ISM 1.0 Service Pack 2

Wave ViewPoint
User Guide

REVISION HISTORY

Release	Date	Documentation Changes	Page No.
1.0 SP2	2/08	Release identifier on the title page has been modified to reflect current s/w release. **Manual content is unchanged.**	
1.0 SP1	12-07	Added Revision History table.	this page
1.0	10-07	Initial Release	---

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Chapter 3 Using the Extensions List

Chapter 4 Receiving and Handling Calls in ViewPoint

Introducing Vertical Wave

CHAPTER CONTENTS

About Vertical Wave

Vertical's award-winning Wave phone system integrates your telephone and computer to make your telephone a much more powerful tool, dramatically expanding the ways in which you can place, receive, and manage your phone calls.

Accessing Wave

You can access Wave in any of the following ways. Each method is described below.

- Wave ViewPoint
- Wave TAPI Service Provider and Contact Manager Assistant
- Your phone

Using Wave ViewPoint

This manual describes how to use ViewPoint, Wave's easy-to-use Windows interface. With ViewPoint you can point and click to play voice messages, place and receive calls, manage multiple active calls, access contacts and users, and more.

Using the Wave TAPI Service Provider and Contact Manager Assistant

If you make extensive use of contact management applications or customer relationship management software such as Microsoft Outlook, GoldMine or GoldMine FrontOffice 2000, or Interact Commerce Corporation's Act!, you can install the Wave TAPI Service Provider and place Wave calls to contacts from those applications. You do not need to have Wave ViewPoint installed on your computer to use the TAPI Service Provider.

The TAPI Service Provider links your contact management applications to your Wave phone, just as Wave ViewPoint is linked to your phone. After the TAPI Service Provider is installed, you can use your contact manager application's Place Call feature to call its contacts using your Wave phone. Ask your Wave system administrator to install the Wave TAPI Service Provider, and then follow the instructions in your contact manager application for placing calls.

You can also install the Wave Contact Manager Assistant (CMA) and receive screen-pops for calls that show the name, the Caller ID, and the time of day of the call. You do not need to have Wave ViewPoint installed on your computer to use the CMA.

Note: With Act!, you can receive screen-pops without installing the CMA.

For more information, see the Wave TAPI Service Provider Help and the Wave Contact Manager Assistant Help.

Using your phone

Voice prompts guide you to enter Wave phone commands via your phone's keypad. Depending on your phone type (SIP, digital, or analog), you can also use phone feature buttons or soft keys to access Wave features. For more information, see the *Wave Phone User Guide*, or the *Wave Phone Quick Reference Guide* specific to your phone type.

Feature comparison table

The following table shows the major features that are available in Wave, via ViewPoint, the phone menu prompts, or the Contact Manager Assistant (CMA). If your Wave system does not include some of these features, your Wave system administrator may have made them unavailable to you.

Feature	ViewPoint	Phone	CMA
Managing voice messages	Yes	Yes	No
Placing, receiving, and handling calls	Yes	Yes	Some
Managing participants in conference calls	Yes	No	No
Managing contacts	Yes	No	Yes
Call announcing of contacts	Yes	Yes	No
Screen-pops for incoming calls	Yes	n/a	Yes
Managing workgroups	Yes	No	No
Viewing the Extensions list	Yes	No	No
Viewing the Call Log	Yes	No	No
Recording greetings	Yes	Yes	No
Forwarding calls	Yes	Yes	No
Changing the active greeting	Yes	Yes	No

Getting technical support

Contact your Wave system administrator for technical support. For information on how to report problems, see Appendix C.

You can get help through Wave documentation as described in the next section.

Wave documentation

Related reading

The following documents are included with Vertical Wave in Acrobat format, and can be found on the Vertical Wave Documentation CD.

For information about this version of Vertical Wave, including new features, known issues, and other late-breaking information, see the Release Notes included on the Documentation CD.

Manuals

- *Wave Phone User Guide* Describes how to use digital phones, SIP phones, and analog phones with Wave.

Quick Reference Guides

- *Wave Analog Phone Quick Reference Guide*. Provides instructions for using analog telephones with Vertical Wave.
- *Wave Digital Phone Quick Reference Guide*. Provides instructions for using Vertical Edge digital telephones.
- *Wave SIP Phone Quick Reference Guide*. Provides instructions for using Vertical Wave SIP telephones.
- *Wave Voice Mail Quick Reference Guide*. Provides instructions for using Vertical Wave voicemail features.

Accessing Help

From any Wave dialog, you can press F1 or click **Help** to get context-sensitive Help describing the window and its individual fields.

Using ViewPoint

Chapter Contents

About ViewPoint

ViewPoint provides a central place to manage your calls, voicemail, contacts and Wave account in an easy-to-use, graphical Windows interface. In ViewPoint you can quickly and easily drag and drop to transfer or conference calls, point and click to hear voice messages or call people back, and more.

See your Wave system administrator about installing ViewPoint on your computer.

Without ViewPoint, you can still access many Wave functions by using the telephone commands. For details, see the *Wave Phone User Guide*.

Using ViewPoint remotely

If your office's network is set up so you can log on remotely via a Virtual Private Network (VPN) connection, you can use ViewPoint as if you were on the network at your office. Contact your network administrator to see if you have VPN support and how to start VPN from your remote computer.

ViewPoint will not run without a network connection to your Wave Server. Be sure you have an active VPN connection to your office before launching ViewPoint.

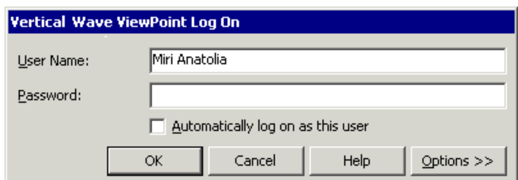
Logging on to ViewPoint

To use ViewPoint, you must log on using a valid Wave user account.

Note: Each ViewPoint program must be licensed. If you see a message stating that ViewPoint is not licensed, you cannot log on. See your Wave system administrator for help if such a message appears.

To log on to ViewPoint:

1. Choose **Start > Programs > Programs > Vertical Wave ViewPoint > Wave ViewPoint.** The ViewPoint Log On dialog opens.



2. Type your user name in the **User Name** field. If you do not know your user name, ask your Wave system administrator.
3. Type your numeric password in the **Password** field. Use the same password that you use to log on to Wave on the phone.
4. If you want to skip the process of logging on to the Wave ViewPoint in future sessions, check **Automatically log on as this user**.

   Note: If you check **Automatically log on as this user**, anyone at your computer can open your ViewPoint program and listen to your voice messages, because ViewPoint will open without requiring a password.
5. If you need to change login options, click **Options >>**. See the next section, “Using ViewPoint with a different phone or server.”
6. Click **OK**. ViewPoint starts.

Using ViewPoint with a different phone or server

By clicking **Options >>** in the ViewPoint Logon dialog, you can change the following login settings:

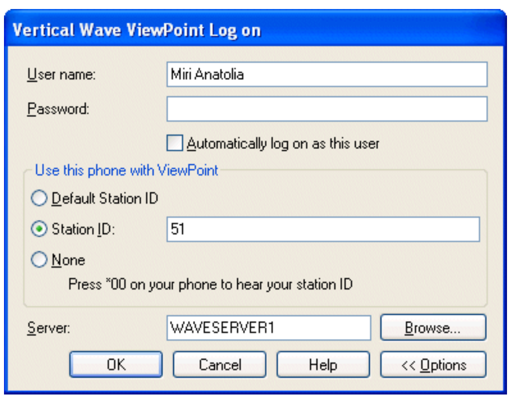
- **The associated phone.** ViewPoint works best in conjunction with a phone, when you can use the **Place Call** commands, make recordings, and more. ViewPoint can be associated with only one phone at a time. You change the associated phone whenever you want to use a different phone with ViewPoint (for example, your desktop computer has been moved to a different office).

  You can also change the associated phone after logging on by selecting **File > Use a different station.**

- **The Wave ISM Server.** ViewPoint connects to a specific Wave ISM server. If multiple Wave ISMs are available on your network, you can change the one to which ViewPoint is connected. You must also change server name if the network name of its computer has changed.

To change ViewPoint login options:

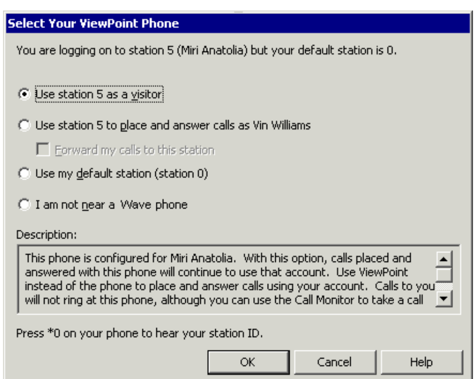
1. Start the ViewPoint program as described in the previous section. If your system logs you on automatically, choose **File > Use a different station** after you start ViewPoint. The expanded ViewPoint Log On dialog opens.



2. Under **Use this phone with ViewPoint**, specify the phone with which ViewPoint is associated. This phone will ring whenever you use a ViewPoint command that requires ringing your phone, for example, playing a voice message over the phone, using the **Place Call** command, or making a recording. Specify the associated phone in one of the following ways.
   - To use ViewPoint with a Wave station, select one of the following options:
     - **Default Station ID.** Select this field to automatically use your default station ID as configured by your Wave administrator.
     - **Station ID.** Select this field and enter the phone's station ID. To learn a Wave phone's station ID, pick up the phone and press ***00**.
   - To use ViewPoint without an associated phone, choose **None**. ViewPoint commands that require a phone—for example, placing a call—will be unavailable.
3. In **Server**, type the network name of a Wave ISM on your network, or click ... to select one.
4. Click **OK**.

Using ViewPoint with another station

Most Wave users have a default station ID, which represents the phone your Wave system administrator assigned to you (if you roam between phones your station ID may be 0). When you log on to ViewPoint specifying an associated phone other than your default station, the Select Your ViewPoint Phone dialog opens, enabling you to clarify which phone you want to use with ViewPoint.



To use ViewPoint with another station:

1. In the Select Your ViewPoint Phone dialog, choose one of the following options:

   - **Use station *n* as a visitor.** This option appears only if you specified another user's station as your associated phone—for example, you are logging on at another user's desk. The phone remains set for its normal user, but ViewPoint is set for you. Calls you place and receive using the phone use the normal user's account (for example, the dialing permissions and call announcing settings) and appear in the normal user's Call Log.

     However, calls you place and receive using ViewPoint commands use your account. Choose this option if you do not intend to use the phone extensively during this ViewPoint session.

   - **Use <this phone > to place and answer calls ... .** The phone (station or remote number) is set for you. Calls you place and receive using the phone use your account settings. Choose this option if you will be using the phone as your own during this ViewPoint session.

     For how to reset the station to its normal user, see "Placing outbound calls from shared stations" on page 3-2.

     If you choose this option, you can also select **Forward my calls to this station / number** to receive calls to your own extension here. For more information about call forwarding, see "Forwarding calls" on page 8-1.

   - **Use my default station.** Your default station remains ViewPoint's associated phone. Whenever you use a ViewPoint command that requires the phone—for example, to play a voice message—ViewPoint uses your default station. Choose this option only if your default station is nearby.

   - **I am not near a Wave phone.** You log on with station ID 0, meaning that ViewPoint is not associated with a phone. ViewPoint commands that require a phone—for example, placing a call—are unavailable.

     Note: When you run ViewPoint without an associated phone, the Call Monitor folder title bar displays "No associated phone" as a reminder.

2. Click **OK**. ViewPoint opens with the phone selection you made.

Logging on with new logon options

You can log on as a different user, or with a different associated phone, without exiting and restarting the ViewPoint program. This feature makes it easy to log on to another user's account from your ViewPoint, or to move ViewPoint from one phone to another. To log on to another user's account, you must know the other user's password.

To log on as a different user, choose **File > Log on as a different user**. The Wave ViewPoint Log On dialog opens. See "Logging on to ViewPoint" on page 2-2.

To change ViewPoint's associated phone, choose **File > Use a different station**. The Wave ViewPoint Log On dialog opens with your name and password already entered and the Options showing.

Changing your password

To change your password, you must use your phone. See the *Wave Phone User Guide* for more information.

Logging on with command-line switches

You can add switches to the Windows shortcut command line that starts ViewPoint. The command line switches enable you to run ViewPoint using two phones at your desk, log on using a particular station or remote number, turn on debugging data, and perform other tasks. See Appendix B for more information.

Exiting ViewPoint

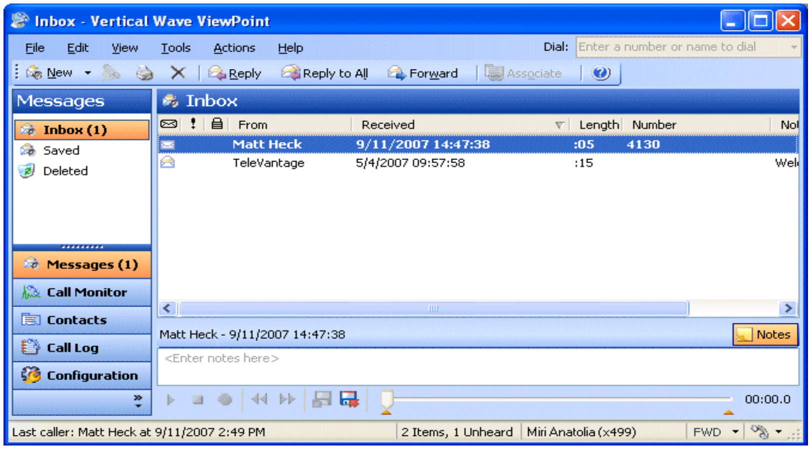
To exit ViewPoint, choose **File > Exit**.

If you are at another user's desk, exiting logs you off from the station associated with the PC, returning the station to its default user. You can log off from the station without exiting ViewPoint by picking up the phone and dialing ***00**.

Exiting and logging off

You can also exit ViewPoint by choosing **File > Exit and Log off**. This command closes all ViewPoint folders that you have opened in a new window by right-clicking the navigation pane and choosing **Open in new window**. Note that it does not close multiple instances of ViewPoint opened by using the /allowmultiple command line argument (see Appendix B).

Elements of the ViewPoint window



ViewPoint window contains the following elements:

- The menu bar
- The toolbar
- The navigation pane or view bar
- The status bar
- ViewPoint folder that is currently displayed (see “Working in ViewPoint folders” on page 2-10)

The menu bar

The *menu bar*, at the top of ViewPoint, provides access to Wave commands. Click each menu to see the commands that menu contains. Menu commands are referenced in this manual in the format **File > New > Contact**. You can drag the menu bar from its left edge to detach it.

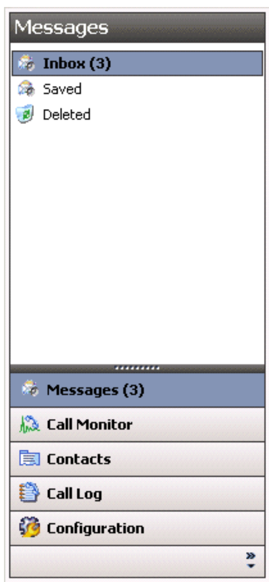
The toolbar

The *toolbar*, directly under the menu bar in each folder, provides single-click access to frequently used Wave commands. Some folders contain toolbar buttons that are not found in other folders. The following illustration shows the toolbar for the Messages folder.

In any folder, clicking the left-most toolbar button creates a new item for that folder. For example, in the Call Monitor, clicking the left-most button lets you place a new call: 

You can also click the small arrow to the right of that button for a menu that lets you create any new ViewPoint item. The arrow is available in every folder.

The navigation pane



The *navigation pane*, on the left side of the ViewPoint window, gives you point-and-click access to ViewPoint's folders. Click a folder in the navigation pane to open that folder in the ViewPoint main window.

The navigation pane is made up of the Favorite Folders list and, below it, the navigation bar. You can expand the navigation bar or Favorite Folders list by dragging the separator bar between them. As you shrink the navigation bar, its icons minimize and appear at the bottom.

Using the navigation bar

Click an entry in the navigation bar to go to that folder and gain access to other related folders in the Favorite Folders list. The entries in the navigation bar are:

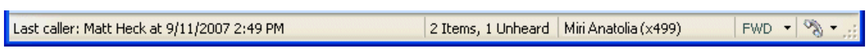
- **Call Monitor.** Displays the Call Monitor. **Favorite Folders:** Extensions.
- **Voicemail.** Displays the Inbox folder of the Messages folder. **Favorite Folders:** All other Messages folders, including local folders and any folders that other users have shared with you.
- **Contacts.** Displays the Contacts folder. **Favorite Folders:** The Public Contacts folder.
- **Call Log.** Displays the Call Log.
- **Configuration.** Displays the Greetings folder. **Favorite Folders:** Greetings, Workgroups, Public Workgroups.

Customizing the navigation pane

To add or remove buttons from the navigation pane, click the small arrow icon in the lower right corner of the pane, then choose **Add or Remove Buttons** from the menu that appears. Check or uncheck button options on the submenu to include or hide them in the pane.

The status bar

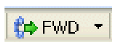
The *status bar* is located at the bottom of ViewPoint window.



The status bar gives you quick access to the following information:

- **Last caller.** Lists the name (if available) and Caller ID of your last incoming call. You can press F11 to place a call to that number.
- **Number of items.** Number of items in the current folder. For example, if you have 18 contacts, the Contacts folder status bar displays “18 Items.” In any Messages folder, the status bar also indicates the number of unheard messages.
- **Name and extension.** The name and extension of the user logged on to ViewPoint on this computer.

- **Phone.** If you see a Phone pane showing the name of another user, it indicates that user is logged in to your station. While that user is logged in, calls you place using the phone will be subject to that user's dialing restrictions, and logged as coming from that user. To restore the station to yourself, pick up the phone and dial *00.
- **Audio output.** You can click these buttons to switch ViewPoint's audio output between your computer speakers and your phone. Audio output includes playing your voice messages. Click the arrow to the right of the button to switch your audio output.
- **Call forwarding.** If the FWD button is not greyed out, it means you are currently forwarding your calls. Hover your mouse over the button to display the forwarding number. You can also click the arrow to quickly select one of your personal numbers (set by your Wave system administrator) as the forwarding number. Double-click the button to open the Call Forwarding dialog, in which you can change or turn off call forwarding. See "Forwarding calls" on page 8-1.



Working in ViewPoint folders

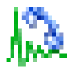
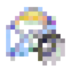
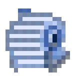
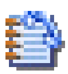
Wave ViewPoint contains folders, which appear in the main part of ViewPoint window and give you access to specific Wave functions.

Note: Some folders may not be available to you. Your Wave system administrator controls which folders your ViewPoint program displays.

To open a folder, do one of the following:

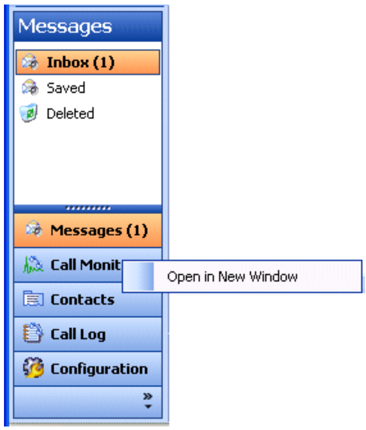
- Click its icon in the Navigation pane. See "The navigation pane" on page 2-8
- Choose **View > Go To**, then select the folder to display.

For an overview of each folder, see the following table.

Navigation Pane	Folder	Description
		**Call Monitor** Place calls and handle incoming calls (transfer calls, create conference calls, monitor a voice message as it is being left).
		**Messages** Hear and manage your voice messages. To call back a message, right-click it and choose Place Call.
		**Contacts** Manage an online phone book of your telephone contacts.
		**Call Log** View a record of all your phone calls. To return the call, right-click it and choose Place Call.
		**Call Monitor \ Extensions** View all Wave extensions, their personal statuses, and who is on the phone now.
		**Configuration \ Greetings** Record your voice-mail greetings and change the active greeting.

