Cisco BroadWorks

Hosted Thin Receptionist

User Guide

Release 23.0

Document Version 3

Notification

The BroadSoft BroadWorks has been renamed to Cisco BroadWorks. Beginning in September 2018, you will begin to see the Cisco name and company logo, along with the new product name on the software, documentation, and packaging. During this transition process, you may see both BroadSoft and Cisco brands and former product names. These products meet the same high standards and quality that both BroadSoft and Cisco are known for in the industry.

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1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for Release 23.0

This section describes the changes to this document for each document version of Release 23.0.

Document Version 3

This version of the document includes the following changes:

- Updated sections *4.3 Launch JNLP File* and *14.2 Certificate for Desktop Integration Components* for PR-60972.
- Updated section *9.5 Make Notes about Contact (Enterprise Edition)* for PR-61791.

Document Version 2

This version of the document includes the following changes:

- Updated *Appendix C: Keyboard Shortcuts* for PR-60625.
- Completed rebranding for Cisco.

Document Version 1

This version of the document includes the following changes:

- Updated section *4 Get Started* for the *Receptionist Client PIV Support Feature Description* (FR 11962).
- Updated document for the *Thin Clients Aggregated Presence 2.0 Support Feature Description* (FR 11397).
- Updated sections *4 Get Started* and *13.4.3 Microsoft Outlook* for the *Receptionist and Call Center Integration with Outlook 2016 Feature Description* (FR 13279).
- Updated section *4 Get Started* for the *Okta SAML SSO Support for Receptionist Feature Description* (FR 14834).
- Updated sections *4.2.3 Sign In with Personal Identity Verification Card*, *4.9 Change Your Password*, and *13.1.1 Account* for the *Receptionist Thin Client PIV and Non-PIV Support Feature Description* (FR 15022).
- Updated section *5.3.4 Favorites Tab* for PR-57246 to explain why the lists of contacts in the *Favorites* tab may differ between sessions.
- Updated section *4.2.1 Sign in with User ID and Password* for PR-57753.
- Updated section *5 Explore Workspace* to specify that Full Screen and F11 actions cannot be mixed for PR-53486.
- Updated section *5.3.7 Monitored Contacts Tab (Enterprise Edition)* for PR-57961.
- Updated section *13.4.5 Program Shortcuts* for PR-56521.
- Updated sections *4 Get Started* and *13.4.3 Microsoft Outlook* to remove the requirement that Outlook should be running before Receptionist is started.
- Updated section *4.2.2 Sign In with External System Credentials* for the *Receptionist SSO Support of Additional IdPs Feature Description* (FR 16036).

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- Added section *4.2.4 Display Privacy Policy* and updated section *13.6 Settings – About* for the *Privacy Policy Link – Receptionist and Call Center Clients Feature Description* (FR 16892).
- Added *Acronyms and Abbreviations*.

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1.2 Changes for Release 22.0

This section describes the changes to this document for each document version of Release 22.0.

Document Version 1

This version of the document includes the following changes:

- Added *Appendix B: Diagnostic Tool* and updated sections *2.2 How This Guide Is Organized* and *13.6 Settings – About* for the *Client Side Diagnostic Tool For Thin Clients Feature Description* (EV 228113).
- Added section *14 Configure Web Browser* for EV 249302.
- Updated sections *5.3.2 Directories List* and *9.1 Show/Hide Directories* for EV 246104.
- Updated sections *6.6.5 Dial from History*, *11.1 View Call History*, *13.1.4 Date Format*, and *13.1.5 Time Format* for EV 245705.
- Updated section *5.2.3 Current Calls* and added sections *5.2.6 Call Redirection Reasons* and *16.4 Call Redirection Reasons* for PR-48139.
- Updated sections *4.1 Launch Receptionist from Web Portal* and *4.2 Sign in from Web Browser* and added sections *4.3 Launch JNLP File*, *13.4 Settings – Plug-ins*, *14.2 Certificate for Desktop Integration*, and *15 Restrictions and Limitations* for the *Desktop Integration Features Without Java Plug-in (Applets) Feature Description* (FR 7404).
- Updated sections *9.3.2 Perform Regular Search*, *9.4 Order Directory Entries*, and *9.5 Make Notes about Contact (Enterprise Edition)* for the *Search in Receptionist Notes Feature Description* (FR 2226).
- Updated sections *4.1 Launch Receptionist from Web Portal* and *4.2 Sign in from Web Browser Thin Clients System Use Notification Feature Description* (FR 10633).
- Added section *15.2 Tab Button in Microsoft Edge* to specify a restriction when running the client in Edge.

1.3 Changes for Release 21.0

This section describes the changes to this document for each document version of Release 21.0.

Changes for Release 21.0, Document Version 3

This version of the document includes the following change:

- Changed references to the *BroadWorks Application Server User Web Interface Administration Guide* to *BroadWorks User Web Interface Administration Guide* as the document has been renamed.

Changes for Release 21.0, Document Version 2

This version of the document includes the following change:

- Updated section *12 Manage Queued Calls (Enterprise Edition)* for EV 222258.

Changes for Release 21.0, Document Version 1

This version of the document includes the following changes:

- Updated section *13.1.3 Screen Pop* for the *Call Center Marking Data From External Systems Feature Description* (EV 226298).
- Updated section *10 Monitor Contacts* for the *Personal Assistant Feature Description* (EV 216692).

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- Updated document for the *Thin Client Usability Enhancements Feature Description* (EV 195594).
- Updated section *13.6 Settings – About*.

1.4 Changes for Release 20.0

This section describes the changes to this document for each document version of Release 20.0.

Changes for Release 20.0, Document Version 4

This version of the document includes the following changes:

- Updated sections *10.6 Contact States* and *16.1 Monitored User States* for EV 224630.
- Revised indexing.

Changes for Release 20.0, Document Version 3

This version of the document includes the following changes:

- Updated sections *3.2.2 Contact Directories* and *5.3.13 Outlook Tab (Enterprise Edition)* for EV 216467.

Changes for Release 20.0, Document Version 2

This version of the document includes the following changes:

- Updated sections *4.8 Change Your IM&P Presence State*, *5.1.3 Signed-in User Information*, *5.3 Contacts Pane*, *8 Monitor IM&P Contacts and Chat with Contacts, 8.1.6 View Presence State of Contacts*, and *16.3 Unified Instant Messaging and Presence States* for the *Thin Clients to Conform to Presence Rules Feature Description* (EV 192595).

Changes for Release 20.0, Document Version 1

This version of the document includes the following changes:

- Updated for the *Receptionist Usability Update for Directories Feature Description* (EVs 172852, 182502).
- Updated for the *Visual Security Classification for Active Call Feature Description* (EV 174096).
- Updated sections *5.5.1 Call Action Buttons* and *6.11 Record Calls* for the *Call Recording – Start/Stop/Pause/Resume User Control Feature Description* (EV 172506).
- Updated sections *5.2.3 Current Calls*, *6.2.2 View Incoming Call Details*, and *13.1.3 Screen Pop* for the *Diversion Info Availability for Queued Calls Feature Description* (EV 175543).
- Updated sections *4 Get Started* and *13.4.3 Microsoft Outlook* for EV 192180.
- Removed section on theme for EV 194697.
- Updated sections *5 Explore Workspace* and *13.1.6 Workspace* for EV 175559.
- Updated sections *5.5.1 Call Action Buttons* and *10.3 Request Dynamic Monitoring* for EV 196216.
- Updated section *13.4.6 Activity Archive* for EV 196539.
- Updated section *6.7 End Call* for EV 198717.

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- Updated sections *3.2.2 Contact Directories*, *10 Monitor Contacts*, and *10.2 Dynamic Monitoring (Enterprise Edition)* for EV 204600.

1.5 Changes for Release 19.0

This section describes the changes to this document for each document version of Release 19.0.

Changes for Release 19.0, Document Version 1

This version of the document includes the following changes:

- Updated document for the *Web Pop URL Enhancement – Call Center and Receptionist Feature Description* (EV 150425).
- Updated the description of the Unknown phone state in sections *10.6 Contact States* and *16.1 Monitored User States*.
- Updated document for the *IM&P for Call Center and Receptionist Clients Feature Description* (EV 150369).
- Updated section *4.2 Sign in from Web Browser* for EV 160535.
- Added section *4.4 Sign-in Restrictions* for the *Thin Client Single User Login Restrictions Feature Description* (EV 163737).
- Updated sections *5.1.3 Signed-in User Information, 10 Monitor Contacts*, and *16 Appendix A: Glossary and Definitions* for the *Calendar Presence Integration Feature Description* (EV 142625).
- Added sections *4.8 Change Your IM&P Presence State* and *8 Monitor IM&P Contacts and Chat with Contacts* and updated section *9 Manage Contacts* for the *IM&P for Call Center and Receptionist Clients Feature Descriptio*n (EV 150369).
- Updated document for changes in the user interface and added section *5.3.6 Group/Enterprise Common Tab*.

1.6 Changes for Release 18.0

This section describes the changes to this document for each document version of Release 18.0.

Changes for Release 18.0, Document Version 2

This version of the document includes the following changes:

- Updated sections *3.2.1 User Interface*, *3.3.1 User Interface*, *3.4.1 User Interface*, *5 Explore Workspace*, *5.4 Queued Calls Pane (Enterprise Edition)*, and *12 Manage Queued Calls (Enterprise Edition)* to align document with changes in the application.
- Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 159630. The position of some information in the *Queued Calls* pane has changed. The position has changed for the name and number of the remote party and the name and number of the Dialed Number Identification Service (DNIS)/call center that took the call.

Changes for Release 18.0, Document Version 1

This version of the document includes the following changes:

- Added section *6.11 Record Calls* for the *Call Recording – Thin Clients Feature Description* (EVs 46939 and 141973).
- Updated sections *5.1.3 Signed-in User Information*, *5.2.3 Current Calls*, *5.2.5 Call States and Actions*, and *10 Monitor Contacts* for the *Call Park and Recall Enhancements – Receptionist Thin Feature Description* (EV 105267).

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- Updated sections *4 Get Started* and *13.4.3 Microsoft Outlook* for EV 153628.

1.7 Changes for Release 17.sp2

This section describes the changes to this document for each document version of Release 17.sp2.

Changes for Release 17.sp2, Document Version 6

This version of the document includes the following changes:

- Updated section *12.11 Order Queued Calls* for EV 142502.
- Updated section *10 Monitor Contacts* for EV 144284.

Changes for Release 17.sp2, Document Version 5

This version of the document includes the following changes:

- Updated section *12.1 Select Call Centers to Manage* for EV 141300.
- Updated document for the usability enhancements.
- Updated sections *10.6 Contact States* and *16.1 Monitored User States* for EV 146017.
- Updated sections *9.6 Manage Personal Contacts* and *9.7 Manage Speed Dial Entries* for EV 145992.
- Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 146214.
- Updated sections *5.3 Contacts Pane* and *9.5 Make Notes about Contact (Enterprise Edition)* with comments from testing.

