want to use your own custom colors, and you want to change individual component colors throughout the window, choose a skin other than Default (the Standard scheme is recommended). Select each part of the interface in turn in the Color Property drop-down list. Then select the button to the right, to change the color of that property. Refer to *Overview of the Main Window on page 12* for a description of various parts of the window. Within the names of the color properties, **Bk** means background color. For example, **CallQueueBkColor** is the background of the call list. Some of the non-default skins also have different icons from the Default icons. Select **OK** to set your changes..

> *NOTE*   *To reset all colors back to default, select **Settings** > **Skins**, and then set the Choose Skin to **Default**.*

Minimizing the Program to the System Tray

To minimize the program

1. Select the **Minimize** button in the top, right part of the title bar.

2. If the **Minimize Application to Tray** option is enabled, the program is minimized to the system tray. The **Minimize Application to Tray** setting is set in **Settings > Options > Misc** tab.

3. To maximize the program again, double-click on the ucCompanion icon, or right-click on it and select **Open ucCompanion** or **Open ucCompanion-Live Attendant**.

ucCompanion icon in the Windows System Tray

If the **Minimize Application to Tray** option is not enabled, the program is minimized to the task bar. To maximize the program, select it in the task bar.

Running in Tray Icon Mode

Overview of Tray Icon Mode

If you want to use the minimum desktop space for ucCompanion you can run in Tray Icon mode. In this mode, the program appears as an icon in the System Tray. When call activity occurs on your extension, it will be displayed as a small notification popup window that appears from the System Tray, if the notification window is enabled.

Notification Popup Window

Enabling Tray Icon Mode

To enable Tray Icon mode

1. In ucCompanion, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **Misc** tab.

3. Check **Minimize Application to Tray**.

4. Check **Enable Notification Window**, and select **OK**. Tray Icon mode is now enabled. Whenever you want to disable Tray Icon mode, open the **Options** dialog box again and uncheck **Minimize Application to Tray**.

Setting Options

Server Options

To set server connection options

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. In the **Server** tab, select the **Connection Parameters** button. The **ucCompanion PCE Connection** dialog box appears.

   Host – Enter the IP address of the ucCompanion server. Ask your system administrator for this information.

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

My Extension Options

The **My Extension** tab allows you to set the name and extension number you will use in the ucCompanion system. You can also set a personal password, to restrict changes to your name and extension number settings.

To set My Extension options

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **My Extensions** tab. Refer to *Logging in as Administrator on page 79* for more information. If you are not logged in as administrator, you can gain access to the grayed out settings by entering your personal password in the **New Password** field and the **Re-Enter New Password** field.

3. Configure the settings in this tab as desired:

Enter New My Extension	Enter the extension number that you will access on this computer. This number will be displayed in your main title bar. This is the only setting in the **My Extension** tab that does not require a personal password.
	If the extension number you enter is protected by a personal password, you must enter that password in the **Enter Password** box.
Enter Password	Enter your personal password in this field and select the **...** button. If you are logged in as administrator, you are already logged in here automatically.
	If you have not yet set a personal password on this computer, leave the **Enter Password** box blank and just select the **...** button.
My Extension Name	Enter a new first and last name in this box. This is the name that will identify you to other users, such as when you send an instant message. However, this does not set the name that appears in your extension cell; that is set up by your system administrator.

4. If you have not yet created a personal password, you may do so in the **My Extensions** tab. This prevents another user from using your extension number or name. To set a new personal password, do the following: enter a new password in the **New Password** box. Then type the new password again in the **Re-enter Password** box. Then select the **Change Password** button.

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

Number Format Options

To set Number Format options

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **Number Format** tab.

3. Configure the settings in this tab, as desired:

- In the first box in this tab, enter the number of digits used for extensions in your phone system.
- In the second box, enter the number of digits required to dial a local phone number, not including trunk prefixes such as 9.
- In the **CallerID Format** field, use the default setting of "(???) ???-????" for most systems.
- Select the **Dialing Properties** button to bring up a Windows dialog box that allows you to set your local dialing options.

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

Display Options

To set Display options

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **Display** tab.

3. Configure the settings in this tab, as desired:

Show CPS Scripting Area	Check this option to show the CPS Scripting panel above the call list. This option is disabled by default, and should remain unchecked unless CPS scripts are being used. Refer to your administrator for more information.
Color Coded Extension Cell Bars	When this option is checked, call activity on extensions (and trunks) is indicated in the extension status area by color changes in the extension cells. Refer to *Extension Status Area on page 24* for more information. This option is checked by default.
	Uncheck this option to make extension cells always remain the default color. The default color is blue, when using the default "skin." Refer to *Changing Interface Colors on page 80* for more information.
	After you change this setting, you must change to a different extension group or restart the program before the change will take effect.
Show Line Column	Displays the Line column in the call list. The line column shows which line a call came in on.
Use Bold Font for Status Note	Enable this option to make all status note text bold, as it displays on your computer.

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

Miscellaneous Options

To set Miscellaneous options

1. From the menu bar, select **Settings > Options**. The **Options** dialog box appears.

2. Select the **Misc** tab.

3. Configure the settings in this tab as desired:

Bring to Foreground on Ring	Check this option to make the main window come to the front of all other programs when your extension rings.
Minimize Application to Tray	Check this option to make ucCompanion go to the Windows system tray when you minimize it. To restore the program, double-click the icon in the system tray. If this option is not checked, minimizing the program causes it to appear in the Windows task bar rather than in the system tray.
Ring the PC on Incoming Call	Check this option to make your PC speakers ring when a call comes into your extension. This requires that your PC has speakers and a sound card installed.
Flash Icon on Activity	When this is enabled, the ucCompanion will flash when it is minimized to the system tray, if there is activity in ucCompanion.
Enable Notification Window	Shows a small popup window from the system tray whenever call activity occurs on your extension.
Notify call parking destination (user)	When parking a call, enabling this option prompts you to enter the extension number of the user for whom the call is being parked. The user is then notified that a call is parked for them, so they can unpark it. Refer to *To automatically notify users when a call is parked for them on page 44* for more information.
Call Processing Scenario Scripting	For use in creating CPS scripts.

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

Custom Toolbar

You can add custom smart buttons to the main toolbar. You can configure these buttons to launch programs or perform some other programming task.

To create a custom button to launch an external program

1. Make sure the Custom toolbar is displayed. Enable it by selecting **View > Toolbars > Custom** from the menu bar.

2. From the menu bar, select **Settings > Options > Custom Toolbar** tab.

3. Select the **New (Insert)** button.

New button

4. Enter a name for the custom button, and press the **Enter** key. An entry for the custom button appears in the Toolbar Items box.

5. While the new entry is selected, make sure the command drop-down list is set to **External Program**.

6. In the Parameters area at the bottom of the dialog box, select the **...** button next to the command box. Browse and select an executable file.

7. Enter settings in the **Argument** field as needed.

   Arguments are additional parameters that must be included with the initial command to execute the program.

8. Enter settings in the **Working Directory** field as needed.

   The working directory is the location where the program will look to find any related files it needs.

9. Select **OK** to close the **Options** dialog box. The new custom button now appears in the custom toolbar in the main window.