Working with multiple ViewPoint windows

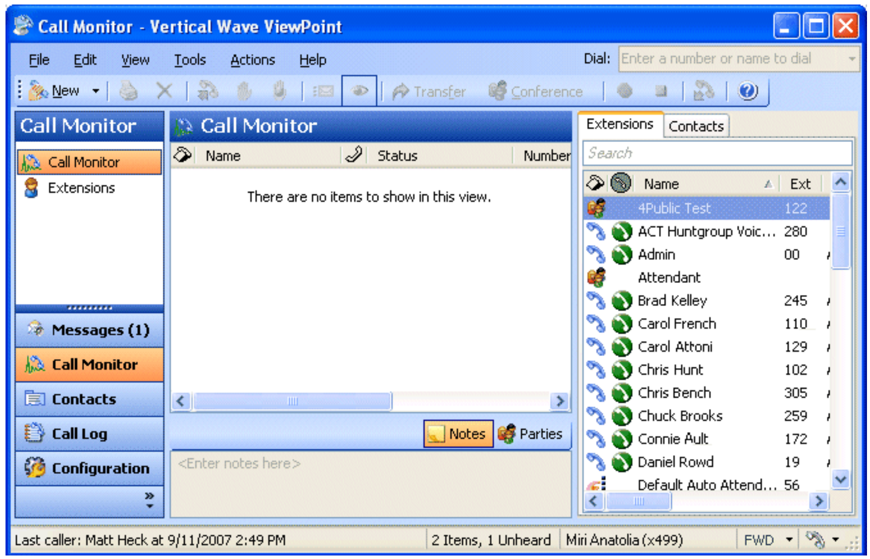
You can have several folders open at once by opening each folder in its own window. To open a folder in its own window, right-click a folder in the Favorite Folders list and choose **Open in New Window** on the shortcut menu.



When you want to shut down ViewPoint, you can close all ViewPoint windows at the same time by choosing **File > Exit and Log Off** on the main menu.

Adjusting the Phonebook Pane in the Call Monitor folder

The Phonebook pane—shown by default in the Call Monitor—includes the Extensions folder and the Contacts folder. You can perform drag-and-drop call handling operations between the pane and the Call Monitor. See “Dragging and dropping items” on page 2-14. With the Extensions folder, you can see whether a user is on the phone before placing a call to him or her.



With the Phonebook pane open, click the appropriate tab to display the Extensions folder or Contacts folder.

To move the Phonebook Pane within the Call Monitor folder, choose **View > PhoneBook Pane**, and then select a location from the sub-menu.

To remove the Phonebook Pane from the Call Monitor folder, choose **View > Phonebook Pane > Off**.

Deleting voice messages and other items

To delete a voice message from your Inbox, select it and then press **Delete**. The voice message moves to your Deleted folder.

To permanently delete a voice message from your Inbox:

1. Select the voice message. To select more than one voice message, press Ctrl and select them.
2. Press Shift+Delete. A confirmation dialog opens.

3. Do one of the following:
   - Click **Yes** if you want the selected voice message to be permanently removed from your computer.
   - Click No to keep the voice message in your Inbox.

To delete other items:

1. In the folder in which the item appears, select the item. To select more than one item, press Ctrl and click each item that you want to delete.
2. Right-click the selected item and choose **Delete** on the shortcut menu. A confirmation dialog opens.
3. When you delete an item that is not a voice message, such as a greeting, the item is permanently and irretrievably removed from your computer. You cannot recover it after you delete it.
4. Click **OK** to permanently delete the item.

Copying and pasting items

Copying a row in the Contacts, Greetings, and Workgroups folders places a copy of the item in that row on the clipboard as text. This information can be pasted into other applications, such as a text program.

Choose **Edit > Copy** to place a copy of selected items on your clipboard. Choose **Edit > Paste** to paste the items. Use this method to paste Call Log entries and voice message information into the Problem Report Wizard (See “About the Problem Report Wizard” on page C-1.).

Dragging and dropping items

You can drag and drop one item onto another item to perform actions such as making a call, transferring a call, and adding a call to a conference. You can also move an item to a folder.

For example, if you drag an active call in your Call Monitor onto a user in the Extensions tab of the Phonebook pane, the call transfers to that user. Conversely, you can drag a user from the Phonebook pane to the Call Monitor to call that user.

The following table lists the drag-and-drop actions you can perform within Wave ViewPoint. The From column shows the items you can click and drag. The To column shows the destination items. The remaining columns show the actions that result when you drag and drop an item or use the Shift and Ctrl keys in conjunction with dragging and dropping.

Note: Whenever you can drag an item to the Call Monitor to place a call, you can also drag it to the Dial toolbar field.

From	To	Drag	SHIFT + Drag	CTRL + Drag
Call	**Call**	No action	Opens the Conference dialog	Conferences the calls together
	Extension, Contact, Call Log, Voice Message	Performs a blind transfer	Opens the Transfer dialog	Performs a consultation transfer
		Note: Alt + Drag of a call to an extension transfers the call directly to that extension's voicemail.		
Call Log	**Call**	Conferences the Call Log party with the call	Opens the Conference dialog	
	Empty Call Monitor	Places a call to the Call Log party	Opens the Place Call To dialog	
Contact	**Call**	Conferences the contact's default number with the call	Opens the Conference dialog	
	Empty Call Monitor	Places a call to the default phone number	Opens the Place Call To dialog	
	Folder	Moves the contact to the folder	Opens the Move Item dialog	Copies the folder

From	To	Drag	SHIFT + Drag	CTRL + Drag
Folder	**Folder**	Moves the folder to another folder	Opens the Move Folder dialog	
	Contact	Moves the folder to the Contacts folder	Opens the Move Folder dialog	
	Voice Message	Moves the folder to the Messages folder	Opens the Move Folder dialog	
Voice Message	**Call**	Conferences the message sender with the call	Opens the Conference dialog	
	Empty Call Monitor	Places a call to the message Caller ID	Opens the Place Call To dialog	
	Folder	Moves the message to the folder	Opens the Move Item dialog ox	Copies the message
Extension (User, Auto Attendant, Queue, or IVR Plug-in)	**Call**	Conferences the call	Opens the Conference dialog	
	Empty Call Monitor	Places the call	Opens the Place Call To dialog	
Text (for example, a phone number in ViewPoint)	**Call Monitor**	Places a call to the number that was dropped	Opens the Place Call To dialog	

Printing items in folders

To print the contents of a folder, choose **File > Print**. When you print a folder that contains several columns, you may need to change the orientation of the page to “landscape” so that all columns that appear in the folder are printed.

Organizing items in folders

The Messages folder contains one folder already created, the Saved folder. When you listen to a voice message on the telephone and save it, the message is moved into the Saved folder.

Private and public folders

ViewPoint displays the following types of folders in the Folder List section of the Navigation pane:

- **Private folders.** Folders that you create and that appear in your ViewPoint only.
- **Public folders.** Folders that are visible to all Wave users. See “Viewing public folders” on page 2-19.

Customizing columns

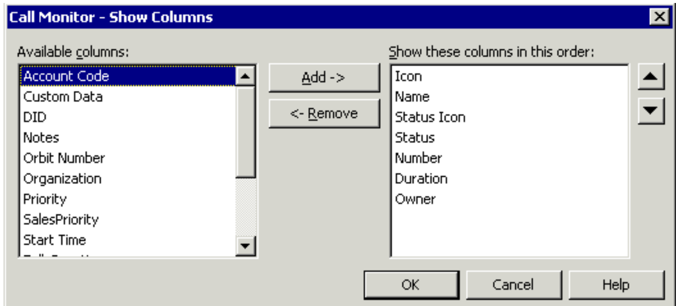
You can choose to show or hide columns in a folder. You can also customize columns in a folder by moving, resizing, and resorting them. The changes you make to columns in a folder are saved when you exit ViewPoint.

Showing, hiding, and reordering columns

For each folder in ViewPoint, you can choose the columns that you want to see in the folder. Note that by default, some folders do not show all of the available columns.

To show, hide, or reorder columns in a ViewPoint folder:

1. Choose **View > Show Columns**. The Show Columns dialog opens.



2. Do any of the following:
   - To add another column to the folder, select it in the **Available columns list**, and then click **Add->**.
   - To remove a column from the folder, select it in the **Show these columns in this order** list, and then click **<-Remove**.
   - To reorder the columns in the folder, select the column in the **Show these columns** list, and click the **Up** and **Down** arrows to move the column up or down in the list.
3. Click **OK** to save your changes.

Moving columns

To move a column, do either of the following:

- In the folder, click the column header and then drag and drop it to a new location.
- Use the Show Columns dialog to reorder the columns in a folder, as described above.

Resizing columns

To change a column’s width, in the folder click and drag the right-hand side of the column header.

Sorting the contents of a column

Click a column header to sort the items in a folder by the information in that column. Click the column header again to sort in the reverse order.

The column in the folder that contains an arrow in its header is the column by which the display is currently sorted. The direction of the arrow indicates the sort order.

Viewing public folders

Public folders contain items that all Wave users can view and use. For example, any user can view a public contact’s information or place a call to that contact.

Example:

Your company defines its departments as public workgroups. All users in the company can view the members of those workgroups.

Note: Items in public folders are not generally available for editing or deleting. You must have special permission to edit a public item.

Managing the Deleted folder

The Deleted folder contains voice messages that you have deleted from the Messages folder. Items in the Deleted folder continue to be stored in the limited space that has been allocated to you for your voice files. To regain space for more voice messages or other voice files, empty your Deleted folder.

To view the contents of the Deleted folder, click it in the Folder List.

Emptying the Deleted folder

You can delete an item from the Deleted folder just as you would from any folder. When items are deleted from the Deleted folder, they are deleted permanently.

To empty the Deleted folder, choose **Tools > Empty Deleted Folder**.

Using the audio controls

Wave's audio controls make it easy to create recordings and listen to recordings and voice messages.

These audio controls appear throughout ViewPoint in dialogs in which you can create recordings and listen to voice messages.

Creating recordings and playing voice messages.

You create recordings by speaking into your phone.

	**Record**	When you are ready to record, pick up your phone, and then click the button. A beep signals that recording has begun.
	**Stop**	When you are finished recording, you can either hang up or click the button.
	**Play**	Click the button to listen to the recording or voice message. Click it again to pause playback.

To move forward and backward within the recording or voice message, drag the slider bar:

You can play audio either over your computer speakers or your telephone. Choose **Tools > Audio Output** to switch audio output from one to the other. You can also use the button in the status bar. When playing audio over the phone, if your phone is on hook, it will ring to connect you to the audio being played.

Note: When sending audio to your phone, ViewPoint displays a message identifying the station ID being rung.

Using voice message bookmarks

You can set bookmarks in voice messages by dragging the arrows that appear under the slider bar. When you play a message you have bookmarked, only the portion of the file between the bookmarks plays. This capability can be useful when you want to mark the location of an important phone number in a voice message.

Importing and exporting voice files

To import or export a voice file, use the buttons on the recording control.

Import	You can import a voice file in WAV format to use for any ViewPoint recording (greetings, voice titles, and so on). Wave can import WAV files with a frequency of 8Khz, 11.025 Khz, 22.05 Khz, or 44.1 Khz.
Export	You can export any of your ViewPoint recordings, including voice messages and recorded conversations, to a WAV or MP3 file on your hard disk.

Importing and exporting Wave items

You can import contacts into Wave from a CSV (comma-separated value) file, and you can export contacts to a CSV file. Click **File > Import and Export** to open the Import and Export Wizard.

Importing and exporting contacts

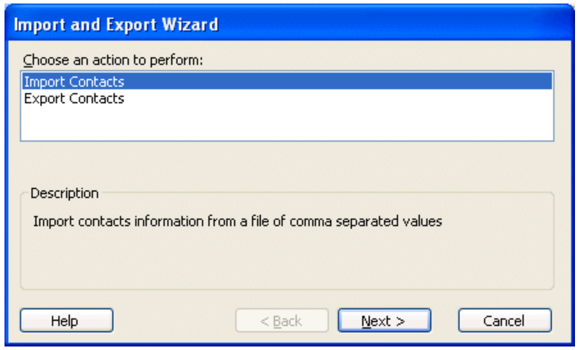
You can import contacts into Wave:

- From a CSV file generated from Wave
- From a CSV file generated from another contact manager such as Microsoft Outlook

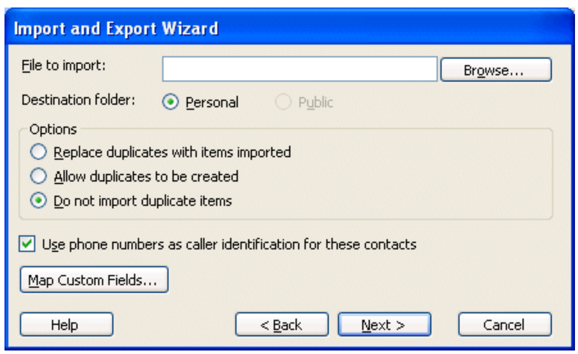
You can export contacts from Wave to a CSV file that you can import into another Wave ViewPoint, Outlook, GoldMine, FrontOffice 2000, Act!, or other contact management software.

To import contacts from a CSV file:

1. Choose **File > Import and Export**. The Import and Export Wizard opens.

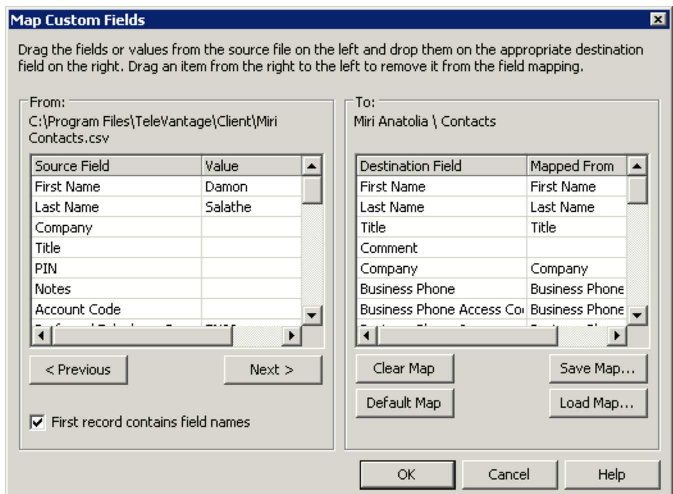


2. Select **Import Contacts**, and then click **Next**.



3. In **File to Import**, click **Browse** and select the CSV file that you want to import.
4. In **Destination folder**, select the Wave Contact folder into which you want to import the contacts in the CSV file.
5. Under **Options**, select one of the following:
   - **Replace duplicates with items imported.** If Wave finds a duplicate contact in the CSV file, the contact from the file will replace the existing Wave contact.
   - **Allow duplicates to be created.** If Wave finds a duplicate contact in the CSV file, it will import all contacts, even those that are duplicates of Wave contacts.
   - **Do not import duplicate items.** If Wave finds duplicate contacts in the CSV file, it will not import them.

6. Select **Use phone numbers as caller identification for these contacts** to add the imported contacts’ phone numbers to Wave’s list of Caller ID numbers so that contacts can be identified when they call. For more information, see “Teaching Wave to recognize your contacts” on page 9-7.
7. If you are importing a CSV file that was created by Wave, go to step 10.
8. If you are importing contacts from another application and have not previously mapped the fields, click **Map Custom Fields**. The Map Custom Fields dialog opens using the default map, showing the first contact record to be imported, and how the existing fields will be mapped to Wave fields.



9. If you have saved a different map and want to use it, click **Load Map** and select it. Otherwise, map the fields manually as follows:

- Check **First record contains field names** at the bottom of the dialog if the CSV file’s first record consists of the names of fields. Then drag fields or values from the left pane (the CSV file) to the fields in the right pane (Wave contacts) in which you want the values to appear. Drag unwanted field mapping from the right pane to the left pane to clear them.
- Click **Previous** or **Next** to view other records in the CSV file to see how they will map.
- Click **Clear Map** to remove all mapping from the right pane.
- Click **Default Map** to restore the default mapping.

- Click **Save Map** to save the current mapping to a new file (this can be useful if you regularly import contacts from several different sources). If you do not click **Save Map**, the default map is saved when you click **OK**.

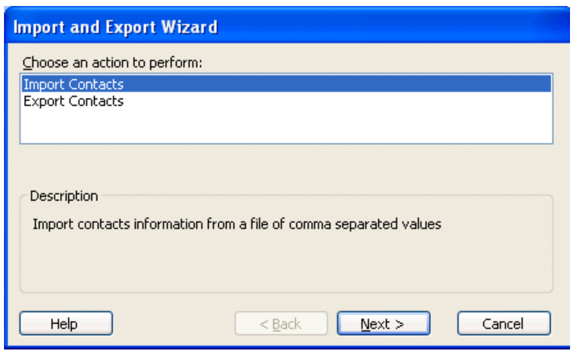
  When you are finished mapping fields, click **OK**. Any changes to the default or custom map are saved for future importing.

10. Click **Next** in the Import and Export Wizard, and then click **Finish**. The contacts in the CSV file are imported.

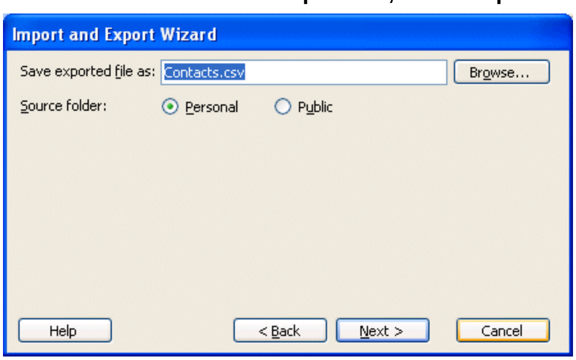
Note: When text is imported from a CSV file, a comma in the text breaks the text between fields unless the text is within quotation marks.

To export contacts to a CSV file:

1. Choose **File > Import and Export**. The Import and Export Wizard opens.



2. Under **Choose an action to perform,** select **Export Contacts**, and then click **Next**.



3. In **Save exported file as,** browse to the folder in which you want to save the CSV file.
4. In **Source folder**, choose the Contacts file that you want to export, and then click **Next.**
5. Click **Finish**. The CSV file is exported.

Using the Extensions List

CHAPTER CONTENTS

Viewing Wave extensions

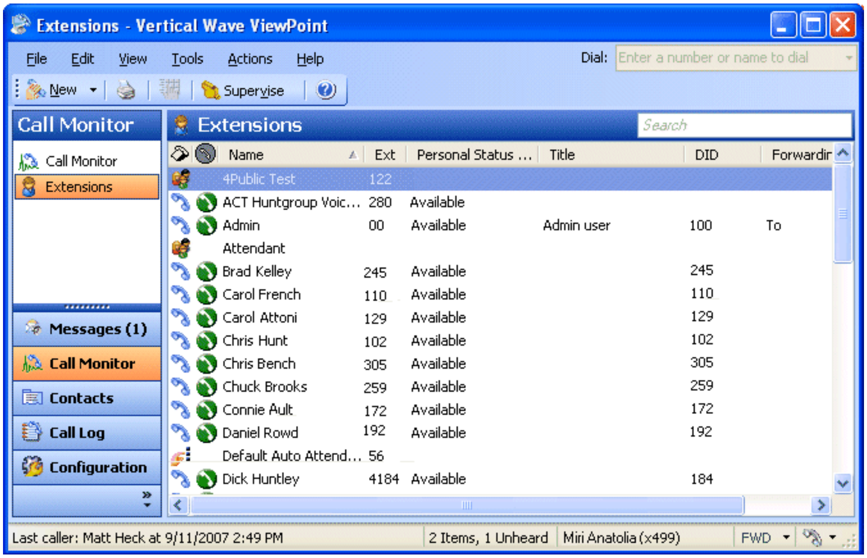
You can see all Wave extensions, along with information about the current status of each extension, in the Extensions list. You can use the Extensions list to quickly place calls to other Wave extensions.