Changes for Release 17.sp2, Document Version 4

This version of the document includes the following changes:

- Updated document with changes in the application.
- Updated section *12 Manage Queued Calls (Enterprise Edition)* for EV 141300.
- Updated section *Appendix C: Keyboard Shortcuts* for EV 130778.
- Updated sections *6.2.2 View Incoming Call Details* and *13.4.2 Notification* for EV 131521.

Changes for Release 17.sp2, Document Version 3

This version of the document includes the following changes:

- Updated section *13.1.6 Workspace* for EV 119881.
- Updated sections *6.2.2 View Incoming Call Details* and *13.4.2 Notification* for EV 118621.

Changes for Release 17.sp2, Document Version 2

This version of the document includes the following changes:

- Updated sections *6.4.1 Answer Call* and *6.5.2 Resume Held Call* for EV 126902.
- Updated section *13 Configure Receptionist* for EV 126771.
- Updated section *5 Explore Workspace* for EVs 127180 and 128936.
- Updated section *13.6 Settings – About* to align document with changes in the interface.
- Updated section *5 Explore Workspace* for EV 126451.

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Changes for Release 17.sp2, Document Version 1

This is a new document in this release.

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2 About This Document

This guide provides step-by-step procedures and reference information for Cisco BroadWorks Hosted Thin Receptionist Release 23.0.

Cisco BroadWorks Hosted Thin Receptionist herein is referred to as Receptionist, Receptionist client, or client.

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users. This guide covers all three editions of Receptionist.

2.1 Audience

This document is intended for end users of Receptionist Enterprise, Small Business, and Office.

2.2 How This Guide Is Organized

The following table identifies the sections to refer to for information about the functionality provided by Receptionist.

Section	Overview
Introduction to Receptionist	This section provides an overview of Receptionist and its three editions: Enterprise, Small Business, and Office.
Get Started	This section describes how to sign in and out of Receptionist, perform the initial setup, change password, and obtain help.
Explore Workspace	This section provides an overview of the user interface.
Manage Calls	This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.
Message Contacts (Enterprise Edition)	This section includes information on how to send email messages to contacts.
Monitor IM&P Contacts and Chat with Contacts	This section provides information about monitoring your Instant Messaging and Presence (IM&P) contacts and chatting with them.
Manage Contacts	This section provides information on managing contact directories and searching for contacts.
Monitor Contacts	This section describes static and dynamic monitoring and includes information on how to select contacts to monitor.
Manage Call History	This section provides information on managing call logs.
Manage Queued Calls (Enterprise Edition)	This section provides information on managing queued calls.
Configure Receptionist	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
Configure Web Browser	This section describes the settings you can configure and customize different web browsers.
Restrictions and Limitations	This section describes the steps required to successfully execute the Java Network Launch Protocol (JNLP) file that may not otherwise execute due to security-related restrictions.
Appendix A: Glossary and Definitions	This appendix contains definitions of call states and phone states used in Receptionist.

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Section	Overview
Appendix B: Diagnostic Tool	This appendix describes a diagnostic tool used to troubleshoot performance problems with the help of support personnel.
Appendix C: Keyboard Shortcuts	This appendix describes keyboard shortcuts available in Receptionist.

2.3 Additional Resources

For more information on Receptionist and on Application Server procedures used by group administrators, department administrators, and users, see the following Cisco BroadWorks guides:

- *Cisco BroadWorks Hosted Thin Receptionist Configuration and Administration Guide*
- *Cisco BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2)*
- *Cisco BroadWorks Call Center Solution Guide*
- *Cisco BroadWorks Getting Started Web Interface Administration Guide*
- *Cisco BroadWorks User Web Interface Administration Guide*

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3 Introduction to Receptionist

Cisco BroadWorks Receptionist is a carrier-class Internet Protocol (IP) Telephony Attendant Console, specifically developed for hosted environments. It is used by “front-of-house” receptionists or telephone attendants, who screen inbound calls for enterprises. Cisco BroadWorks Receptionist realizes the promise of IP telephony by enhancing business processes and delivering rich services in a user-friendly way.

Cisco BroadWorks Receptionist delivers the following real benefits to users:

- An elegant design that is aesthetically pleasing.
- An ergonomic design that follows the natural work “flow” of a call from the left to the right of the screen.
- Improved business processes as only “valid” options are presented to the attendant.
- Professional call handling as critical information is available in “real time”.
- Accurate delivery of messages through a one-step process when people are unavailable.
- Web-based interface, accessible from a web browser.

Hosted Thin Receptionist is a Software as a Service (SaaS) Rich Internet Application (RIA) hosted on Cisco BroadWorks that allows you to manage calls from a web browser.

> **NOTE**: For information about the web browsers supported by Receptionist, see the *Cisco BroadWorks Hosted Thin Receptionist Configuration and Administration Guide* or contact your administrator.

This document describes the Cisco BroadWorks Hosted Thin Receptionist client.

Cisco BroadWorks Hosted Thin Receptionist herein is referred to as Receptionist, Receptionist client, or client.

3.1 Receptionist Editions

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users.

The following sections provide an overview of the Receptionist Enterprise, Small Business, and Office interface and functionality and refer you to other sections of the document for more information.

> **NOTE**: Features available in a specific version are identified and tagged with the edition’s name.

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3.2 Receptionist Enterprise

The Receptionist Enterprise edition is a Cisco BroadWorks full-featured client, designed to support the needs of front-office personnel in any environment. It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options, and views, Outlook integration, and other features required in large or distributed organizations.

3.2.1 User Interface

Figure 1 shows the main interface of Receptionist Enterprise.

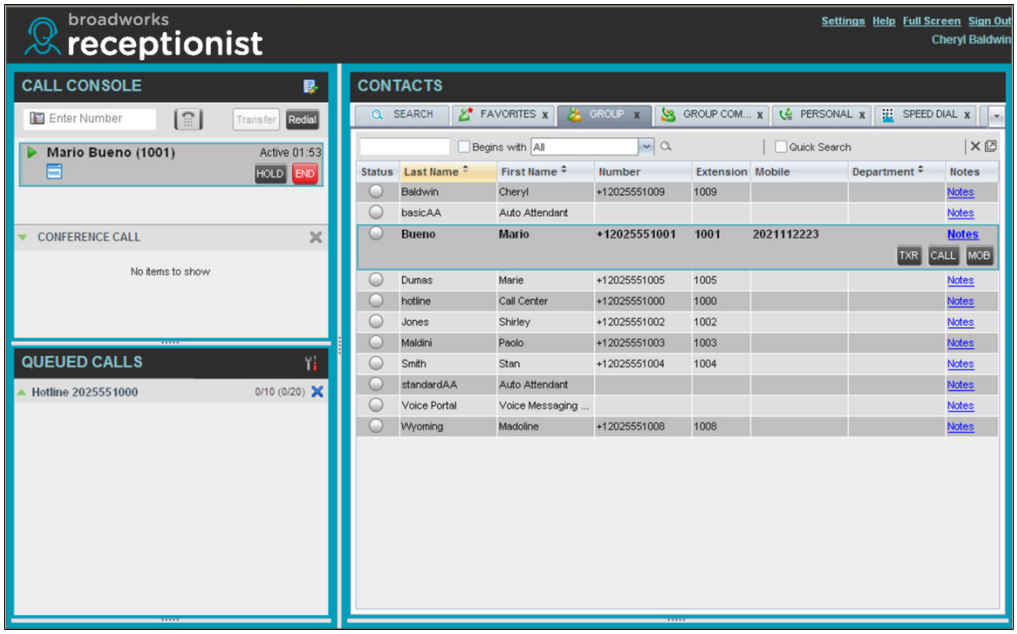

Figure 1 Receptionist Enterprise Main Interface

The interface contains the following main work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Queued Calls pane** – This is where you manage queued calls. You must have the BroadWorks Supervisor service assigned to have access to this feature.
- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the *Call History* dialog box to view and return your past calls.
- **Chat windows** – You use a *Chat* window to chat with Instant Messaging and Presence (IM&P) contacts.

For more information, see section *5 Explore Workspace*.

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3.2.2 Contact Directories

This following table lists the contact directories available in Receptionist Enterprise. The *Comments* column specifies additional settings required to access the directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently statically monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 200 static contacts enterprise-wide.
Group/Enterprise	This consists of all contacts in your Cisco BroadWorks group or enterprise directory. You can access this same directory through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	You can dynamically monitor contacts in your Group/Enterprise directory. The maximum number of contacts you can dynamically monitor is configured by your administrator and it cannot exceed 100.
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on Cisco BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Monitored Contacts	This consists of contacts whose phone status you are currently dynamically monitoring.	If the directory is empty, it is not shown.
Personal	This consists of all contacts in your personal directory on the Cisco BroadWorks web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You must have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of the IM&P users to which you are subscribed.	You must have the Integrated IM&P or Third-Party IM&P service assigned.
Queues	This consists of the call centers and associated DNIS numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues quickly.	You must have Call Center service assigned.
LDAP (search only)	This consists of all users found in the configured LDAP directory. Receptionist provides you with search access to LDAP and results are displayed in the *Search* tab.	The directory must be configured by your system administrator. Otherwise, it is not visible.
Custom: <custom contact directory name>	This consists of all contacts in your custom contact directories configured by your administrator on the web portal. Each custom directory is displayed in a separate tab.	You may not have any contact directories or you may have several.
Outlook	This consists of all your Outlook contacts.	

For information on managing your contact directories, see section *9 Manage Contacts*. For information on using your contacts to make and manage calls, see section *6 Manage Calls*. For information on monitoring contacts, see section *10 Monitor Contacts*.

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3.2.3 Call Management Functions

The Receptionist Enterprise provides the following call management functions.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Transfer to Queue	Transfer to Queue (Enterprise Edition)
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Group Call Park	Conduct Group Call Park (Enterprise Edition)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

For more information, see section *6 Manage Calls*.

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3.3 Receptionist Small Business

The Receptionist Small Business edition is a lower-priced version of the client, targeted at front-office personnel in small and mid-sized organizations that do not require multiple directories, call queuing, or other advanced features. It supports a full set of call control functions and monitoring of up to 30 lines in the directory.

3.3.1 User Interface

Figure 2 shows the main interface of Receptionist Small Business.