You can display the Extensions list in the Call Monitor for quick access, including drag-and-drop calling. See “Adjusting the Phonebook Pane in the Call Monitor folder” on page 2-12.

A glance at the Extensions list can tell you:

- A user’s extension number
- Whether a user is currently on a call
- A user’s current personal status
- Whether a user has call forwarding turned on, and the location to which the calls are forwarded
- The extensions of your office’s auto attendants and queues.

The Extensions list updates automatically in real time.



Extensions folder tabs

The Extensions folder can contain tabs that display related groups of extensions. To view tabs, right-click the Extensions view column headers and choose **Show Tabs**. Click each tab to view its contents.

- **All tab.** This tab displays all Wave extensions. Your system may be configured to not show this tab.
- **Workgroup tabs.** The Extensions folder contains a tab for each public workgroup of which you are a member, and a tab for each personal workgroup that you created and decided to show as a tab. Click a workgroup tab to see the extensions within that workgroup. See “Using workgroups” on page 9-14.
- **Queue tabs.** If you are an agent in contact center queues, the Extensions folder contains a tab for each queue. Click the tab to see the agents who are members of that queue.

Extensions folder columns

The following table shows the columns that are available in the Extensions folder. To show or hide columns, see “Customizing columns” on page 2-17.

Column	Description	
	Either type of extension, or user phone state. The extension types are:	
		User whose phone is on hook
		User whose phone is on hook
		Call center agent in wrap-up state
		Auto attendant
		Call center queue
		Workgroup
		IVR Plug-in
Name	Name associated with the extension.	
Ext	Extension number.	
Personal Status Name	User’s current personal status.	
Title	User’s title, if available.	

Placing calls to an extension

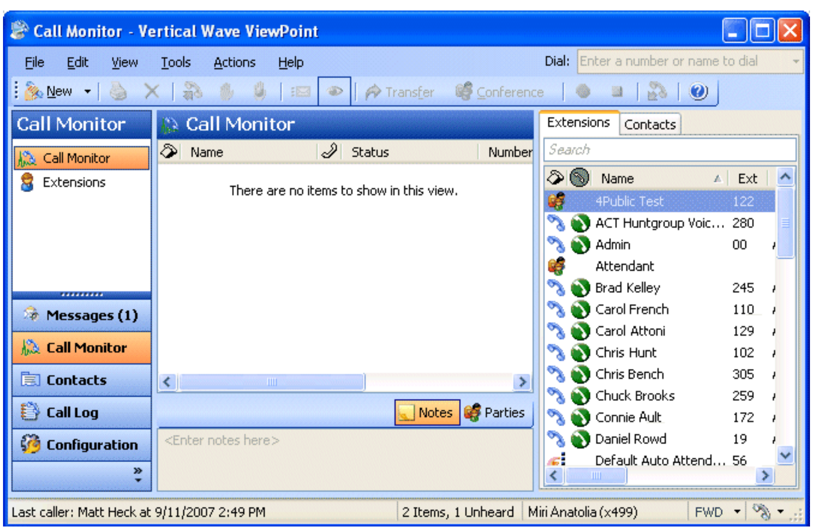
To place a call to an extension, double-click the extension. If your phone is on hook, it rings to connect you to the call being placed.

Receiving and Handling Calls in ViewPoint

Chapter Contents

Using the Call Monitor folder

In the Wave ViewPoint, the Call Monitor folder is the visual counterpart to your telephone. The Call Monitor lets you see all your incoming calls and any outgoing calls at once, often with the callers identified by name.



In the Call Monitor folder you can:

- See who is calling you and take the call or send it to voicemail
- Click calls to transfer them, put them on hold, send them to voicemail, or perform other actions
- Move among multiple calls on hold with a click of the mouse
- Record calls
- Conference calls (including creating or starting a conference)

Each row in the Call Monitor folder is an item that contains information about one call, or one party in a call. Conference calls appear as a grouped item with each party to the conference call as a separate indented row.

For an explanation of Call Monitor folder columns, press **F1** for online Help. For information about changing the Call Monitor folder columns that are displayed, see “” on page 18-22.

Call Monitor folder panes

The Call Monitor folder contains the following two panes that you can hide or show:

- The Phonebook Pane, which shows the Extensions folder and the Contacts folder and enables drag-and-drop call handling. See “Adjusting the Phonebook Pane in the Call Monitor folder” on page 2-12 and “Dragging and dropping items” on page 2-14.
- The Notes Pane, which enables you to type and save call notes. See “Adding notes to a call” on page 4-11.

Call Monitor folder columns

The Call Monitor folder contains several columns that show detailed information about a call, such as Trunk Name and Target Station. Some of the columns are hidden by default. For an explanation of the columns, press **F1** in the Call Monitor folder for its online Help. For instructions on hiding and showing columns, see “” on page 18-22.

Viewing a custom data column in the Call Monitor

If your Wave ISM is configured to display custom data in the Call Monitor, the custom data appears in one or more columns. You can view the available columns in the Show Columns dialog. You can hide and show custom data columns the same way you can hide and show normal columns (see “Customizing columns” on page 2-17.) Contact your Wave system administrator to see if any custom data columns are available in your Call Monitor folder.

Selecting and acting on a call in the Call Monitor folder

Click a call in the Call Monitor folder to select it. After it is selected, you can choose commands to apply to that call.

To use a command on a call in the Call Monitor folder, do one of the following actions:

- Right-click the call and choose a command on the shortcut menu. This option is often the fastest way of choosing a command, but it may be difficult to do so during times when phone traffic is heavy. This is due to the fact that calls change position in the Call Monitor folder as new calls arrive and transferred calls leave the Call Monitor folder.
- Click a button on the toolbar.
- Choose a command from the **Actions** menu.
- Press **Enter**. This puts the selected call on hold, or retrieves it if it is already on hold.

Call ownership

In the Call Monitor you can perform call-handling commands only on calls that you own. You own a call if you are the one who answered it. If you select a call that you do not own, the call-handling commands are unavailable.

Examples of calls that you can see, but that you do not own, include calls in a Queue tab that are being handled by another agent.

To determine who owns a call, look at the name in the Owner column.

Double-clicking calls

Double-clicking in the Call Monitor folder has the following effects:

- Double-clicking an active call puts it on hold.
- Double-clicking any other type of call takes the call (connects you to the caller). This includes incoming calls, calls on hold, parked calls, and calls to which you are listening while the caller leaves a message.

Commands while a call is ringing

While calls are ringing at your phone, the Call Monitor folder displays “Incoming Call.” If Wave can identify the caller, the item in the Call Monitor folder also displays the caller’s phone number and name, which enables you to screen your calls. (See “Teaching Wave to recognize your contacts” on page 9-7.) While calls are ringing, you can perform the following actions:

- Take the call
- Send the call to voicemail
- Transfer the call without talking to the caller first

Taking the call

If you are already on another call, select the incoming call and choose **Actions > Take Call**. Your current call is put on hold. You can easily move among multiple calls by choosing **Take Call** again.

When you use **Take Call** in the Call Monitor folder, call announcing is not used. However, you can play the caller’s name over your speakers by choosing **Actions > Announce Caller**.

Sending the call to voicemail

Select the call, and then choose **Actions > Take Message**. The call is sent to your voicemail.

Note: Contact center agents cannot perform this command on an incoming queue call.

Screening a voice message as it is being left

You can listen to a voice message as the caller is leaving it and pick up the call if needed. To do so:

1. Select the call while it is ringing or while the caller is leaving a message.
2. Choose **Actions > Screen Message**.
3. Pick up your phone and listen to the message as it is being left. This is a one-way connection. The caller cannot hear you.
4. To interrupt the message and take the call, choose **Actions > Take Call**. You are connected to the caller.

You can also listen to a voice message as it is being left via the phone.

Commands while you’re on a call

Once you are on an active call, you can perform actions on that call, including the following:

- Putting a call on hold
- Transferring a call
- Recording a call
- Associating a call with a contact
- Parking a call
- Unparking a call
- Sending a call to voicemail
- Playing a caller's name over your speakers
- Disconnecting a call while staying on the phone
- Entering an account code for a call
- Adding notes to a call

Instructions for each of these commands appear in the following sections.

You can also include the call as part of a conference call. See “Creating conference calls” on page 5-7.

Note: To perform a Call Monitor command on a call, you must first select the call.

Putting a call on hold

To put a call on hold, select the call, and then choose **Actions > Hold**. Alternatively, double-click the call or select the call and press Enter.

To retrieve the call from hold, select the call and either choose **Actions > Take Call**, double-click the call, or press **Enter**.

You can put as many calls on hold at one time as you want. The **Duration** column in the Call Monitor folder shows how long each call has been waiting on hold.

Note the following:

- Use **Actions** > **Hold** instead of the Hold button on your phone. When on hold, callers hear music (if your system has music on hold), but they hear only silence if you use your phone's Hold button.
- You cannot put a call to a queue, auto attendant, or IVR Plug-in on hold. If you attempt to do so, the call is disconnected.
- If you're using a digital feature phone with multiple line appearances, you do not hear dial tone after putting a call on hold. To get dial tone, select an unoccupied line.

Ringback for calls on hold

By default, if you hang up with one or more calls on hold, Wave's ringback feature rings your phone to remind you. Talk to your Wave system administrator about configuring ringback behavior.

Transferring a call

The Call Monitor folder allows you to easily transfer a call to any party, either another Wave user or someone at an external phone number. You can look up users and contacts by name, and you can see in advance if an extension is busy. You can also transfer a call to an auto attendant or to a user's voicemail.

Drag-and-drop transferring

With the Phonebook pane showing in the Call Monitor folder, you can drag a call from the Call Monitor to an extension to transfer the call to that extension, or to a contact's name to transfer the call to the contact's default number. For more information about drag-and-drop commands, see "Dragging and dropping items" on page 2-14. To show the Phonebook pane, see "Adjusting the Phonebook Pane in the Call Monitor folder" on page 2-12.

Blind, consultation, and direct-to-voicemail transfers

You can transfer a call in one of the following ways:

- **Blind transfer**, sometimes called an unattended transfer. You transfer the call without first speaking to the recipient. When the recipient answers the phone, the call is connected.

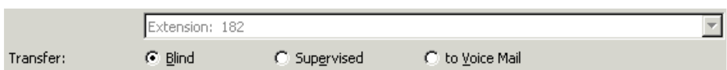
  Note: Blind transfers occur automatically when transferring a ringing call, and when transferring to voicemail, an auto attendant, a queue, or an IVR Plug-in.

- **Supervised transfer**, sometimes called an attended or consultation transfer. You speak to the transfer recipient first, while the caller is placed on hold. You can then complete the transfer, or conference the three of you together, or cancel the transfer and return to the caller.
- **Direct to voicemail**. You transfer the call directly to an extension's voicemail.

To transfer a call:

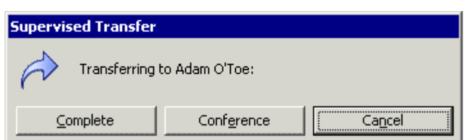
1. Select the call that you want to transfer.
2. Choose **Actions > Transfer**. The Transfer To dialog opens.
3. Select the person or enter the number to which to you want to transfer the call. See "Placing a call" on page 5-1 for instructions.

   Note: You may be prohibited from transferring an external caller to an external number. See your Wave system administrator for more information.
4. In the **Transfer** field at the bottom of the dialog, click either **Blind**, **Supervised**, or **to Voicemail**. See the beginning of this section for more information.

5. Click **OK**. If you selected **Blind** or **to Voicemail**, the transfer is completed and the call disappears from your Call Monitor.

   If you selected **Supervised**, you are connected to the recipient's extension, and the caller is put on hold. The incomplete transfer displays as a linked three-party call in the Call Monitor.
6. Speak to the recipient and announce the caller. A dialog opens and asks you if you want to complete the transfer or cancel it.

7. Choose one of the following options:

- **Complete.** The transfer is completed and the call disappears from your Call Monitor. You can also complete the transfer by hanging up the phone.
- **Conference.** The caller, the recipient, and you are all connected in a conference call.
- **Cancel.** The transfer process ends and you are reconnected to the caller, so you can transfer him or her to voicemail or another destination.

Transfer tips for Operator users

By using workgroups and showing the Extensions tab of the Phonebook pane in the Call Monitor folder, you can easily find and choose the recipient of a call that you want to transfer. Define workgroups to represent the departments of your office. When transferring a call you can then view only the members of a workgroup, for example, the Marketing workgroup. You can see at a glance the names of members of the Marketing department and who is available to take a call. See "Using workgroups" on page 9-14 and "Adjusting the Phonebook Pane in the Call Monitor folder" on page 2-12.

You can also transfer calls more easily by resizing the Transfer To dialog, by showing and hiding columns, and by sorting calls by column. See "" on page 18-21.

Recording a call

If your Wave system administrator has given you the required permission, you can record your Wave conversations, including conference calls. By default, recordings appear in your Voicemail Inbox folder, although the system may be configured to send them to another extension's Inbox.

The maximum length of a single recording is equal to the total number of minutes available in your voice mailbox. By default this is 20 minutes, but your Wave administrator may have set a different limit.

Note: You cannot receive more voice messages when your voice mailbox is full. You should check your available mailbox space after recording any conversation to be sure that you have space for new voice messages. See "Managing your voicemail maximums" on page 6-9 for more information.

To record a call:

1. During an active call, choose **Actions > Start Recording**. Wave starts to record the call. You may hear a regular beep while recording, depending on your system configuration.
2. To stop recording before the call is finished, choose **Actions > Stop Recording**.

Using the telephone commands

You can start and stop recording your calls using the ***16** telephone command. You can also use the telephone commands to listen to recordings in your Inbox. For more information, see the *Wave Phone User Guide*.

Privacy

It is the responsibility of you and your Wave system administrator to comply with any federal or other applicable statutes regarding the recording of phone calls. Vertical Communications, Inc. disclaims any responsibility for failing to comply with such regulations.

Associating a call with a contact

Unidentified calls appear in the Call Monitor folder as being from “Unknown.” You can associate a particular unidentified call with one of your contacts, so that the Call Monitor and Call Log folders display a name with the call. You can also permanently associate the call's Caller ID phone number or text with the contact, so that Wave automatically identifies the contact on all subsequent calls from that phone.

To associate a call with a contact, choose **Actions > Associate**. See “Associating a call or Caller ID number with a contact” on page 9-9.

Parking a call

Parking a call puts a call on hold and lets any Wave user retrieve it from any Wave telephone or ViewPoint program in your office.

To park a call

1. In the Call Monitor, select the call you want to park.
2. Choose **Actions > Park**. The **Status** column in the Call Monitor folder displays “Parked on <orbit number>.

Unparking a call

You can retrieve a parked call from any Wave telephone or from any PC running ViewPoint.

To answer a parked call from any ViewPoint program:

1. Click **Tools > Unpark**. The Unpark dialog opens.
2. Select the call that you want to unpark and answer and click **OK**.

You can also answer a parked call by picking up a Wave phone, pressing ***53**, and then entering the parking slot number.

Sending a call to voicemail

To send an active call to voicemail, choose **Actions > Take Message**.

Playing a caller's name over your speakers

You can play a recording of a caller's name over your speakers at any time during a call by choosing **Actions > Announce Caller**.

The recording that plays is either the caller's voice title, if one has been recorded, or the caller's answer to the call announcing prompt, "Please say your name." If you choose **Actions > Announce Caller** and hear nothing, then either the caller has no voice title recorded, you have the call announcing prompt turned off, or the caller did not answer the prompt.

Disconnecting a call while staying on the phone

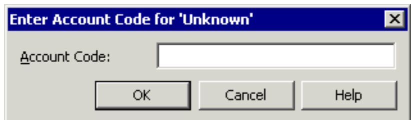
You can disconnect a call without hanging up the phone. Select the call, and then choose **Actions > Disconnect**. This command disconnects the caller and provides you with a dial tone. This command is useful if:

- You want to disconnect a single party in a conference call. Hanging up your phone would disconnect you from the whole conference.
- You are going to immediately dial another call. If you hang up and pick up your phone too quickly, Wave can read that as a Flash command, which would put the call on hold instead of disconnecting it.

Entering an account code for a call

While on a call, you can enter an account code for the call or change the one already entered.

1. Select the call, and then choose **Actions > Enter Account Code**.



2. Enter an account code. You can enter numbers, letters, or other characters.
3. Click **OK**.

You can also enter an account code from the Call Log after the call is complete. See “Entering an account code for a Call Log entry” on page 7-8.

Adding notes to a call

While a call is visible in your Call Monitor folder, you can type notes about the call in the Notes Pane. If the Notes Pane is not showing, click **Notes** in the bottom pane.

If the call is transferred to someone else, notes that you created about the call are sent with the call (for example, you can add a note such as “Customer wants to track invoice #123987” before transferring the call to your shipping department). When the call is complete, you can view or edit the notes for the call in the Call Log folder (see Chapter 7, “Using the Call Log Folder”).

Incoming call indicators

When you receive a call, a popup indicator appears, displaying who is calling by phone number and name, if available.

Right-click the indicator for a shortcut menu of call-handling commands such as **Take Call** and **Take Message**. Double-click the indicator to bring ViewPoint to the front of your desktop.

Wave can also give you information about an incoming call on the phone, in the following ways:

- **Call announcing.** Wave announces the caller's name and gives you the choice of accepting the call or sending it to voicemail.
- **Call waiting.** When you are on a call, Wave alerts you of an incoming call by playing the call waiting tone (two beeps).
- **Caller ID display.** If you have a telephone with a Caller ID display, you can use it to see the Caller ID of the incoming call. See "" on page 18-8 for more information.

Placing Calls in ViewPoint

CHAPTER CONTENTS

Placing a call

ViewPoint provides the following ways for you to place calls:

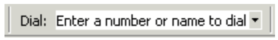
- Placing calls using the Dial bar
- Using the Place Call To dialog
- Quick-dialing from ViewPoint folders
- Placing calls using drag-and-drop
- Placing calls by using other contact managers

Placing calls with the phone on or off hook

When placing calls from ViewPoint you can choose the command with the phone either on-hook or off-hook. If the phone is on-hook when you place a call, your phone rings immediately after you finish dialing the number. If the phone is off-hook when you place a call, you hear Wave dialing the number.

Placing calls using the Dial bar

ViewPoint has a **Dial** bar on the menu bar that you can use to place calls.



To place a call using the Dial bar:

1. Type either of the following in the Dial bar:

   - The number to dial. If it is an external number, type the full number including area code (10 digits in North America, for example 6173540600). Do not enter a Wave access code (such as 9). To dial international numbers enter + followed by the country code and the number, for example +44 020 7323 8299. Do not add the international access code (for example, 011 in North America).

     Hyphens, spaces, periods and parentheses are allowed.

   - The name or partial name of a user, contact, or contact company name. Wave searches all of the Contacts, Extensions, and Workgroups for a match. If only one match is found, the system places the call immediately. If there is more than one match, a dialog opens and you can select a name on the list and click Dial to place the call.

2. To specify an account code for the call, add a vertical bar character (|) after the number, followed by the account code.

3. Press **Enter** to place the call.

You can also drag-and-drop items into the Dial bar, including a text phone number from another application. See "Placing calls using drag-and-drop" on page 5-5.