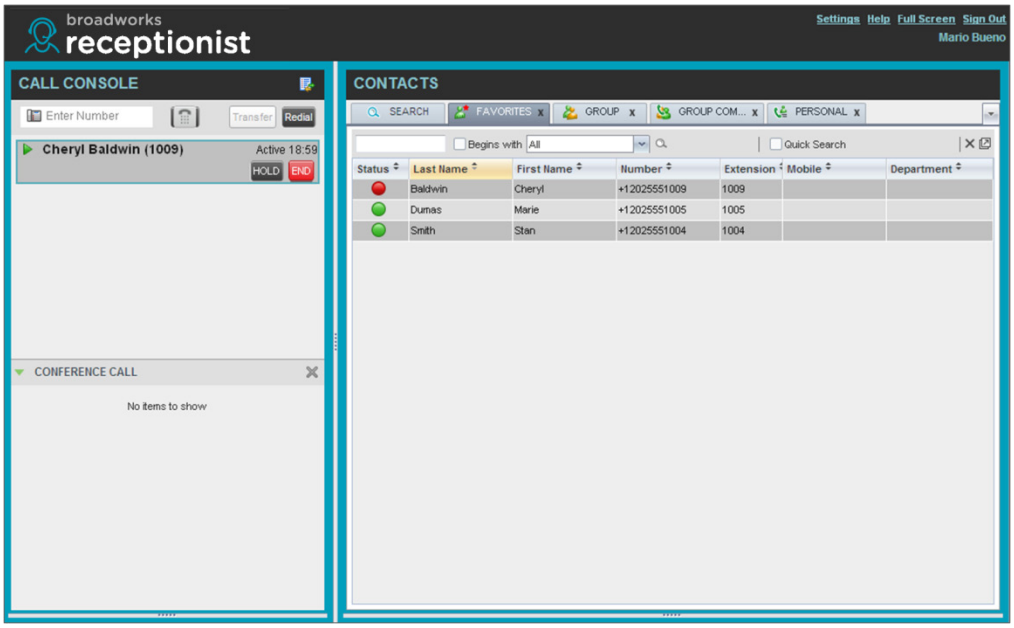

Figure 2 Receptionist Small Business Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. You also use the *Contacts* pane to monitor contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the Call History to view and return your past calls.
- **Chat windows** – You use a chat window to chat with an IM&P contact.

For more information, see section *5 Explore Workspace*.

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3.3.2 Contact Directories

This following table lists the contact directories available in Receptionist Small Business. The *Comments* column specifies additional settings required to access a directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 30 static users company-wide.
Group/Enterprise	This consists of all contacts in your Cisco BroadWorks group or enterprise directory. You can access this same directory through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on Cisco BroadWorks.	The directory may be empty if your administrator has not configured any contacts.
Personal	This consists of all contacts in your personal directory on the Cisco BroadWorks web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You must have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of your IM&P contacts, that is, the IM&P users to which you subscribed.	You must have the Integrated IM&P or Third-Party IM&P service assigned.

For information on managing your contact directories, see section *9 Manage Contacts*. For information on using your contacts to make and manage calls, see section *6 Manage Calls*. For information about monitoring contacts, see section *10 Monitor Contacts*.

3.3.3 Call Management Functionality

This section lists call management functions of Receptionist Small Business and provides you with pointers to sections of this document where they are described.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call

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Function	Quick Reference
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

3.4 Receptionist Office

The Receptionist Office edition is targeted at a small office environment with a limited number of employees. It supports the standard set of Call Control features and the monitoring of up to eight lines in the directory.

3.4.1 User Interface

Figure 3 shows the main interface of Receptionist Office.

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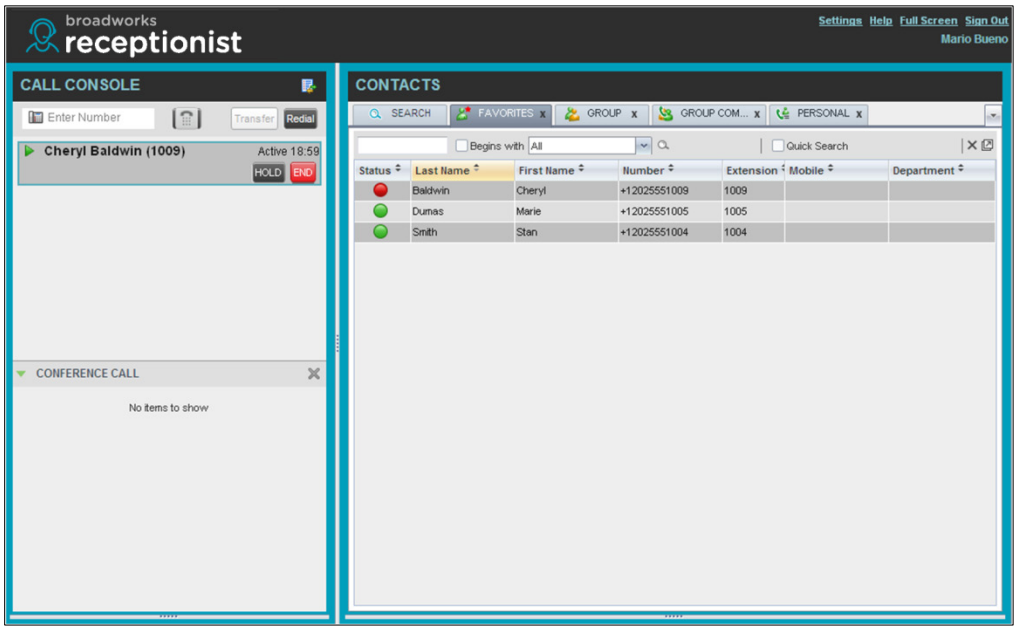

Figure 3 Receptionist Office Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. It also allows you to monitor selected contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the *Call History* dialog box to view and return your past calls.
- **Chat windows** – You use a chat window to chat with an IM&P contact.

For more information, see section *5 Explore Workspace.*

3.4.2 Contact Directories

This following table lists the contact directories available in Receptionist Office. The *Comments* column specifies any additional settings required to have access to a directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to eight static users group-wide.
Group/Enterprise	This consists of all contacts in your group.	
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on Cisco BroadWorks.	The directory may be empty if your administrator has not configured any contacts.

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Directory Name	Contents	Comments
Personal	This consists of all contacts in your personal directory on the Cisco BroadWorks web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You must have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of your IM&P contacts, that is, the IM&P users to which you subscribed.	You must have the Integrated IM&P or Third-Party IM&P service assigned.

For information on managing your contact directories, see section *9 Manage Contacts*. For information on using your contacts to make and manage calls, see section *6 Manage Calls*. For information about monitoring contacts, see section *10 Monitor Contacts*.

3.4.3 Call Management Functionality

The Receptionist Office provides the following call management functions.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant

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Function	Quick Reference
Leave Conference Call	Leave Conference
End Conference Call	End Conference

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4 Get Started

Receptionist is hosted on Cisco BroadWorks and you access it over the network either from your web portal or from a web browser. The sign-in procedure is the same for all Receptionist editions.

In addition to Cisco BroadWorks user ID and password, Receptionist can be configured with one of the following methods of user authentication: external system credentials or a personal identity verification (PIV) card.

The PIV method has priority over the external authentication method, so when it is enabled, external authentication is not available. When using a PIV card, you cannot launch Receptionist from the web portal.

NOTE 1: The minimum required screen resolution for Receptionist is 1024 x 768 pixels.

NOTE 2: Receptionist does not support signing in as different users from the same machine at the same time.

4.1 Launch Receptionist from Web Portal

Cisco BroadWorks has a Single Sign-On (SSO) feature. When you access the Receptionist client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

NOTE: You cannot launch Receptionist from the web portal if your system requires using a PIV card to sign in.

To access Receptionist from the web portal:

1) Log in to your Cisco BroadWorks web portal.
2) From the *Launch* drop-down list at the top right-hand side of the Cisco BroadWorks *Logo* pane, select the link for your Receptionist service.

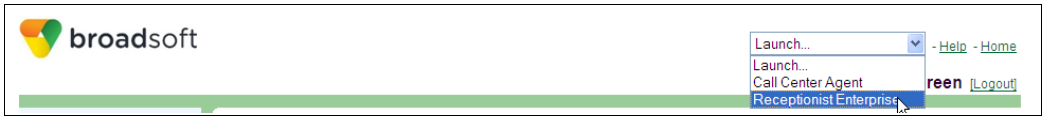

Figure 4 Cisco BroadWorks Web Portal Logo Pane – Launch Receptionist

3) If you are presented with a system use notification, click **Accept** to accept the notification. Otherwise, you will be denied access to Receptionist.

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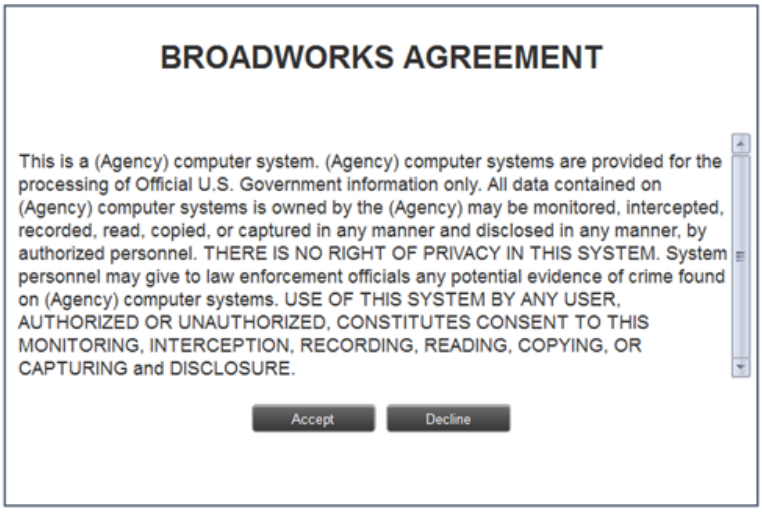

Figure 5 System Use Notification Dialog Box

4) As Receptionist starts, a Java Network Launch Protocol (JNLP) file required to run some of the Receptionist features is downloaded to your machine. You must agree to run the file; otherwise, the features will not be available. For more information, see section *4.3 Launch JNLP File*.

4.2 Sign in from Web Browser

This section describes the possible methods of signing in to Receptionist form a web browser as well as viewing the privacy policy of your service provider. The methods available to you depend on your system configuration.

- Sign in with User ID and Password
- Sign In with External System Credentials
- Sign In with Personal Identity Verification Card
- Display Privacy Policy

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4.2.1 Sign in with User ID and Password

When signing in to the Receptionist client with Cisco BroadWorks credentials, use the same user ID and password you use to connect to the web portal.

1) In your web browser, enter the URL of the Receptionist client on Cisco BroadWorks. The Receptionist *Sign-in* page appears.

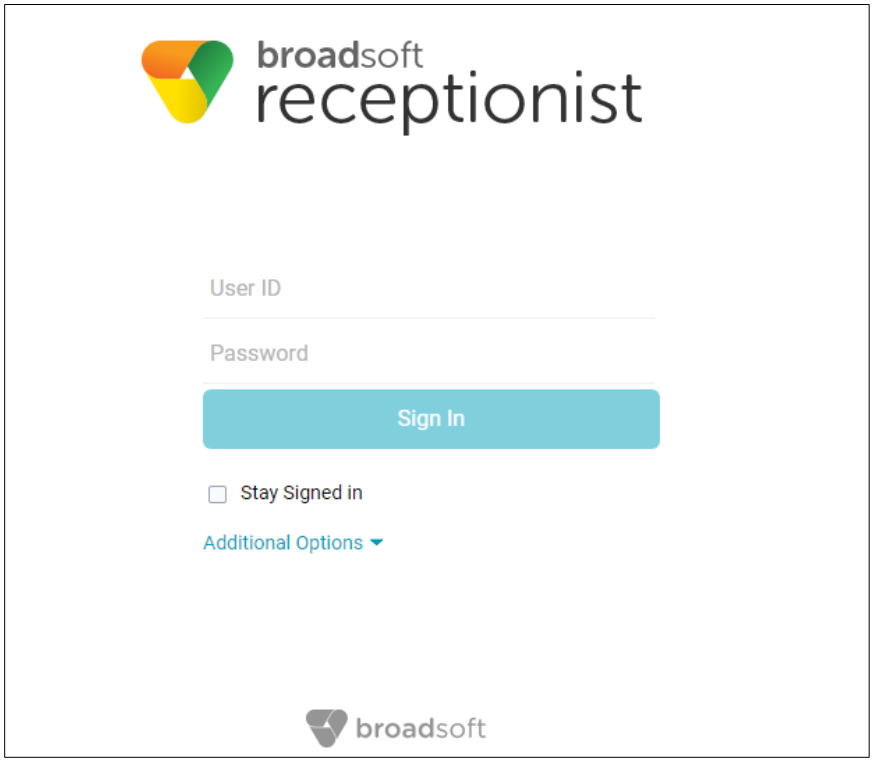

Figure 6 Receptionist Sign-in Page

1) Enter your Cisco BroadWorks user ID in *user@domain* format and your password.