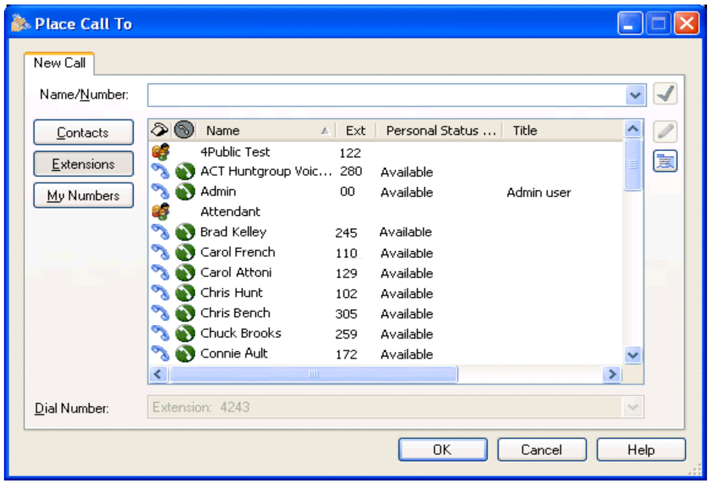
To redial a call using the Dial bar:

Click the arrow on the right of the Dial bar for a list of recently dialed names and numbers. Click a number to redial it.

Using the Place Call To dialog

The Place Call To dialog visually guides you to place a call. It is not as efficient as using the Dial bar (if you know the person's name or number) or the Call Monitor's Phonebook pane.

1. Choose **File > New > Call**. The Place Call To dialog opens.



2. Enter or select the number to dial in one of the following ways:

- Enter the number to dial in the **Name/Number** field. You can also type the name of a contact or user.
- Click **Contacts** and select a contact on the list.

  The contact's default phone number appears in the drop-down list below the main list. If the contact has more than one phone number associated with it, you can select a different number to call on the drop-down list.

  To create a new contact, click to open a new Contact dialog. To edit the currently selected contact, press Alt and click . See "Entering a new contact" on page 9-3 for more information.
- Click **Extensions** and select an extension in the list. The list is identical to other Extensions lists in ViewPoint (see "Viewing Wave extensions" on page 3-1).

  If the extension is a user with public numbers, you can choose one of those numbers from the drop-down list below the main list.

- Click **My Numbers**. To place a call to one of your own phone numbers, such as your home or mobile phone, select it on the list. To place a call to another number, enter the number in the **Number** field.

  See your Wave system administrator about entering numbers into your My Numbers list.

  Note: To verify that the phone number is entered in a correct format, click .

3. To enter an account code for the call, type a vertical bar character (|) after the number, followed by the account code.
4. Click **OK** to place the call.

Another way to place a call to a user is to double-click the user in the Extensions list.

Quick-dialing from ViewPoint folders

In certain ViewPoint folders you can quickly place calls by either right-clicking an item or selecting it and using the **Actions** menu. You can choose the following commands:

- **Speed Dial**. Immediately places a call to the default number of the selected item. For a user, it is his or her extension. For a contact, it is the contact's default phone number.
- **Place Call**. Opens a sub-menu that lets you choose from all the available numbers for the selected item (for example, all of a contact's numbers). You can also choose **Other** to open the Place Call To dialog with that item selected (see "Using the Place Call To dialog" on page 5-3).

You can quick-dial the following types of call from ViewPoint folders:

To quick-dial...	Use this folder	Notes
A user or other extension	**Extensions** (or the Extensions list in the Call Monitor's Phonebook pane)	
A caller (call back)	**Call Log**	Places a call to the Caller ID or callback number associated with the call.
A message (call back)	**Messages** (Inbox or other folder)	Places a call to the Caller ID or callback number associated with the message.

You can quick-dial the following types of call from ViewPoint folders:

To quick-dial…	Use this folder	Notes
A contact	**Contacts** (or the Contacts list in the Call Monitor's Phonebook pane)	
A workgroup	**Workgroups** (or **Extensions** with a workgroup selected)	Calls all users in the workgroup simultaneously. The first user to answer receives the call.

Speed-dialing by double-clicking

In the Extensions list, double-clicking an extension speed-dials that extension.

In the Contacts folder, double-clicking a contact may speed-dial the contact's default number, depending on how you have configured your Contacts folder (see "" on page 18-21).

Placing calls using drag-and-drop

You can place a call to an extension, contact, or workgroup by dragging and dropping it either into the Call Monitor or the Dial bar. When dropped, Wave places the call using the default phone number.

For a complete list of ViewPoint drag-and-drop operations, see "Dragging and dropping items" on page 2-14.

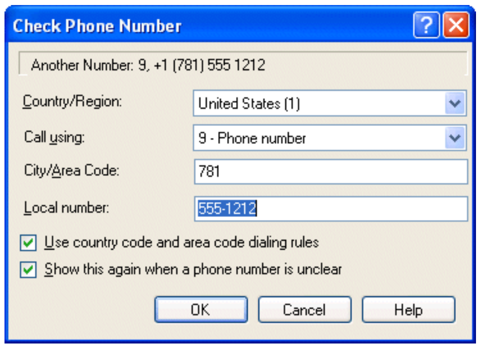
Placing calls by using other contact managers

You can place calls by using other contact managers such as Microsoft Outlook, GoldMine or FrontOffice 2000, or Interact Commerce Corporation's Act!. For more information, see "Using the Wave TAPI Service Provider and Contact Manager Assistant" on page 1-2.

Checking a number

To confirm that Wave has correctly interpreted a number or address that you have entered—for example, that it has recognized the correct country on an international call—click next to the **Number** or **Address** field. The Check Phone Number dialog opens. You can correct any dialing errors here before you place the call.

Note: The dialog will open automatically if the number you entered was unclear.



To check a phone number:

1. Under **Country/Region**, make sure the correct country is selected.
2. Under **City/Area code** and **Local number**, confirm that Wave has interpreted the number correctly.
3. Select **Use country code and area code dialing rules** if you want Wave to apply dialing rules that determine if a number is a local or long-distance call. Clear it to have Wave dial the number exactly as entered, as if you had dialed it on the phone.
4. Click **OK** to close the Check Phone Number dialog.

Redialing numbers and returning calls

You can quickly perform the following dialing actions in ViewPoint:

- **Redial the last number you dialed**. Press **F12** on your keyboard.
- **Return the last call you received**. Press **F11** on your keyboard. The name of the last caller and the phone number appear in the status bar at the bottom of ViewPoint window.

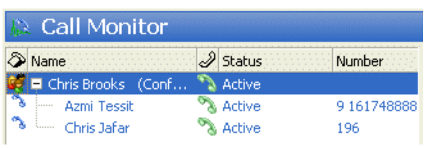
You can also redial and return calls using the Dial bar (see “Placing calls using the Dial bar” on page 5-2) or the telephone commands (see the *Wave Phone User Guide* for more information).

Creating conference calls

Wave lets you easily conference multiple calls together. The Call Monitor folder treats a conference call as a single call.

The maximum number of parties that can be in a single conference can be between 4 and 30, depending on your system's configuration. Ask your Wave system administrator for details.

Conference calls appear in a tree structure in the Call Monitor folder. Participants appear on indented rows under the conference call. Click the top row to perform an action on the conference.



You can create a conference call by:

- Adding parties one at a time to a call
- Combining separate active calls into one

Adding parties to a conference

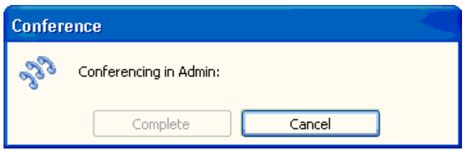
Use this procedure to start and build a conference call. The call is placed on hold while you are adding new parties, but the parties already conferenced can continue to talk to each other.

1. Dial the first party and wait for an answer.
2. Click the call in the Call Monitor folder.
3. Choose **Actions > Conference**. The Conference dialog opens.

4. Select the second party for the conference call or enter a phone number to dial, and then click **OK**. See “Placing a call” on page 5-1 for more information.

   Note: If you have more than one active call when you choose the Conference command, click the New Call tab in the Conference dialog to place the call.

   When the call is answered, you are connected to the new party in a separate call. The Conferencing dialog opens giving you the option of adding the party to the conference or not.



5. Determine whether you want to add the new party to the conference. Then click one of the following:

- **Complete**. The new party joins the conference call.
- **Cancel**. The new party’s call is disconnected, and you return to the conference call.

6. Repeat steps 2-5 to add more parties to the conference.

Adding parties to a conference by dragging and dropping

To drag and drop parties into a conference, you must have the Calls pane open in the Extensions or Contacts folder, or the Phonebook pane open in the Call Monitor folder. For more information, see “Adjusting the Phonebook Pane in the Call Monitor folder” on page 2-12 for instructions.

Drag and drop parties to the conference as follows:

- Using the Calls Pane in the Extensions or Contacts folder, you can drag users or contacts onto the active call in the Calls Pane to automatically add them as parties to the conference. If you press Shift while you drag a user from the Extensions list, the Conference dialog opens and provides further options.
- Using the Phonebook Pane in the Call Monitor folder, you can create a conference call by pressing Shift and dragging and dropping a call, contact, or extension onto another call.

For other drag-and-drop operations you can perform in ViewPoint, see “Dragging and dropping items” on page 2-14.

Conferencing multiple active calls together

Use the following procedure when you have two or more separate existing calls that you want to conference together with yourself. Note that you cannot conference two conference calls together.

To conference separate existing calls together:

1. Select all the calls that you want to conference together. Press Ctrl on your computer keyboard as you select multiple calls.
2. Choose **Actions > Conference**. The selected calls are now conferenced with you.

Ending a conference call

A conference call normally ends when all parties hang up at roughly the same time. If you leave the conference call early, by default the conference call continues without you. The other participants can continue to talk, even if you started the conference and your company is paying for the outgoing calls used to create it. To terminate the call, each participant must hang up, or you must disconnect all parties.

Your system may be configured to disconnect the conference when you leave.

Supervising other users' calls

With the proper permissions, you can enter another user's call as a third party without being invited. This is usually done by a manager to supervise the other user, or by an operator to briefly join someone's call to announce something that needs immediate attention.

Note: You cannot use this feature to supervise ACD workgroup calls.

You can supervise calls in the following ways:

- **Monitor**. You can listen to the other user's call without being heard by the other parties in the call.
- **Coach**. You can speak to the other user without being heard by other parties in the call. The other user is the only party to hear you. You hear all parties.
- **Join**. You join the call as a full participant, able to hear and be heard by all parties in the call. Essentially, you create a conference call by inviting yourself in.

Each supervise command is available only if you have permission to use that command *and* the user is configured to allow being supervised with that command. Talk to your Wave system administrator about whether you can monitor, coach, and join other users' calls, and which users you can supervise, if any.

Note: When supervising a call with multiple users, all other users in the call must be configured to allow being supervised with that mode. If even one user already in the call does not permit being supervised, you cannot supervise the call.

Depending on your system setup, if the person you are supervising leaves the call—for example, transfers it to someone else—you are disconnected.

To supervise another user's call using ViewPoint:

1. Select one of the following:
   - A call in the Call Monitor or a queue.
   - A user in the Extensions list who is currently on a call.
2. Choose **Actions > Supervise**, and select the supervisor mode you want to use. The option is available only if both you and the other users in the call permit that supervisor mode.

To supervise another user's call using the telephone:

1. Pick up the phone and enter one of the following commands at the dial tone:
   - ***57.** Join.
   - ***58.** Coach.
   - ***59.** Monitor.
2. Enter the extension of the user whose call you want to monitor, coach, or join, followed by **#**.
3. Press **1** to confirm the extension, or press ***** to enter a different extension.

   Note: You can enter the complete digit string rapidly without waiting for the prompts. For example, ***58 102# 1** to coach extension 102.
4. Once connected to the call, you can use the following telephone command options:
   - To change the supervising mode—for example, from monitoring to coaching—press **Flash**, then enter the code for the new mode.
   - To supervise a different user, press **Flash #** to return to the dial tone, then begin again.

Managing Voice Messages in ViewPoint

CHAPTER CONTENTS

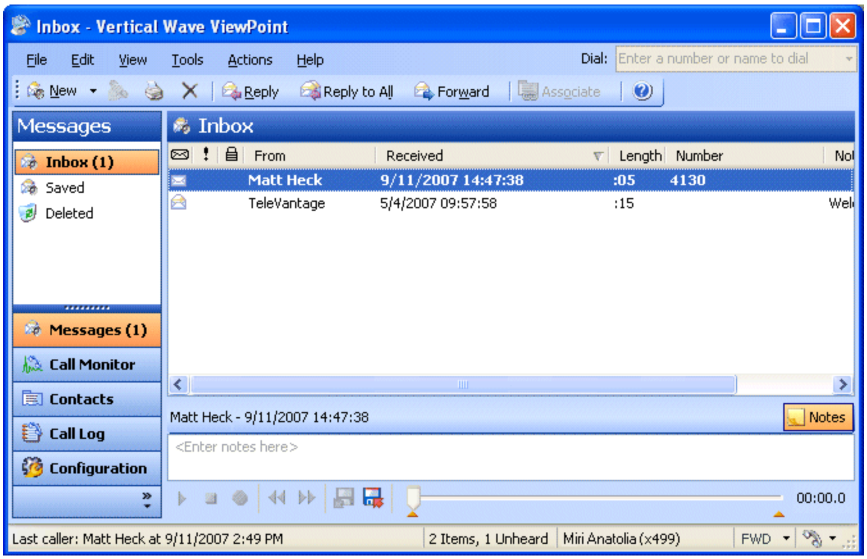
About managing voice messages in ViewPoint

You can manage your voice messages and call recordings in the Wave ViewPoint in the same way that you manage e-mail messages in your e-mail program. Your new voice messages or recordings appear in a list in your Inbox folder according to the time and the caller. You can listen to them in any order you want, and you can easily forward them, reply to them, or save them.

For instructions on how to listen to voice messages or recordings using the telephone commands, see the *Wave Phone User Guide*.

The Messages folder

The Messages folder is your complete voice mailbox. It contains your Inbox, Saved, and Deleted folders, which hold your voice messages as well as any call recordings sent to your mailbox. New messages appear in the Inbox folder. Use the audio controls above the status bar to play your voice messages. When you play a message, the audio bar shows elapsed message playback time in minutes and seconds.



Voice messages have the following display attributes:

- **Bold text** indicates a new (unheard) message.
- **FW:** in the From column indicates a message that was forwarded to you.

  Note: You can view the date on which a forwarded message was created by showing the Created column in the Messages folder. See “” on page 18-22.
- **RE:** in the From column indicates a message that was sent to you in reply to another message.

Messages folders

You can store your voice messages in multiple folders. The Messages folder contains three predefined folders:

- **The Inbox folder**. New voice messages appear here. After you listen to them, they remain here unless you move or delete them.
- **The Saved folder**. Saved messages appear here. When you save a message by using the telephone commands, it moves to the Saved folder.
- **The Deleted folder**. When you delete a voice message in ViewPoint, it is moved to the Deleted folder. Voice messages deleted using the telephone commands do not appear in the Deleted folder. To empty the Deleted folder, see “Emptying the Deleted folder” on page 2-19.

Note: The Inbox and Saved folders are the only voice message folders accessible through the telephone commands. Voice messages in other folders are not accessible using the phone.

Viewing custom data

Messages folders contains a Custom Data column that is hidden by default. By showing it you can view all custom data that your office might have associated with the call, for example, customer ID or caller priority. To show columns, choose **View > Current View > Show Columns**.

Archiving voice messages and call recordings

The system may be set up to periodically archive your older voice messages and call recordings. If you find that your messages disappear from your voice mailbox, ask your Wave system administrator whether they have been archived. You can access archived messages using the Wave Archived Recording Browser (see Appendix A).

Managing thousands of voice messages or call recordings

If you need to manage thousands or millions of messages or call recordings, you should have your Wave system administrator set up automatic archiving, or manually archive your messages. This eases the performance burden on ViewPoint and the Wave ISM, and you can still use the Archived Recording Browser to quickly review, search, and manage the recordings (see Appendix A).

Listening to your voice messages and call recordings

To listen to a voice message or call recording, double-click it in any Messages folder. For instructions on using the audio controls, see “Using the audio controls” on page 2-20.

You can play the message or recording either over your computer's speakers or over your telephone. Choose **Tools > Audio Output** to switch audio output from one to the other. You can also use the button on the right side of the status bar.

If you have call announcing turned on, messages less than five (5) seconds in length are prefaced by a recording of the caller's name.

Note: You can open other ViewPoint folders while a message is playing and the message will continue to play. The message stops playing, however, if you open a folder with another audio control visible, for example, the Greetings folder.

Listening to a voice message as it is being left

To listen to a voice message as the caller is leaving it, without being heard by the caller, see “Screening a voice message as it is being left” on page 4-4.

Handling your voice messages

You can perform the following tasks on a voice message using a few mouse clicks:

- Forward it to other users
- Reply to one or more users directly with a voice message of your own
- Return the call, if the Caller ID or contact information is available
- E-mail the voice message as a WAV or MP3 file attachment
- Associate a message with a contact
- Add notes to an existing message
- Open the contact record of the contact who left the message
- Send a new voice message to other users
- Delete a voice message
- Mark an existing message Private, unheard, or Urgent

Forwarding a voice message

You can forward a voice message, except if it is marked Private, to one or more users. A copy of the message is sent directly to the voicemail of all recipients.

You can also attach a recording of your own at the beginning of the forwarded message. For example, “Bob, this is Jim. I received this message and thought you would want to hear it.” Your recording precedes the forwarded message.

To forward a voice message:

1. In any Messages folder, right-click a voice message that you want to forward and select **Forward** on the shortcut menu. The Forward Message dialog opens.
2. In the **Available Users** list, select the users to whom you want to forward the message. To select multiple users, press Ctrl while you select users.
3. Click **Add** to move the selected users to the **Recipients** list.
4. Optionally, record a short message that introduces the message you are forwarding. Use the audio controls (for detailed instructions, see “Using the audio controls” on page 2-20).
5. Click **Send**. A copy of the selected voice message, preceded by your short introductory message, is forwarded to the users in the Recipients list. When recipients select the message, they can view (in the **To** field) a list of other users who received the same message. Users can reply to the sender or to all recipients.

Replying to a voice message

Replying to a voice message lets you send a recorded reply directly to the voicemail of the user who sent you the message. You can send the reply to other users as well. Select the message and choose **Actions > Reply.** Then perform steps 3-5 of “To forward a voice message:” in the previous section.

You can reply in this way only to a message left by another Wave user. You cannot send a message in reply to a message left by an external caller.

Note: Replying to a message sends a new message to another user's voicemail. To call back the person who left you the voice message, choose **Actions > Place Call** instead (see the next section).

To reply to all recipients of a message:

1. Select the message.
2. Click **Actions > Reply to all**.

   The recipients are listed in the Recipients pane of the Reply to Message dialog.

Calling back the person who left a voice message

You can call back the person who left you a voice message by using the Wave **Place Call** or the **Speed Dial** command. **Place Call** lets you choose the number to call if several numbers are available. **Speed Dial** returns the call to the default number.

Note: On messages from unidentified callers, Wave places a call to the phone number from which the message originated. If the message was left by someone calling from an office (PBX) extension, you might not be able to connect to the correct party.

To call a person back:

1. Select the voice message left by the person you want to call back.
2. On the **Actions** menu, choose **Place Call** or **Speed Dial**.

E-mailing a voice message

You can e-mail a voice message as a WAV or MP3 file attachment to someone who is outside the Wave system.

To e-mail a voice message, you must have an e-mail reader that supports MAPI installed on your computer, such as Microsoft Outlook or Eudora Pro.

To e-mail a voice message:

1. Select the message you want to send by e-mail.
2. Choose **File > Send To**, and select the desired format for the **Mail Recipient**. Your MAPI mail ViewPoint Send dialog opens with the message attached.
3. Address and send the e-mail as you normally would.

Opening the contact record from a voice message

If a voice message was left by an identified contact (see Chapter 9), you can open the contact record to view or change information about the contact. To do so, choose **Actions > Open Contact**.

Deleting voice messages

By default, messages in the Deleted folder that are older than three days are permanently removed from Wave. For information about how to change the default, see "Emptying the Deleted folder" on page 2-19.

To move a voice message to the Deleted folder:

1. Select the message.
2. Choose **Edit > Delete**. The message is moved to the Deleted folder. You can still play it or retrieve it if necessary.

Deleting a message permanently

To delete a message permanently, select the message and press Shift+Delete. A message is also deleted permanently when you delete it from the Deleted folder or empty the Deleted folder. See "Managing the Deleted folder" on page 2-19.

Microsoft Exchange Server synchronization

If your office uses Microsoft Exchange Server for e-mail, Wave can synchronize the Inbox and Deleted folders with those in your e-mail program. When synchronized, messages that you delete in one application are deleted in the other application.

For example, if you delete a voice message notification e-mail in your e-mail program, Wave moves that voice message to its own Deleted folder. Similarly, if you delete the matching voice message in Wave, your e-mail notification moves to your e-mail program's Deleted folder.

For more information, see your Wave system administrator.

Associating a voice message from “Unknown” with a contact

A voice message that appears from “Unknown,” means that Wave could not identify the caller as a Wave contact or user (Caller ID, if present, is still shown in the **Number** column). You can associate the message with a contact, so that the correct name appears in the Call Monitor and so that Wave identifies the contact on subsequent calls from that phone.

See “Associating a call or Caller ID number with a contact” on page 9-9 for complete instructions.

Marking a voice message Unheard

To mark an old (heard) voice message as new (unheard), select the message and then choose **Actions > Mark As Unheard**.

Marking a voice message Urgent or Private

You can mark a voice message Urgent, Private, or both. Private messages cannot be forwarded, and users who share your mailbox cannot play them, reply to them, or call back the sender.

The icons in the columns to the right of the envelope icon show whether a message is Urgent  or Private  .

- To mark a voice message Urgent, select the message and choose **Actions > Urgent**. Select the command again to remove its Urgent status.
- To mark a voice message Private, select the message and choose **Actions > Mark As Private**. After a message is marked Private, it cannot be made not Private again.

Adding notes to a voice message

To add written notes to a voice message, click the message and type your notes in the Notes Pane at the bottom of the Messages folder.

Any notes that you create for a message accompany that message if it is forwarded to other users.

Hiding and showing notes

To hide or display the Notes Pane, choose **View > Notes Pane**. To hide the Notes column, see “” on page 18-22.

Managing call recordings

The following types of call recordings can appear in your Inbox:

- Recordings that you made yourself using the Call Monitor (see "Recording a call" on page 4-8).
- Recordings made automatically by the system. Usually such recordings are sent to the voice mailbox of a Wave system administrator or contact center queue supervisor. If you are receiving such recordings in error, speak to your Wave system administrator.

You can listen to a call recording by double-clicking it, just as you listen to a voice message. Any command you can use on a voice message you can also use on a call recording.

Managing your voicemail maximums

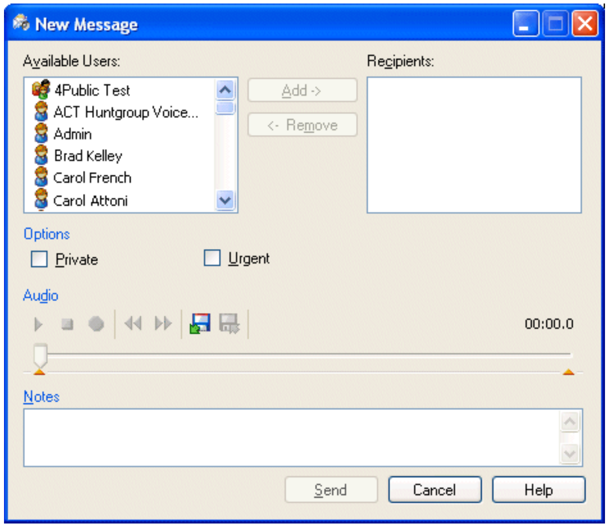
Your voice mailbox has a limited amount of disk space (in minutes) to store your voice messages. In addition, your mailbox has a maximum length for any individual message (by default 180 seconds, or three minutes). See your Wave system administrator about changing these maximums.

If you log on to Wave by using the telephone commands and your mailbox is nearly full, Wave prompts you to empty your Deleted folder.

Sending a message directly to a user's voicemail

You can record a message and send it directly to the voicemail of one or more Wave users.

1. Choose **File > New > Voice Message**. The New Message window opens.



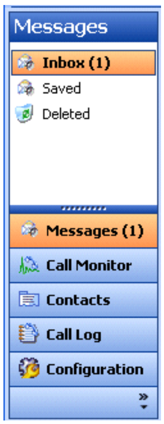
2. Click the recipients who you want receive the message in the **Available Users** list. Hold down the Ctrl key as you click to select multiple users. If you select a workgroup or a queue, the message is sent to every user within the workgroup or queue.
3. Click **Add** to move the selected users to the **Recipients** list.
4. Use the audio controls to record the message. For instructions, see "Using the audio controls" on page 2-20.
5. Select any of the following options:
   - **Private**. The voice message is marked Private and cannot be shared by the recipients.
   - **Urgent**. The voice message is marked Urgent.
6. In **Notes**, type any notes that you want to accompany the message. The notes appear in the Notes column of the recipients' Messages folders.
7. Click **Send** to send the message.

Knowing when you have new messages

New voice messages appear in the Inbox folder soon after they are left. Wave indicates new voice messages in the following ways:

- Number in navigation pane
- Stutter dial tone
- Message-waiting light (if supported by your phone)
- E-mail, pager, and call notifications

Number in navigation pane



ViewPoint's navigation pane displays the number of new messages in two places: next to **Inbox** in the navigation bar, and next to the specific folder (for example, **Messages**) in the Favorite Folders list.

Stutter dial tone

A dial tone that begins with a stutter when you pick up the phone indicates that you have unheard voice messages.

Message waiting light

If your phone has a message waiting light that Wave supports, you can have it flash to indicate new voice messages. For analog phones supporting CLASS message waiting lights, your Wave system administrator must enable the phone's message waiting light to make it work.

E-mail, pager, and call notifications

Wave can alert you by e-mail, page, or telephone call whenever you receive a new voice message. This feature is handy if you are working at a remote location without ViewPoint. You can then call your office and hear your messages. Your Wave system administrator can set up e-mail, pager, and call notification for you.

You can receive notification for all voice messages, or for urgent messages only. You can also receive notifications only on specific days or at specific times. See "Scheduling notifications" on page 6-12.

Note the following:

- For e-mail notification to work properly, the Wave ISM must be configured correctly. See your Wave system administrator if you encounter any problems.
- Your Wave system can be synchronized with Microsoft Exchange so that changes you make to messages in one Inbox folder are reflected in the other. See "Microsoft Exchange Server synchronization" on page 6-7 for more information.
- Notification is sent only for new voice messages, not new call recordings.

About e-mail notification

E-mail notification messages include the caller's name (if available), the phone number at which the call originated, the extension at which the message was left, the message length, and any notes associated with the message. You can even have Wave attach the voice message itself to the e-mail as an audio file so that you can play it wherever you are.

About pager notification

Pager notifications can include the Caller ID of the voice message, the Wave extension that the caller dialed, and the length of the voice message.

About call notification

Wave places notification calls to the number of your choice. The notification call says, "<voice title> has a new voice message from <caller's voice title if available>. Press # to hear your message." By pressing #, you can log onto the queue's account and hear the new message, and even press **4 3** to call the person back.

Scheduling notifications

If you do not want to receive notifications 24 hours a day, 7 days a week, your Wave system administrator can schedule notifications to occur at specific times only. For example, you can have Wave send notifications only during business hours or after business hours on work days. You can also set up custom hours. You can have different schedules for e-mail, pager, and call notification.

Note: Notifications are never queued for later delivery. When you use a schedule, voice messages that arrive during an unscheduled time do not produce notifications at all.

Managing greetings

Greetings are recorded messages that callers hear when they reach your voicemail. For example, “This is Steve. I’m not at my desk at the moment, but leave me a message and I’ll get back to you soon.”

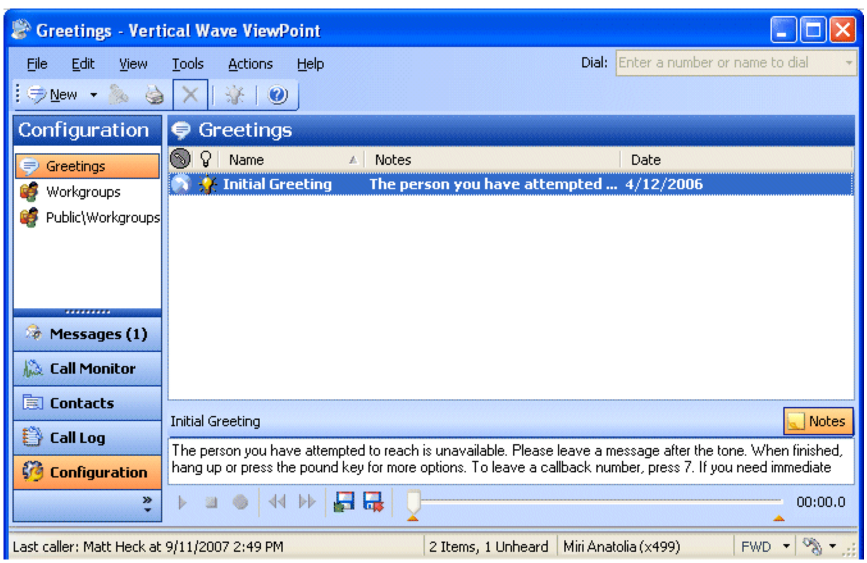
With Wave you can record and store multiple greetings and specify when you want Wave to use each one. For example, you can have a normal greeting for everyday use, another greeting for extended absences, and a third greeting for vacations. You can also create and use custom greetings for individual callers (see Chapter 17).

Space for greetings

You have a limited amount of disk space for greeting and voice title recordings. See your Wave system administrator to find out how much space has been allocated to you and how much you have used.

The Greetings folder

The Greetings folder lets you view and manage your greetings. To open the Greetings folder, click **Configuration** in the navigation bar, and then click Greetings.



The Greetings folder contains three sections:

- **The Greetings list**. Your existing greetings appear here.
- **The Notes Pane**. This pane displays the contents of the greeting. To hide or show the Notes Pane, choose **View > Notes Pane**.
- **The audio controls**. Use these controls to record a new greeting, import a greeting from disk, or rerecord a selected greeting. See "Using the audio controls" on page 2-20.

The active greeting

The active greeting is the greeting that Wave plays by default when callers reach your voicemail. Only one greeting at a time can be the active greeting.

Recording a new greeting

1. Choose **File > New > Greeting**. The Greeting dialog opens.
2. Enter a **Name** for the greeting.
3. In the **Contents** field, enter a description of the greeting. This description can be the text of the statements used in the greeting.
4. Record the greeting by using the audio controls. See "Using the audio controls" on page 2-20.
5. Click **OK**.

To rerecord or edit an existing greeting, double-click the greeting in the Greetings folder and edit the greeting by using the audio controls.

E-mailing a greeting

You can e-mail a greeting as a WAV file attachment.

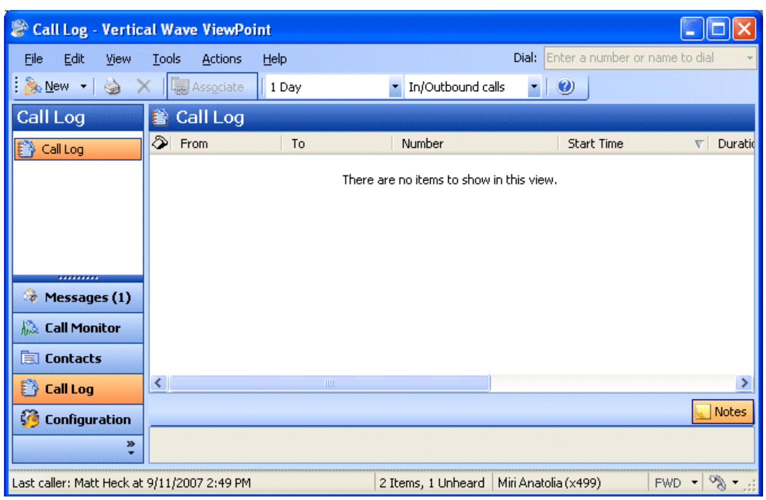
1. Select the greeting that you want to e-mail.
2. Choose **File > Send To**, and select the desired format for the **Mail Recipient**. Your MAPI mail ViewPoint Send dialog opens with the message attached.
3. Address and send the e-mail as you normally would.

Using the Call Log Folder

Chapter Contents

The Call Log folder

The Call Log folder contains a record of all incoming and outgoing phone calls associated with your extension. Internal calls (calls between Wave users) may or may not be logged, depending on how your Wave system administrator set up the system.To open the Call Log folder, click its entry in the navigation bar.



Call Log folder filters

The Call Log folder toolbar contains the following drop-down lists that enable you to view only the calls you want.

Use either or both of the following:

- **Time filter**. View the most recent calls according to the time frame you select.
- **Inbound/outbound filter**. View only inbound calls, only outbound calls, or both.

Call Log folder columns

The following table shows the columns that are available in the Call Log folder. Many of these columns are hidden by default.

You can view more information for a call in either of the following ways:

- Double-click a call to view it in the Call Details dialog, in which more columns are displayed. See “Viewing call details” on page 7-5.
- Add more columns to the Call Log folder itself. See “” on page 18-22.

To view more information for a call, you can add more columns to the Call Log folder itself. See “Customizing columns” on page 18-22.

Column	Description
	Indicates incoming or outgoing calls, respectively. Called **Direction** in the Show Columns dialog.
Account Code	Account code associated with the call, if any.
Answered By	Name of the user who answered an incoming call. Note that on unanswered calls, this field shows the name of the user who was dialed.
Callback number	The callback phone number entered by the caller, if one is available.
Called Number	On incoming calls, your Direct Inward Dial (DID) number if the caller used it to call you. The field is blank for incoming calls without DID. On outgoing calls, the number you dialed.

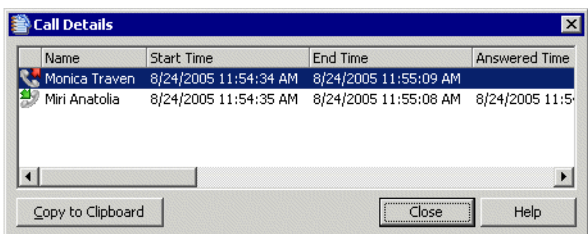
Column	Description
Custom Data	Custom data, if any, associated with the call. Custom data can be collected by IVR Plug-ins, auto attendants, or contact center queues.
Dial String	Digits that Wave actually dialed over the trunk, which may be different than the digits Wave displays in a contact's phone number. For example, a dial string may contain an international or long-distance access code, a dialing prefix, or a dialing suffix.
Duration	Length of the call, beginning at the time when the two parties are connected.
From	Name of the person who originated the call. On incoming calls, “Unknown” appears unless the user identified the caller as a contact. On outgoing calls, this is the user’s name.
From Device	The station ID or Wave trunk number from which the call originated.
From Number	On incoming calls, the caller's extension or external phone number. On outgoing calls, the user's extension.
Left Message	If checked, the caller left a voice message.
Notes	Any notes associated with the call.
Number	On incoming calls, Caller ID name and number if available. On outgoing calls, the number the user dialed. On a call to or from another Wave user, this field contains <NA>.
Organization	Organization associated with the call, if any. Organizations are associated with outbound calls only, and represent the Organization to which the calling party belongs.
Placed By	Name of the person who placed the call. On incoming calls, “Unknown” appears unless Wave identified the caller as a contact or another user. On outgoing calls, the user’s name appears.
Recorded By Queue	If checked, the call was automatically recorded by a contact center queue.

Column	Description
Recorded By User	If checked, the user recorded the call manually using ViewPoint commands (see “Recording a call” on page 4-8.)
Result	How the caller’s wait ended. The possible outcomes are: **Abandoned:** The caller hung up before the call was answered. **Connected:** The call was answered. **To voicemail:** The call was sent to voicemail. **Blind Transfer:** A blind transfer sent the call to another extension. **Supervised Transfer:** A supervised transfer sent the call to another extension. **Unknown:** Wave was unable to identify the outcome of the call. **Login:** The user logged in to Wave at a remote phone.
Start Time	Date and time that the call first arrived in the Wave system.
Stop Time	Date and time that the call ended.
To	Name of the party who received the call. On incoming calls, this is the user’s name. On outgoing calls, “Unknown” appears unless the user identified the person as a contact. “& others” in this column indicates a call with more than two parties, for example, a conference call or a call that was transferred. Double-click the call to see all of the parties in the Call Details dialog.
To Device	On incoming calls, the user’s station ID. If an incoming call was transferred, this column shoes the last station that took the call. On outgoing calls, the trunk used for the call.
To Number	On inbound calls, the extension or DID number that the caller dialed. On outbound calls, the number the user dialed.

Column	Description
Wait Time	On incoming calls, the length of time starting when the caller selected the user's extension until the time that the user picked up. On outgoing calls, **Wait Time** is always 00:00. (This column is used primarily in contact centers to keep track of the time callers spent waiting for an agent.)
Call ID	The Wave ID number of the call, primarily of interest to Wave system administrators. Call ID number also appears in queue logs to identify the call.

Viewing call details

You can view more information about your calls by double-clicking a call in the Call Log folder. The Call Details dialog opens.

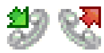


The Call Details dialog displays a separate line for each party in the call.

Note: The Call Details dialog shows current information about the parties in the call, while the Call Log folder shows the information as it was at the time of the call. Therefore the two can sometimes be different, for example, if the call was from a contact and you changed the contact's name since the time of the call.

Call Details columns

The Call Details dialog contains following columns:

Column	Description
	Indicates the incoming and outgoing components of the call, respectively.
Name	Name of the parties in the call. On incoming calls, “Unknown” appears unless the user identified the caller as a contact. On outgoing calls, the user’s name appears.
Start Time	Date and time that each party began participating in the call.
End Time	Date and time that each party left the call.
Answered Time	Date and time that the call was answered.
Answered By	Name of the users for whom this was an incoming call.
Account Code	Account code associated with the call, if any. See “Entering an account code for a Call Log entry” on page 7-8.
Number	On incoming lines, Caller ID name and number, if available. On outgoing lines, the number dialed. On a call to or from another Wave user, this field contains <NA>.
Number Type	The type of number displayed in the Number column. Types are: **Phone:** External phone number **Internet:** Internet or IP network address **Extension:** Internal extension
Access Code	On outgoing calls and incoming calls over an IP gateway, the access code of the dialing service used to place the call.
DID	On incoming lines, your Direct Inward Dial number if the caller used it to call you. DID is not applicable for outgoing lines.
Device	On incoming lines, the trunk or station number at which the call was placed. On outgoing lines, your station number.