   If you are unsure of your user ID and password, contact your company (group or enterprise) administrator.

   If you use the default domain, you can enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. If your domain is different from the default domain, you have to enter your user ID with the domain name.

   Optionally, if your system has been configured to allow it, you can configure your domain name.

2) To configure your domain or the Receptionist language, click **Additional Options**. The area expands displaying advanced options.

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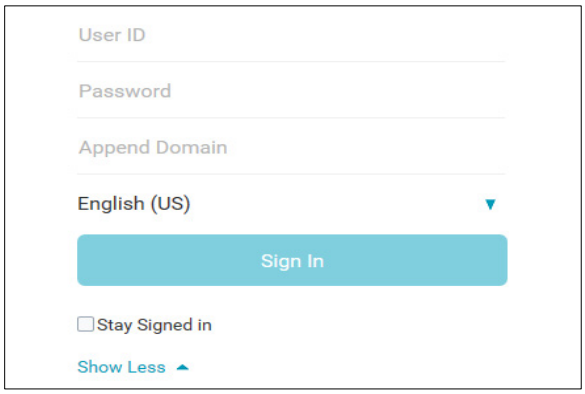

Figure 7 Receptionist Sign-in Page – Advanced Options

3) To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the default domain.

4) To change the language, from the *Language* drop-down list, select a new language.

5) Optionally, check *Stay Signed in*. This stores your credentials in a browser cookie so that future navigation to the Receptionist URL from this machine and browser combination will automatically sign you in. If you close the browser window or tab where Receptionist is running without signing out, the next time you access the application URL, you will be automatically signed in. If you explicitly sign out, your credentials are not kept.

6) Click **Sign In**.

7) If you are presented with a system use notification, click **Accept** to accept the notification. Otherwise, you will be denied access to Receptionist.

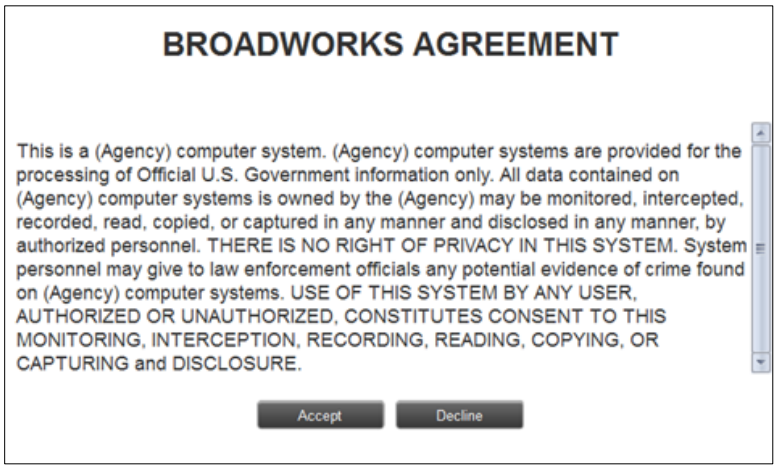

Figure 8 System Use Notification Dialog Box

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8) As Receptionist starts, a Java Network Launch Protocol (JNLP) file required to run some of the Receptionist features is downloaded to your machine. You must agree to run the file; otherwise, the features will not be available. For more information, see section *4.3 Launch JNLP File*.

NOTE: In some browser/operating system combinations, when you press ENTER instead of the Sign In button, a blank page appears and not the Receptionist main interface.

4.2.2 Sign In with External System Credentials

If this option is enabled in your system, you can sign into Receptionist using the credentials for an external system, such as Okta. The available external systems depend on your system configuration.

1) In your web browser, enter the URL of the Receptionist client on Cisco BroadWorks. The Receptionist *Sign-in* page appears.

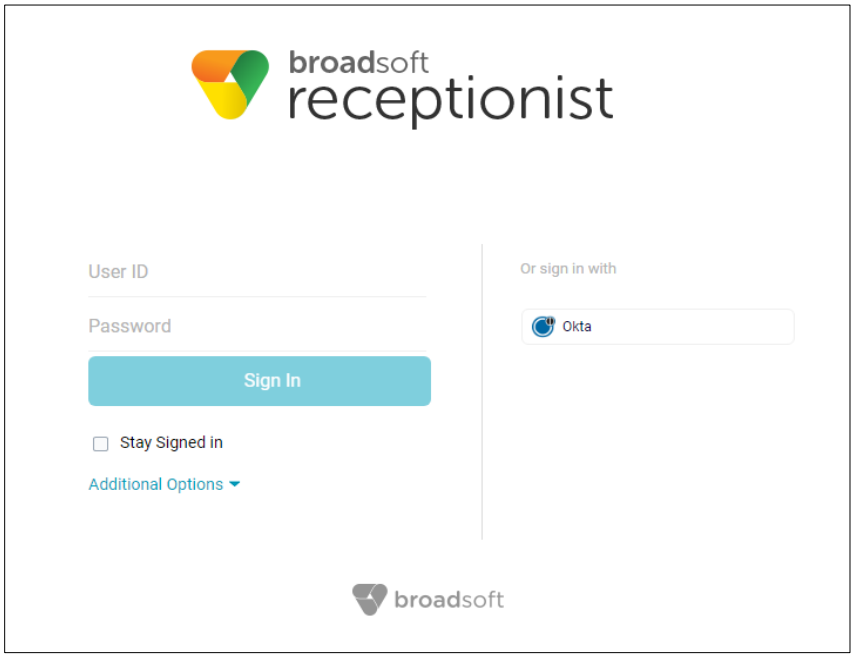

Figure 9 Receptionist Sign-in Page with Okta Authentication

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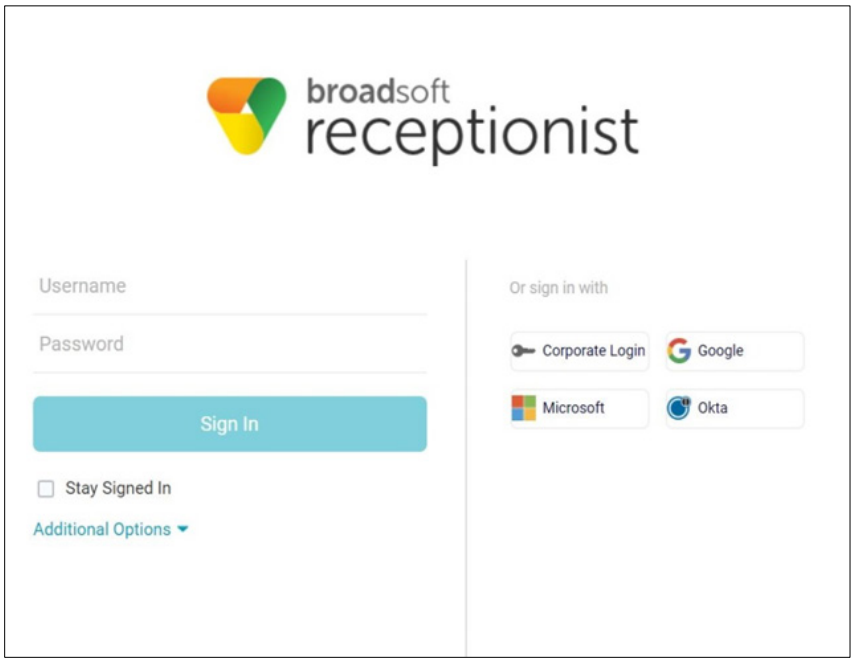

Figure 10 Receptionist Sign-in Page with Several External Authentication Systems

2) Click the icon of the external system to the right of the user ID and password sign in settings.

3) Enter your credentials for the external system.

4) If you are presented with a system use notification, click **Accept** to accept the notification. Otherwise, you will be denied access to Receptionist.

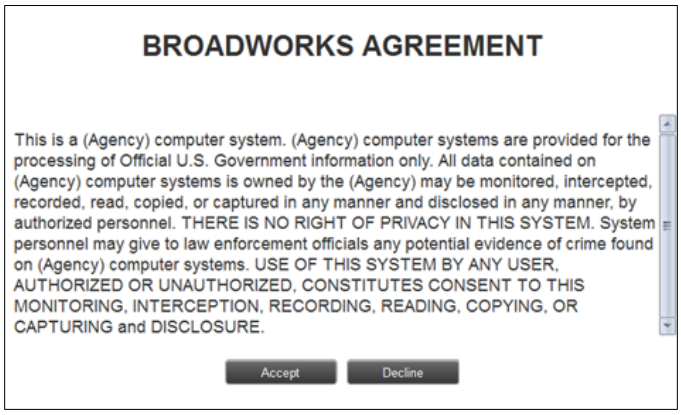

Figure 11 System Use Notification Dialog Box

5) As Receptionist starts, a JNLP file required to run some of the Receptionist features is downloaded to your machine. You must agree to run the file; otherwise, the features will not be available. For more information, see section *4.3 Launch JNLP File.*

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4.2.3 Sign In with Personal Identity Verification Card

Once you entered your PIV card in the card reader, follow the steps in this procedure to sign in to Receptionist.

1) In your web browser, enter the URL of the Receptionist client on Cisco BroadWorks. The Receptionist *Sign-in* page appears.