The Call Details dialog contains following columns:

Column	Description
Dial String	Digits that Wave actually dialed over the trunk, which can be different than the digits Wave displays in a contact's phone number. For example, a dial string can contain an international or long-distance access code, least-cost routing information, or dialing prefix or suffix.
Left Message	A check in this field indicates that the caller left a voice message.
Result	How the call ended. The possible outcomes are: **Abandoned:** The caller hung up before the call was answered. **Connected:** The call was answered. **To voicemail:** The call was sent to voicemail. **Blind Transfer:** A blind transfer sent the call to another extension. **Supervised Transfer:** A supervised transfer sent the call to another extension. **Unknown:** Wave was unable to identify the outcome of the call. **Login:** The user logged in to Wave at a remote phone.
Custom Data	Custom data, if any, associated with the call. Custom data can be collected by IVR Plug-ins or contact center queues that prompt the caller for information.

Taking notes on a Call Log entry

By clicking **Notes** in the bottom pane, you can take notes on a Call Log entry. Notes can help identify a call in the list or summarize important information about a call.

To take notes on a Call Log entry, select the entry, click in the Notes Pane, and then type your notes. When you are done, you can press **Enter** or click your mouse anywhere. The notes you just created appear in the Notes column for that Call Log entry.

Associating a call from “Unknown” with a contact

When a Call Log entry appears from “Unknown,” it means that Wave was unable to identify the caller as a Wave contact or user. You can associate the call with a contact, so that the correct name displays and Wave identifies the contact on subsequent calls from that phone.

See “Associating a call or Caller ID number with a contact” on page 9-9 for complete instructions.

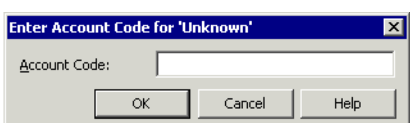
Returning a call in the Call Log folder

1. Select the call in the Call Log folder that you want to return.
2. On the **Actions** menu, choose one of the following:
    - **Place Call**. This command lets you choose the number to dial from a submenu. If the caller is a contact, you can choose the phone number to call from the list of the contact’s phone numbers. You can also choose to call by using the Caller ID number of the call.
    - **Speed Dial**. This command places a call immediately to a user’s extension, a contact’s default number, or an unknown caller’s Caller ID number. You can also choose Speed Dial by double-clicking the call.
3. Click **OK**. Wave dials the number.

Entering an account code for a Call Log entry

You can enter an account code or change the one already entered for a call in the Call Log. You must have permission to view and edit the Call Log to enter or change account codes.

1. Select the call, and then choose **Actions > Enter Account Code**.



2. Enter an account code. You can enter numbers, letters, or other characters.
3. Click **OK**.

You can also enter an account code during a call using ViewPoint (see “Entering an account code for a call” on page 4-11) or the telephone commands (See “Entering an account code for a Call Log entry” on page 7-8).

Opening the contact record from a contact’s call

If a call was identified as being from a contact, you can open the contact’s record to view or change information about that contact. To do so, select the call and choose **Actions > Open Contact**.

Chapter 8

Call Forwarding

Chapter Contents

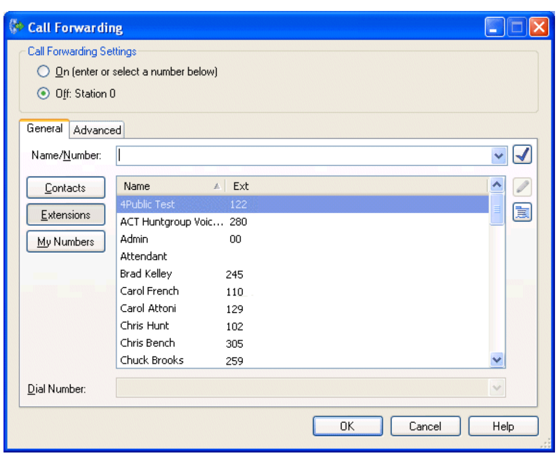
About call forwarding

Call forwarding causes your calls to ring at another phone, either another extension or an external number. Call forwarding is useful when you are working away from your desk or your office for a period of time.

Forwarding calls

To turn call forwarding on:

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog opens.



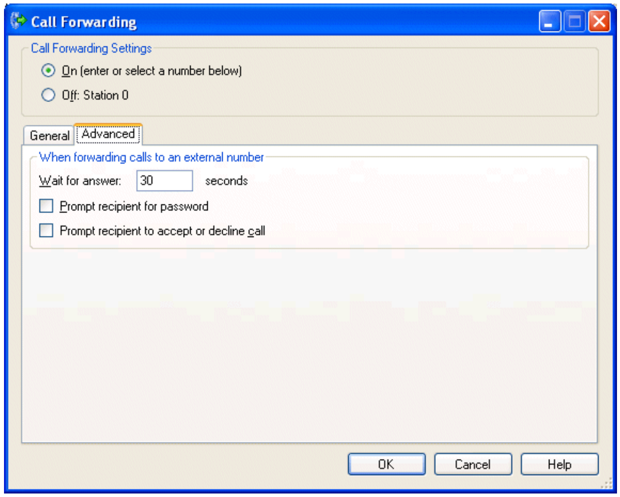
2. Click **On**.
3. Enter or select the number to dial in one of the following ways:
    - Enter the number to which calls are forwarded in the **Name/Number** or **Name/Extension** field. You can also type the name of a contact or user.
    - Click **Extensions** and select an extension on the list. You can also select a queue, auto attendant, IVR Plug-in, or workgroup.
    - Click **Contacts** and select a contact on the list. The contact's default phone number appears in the drop-down list below the main list. If the contact has more than one phone number associated with it, you can select a different number on the drop-down list.
    - To create a new contact, click to open a new Contact dialog. To edit the currently selected contact, press Alt and click . See "Entering a new contact" on page 9-3 for more information.

- Click **My Numbers**. To forward your calls to one of your own phone numbers, such as your home or mobile phone, select it on the list. See your Wave system administrator about entering numbers into your My Numbers list.

4. To enter an account code that will automatically be associated with all calls forwarded to this number, type a vertical bar character (|) after the number, followed by the account code.

    At this point most users can click **OK** to complete call forwarding. The following step is for advanced Wave users.

5. To set other call forwarding options, click the Advanced tab.



You can set any of the following options:

- **Wait for answer**. Enter the length of time in seconds that you want a call to ring the forwarding number before going to your voicemail). If you are using the option **Prompt recipient for password** (described below), you should enter at least 30 seconds. If you enter less time, the call might be sent to your voicemail before you finish listening and responding to the prompts.
- **Prompt recipient for password**. If checked, the person who picks up the phone hears, “Call for <your voice title>. Please connect me.” To be connected to the caller, you must enter your Wave password. Entering a password ensures that only you can receive your forwarded calls.

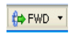
  This option works only when calls are forwarded to an external number and when you have a voice title for yourself recorded. If you have not recorded a voice title, Wave ignores your selection of this option. For more about recording your voice title, see the *Wave Phone User Guide*.

6. Click **OK**.

To turn call forwarding off in ViewPoint:

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog opens.
2. Uncheck **Forward Calls**.
3. Click **OK**.

Turning forwarding on and off via the FWD button

The FWD button  appears in the status bar. While your calls are forwarded, the FWD button displays a small phone and green arrow icon.

Click the FWD button to open the Call Forwarding dialog to turn call forwarding on or off or make other changes. Click the down arrow on the FWD button to choose a different forwarding number from your My Numbers list (set by your Wave ISM administrator) without opening the Call Forwarding dialog, or toggle call forwarding on and off.

Placing calls at another user's extension

To place calls as yourself from another user's extension, log on either through ViewPoint or the telephone commands, as described in "Placing outbound calls from shared stations" on page 3-2.

Call forwarding and voicemail

If no one answers at your call forwarding location, the call is sent to your voicemail.

Note: Forwarding calls with this method avoids tying up extra trunks. However, when a call is routed out, Wave loses control of it.

Managing Contacts and Workgroups

Chapter Contents

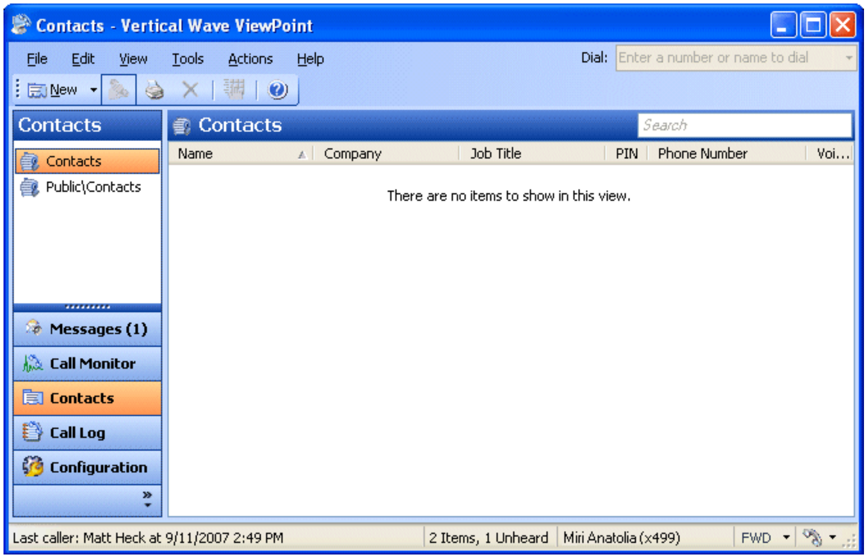
About contact management and Wave

ViewPoint's Contacts folder provides you with an online phone book of your telephone contacts in which you can enter the names, phone numbers, and other information about people you talk with frequently on the phone. After you enter contacts, you can place calls to them with a few clicks of the mouse.

This chapter describes the Contacts folder and then explains the following aspects of working with contacts:

- Managing contacts
- Teaching Wave to recognize your contacts
- Using workgroups

The Contacts folder



To open the Contacts folder, click its icon in the navigation bar.

Using contacts folders

You can create folders to organize your contacts. For example, you could have a Friends folder for personal contacts that keeps your friends separate from your other contacts. Separating contacts into folders makes it easier to find your contacts quickly. See “Organizing items in folders” on page 2-17.

Private and public contacts

In Wave, contacts can be private or public, as follows:

- **Private contacts** are your own personal contacts. These contacts appear only in the Contacts folder of your ViewPoint on your computer. Other users cannot see your contacts unless you explicitly share your Contacts folder with them.
- **Public contacts** are available to all users in your office. When public contacts call your office, Wave identifies them no matter which extension or user they are calling.

Public contacts contained in the Public\Contacts folder and can also be accessed via the Phonebook pane's Contacts tab, and by choosing **Actions > Place Call**. To enter or edit a public contact, you must have public contact editing permissions. If you do not have those permissions, you can view and place a call to public contacts, but you cannot edit them.

Viewing shared contacts

To view contacts that another user has shared with you, click that user's name under **Public Folders** in the Folder List and click the Contacts folder.

Changing double-click behavior

You can choose whether double-clicking a contact opens the contact for editing or places a call to the contact.

Searching for contacts

To search for a contact, start typing the contact's name into the **Search** field. As you type, the folder jumps to the contacts matching those letters.

Managing contacts

You can manage your contacts using Wave ViewPoint, or you can use another contact manager application or customer relationship management program with Wave if you prefer. You can also import contacts from other contact managers into Wave. See "Importing contacts from other contact managers into Wave" on page 9-13.

Entering a new contact

Entering a new contact involves the following tasks, which are explained in detail in the three procedures that follow:

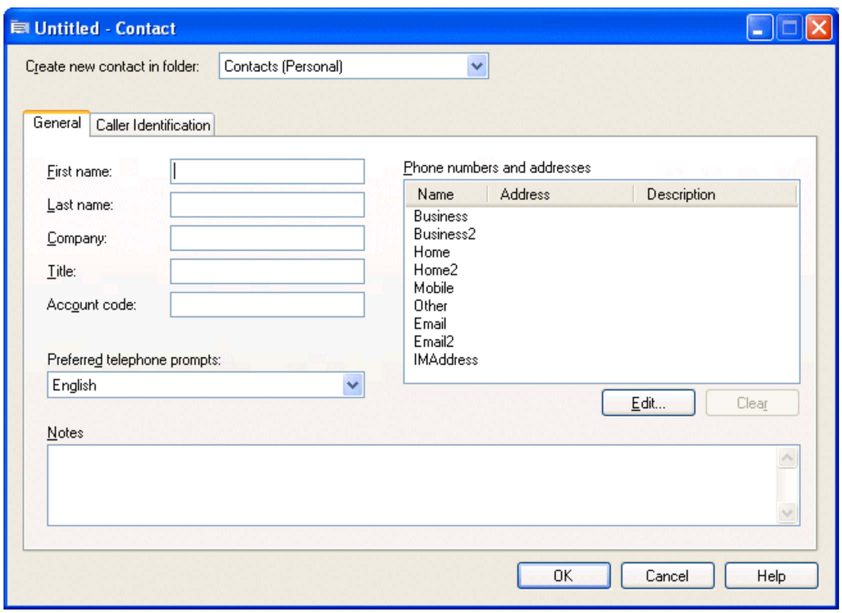
- **Entering a contact's name and basic information**. Other basic information includes the contact's company, any account code, and the language used for prompts for this contact. You can also enter up to 5,000 characters in the Notes Pane of the Contact dialog.
- **Entering a contact's phone numbers and addresses**. When you enter a contact's phone numbers, you can specify the number used for Caller ID and the number that is the default number to dial when you call the contact. You can also specify a contact's e-mail and instant messaging addresses for reference.

- **Recording a voice title for a contact**. Like your own voice title, a contact's voice title is a short recording that you create of the contact's name. If you are using call announcing, Wave announces calls from the contact by saying "Call from," followed by the contact's voice title. Contacts who do not have voice titles recorded are prompted to say their names each time they call you, unless you have turned off that prompt.

Note: You have a limited amount of space for all voice files, including voice titles. Therefore, if you have many contacts, you can save space by recording voice titles for the most important ones only. Ask your Wave system administrator how much space you have been allocated and how much you have used.

Entering a contact's name and basic information

1. Choose **File > New > Contact**. The Contact dialog opens to the General tab.



2. Select which folder to create the contact in, using the **Create new contact in folder** drop-down list.

   If you have permission to create public contacts, you can make this contact a public contact by choosing **Contacts (Public)**. Public contacts can be seen and used by all Wave users. All other selections create a private contact, which only you can see and use.

3. Enter the appropriate information about the contact in the **First Name**, **Last Name**, **Company**, and **Title** fields. The first and last names are displayed in the Call Monitor folder when this contact calls you.

   Either a first name or a last name is required. To create a contact that has the name of a company only, enter the company name into one of these fields.

4. If your office uses account codes, you can enter an **Account code** for the contact. Wave automatically uses the account code for the call when it identifies the contact on an incoming call or when you dial one of the contact's numbers on an outgoing call.

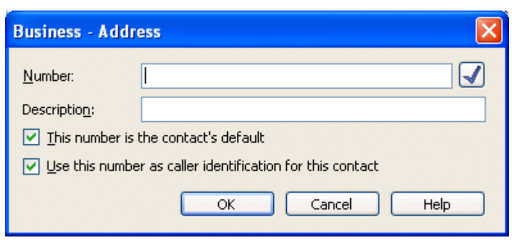
   If you are prompted to enter account codes when you place calls, you will hear a double beep instead of a single beep to indicate you are dialing a contact who has an account code already entered. When you hear the double beep, you can press **#** on your phone to accept the contact's existing account code, or you can enter another account code.

   For more information, see "Entering an account code for a Call Log entry" on page 7-8.

5. In the **Preferred telephone prompts** drop-down list, select the language that you want Wave to use when it plays voicemail and other prompts to this contact. The available languages are the languages that were installed on your system.

Entering a contact's phone numbers and addresses

1. On the General tab in the Contact dialog, double-click the appropriate line in the **Phone Numbers and addresses** list. The related Address dialog opens.



- For **Business, Home, Mobile, or Other.**, enter the following information:
  - **Number:** Enter the phone number to dial for the contact.
  - **This number is the contact's default:** Select this checkbox if this is the phone number you dial most frequently to reach the contact. The number you choose as the default is slightly faster to select when you place calls.

- **Use this number as caller identification for this contact:** Select this checkbox if you want Wave to identify calls from this number as calls from the contact. Checking this box adds the phone number to the contact's Incoming Caller ID list (see "Teaching Wave to recognize your contacts" on page 9-7). If this option is unchecked, calls from this number appear in the Call Monitor and Call Log folders as being from "Unknown."
- **For Email or IMaddress.** Enter the e-mail or instant message address for the contact. You can enter notes about the address in the **Description** field.

2. Enter notes about the phone number or address in the **Description** field. For example, for a business number, this is a good place to enter the contact's extension.
3. Click **OK** to close the Phone Number dialog.
4. To enter more phone numbers or addresses for this contact, repeat steps 1-3 for the other categories in the **Phone numbers and addresses** list.
5. Click **OK** to close the Contact dialog. The new contact now appears in the Contacts folder.

Recording a voice title for a contact

1. In the Contacts folder, select the contact for whom you want to record a voice title and choose **File > Open**.
2. In the Contact dialog, click the Caller Identification tab.
3. Record the voice title by using the audio controls. See "Using the audio controls" on page 2-20 for instructions.
4. Click **OK**.

Notes:

- Wave can play the voice titles of contacts over your computer speakers automatically when those contacts call. See "" on page 18-16 for more information.
- Wave can also capture the names of contacts in the voices of the contacts when they respond to the call announcing prompt. Wave can then use those recordings as voice titles. See "Associating a call or Caller ID number with a contact" on page 9-10 for more information.

Placing calls to your contacts

You can place a call to a contact with a phone number using ViewPoint. See “Placing a call” on page 5-1 for instructions.

Teaching Wave to recognize your contacts

Wave’s more advanced features depend on Wave recognizing your contacts. You can teach Wave to recognize your contacts in the following ways:

- By recognizing the Caller ID number or name of the contact’s phone.
- By recognizing a special number you give to the contact to dial after your extension, called a Contact PIN. By using Contact PINs, Wave can recognize contacts regardless of the phone they use to call.

Note: Wave automatically identifies other Wave users when they call from their stations or their public numbers.

The benefits of having Wave recognize contacts include:

- Their names appear in the Call Monitor while the phone is ringing to let you know who is calling.
- Their names are displayed on your Caller ID phone, if you have one.
- Their names appear in the Call Log and Messages folders, so that you can easily see contacts in your phone record and quickly call them back.
- You can hear your contact's name announced over your phone or PC speakers—without forcing your callers to say their name every time they call—by saving a recorded voice title with the contact.

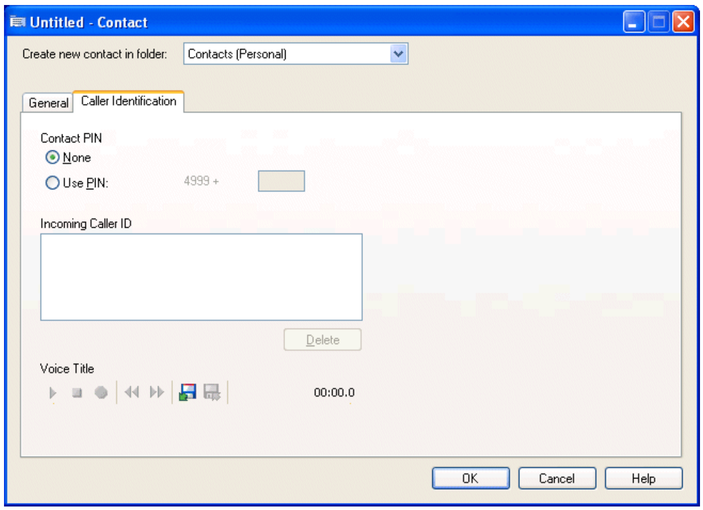
One form of identification, Caller ID from the phone company, is available automatically for every call. The phone number and Caller ID name of the caller appear in the Number column of the Call Monitor, the Call Log, and the Messages folders.