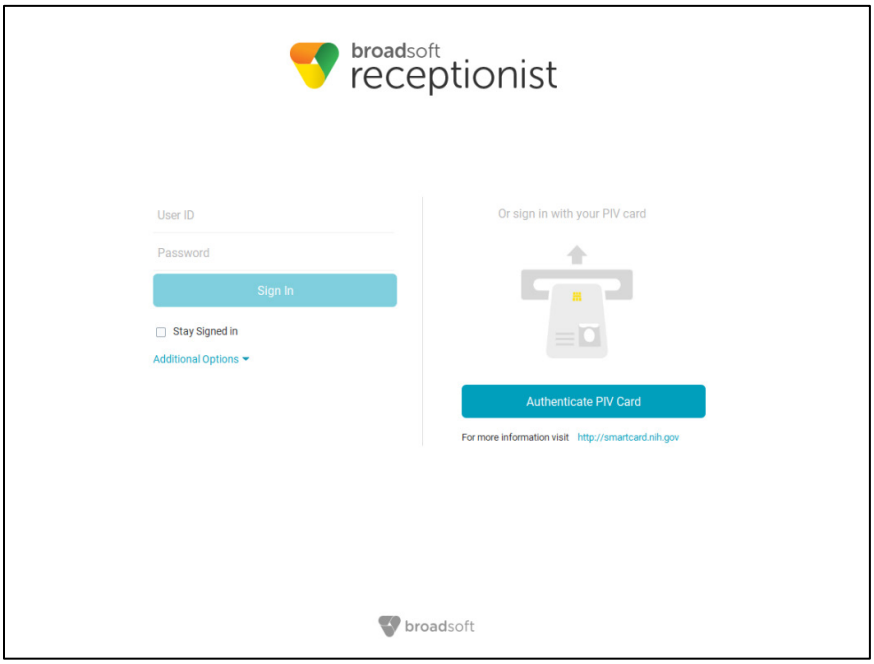

Figure 12 Receptionist Sign in with PIV Card

2) Click **Authenticate PIV Card**.

3) If applicable (that is, if you have more than one certificate on the card), select the certificate to use to sign in to Receptionist. The system then prompts you for the PIN.

4) Enter the PIN that corresponds to the selected certificate.

5) If you are presented with a system use notification, click **Accept** to accept the notification. Otherwise, you will be denied access to Receptionist.

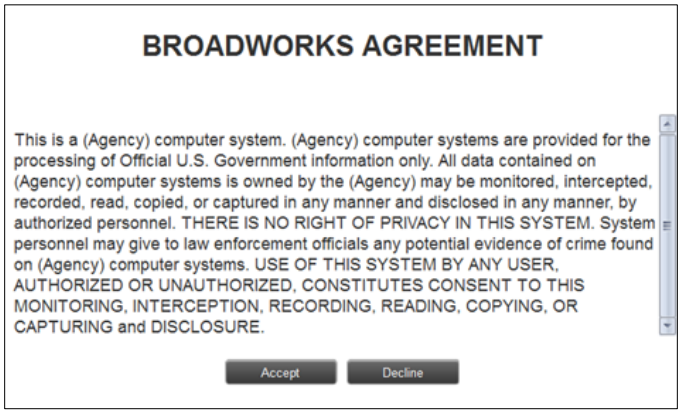

Figure 13 System Use Notification Dialog Box

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6) As Receptionist starts, a Java Network Launch Protocol (JNLP) file required to run some of the Receptionist features is downloaded to your machine. You must agree to run the file; otherwise, the features will not be available. For more information, see section *4.3 Launch JNLP File*.

> **NOTE**: In some browser/operating system combinations, when you press ENTER instead of the Sign In button, a blank page appears and not the Receptionist main interface.

4.2.4 Display Privacy Policy

When configured by the administrator, the Privacy Policy link is displayed in the *Sign-In* page, which when clicked, displays the privacy policy of the service provider.

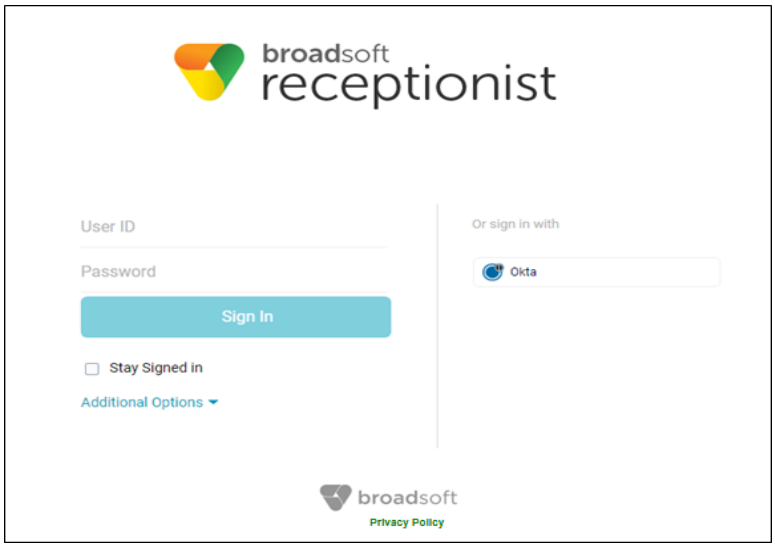

Figure 14 Sign-In Page with Privacy Policy Link Displayed

To display the policy, click the Privacy Policy link. The *Privacy Policy* page appears in a new window.

> **NOTE**: A new window is started every time you click the link.

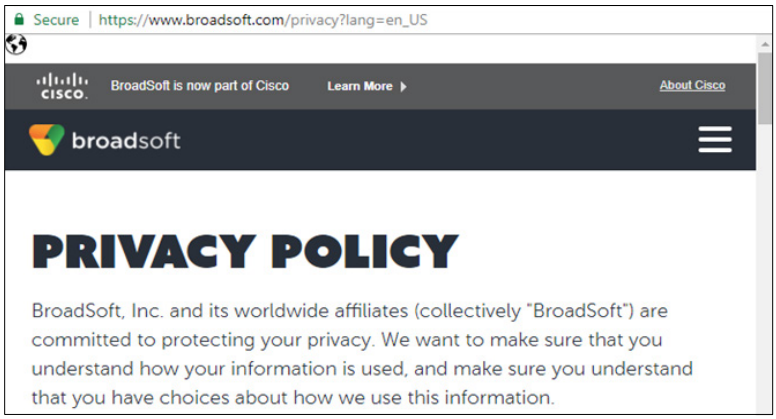

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Figure 15 Privacy Policy Page (Sample)

4.3 Launch JNLP File

Receptionist needs the Java HTTPS server to run desktop integration features. To view the list of desktop integration features available in Receptionist, see section *13.4.Settings – Plug-ins.*

> **NOTE**: You should run Java JRE 1.6 or higher.

As you sign in, Receptionist starts downloading a JNLP file containing the Java HTTPS server to your machine.

Perform the following steps to accept the download and install the server:

1) When a file download pop-up window appears in your browser asking you whether you want to open or save the file, save the file. Messages about downloading and verifying the application contained in the file appear, followed by a dialog box asking you whether you want to run the application.

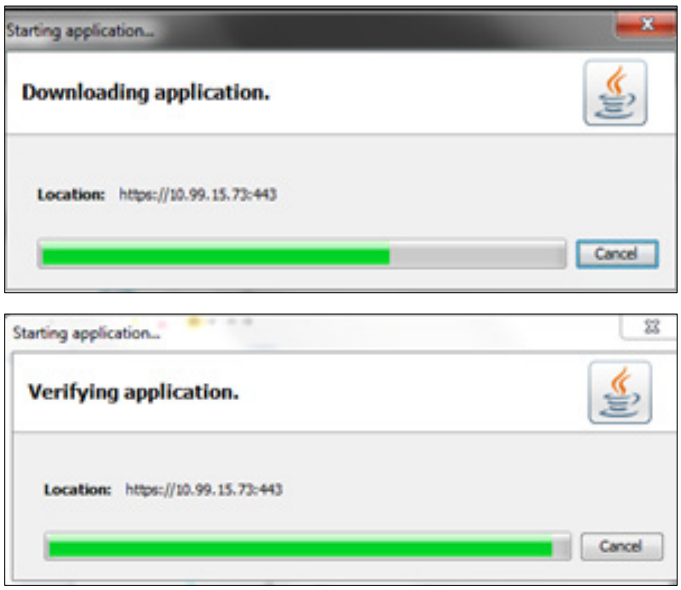

Figure 16 Downloading and Verifying Application Pop-up Window

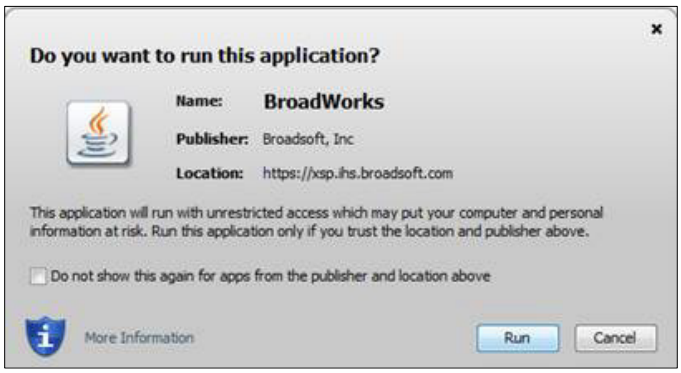

Figure 17 "Do you want to run this application?" Dialog Box

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2) Click **Run**. This starts Java HTTPS server allowing Receptionist to access the desktop integration features. Desktop integration features will not be avalibale if you click **Cancel**.

3) Due to security restrictions, the application may not run. If this occurs, perform the steps specified in section *14.3 Security Settings for Desktop Integration Features*.

4) If the browser certificate required to run the HTTPS server is not yet imported to your device, a dialog-box appears asking for your permission to install it. Follow the steps in section *14.2 Certificate for Desktop Integration Components* to allow the certificate to be installed. This happens only once when the certificate is not yet imported to any browser. If the certificate is already imported, a message appears informing you that it already exists, and Receptionist continues loading the plug-ins.

NOTE: If you refresh the browser after the local HTTPS server has started, the JNLP file is not downloaded again and the HTTPS server simply continues initializing the desktop integration features.

5) When you run desktop plug-ins in Edge browser (Windows 10), the following pop-up window may appear asking you to allow LoopbackExempt. Click **Yes**. Once LoopbackExempt is enabled, desktop plug-ins should work seamlessly on Edge browser.

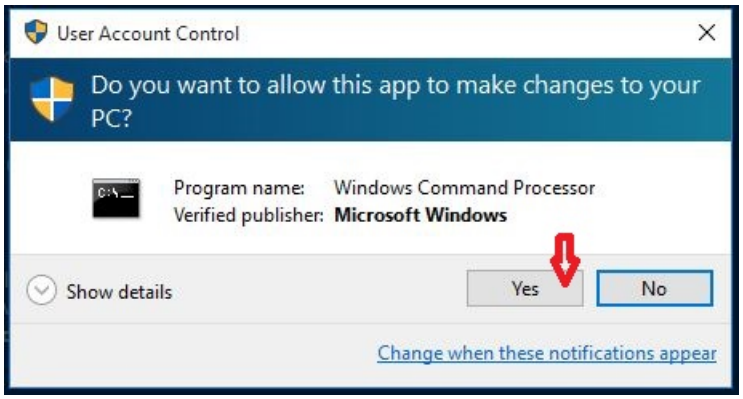

Figure 18 User Account Control Pop-up Window

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4.4 Sign-in Restrictions

You cannot launch Receptionist from the web portal if you are using a PIV card to sign in.

You can only have one active Receptionist session at a time. When you sign in from a second location, you are automatically signed out from the original location with the following message: "You have been signed out as you have signed in from another location."