Identifying contacts by name

Each contact has a list of associated phone numbers called the Incoming Caller ID list. When a call arrives from one of those phone numbers, Wave identifies that contact.

The Incoming Caller ID list can include Caller ID names as well as phone numbers. See “Understanding name and number on Caller ID” on page 9-11 for pointers on which item is more useful for identifying a given contact.

To view a contact's Incoming Caller ID list, select the contact in the Contact’s folder, choose **File > Open**, and then click the Caller Identification tab.



To guarantee that Wave recognizes contacts, regardless of the phone number from which they are calling, use a contact PIN. See “Using contact PINs for guaranteed recognition” on page 9-12 for more information.

Adding phone numbers for contact recognition

You can add a phone number to a contact’s Incoming Caller ID list by doing one of the following:

- Add a new phone number for the contact in the General tab and check **Use phone number as caller identification for this contact**. See “Entering a new contact” on page 9-3 for more information.
- Associate the phone number from a call or voice message with the contact. See “Associating a call or Caller ID number with a contact” on page 9-9 for more information.

Deleting a number from the Incoming Caller ID list

If Wave wrongly identifies a contact as the caller, it is likely that the Incoming Caller ID list for that contact includes an incorrect phone number. You can prevent further misidentification by deleting the phone number from the list.

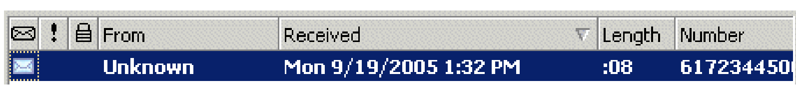
1. Double-click the contact from whom you want to delete a phone number. The Contact dialog opens.
2. Click the Caller Identification tab.
3. In the **Incoming Caller ID** list, select the incorrect phone number.
4. Click **Delete** and then click **OK**.

Associating a call or Caller ID number with a contact

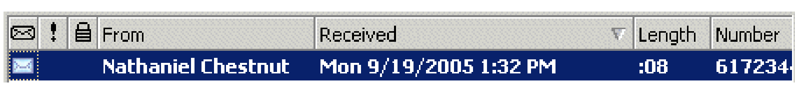
If Wave shows a caller's name as "Unknown," but you know who the caller is, you can associate the call with one of your contacts. Doing this replaces "Unknown" with the contact's name.

You can also associate the Caller ID number or the name from the call with a contact. Doing this adds the number to the contact's Incoming Caller ID list. Future calls from that phone show that contact as the caller. In this way you can "teach" Wave to recognize the people who call you.

For example, the following illustration shows a voice message before association, showing "Unknown" as the caller.



The next illustration shows the same message after you associate it with your contact Nathaniel Chestnut.

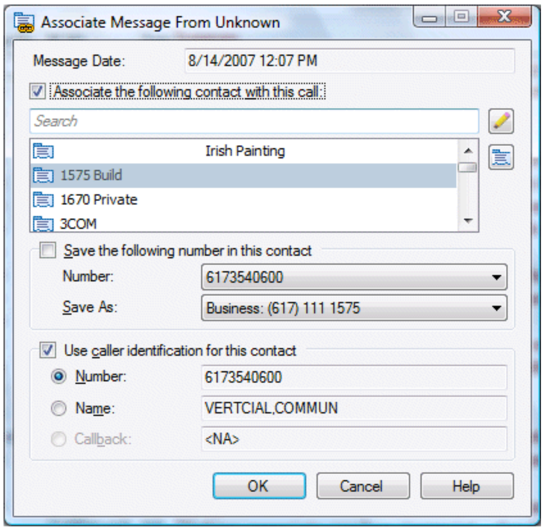


You can teach Wave to recognize a caller by Caller ID name instead of the phone number. This can be useful, for example, if the contact calls from a company with a PBX that randomly assigns phone numbers to trunks but uses a Caller ID name that remains the same.

Note: You cannot associate a phone number or Caller ID text with a public contact unless you have permissions to edit public contacts. You can, however, label an individual call as being from a public contact.

To associate a call with a contact:

1. Click one of the following:
   - An active call in the Call Monitor folder
   - An entry for a call in the Call Log folder
   - A voice message in any Messages folder
2. Click on the toolbar. The Associate dialog opens.



3. To associate this call with a contact, select the **Associate the following contact with this call** checkbox. Then, identify the contact to associate with the call in any of the following ways:
   - Type all or part of the contact's first, last or company name in the **Search** field and then click .
   - Scroll to the contact in the list, and then select it.
   - Create a new contact directly from this dialog. To do so, click . (See "Entering a new contact" on page 9-3 for instructions.) When you finish creating the contact and return to this dialog, the new contact is displayed in the list.
4. To cancel an association and revert the call to its original identification, click "<Unknown>" in the list.

   Note: If a call was originally identified as being from a contact, de-selecting the **Associate the following contact with this call** checkbox reverts it to being identified as from that contact.

5. If the call came from a phone number that is new for this contact, you can add the new number to the contact's phone number list now. To do so, check **Save the following number in this contact**, and then select the phone number category to save it as via the **Save As** drop-down list.
6. If you want only to label the individual call or voice message with the contact's name, deselect the **Use caller identification for this contact** checkbox.

   If you want Wave to associate all subsequent calls from that phone with the contact, check **Use caller identification for this contact** and select one of the following:

   - **Number:** Wave uses the phone number to recognize subsequent calls.
   - **Name:** Wave uses the Caller ID text to recognize subsequent calls.
   - **Callback:** Wave uses the callback number entered by the caller. (This option is only available if the caller entered a callback number.)

   See the next section for more information.
7. Click **OK**.

Understanding name and number on Caller ID

When you receive a call, Wave receives two pieces of information about where the call originated: the phone number and the Caller ID name. You can associate either of these items with a contact.

Depending on where the call originated, one item may work better than the other, as the following examples illustrate:

- **If the call is from a home phone** (for example, `ANTANDER,LOU - 6178380405`). In this case, where both the number and name are unique, either could be used for association.
- **If the call is from a company with many phone lines** (for example, `Vertical Comm - 6175641121`). In this case the phone number may change with every call, because the office's PBX system uses a random trunk for all outgoing calls. The Caller ID name, however, remains constant, so you should use that for association.
- **If the call is from a standardized Caller ID name** (for example, `california - 7605550807`). In cases where the Caller ID name is standardized for many different phones, you should use the phone number for association.

Using contact PINs for guaranteed recognition

Contact PINs provide a guaranteed way for callers to be recognized by Wave whenever they call. A contact with a PIN can call from any phone number and be identified by Wave.

Contact PINs are unique numbers that you give out to contacts. Contacts add their PINs to your extension when they call you.

Note: You cannot enter a contact PIN for a public contact.

Examples:

- Your extension is 177, and you give Mr. Jones a contact PIN of 55. Mr. Jones calls your office, and when prompted to enter your extension, he types in 17755. Wave is thus assured of identifying this call as coming from Mr. Jones.
- If you have a car for sale, you could advertise it in the paper with your extension plus a contact PIN (for example, “Call me at ext. 17756”). Set up the contact as “Car buyer” with a PIN of 56. Now when anyone calls about the ad, it appears as from “Car buyer” in your Call Monitor.

To enter a contact PIN:

1. In the Contacts folder, double-click the contact for whom you want to create a contact PIN. The Contact dialog opens.
2. Click the Caller Identification tab.
3. Under **Contact PIN**, enter the number that you intend to give to this contact. If the contact PIN you entered conflicts with one already created, Wave prompts you to enter a different number.
4. Click **OK**.

Opening contacts from within other folders

After an incoming call has been identified as coming from a contact, you can easily open the contact record from a Messages folder (if the contact left a voice message) or the Call Log folder. Select the call or voice message, and then choose **Actions > Open Contact**.

Using contacts in another contact manager

If you make extensive use of another TAPI-compatible contact manager or customer relationship management application such as Microsoft Outlook, GoldMine or FrontOffice 2000, or Interact Commerce Corporation's Act!, you can place Wave calls to your contacts from those applications by using the Wave TAPI Service Provider. See your Wave system administrator about installing the TAPI Service Provider, and then follow your contact manager's instructions for placing calls. Calls placed by other applications still appear in your Wave Call Log and Call Monitor folders.

You can also install the Wave Contact Manager Assistant (CMA) and receive screen-pops showing the name, the Caller ID, and the time of day of the call. Act! users can receive screen-pops without installing the CMA.

You do not need to have the Wave ViewPoint installed to use the TAPI Service Provider or the CMA.

Using the Wave Contact Manager Assistant

The Contact Manager Assistant enables Outlook, GoldMine, or FrontOffice 2000 contact managers to pop up contact information automatically when contacts in one of your contact managers call. Wave recognizes the incoming Caller ID number, Caller ID, or name.

To run the Contact Manager Assistant:

1. Choose **Start > Programs >** Vertical Wave > C**ontact Manager Assistant**. The program starts and runs in the background.
2. Right-click  in the system tray for a shortcut menu of commands that you can use to configure and personalize the program. For further instructions, see the CMA's online Help.

Importing contacts from other contact managers into Wave

You can export contacts from other contact managers and import them into Wave.

Exporting contacts from Microsoft Outlook

The following instructions show how to export contacts from Microsoft Outlook:

1. In Outlook, Select **File > Import and Export**.
2. Select **Export to a file** from the list and click **Next**.

3. Select **Comma Separated Values (Windows)** and click **Next**.
4. Select a folder in which to store the contacts file and click **Next**.
5. Enter a filename and click **Next**.
6. Click **Finish**.

Importing contacts into Wave

See “Importing and exporting Wave items” on page 2-21.

Using workgroups

A *workgroup* is a group of related extensions or contacts. Extensions in Wave include users, IVR Plug-ins, auto attendants, or queues. With a workgroup you can:

- Send, reply, or forward a voice message to the workgroup. All mailboxes in the workgroup receive the message at once. See “Sending a message directly to a user’s voicemail” on page 6-9.
- Call the workgroup if your Wave system administrator has assigned it an extension. The phones of all users in the workgroup ring simultaneously, and the first user to answer is connected. See “Placing a call” on page 5-1. Members of a workgroup other than users are ignored, for example, contacts, queues, auto attendants, and IVR Plug-ins.
- View the users in your workgroup when transferring calls, which makes it easier to pick the right recipient. You can set any workgroup to appear as a tab in the Extensions section of the Transfer To dialog. For example, you can define the members of your Sales department as a workgroup. When you have a call for the Sales department, you can click the Sales tab and see all the department members at a glance, along with their current personal statuses. See “Transferring a call” on page 4-6, and “Having a workgroup appear as an Extensions tab” on page 9-17.

Personal and public workgroups

Generally, the workgroups you will create in Wave are *personal* workgroups. Only you can see the personal workgroups that you create. Other users cannot see workgroups that you create.

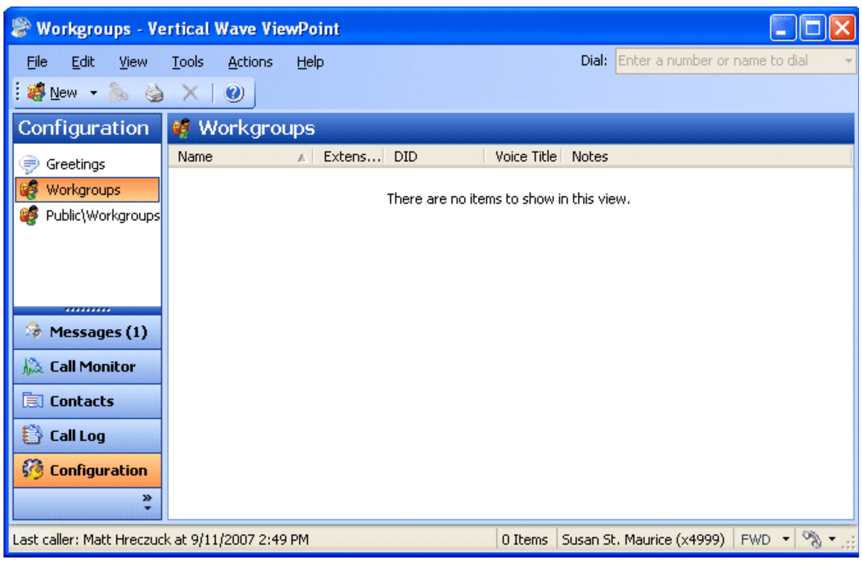
Public workgroups, which are accessible to all Wave users who have permission to see them, can be created only by Administrator users or other users who have been given special permission to do so. Your Wave system administrator can assign public workgroups an extension so that the workgroup can be accessed via the phone.

You can also view and select public workgroups when you place a call using the Place Call To dialog. See “Using the Place Call To dialog” on page 5-3.

Note: You can create or edit public workgroups only if your Wave system administrator has given you permission to do so.

The Workgroups folder

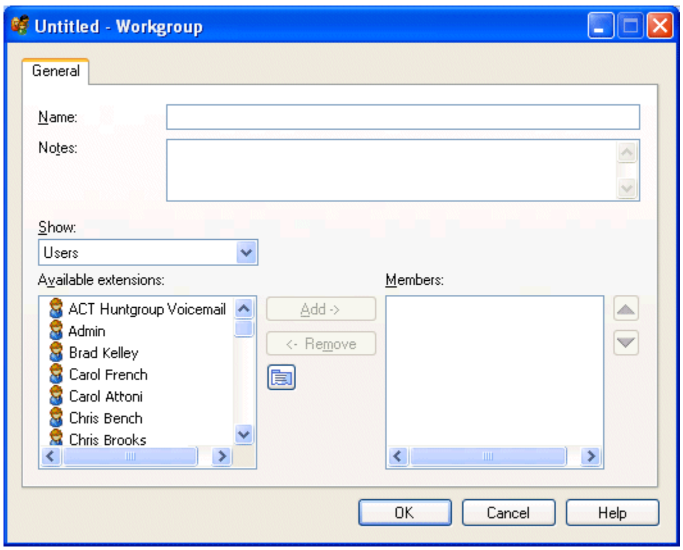
The Workgroups folder lets you view and manage your workgroups.



To open the Workgroups folder, click the Configuration icon in the navigation bar. The Favorite Folders list offers access to your office’s Public Workgroups folder.

Creating a workgroup

1. Do one of the following:
   - To create a personal workgroup, open the Workgroups folder.
   - If you have the permission to create a public workgroup, open **Public Folders** in the Folder List and click **Workgroups**. You can only create a public workgroup if your Wave system administrator has given you permission to do so.
2. Choose **File > New > Workgroup**. The Workgroup dialog opens.



3. Enter a **Name** for the workgroup and any **Notes** to describe the workgroup.
4. Add one or more members to the workgroup by selecting names on the list of **Available Extensions** and then clicking **Add**. Press Ctrl to select multiple names on the list. The members you selected appear in the **Members** list. Use the arrows next to the list to arrange the order of the members. Click **Remove** to delete members from the list.
5. Click **OK**.

Personal workgroups can appear as a tab in your Extensions list. See the next section.

Having a workgroup appear as an Extensions tab

You can specify whether or not a particular workgroup appears as a tab in your Extensions list. If you create a tab for the workgroup, it lists all extensions within the workgroup, and you can see the current status of those extensions at a glance (contacts in the workgroup do not appear). The tab also appears in the Extensions section of the Place Call To and Transfer Call To dialogs.

You can also choose to show a tab for any other personal workgroups or any other public workgroup.

To specify whether a workgroup has a tab in the Extensions list:

1. Go to the Extensions view.
2. Right-click the column header and choose **Show Tabs**.
3. In the Show Tabs dialog, choose the tabs you want to display and their order.
4. Click **OK**.

For more about the Extensions list, see Chapter 3.

Using the Wave Archived Recording Browser

APPENDIX CONTENTS

About the Wave Archived Recording Browser

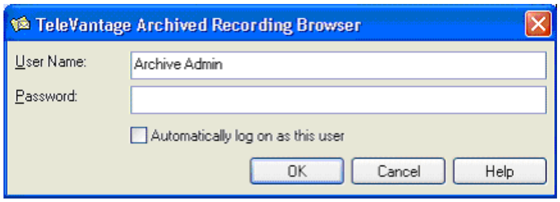
The Wave Archived Recording Browser is a tool for listening to and managing thousands of mailbox recordings (voice messages or call recordings) that have been archived by Wave. You can search for recordings using a variety of criteria, edit or delete recordings, flag recordings for follow up, or restore them to the appropriate Inbox or other folder from which they were archived.

Running the Archived Recording Browser

In order to use the Archive Recording Browser, you must know the network location of the archive and have network access to that location. See your Wave system administrator for details.

To run the Archived Recording Browser:

1. Choose **Start > Programs > Vertical Wave > Wave Archived Recording Browser**. The Wave Archived Recording Browser dialog opens:



2. Enter your archive user **User Name** and **Password**. These can be different than your Wave user name and password—ask your Wave system administrator for the user name and password to use.

   Click **OK**.

3. If you are prompted to do so, navigate to the network location of the recording archive.

4. To log on as another archive user (for example, as a user with different access privileges), click **File > Log On as a Different User**, and then enter that archive user's **User Name** and **Password**.

Searching for recordings

The Archived Recording Browser does not display any entries when you run it. To view recordings in the Browser window, you must first search for recordings that match criteria that you set.

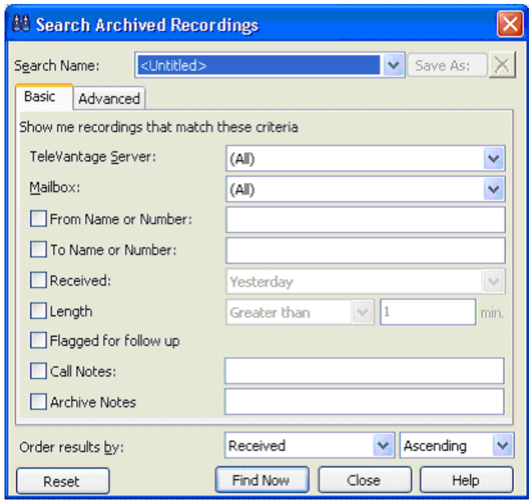
To search for recordings, use either of the following methods:

- Start a new search. See page A-3.
- Load a saved search. See page A-9.

Starting a new search

To start a new search:

1. Click  on the toolbar. The Search Archived Recordings dialog opens.

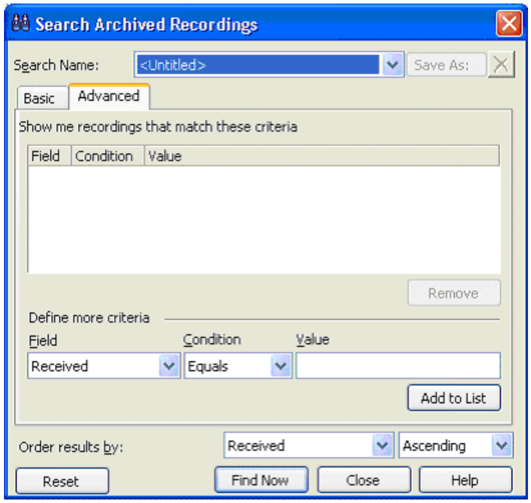


2. Do one of the following:

- If your search only involves the criteria shown on the Basic tab
- On the Basic tab, you can quickly specify commonly-used criteria, and anything you enter is treated as a partial search. For example, entering “617” in the **Number** field will return all records with 617 in that field, including “61755511212”, and “5126175555”.

  For a description of each field on the Basic tab, see “Search criteria” on page A-5. When you are done specifying your search criteria on the Basic tab, go to step 3.
- If you want to specify more complex search criteria

- Click the Advanced tab to search on additional fields in the mailbox recording's Call Log entry, or to define more complex search criteria than you can specify on the Basic tab.