Figure 19 Sign-in Dialog Box with Error Message

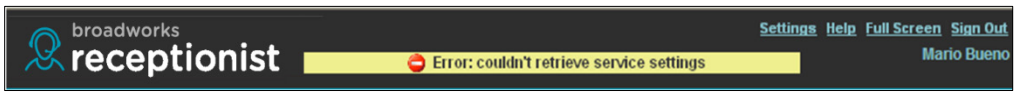

Figure 20 Receptionist Main Interface (Top of Page) with Error Message

4.5 Get Help

Receptionist provides you with online access to a portable document format (PDF) version of this guide.

Figure 21 Main Interface (Top of Page) – Help Link

To access this document:

Click the **Help** link at the top right-hand side of the main interface.

4.6 Sign Out

To sign out of Receptionist:

1) Click the **Sign Out** link at the top right-hand side of the main interface.

   A message appears asking you whether you would like to save your current workspace.

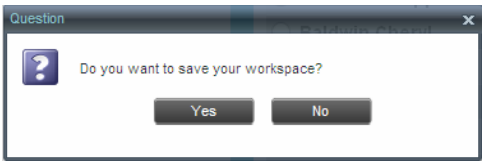

Figure 22 Question Dialog Box

2) Click **Yes** to save your current workspace. This allows you to retain the same setup at your next session.

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3) For information on workspace elements that can be customized, see section *13.1.6 Workspace*.

4.7 Set Up Your Environment (Enterprise Edition)

It is recommended that you configure Receptionist as follows when you first log in.

- Select call centers to manage – see section *12.1 Select Call Centers to Manage*.
- Join queues and set your post sign-in Automatic Call Distribution (ACD) state – see section *13.2 Settings – Application*.

For information about other Receptionist configuration options, see section *13 Configure Receptionist*.

4.8 Change Your IM&P Presence State

When you sign in to Receptionist, Receptionist connects to the IM&P server and sets your presence state to "Available".

Subsequently, Receptionist displays your unified instant messaging presence, which reflects your presence in various instant messaging and Communicator clients when you are logged in through several devices and applications.

Your unified presence state can change either when you manually change it or when Receptionist receives information about your presence state change from other clients.

The states you can set are *Available*, *Busy*, *Away*, and *Offline*. When you are not in the *Offline* state, you are considered to be online. For information on all the possible presence states, see section *16.3 Unified Instant Messaging and Presence States.*

Receptionist also allows you to provide a status message to display to your contacts.

IM&P capabilities are only available when you are online. For more information about the IM&P capabilities of Receptionist, see section *8 Monitor IM&P Contacts and Chat with Contacts*.

To change your presence state:

Click the **My Availability** box at the top right-hand side of the main window and select the new state from the drop-down list.

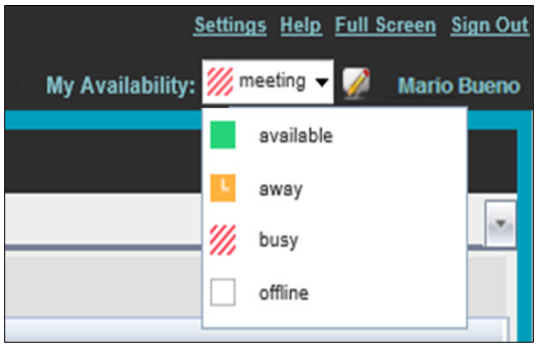

Figure 23 Logo Pane – IM&P Presence State Control

When you are online, you can set a status message to display to your contacts.

To set an IM&P status message:

1) Click the **Edit** button next to the *My Availability* box. The *Set IM Status* dialog box appears.

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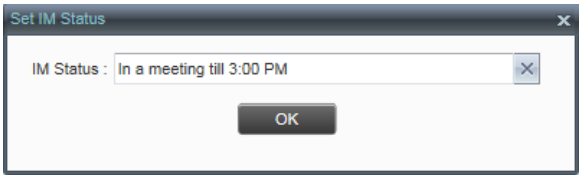

Figure 24 Set IM Status Dialog Box

2) Enter your message and then click **OK**.

3) To see your message, move the mouse over the Edit button . A ToolTip with your presence message appears.

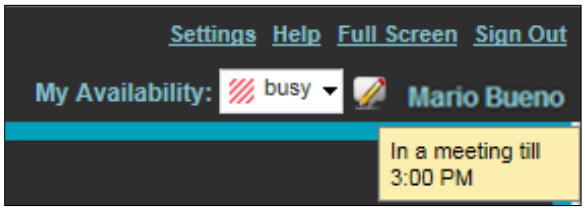

Figure 25 IM&P Status Message

4.9 Change Your Password

Remember that this is your web portal password and that you have to use this new password when accessing your web portal. The password must follow the password rules set on Cisco BroadWorks.

You can change your Cisco BroadWorks password from Receptionist only if you use Cisco BroadWorks credentials to sign in to Receptionist.

To change your password:

1) At the top right-hand side of the main interface, click the **Settings** link. The *Settings – General* page appears.

2) In the *Account* area, click the **Change Password** link. The area expands allowing you to change your password.

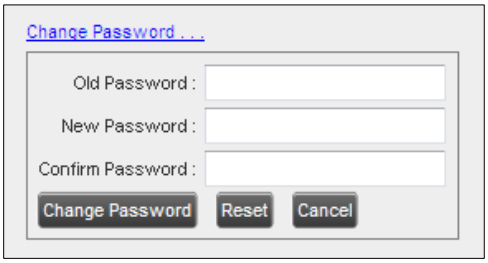

Figure 26 Account – Change Password

3) Enter your current and new password and click **Change Password**.

Note that the Reset button does not reset your password. It only clears the input boxes.

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5 Explore Workspace

When you sign in to Receptionist, the main page appears where you perform most of your call management and monitoring tasks. In addition, the main page provides a link to the *Settings* pages, where you configure various Receptionist settings.

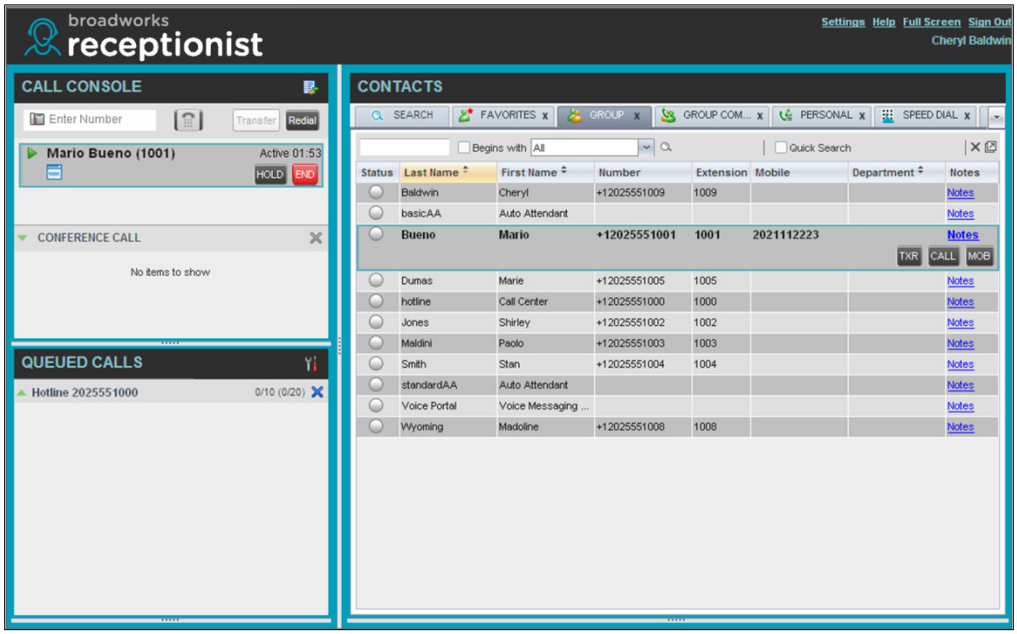

Figure 27 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which windows should be open and change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you log in. For more information on saving your settings, see section *13.1.6 Workspace*.

To work in full screen mode, click the **Full Screen** link in the top-right corner of the main window. The link changes to *Exit Full Screen*, which you can click to exit full screen mode.

NOTE 1: To work in full screen mode, you can also click F11 when the main window is in focus. To exit full screen mode, you have to click F11 again. You cannot mix the F11 and Full Screen operations. In other words, if you clicked *Full Screen* to enter full screen mode you have to click *Exit Full Screen* to exit full screen mode. If you clicked F11 to enter full screen mode, you have to click F11 to exit it.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.

NOTE 3: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

You can also resize the *Call Console* and the *Contacts* panes by moving the bar between the two to the left or to the right. Receptionist remembers the position of the bar at sign out, and the bar is at the same position the next time you sign in.

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Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Receptionist, see section *5.5 Controls*. The action buttons are described in section *5.5.1 Call Action Buttons*.

This section describes the following elements of the Receptionist main interface:

- Logo Pane
- Call Console
- Contacts Pane
- Queued Calls Pane (Enterprise Edition)
- Controls

The *Settings* pages, accessed via the Settings link and used to configure Receptionist, are described in section *13 Configure Receptionist*.

The *Call History* dialog box is described in section *11 Manage Call History*.

The *Chat* windows are described in section *8 Monitor IM&P Contacts and Chat with Contacts.*

5.1 Logo Pane

The Receptionist main page and *Settings* pages contain a *Logo* pane, which displays the Receptionist client or company logo, global messages, links to other interface elements or Receptionist functions, and information about the signed-in user.

Figure 28 Receptionist Logo Pane

5.1.1 Global Message Area

The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user. A message appears for several seconds and then disappears.

5.1.2 Settings, Help, and Sign Out Links

The *Logo* pane displays links to the *Settings* pages, where you can configure the client, and the Help and Sign Out links.

5.1.3 Signed-in User Information

Information about yourself, such as, your name, your availability to chat and take calls, and your voice mail status, is displayed at the top right-hand side of the main interface, as applicable.

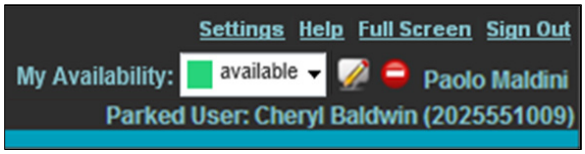

Figure 29 Signed-in User Information

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Your current availability icons are displayed to the left of your name as follows:

- Presence state – This is your unified IM&P presence state. The states you can set are *Available* ( ), *Busy* ( ), *Away* ( ), or *Offline* ( ). For information about all possible presence states, see section *16.3 Unified Instant Messaging and Presence States*.
- Information about the following services and features:
  - Calendar Presence Integration
    - In a Meeting – Your Exchange calendar shows that you are currently busy (in a meeting).
    - Away – Your Exchange calendar shows that you are out of the office.
  - Call Forwarding Always (CFA) – You have activated the Call Forwarding Always service.
  - Do Not Disturb (DND) – You have activated the Do Not Disturb service.
  - Voice Messaging .

  The information is presented in the following format:

  <In a Meeting/Away/CFA/DND> <Voice Messaging>

  The *<In a Meeting/Away/CFA/DND>* state is represented by one icon with the *In a Meeting/Away* states having precedence over the CFA and DND states, and the CFA state having precedence over the DND state.

  If your Exchange calendar state is not *In a Meeting* or *Away and DND,* and CFA services are not turned on, then this icon is not displayed.

  The Voice Messaging icon is present only if you have outstanding voice messages.

  In addition, if a call is parked against your extension, the following information appears:

  Parked User: <First Name> <Last Name> (<Phone Number/Extension>).

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5.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section *6 Manage Calls*.

Figure 30 Call Console

The *Call Console* contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

5.2.1 Header

The Call Console header contains the following controls:

- Call History button – This allows you to access the list of your previous calls.
- Call Waiting button – This allows you to enable the Call Waiting service.
- Auto Answer button – This allows you to answer your calls automatically.

5.2.2 Dialer

The *Dialer*, located at the top of the *Call Console*, below the header, allows you to make ad hoc calls.

Figure 31 Call Console – Dialer

- The *Enter Number* text box is where you enter the number to dial.

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- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls. For more information, see sections *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons*.

5.2.3 Current Calls

The *Call Console* displays your current calls and allows you to take actions on them.

If you are involved in a conference call, its details are displayed in the *Conference Call* panel at the bottom of the *Call Console*. The *Conference Call* panel is described in the following section.

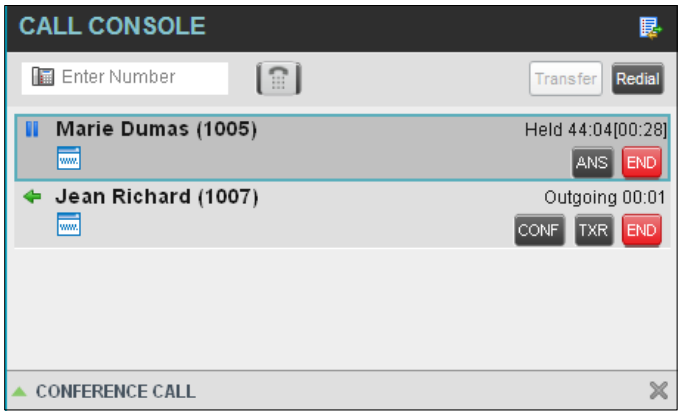

Figure 32 Call Console – Current Calls

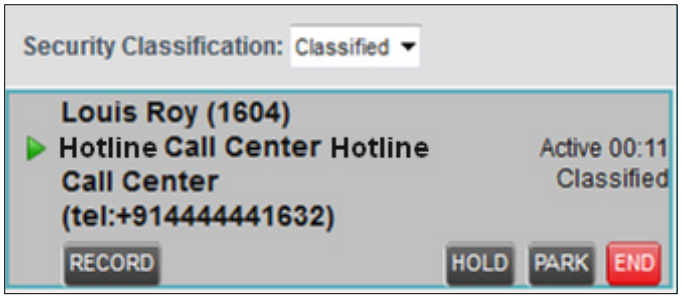

Figure 33 Call Console – Security Classification

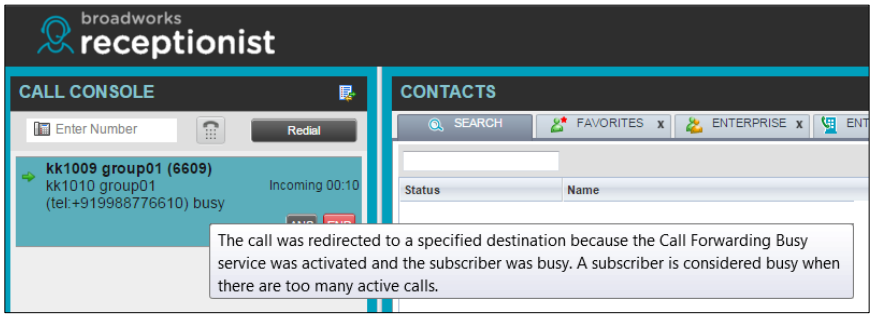

Figure 34 Call Console – Call with Redirection Information

Each call is listed on a separate line with the following information:

- Remote Calling Line ID (CLID) – This is the name of the remote party (if available) and the phone number in parenthesis.

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For a recalled call, the following information appears:
Recall: <Caller's name>; via: <Call parked against user>

- Diversion CLID – This is the name (if available) of the party who redirected (transferred or forwarded) the call before you received the call and the phone number is in parenthesis. If the call was diverted more than once, the last party who diverted the call is listed first; the second to last party is listed second; and so on.
- Redirecting reason – This specifies why the call was redirected. When you move the mouse over the reason, a ToolTip appears providing more details on the reason for redirecting the call. For more information, see section *5.2.6 Call Redirection Reasons*.
- Call State icon – This is a visual representation of the current state of the call. For more information, see section *5.2.5 Call States and Actions*.
- Call State name – This is the display name of the state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from Cisco BroadWorks and it accurately reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.
- Security Classification (if applicable) – This is the security classification level of the call.
- Action buttons – These buttons are for the operations that you can currently take on the call. For more information, see sections *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons*.

5.2.4 Conference Call Panel

The *Conference Call* panel displays your current conference and allows you to manage your conference calls. You can only be involved in one conference call at a time.

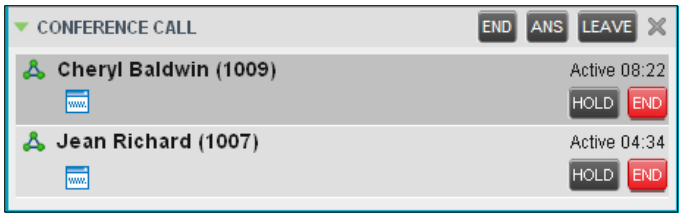

Figure 35 Conference Call Panel

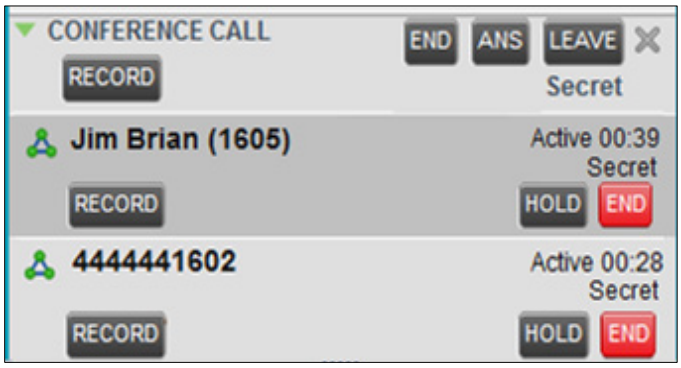

Figure 36 Conference Call Panel – Security Classification

The header bar contains various controls that allow you to manage the conference:

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- Hold Conference button HOLD – This allows you to place the conference on hold.
- Resume Conference button ANS – This allows you to resume a held conference.
- Leave Conference button LEAVE – This allows you to leave the conference.
- End Conference button END – This allows you to end the conference.

The panel lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for a two-way call. For information, see section *5.2.3 Current Calls*.

5.2.5 Call States and Actions

The following table lists the possible call states and actions that can be performed in each state.

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, Park, Camp, End, Conference
On Hold	Held		Any	Transfer, Resume, Park, Camp, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

5.2.6 Call Redirection Reasons

The following table lists the possible reasons for redirecting calls.

Redirection Reason	Description
busy	The call was redirected to a specified destination because the Call Forwarding Busy service was activated and the subscriber was busy. A subscriber is considered busy when there are too many active calls.

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Redirection Reason	Description
no answer	The call was redirected because the Call Forwarding No Answer service was activated and the subscriber did not answer within the specified number of rings.
unavailable	The call was redirected because the Call Forwarding Not Reachable service was activated and the subscriber's device was either unreachable or unregistered.
unconditional	The call was redirected because the Call Forwarding Always service was activated. When active, the Call Forwarding Always service redirects all incoming calls.
time of day	The call was redirected because the Call Forwarding Selective service was activated and the incoming call matched the specified time of day value.
do not disturb	The call was redirected because the Call Forwarding Busy service was enabled and the Do Not Disturb service was activated.
deflection	The call was transferred before being answered.
follow me	The call was redirected because one of the following services was activated: Simultaneous Ringing, Sequential Ringing, or BroadWorks Anywhere.
out-of-service	The call session was redirected by the network with the reason set to "out-of-service?".
away	The call was redirected by the network with the reason set to "away".
transfer	The call was transferred after being answered.
voice mail	The call was redirected because the Call Forwarding Always to Voice Mail service was activated, the Call Forwarding Busy to Voice Mail service was activated, and the subscriber was busy, or the Call Forwarding No Answer to Voice Mail service was activated and there was no answer.
hunt group	The call was redirected to an agent by a hunt group.
call center	The call was redirected to an agent by a call center.
route point	The call was redirected to an agent by a route point.
unknown	The call was redirected for an unknown reason.

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5.3 Contacts Pane

The *Contacts* pane contains your contact directories in a tabbed format and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section *6 Manage Calls*. For information about organizing and managing your contact directories, see section *9 Manage Contacts*.

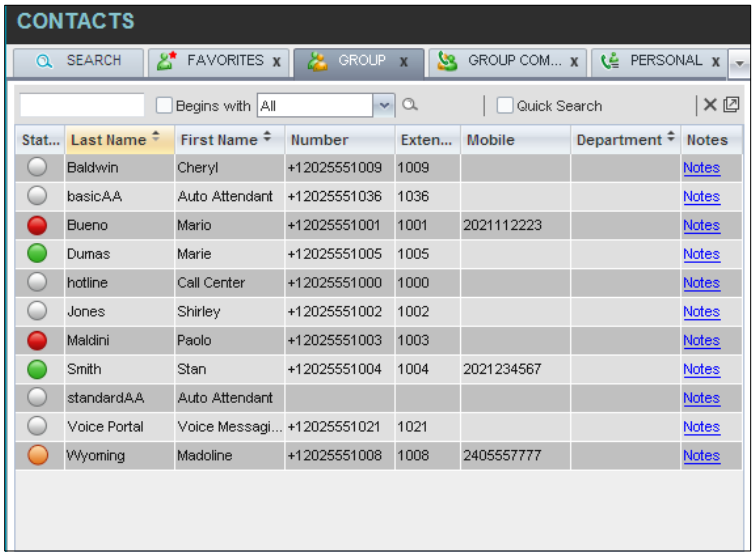

Figure 37 Receptionist Enterprise Contacts Pane

The *Contacts* pane contains the following areas:

- Directory Management Bar
- Directories List
- Search Tab
- Favorites Tab
- Group/Enterprise Tab
- Group/Enterprise Common Tab
- Monitored Contacts Tab (Enterprise Edition)
- Personal Tab
- Speed Dial Tab
- Queues Tab (Enterprise Edition)
- Custom Directories Tabs (Enterprise Edition)
- Instant Message Tab
- Outlook Tab (Enterprise Edition)
- Search Results Tabs

The tabs you see depend on your Receptionist edition, system configuration, as well as the services assigned to you. For more information, see section *3 Introduction to Receptionist* or see your administrator.

You can only see the contents of one directory at a time. The information displayed for a contact, depends on the directory, which is described in the following subsections.