For a description of each field on the Advanced tab, see "Search criteria" on page A-5.

Click **Add to List** after defining each entry. To remove an entry from the list, select it and then click **Remove**.

3. On either tab, you can specify how the results will be sorted. From the **Order results by** drop-down lists, select the Browser column on which to sort the search results. Then select **Ascending** or **Descending** from the drop-down list to specify how to sort the contents of that column.

   Note: Search results can also be sorted by clicking any column header in the Archived Recording Browser.

4. When you are done specifying your search criteria on either tab, do any of the following:

   - To execute the search, click **Find Now.**
   - To reuse the search criteria again at a later time, click **Save As**. In the Save Search As dialog, **Enter a name for your search** and then click **Save**.
   - To reset the contents of the Search Archived Recordings dialog to the default settings, click **Reset**.

Search criteria

The following table describes the search criteria that you can set up on either the Basic or Advanced tab in the Search Archived Recordings dialog:

Tab	Field	Description
Basic	**Wave Server**	If your system archives mailbox recordings from more than one Wave Server, you can search all of the Servers, or select a specific Server from the drop-down list.
	Mailbox	You can search all users' mailbox folders, or select a specific user from the drop-down list.
	From Name or Number	To search for recordings related to calls from a specific user or number, select this checkbox, and then enter all or part of the user's name (for example, "Janice" or "Jan") or phone number (for example, "17815551212", or "781".) To search for calls from an external caller, enter "Unknown".
	To Name or Number	To search for recordings related to calls placed to a specific user or number, select this checkbox, and then enter all or part of the user's name or phone number.
	Received	To limit your search to a specific time period, select this checkbox, and then select a time period from the drop-down list (for example, "Yesterday" or "Last 3 months".) If you select "Specific date", enter the date in the text box using the format provided, or click ... to select a date from a calendar.
	Length	To search for recordings of a specific length, select this checkbox. Select an option from the drop-down list, and then enter the number of minutes in the text box (for example, "Within 30 sec.of 5 minutes".) **Note:** To enter seconds, use the hh:ss format or decimal places. For example, to indicate 1 minute 30 seconds, enter either "1:30" or "1.5".
	Flagged for follow up	To search for recordings that were previously flagged for follow up, select this checkbox.

Tab	Field	Description
	Call Notes	To search for recordings that contain a specific text string in the **Call Notes** field, select the checkbox, and then enter the string in the text box.
	Archive Notes	To search for recordings that contain a specific text string in the **Archive Notes** field, select this checkbox, and then enter the string in the text box.
Advanced	**Show me recordings that match these criteria**	Lists one or more criteria that you specify on the Advanced tab. To remove an entry from the criteria list, select it and then click **Remove**.
	Define more criteria	To add an entry to the criteria list, select a **Field** and **Condition** from the drop-down lists, and then select a **Value** from the drop-down list or enter it in the text box (for example, “Account Code Equals 1074”.) To search for recordings that match one of several values in a single field, select the condition **Or**. When you use **Or**, you must specify the complete field contents that you are searching for, as in: “From Or Nancy Jones OR Pete Smith OR Irene Orleans”.
	Field	Field on which the search criteria is based. For a description of each field, see “Using the Call Log view” in Chapter 22 in the *Wave Global Administrator Guide*.
	Condition	Select any of the following conditions.

Tab	Field	Description	
		Equals, Does not equal	Use to search based on the exact contents of a field. For example, to search for recordings of calls from Kevin McDonough, add the criteria “From Equals Kevin McDonough”. Note that when you use **Equals** and **Does not equal**, you cannot search based on part of the field’s contents—the criteria “From Equals Irene” would not return any matches. **Equals** is the only valid condition for some fields (**Flagged for follow-up, Message Heard, Call Direction, Call Result, Left Message, and Recorded By**.) For these fields, select one of the values offered in the drop-down list, for example, “Call Result Equals Left Message”.
		Greater than, Less than	Use to search based on the numeric contents of a field. For example, to search for recordings of calls that were on hold for more than 10 minutes, add the criteria “Hold Time Greater than 10”.
		Between	Use to search based on a range of values for a field. For example, to search for recordings of calls that lasted more than 10 but less than 20 minutes, add the criteria “Call Duration Between 10 and 20”.
		Or	Use to search for recordings based on two or more values for a field. For example, to search for recordings of calls from several callers, add a criteria like “From Or Nancy Jones OR Pete Smith OR Irene Orleans”.

Tab	Field	Description	
		Like	Use to search based on wildcard characters that represent one or more characters. Use a question mark (?) to represent a single alphanumeric character. For example, to search for recordings of calls from the 617 area code and 555 exchange, add the criteria, “Number Like 617555????”. Use an asterisk (*) to represent one or more alphanumeric characters. For example, to search for recordings of calls from anyone with a first name of Nancy, add the criteria “From Like Nancy”. You can combine wildcard characters in a single search criteria. For example, to search for recordings from calls from an area code that begins with 8 and has the 555 exchange, add the criteria “Number Like “8??555*”. Note that if you want to search for the actual character * or ?, use the **Equals** or **Does not equal** condition.
		Contains	Use to search based on a portion of a field. For example, to search for recordings of calls where 555 appears anywhere in the number, add the criteria “Number Contains 555”.
	Value	Field contents for which to search. Note that when searching on the contents of a time-based fields (Call Duration, Hold Time, and so forth), the value is always entered in minutes.	

Saving your current search

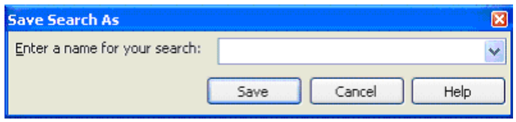
There are two ways to save your current search criteria in order to search using the same criteria at a later time:

1. In the Search Archived Recordings dialog, click **Save As**.

   -or-

   In the Browser, click on the toolbar.

   The Save Search As dialog opens.



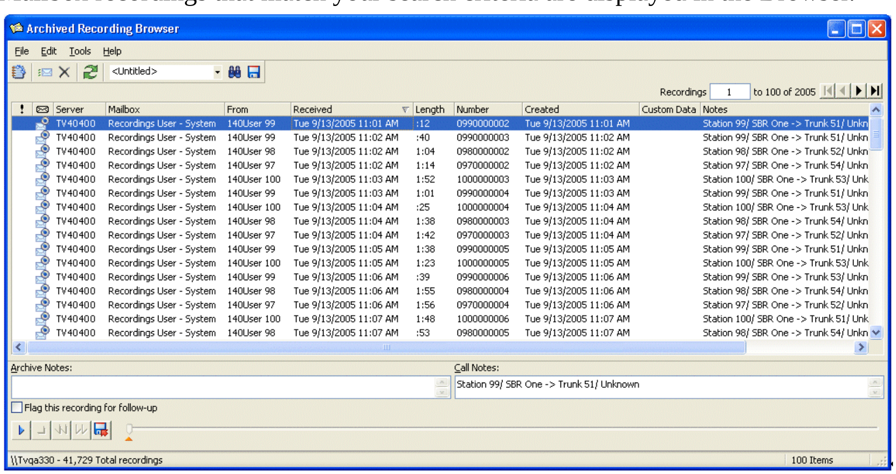
2. **Enter a name for your search** and then click **Save**.

Loading a saved search

To load a saved search, select it in the drop-down list on the toolbar. To change the search criteria for a saved search, select it and then choose **Tools > Find**. The Search Archived Recordings dialog opens where you can make your changes.

Managing individual recordings

Mailbox recordings that match your search criteria are displayed in the Browser.



The following information is displayed for each recording:

- If , recording has been flagged for follow-up.
- Identifies the recording type:
  - Voice message
  - Call recording
- **Server**. Wave Server from which the recording was archived.
- **Mailbox**. User's mailbox folder from which the recording was archived. If you restore the recording, it will be returned to this mailbox.
- **From**. Name of the person who placed the call. On incoming calls, "Unknown" is displayed unless the user identified the caller as a contact. On outgoing calls, this column contains the user's name.
- **Received**. Date and time when a voice message was left, or a call recorded.
- **Length**. Length of the recording in minutes:seconds format.
- **Number**. On incoming calls, the extension, Caller ID name and number (if available), or external number that was dialed. On outgoing calls, the extension or external number that was dialed.
- **Created**. Date and time when the mailbox recording was archived.
- **Custom Data**. Custom data, if any, associated with the call.
- **Notes**. Starting text of any notes added to a voice message or call recording via the Call Monitor or Call Log. The complete notes appear in the Call Notes pane at the bottom of the Browser. For a call recording, Wave automatically adds information about the stations and/or trunks involved in the call.

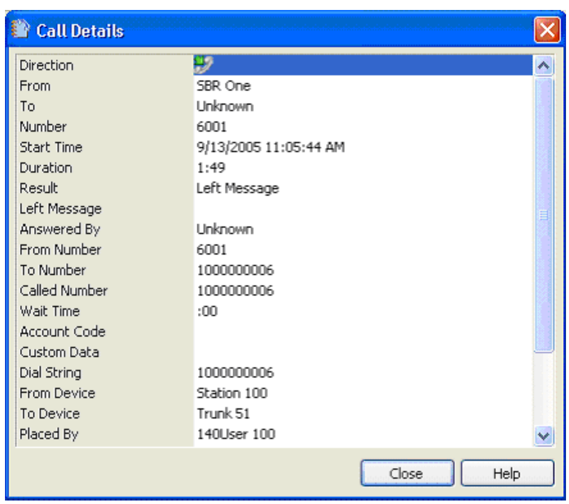
  If you make changes to Call Notes via the Archived Recording Browser, those changes are included if you restore the recording to its original Inbox or other folder, but the Call Log notes remain unchanged.
- **Archive Notes**. Notes added to the archived recording via the Archived Recording Browser. Archive notes are maintained only in the archive, and are not included if the recording is restored to its original Inbox or other folder.

Acting on archived call recordings

To act on archived recordings:

1. Adjust the display in any of the following ways:
   - Click on any column heading to sort the search results on that column. You can type characters or words to jump to the first matching record in the sorted column that begins with that text.
   - Enter a number in the Recordings text box at the top right of the Browser and press **Enter** to go to that entry in the list. Use the buttons to browse through the search results.
   - To change the number of entries displayed per page, choose **Tools > Options**. In the Options dialog, enter the **Number of recordings to display per page**.
2. Click an archived file to select it. You can perform the following actions on a selected file:
   - **Play**. Double-click any column except the first column to play the recording, or use the audio controls at the bottom of the Browser.

     To set a bookmark while listening to a recording, click and drag the orange triangle under the progress indicator at the bottom of the Browser. The next time that you play the recording, playback will start at the bookmark location.
   - **Open Call Log Details**. Click on the toolbar to view details about the Call Log entry associated with the mailbox recording.



Note: You can view Call Log details for all call recordings, and for voice messages that were left by a caller via the Wave telephone commands. Internal voice messages will only have associated Call Log details if internal (station-to-station) call logging is turned on via **Tools > System Settings >** Call Log tab in the TV Admin applet in the Wave Remote Management Console. Voice messages sent directly to a user's voice mailbox by another user via ViewPoint do not have any associated Call Log details.

- **Flag recording**. Double-click the first column for a recording to flag the selected recording for follow up. Double-click it again to remove the flag. (You can also use the **Flag this recording for follow-up** checkbox for the selected recording.)
- **Add notes**. To add new notes or edit existing notes to the selected recording, type in the **Call Notes** or **Archive Notes** panes.
- **Restore recording**. Click on the toolbar to move the selected recording back to the mailbox from which it was archived. It also stays in the archive until purged.
- **Export recording**. Click , one of the audio controls at the bottom of the Browser, to export one or more selected recordings to a location on a hard drive other than the folders from which they were archived. (Exported recordings are not deleted from the archive folder.)
- **Refresh**. Click on the toolbar to refresh the list of mailbox recordings displayed in the Browser.
- **Delete recording**. Click on the toolbar to delete one or more selected recordings from the archive folder. (To delete recordings based on criteria that you set, see "Purging archived recordings" on page A-13.)

Checking the archive for missing audio files

When you check the archive for missing audio files, all archive database entries that do not have a corresponding audio file in the archive folder are deleted from the database.

To check the archive for missing audio files:

1. Choose **Tools > Check Archive**. **Note:** If this option is not available, ask your Wave system administrator to grant you Archive Admin privileges.
2. Click **OK** at the warning message to check the archive.

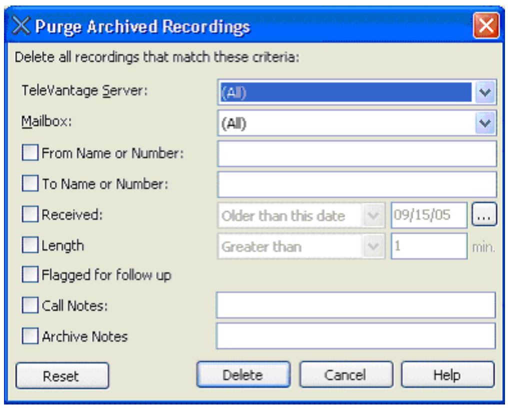
Purging archived recordings

You must have Administrator privileges to perform this operation. When you purge archived recordings, all mailbox recordings in the archive folder that match the criteria that you set are deleted permanently, as well as the corresponding archive database entries.

To purge archived recordings:

1. Choose **Tools > Purge Recordings**. **Note:** If this option is not available, ask your Wave system administrator to grant you Archive Admin privileges.

   The Purge Archived Recordings dialog opens:

2. Specify the recordings that you want to delete from the archive. Selecting recordings to purge works the same as using the Basic tab to search for recordings. See "Search criteria" on page A-5 for a description of each field.

3. Click **Delete** to purge mailbox recordings that match your criteria from the archive. Click **OK** at the warning message to confirm the purge.

Logging On with Command-Line Switches

Appendix Contents

About ViewPoint command line switches

You can add various switches to the command line that ViewPoint shortcut uses to start ViewPoint. To change the command line, right-click ViewPoint shortcut icon, choose **Properties**, and then click the Shortcut tab. The **Target** field shows the command line.

Add switches to the end of the command line (after the quote mark) with a space before the switch. You can add multiple switches separated by spaces. For example:

"C:\Program Files\Wave\Client\TVViewPoint.exe" /Server:Wave /station=77

ViewPoint command line switch reference

The ViewPoint command line switches include the following:

- **/allowmultiple**. Enables you to run multiple instances of ViewPoint at the same time on your computer.
- **/Server**. Syntax: `/Server:<Servername>`. Example: `/Server:Wave`. Runs ViewPoint against a specific Wave Server on your network. This is useful when you want to have one ViewPoint session using a Server other than the one your ViewPoint runs against by default.

- **/user /password /showloginoptions**. Syntax: `/user:<username> /password:<password> /showloginoptions`. Example: `/user:Neil Pratt /password:2112`. (The three switches can be used separately.) Use to automatically log on to ViewPoint as a specific user. With just `/user` and `/password` present, ViewPoint skips the Logon dialog. To have Wave still display the full Logon dialog—for example, to change phone information—add `/showloginoptions`.
- **/station**. See the next section, "Using the /station command."
- **/stationconflict**. `Syntax: /stationconflict:<ask/ignore>`. Example: `/stationconflict:ignore`. The `ignore` option lets you skip the Select Your Wave Phone dialog when launching ViewPoint with an associated phone other than your default station (see "Using ViewPoint with a different phone or server" on page 2-3). If you use the `ignore` option without `/stationusage`, the default selection is `owner` (see the next bullet).
- **/stationusage.** Syntax: `/stationusage:<visitor/owner/forward>`. Example: `/stationusage:visitor`. Lets you make a selection in the Select Your Wave Phone dialog as follows:

  `/stationusage:visitor` corresponds to **Use station *n* as a visitor.**

  `/stationusage:owner` corresponds to **Use <this phone > to place and answer calls**.

  `/stationusage:forward` corresponds to **Use <this phone > to place and answer calls** plus **Forward my calls to this <phone>**.
- **/terminalsvrmode.** Set this to "`terminalsvrmode=1`" when running a ViewPoint application that will be accessed by multiple users over Terminal Server or Citrix. With terminalsvrmode=1, the individual users' logon settings are preserved for each user, instead of being reset by each user.

  Note that with terminalsvrmode=1, ViewPoint does not perform a version check on startup and will not prompt for automatic upgrade if the Server has been or is being upgraded.

Using the /station command

The `/station` command associates ViewPoint with a specific phone, either a station ID or a remote number. You can use this switch to set up various ViewPoint shortcuts for different remote locations, so you don't have to wait for ViewPoint to launch, then choose **File > Use a different station**, and wait for it to launch again.

Syntax

/station:<*station number*/*remote number*>

For `<station number>`, specify a station ID, for example `/station:77`.

For `<remote number>`, use the following syntax:

<*access code*><*extension/phone number/IP address*>

- **access code.** Syntax: `ac=<code>`. Example: `ac=9`. Specifies the dialing service access code for Wave to use when placing calls to you. If omitted, Wave uses the default dialing service for your number type.
- **phone number.** Syntax: `phone:<+><number>`. Example: `phone:+12125551212`. Include the + to have Wave use dialing rules when dialing the number. Omit the + to have Wave dial the number exactly as you enter it without applying dialing rules.
- **IP address.** Syntax `ip:<address>`. Example: `ip:11.22.33.44.` Example: `ip:dotcomaddress.com/1234`. As when entering IP addresses in ViewPoint, you can specify the address by either name or number, and optionally add a slash and append a dial-through number for H.323 Gateways.

Examples

/station:0

/station:phone:+16175551212

/station:ac=77;phone:+16175551212

/station:ip:foo.bar.com/1234

/station:ac=68;ip:foo.bar.com/1234

Reporting Problems

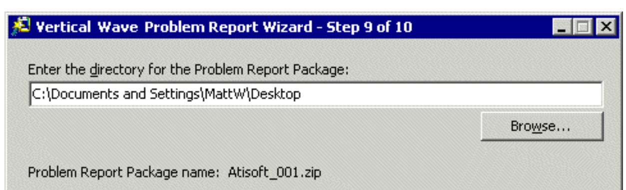
APPENDIX CONTENTS

About the Problem Report Wizard

If you experience a problem with one of the Wave workstation applications—ViewPoint, the Contact Center Reporter, the Contact Manager Assistant, the TAPI Service Provider, or the Archived Recording Browser—report the problem to your Wave system administrator by using the Problem Report Wizard. The Problem Report Wizard is a tool that collects appropriate log files and prompts you for information that can help solve the problem.

The Problem Report Wizard creates a problem report package as a ZIP file in the location of your choice. You can then send the ZIP file to your Wave system administrator.

To prevent ZIP files from being overwritten, the Wizard gives each problem report package a unique name based on your company name and a unique sequence number, as shown in the following example.



The Wizard increments the sequence number in the file name each time it creates a new problem report package.

Reporting a problem that involves a specific call

If you encountered a problem that involved a call, the best way to report the problem is as follows:

1. In ViewPoint, go to the Call Log folder and select the call during which the problem occurred.
2. Choose **Actions > Report a Problem**. The Problem Report Wizard opens with details about the call already entered.
3. Complete the Problem Report Wizard screens.

Reporting other problems

If your problem does not involve a specific call, run the Problem Report Wizard as follows:

1. Do one of the following:
    - From ViewPoint, choose **Help > Report a Problem**.
    - Run the file `C:\Program Files\Common Files\Vertical\Wave\TVPRWizard.exe`.
2. Answer the questions presented in each Wizard window.
3. Optionally, check **Send Problem Report Package via e-mail** in the final window to e-mail the problem report package to your Wave system administrator. It can be helpful to include in your e-mail the time at which the problem occurred, as closely as you can identify it.

Because a problem report package can be large, after you send it to your Wave system administrator, you should delete it from your system to regain disk space.

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