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When you click a contact in any contact directory, the contact expands and the action buttons for the operations that you can currently perform on that contact, and in some cases additional information about the contact, appear.

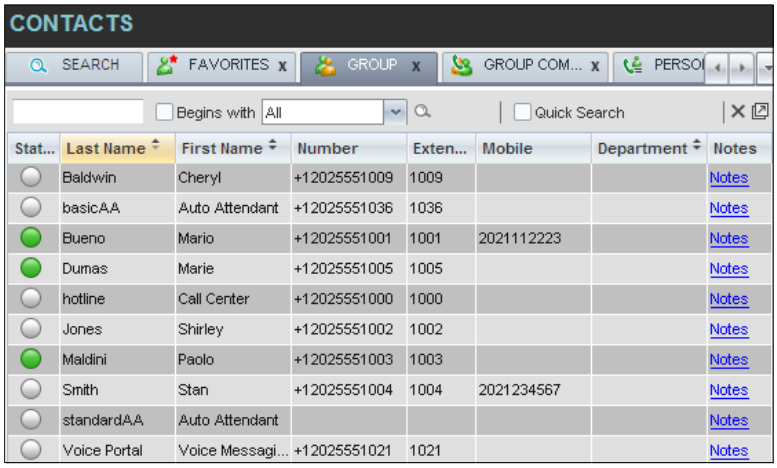

Figure 38 Group Tab – Contact in Focus with Action Buttons

For the list of action buttons available in Receptionist, see section *5.5.1 Call Action Buttons*.

5.3.1 Directory Management Bar

The *Directory Management* bar contains controls that allow you to perform search operations, create directories from search results, and edit directories.

Figure 39 Directories Management Bar

For information on managing contact directories, see section *9 Manage Contacts*.

5.3.2 Directories List

The drop-down arrow to the right of the directories tabs, when clicked, displays the list of directories available to you, and allows you to select directory tabs to display in the *Contacts* pane. When the tabs to display do not fit in the window, scroll arrows appear allowing you to scroll left and right to show hidden tabs.

For more information, see section *9.1 Show/Hide Directories*.

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5.3.3 Search Tab

You use the *Search* tab to look for specific contacts in all your contacts directories and, if available, in the configured *LDAP* directory. For information on performing directory searches, see section *9.3 Search Contacts*.

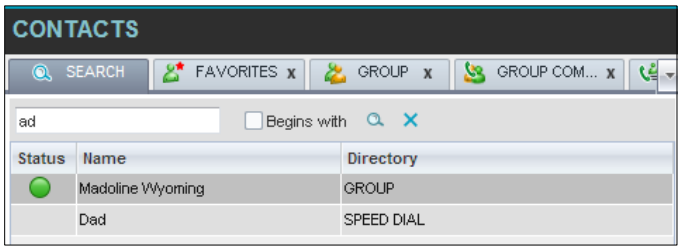

Figure 40 Contacts Pane – Search Tab

The search results can contain contacts from several directories, and the following information can be displayed for each contact (as applicable): phone state, IM&P state, contact name, and the directory where the contact was found.

5.3.4 Favorites Tab

You use the *Favorites* tab to monitor the phone state of selected contacts. The *Favorites* directory provides the following information for each contact (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

The contacts to monitor must be configured on the web portal. This is referred to as static monitoring. For more information, see section *10 Monitor Contacts*.

> **NOTE**: The *Favorites* tab always displays a maximum of 200 contacts, even if more than 200 contacts have been selected for monitoring from the web portal. These are the first 200 contacts from the list provided by the server. The order of contacts on that list may differ between sessions, and as a result, the list of contacts displayed in the *Favorites* tab may also vary between your successive sign-ins if the server returns more than 200 contacts.

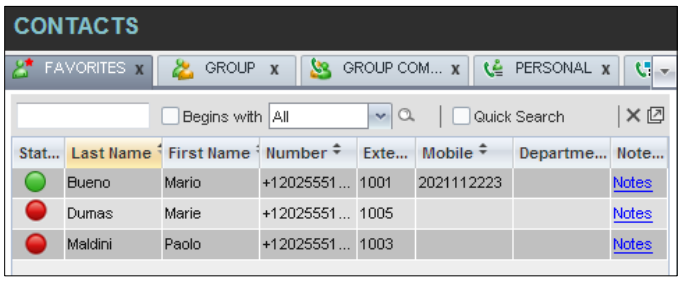

Figure 41 Contacts Pane – Favorites Tab

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5.3.5 Group/Enterprise Tab

The *Group/Enterprise* tab contains the contacts in your Cisco BroadWorks group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise). However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts from your group directory.

The following information is displayed for each contact: (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

If you have the Receptionist Enterprise edition, you can also monitor selected contacts without having to configure them on the web portal. This is referred to as dynamic monitoring. For information, see section *10.2 Dynamic Monitoring (Enterprise Edition)*.

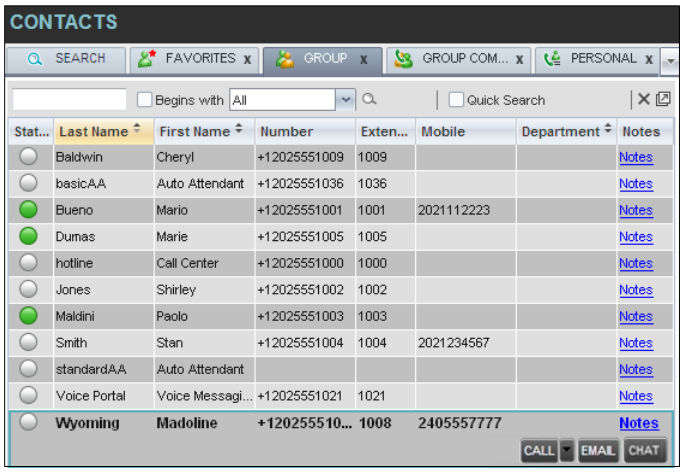

Figure 42 Contacts Pane – Group Tab

5.3.6 Group/Enterprise Common Tab

The *Group/Enterprise Common* directory contains the contacts in your group's common phone list (if your group is part of a service provider) or your enterprise's common phone list (if your group is part of an enterprise) configured by your administrator on Cisco BroadWorks.

The contact's name and phone number (as configured on Cisco BroadWorks) are displayed for each contact.

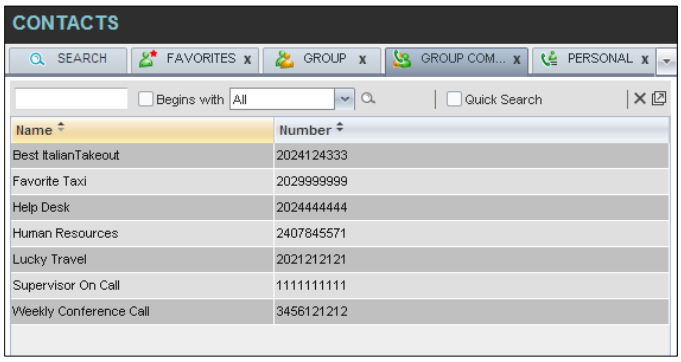

Figure 43 Contacts Pane – Group Common Tab

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5.3.7 Monitored Contacts Tab (Enterprise Edition)

The *Monitored Contacts* directory contains the contacts that you are dynamically monitoring. When you start dynamically monitoring a contact, that contact is added to the *Monitored Contacts* directory. For more information, see section *10 Monitor Contacts*.

This directory is hidden if there are no dynamically monitored contacts.

> **NOTE**: If you stop monitoring the last contact in the *Monitored Contacts* directory, the directory stays visible until the next sign in.

The following information is displayed for each contact (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

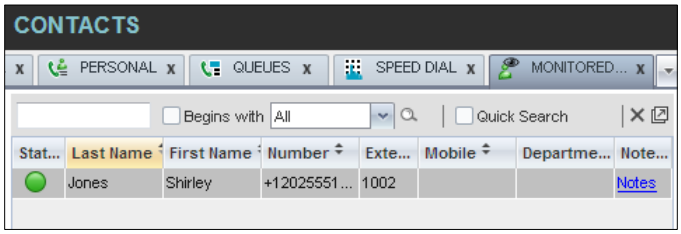

Figure 44 Contacts Pane – Monitored Contacts Tab

5.3.8 Personal Tab

The *Personal* tab contains the contacts from your personal phone list on the Cisco BroadWorks web portal.

You can edit your personal contacts in Receptionist. For information about managing your personal contacts, see section *9.6 Manage Personal Contacts*.

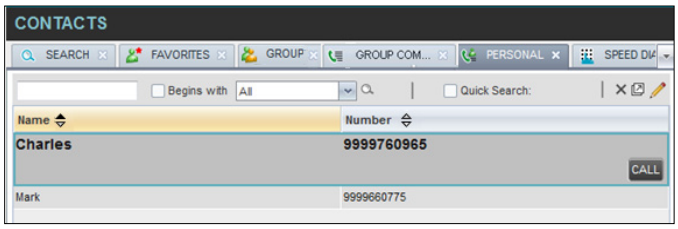

Figure 45 Contacts Pane – Personal Tab

The information displayed for each contact includes the contact's name and number, as you configured them.

5.3.9 Speed Dial Tab

The *Speed Dial* tab displays your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the contacts for that service in your Speed Dial directory.

You can edit your speed dial entries in Receptionist. For information about managing your speed dial entries, see section *9.7 Manage Speed Dial Entries*.

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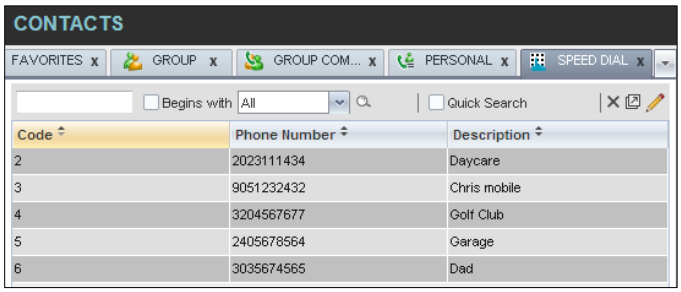

Figure 46 Contacts Pane – Speed Dial Tab

The information displayed for each contact includes the speed dial code, phone number, and description, as you configured them.

5.3.10 Queues Tab (Enterprise Edition)

The *Queues* tab displays the list of call centers and associated DNIS numbers that a call center agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues.

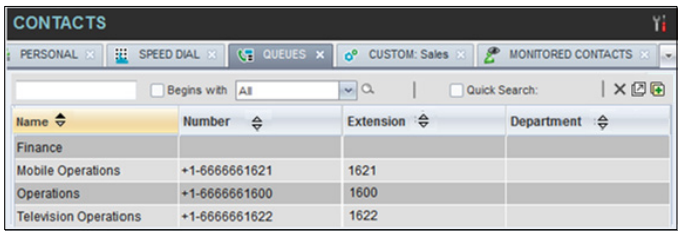

Figure 47 Contacts Pane – Queues Tab

The information displayed for each queue includes the name, phone number, extension, and department (as applicable).

The Group button allows you to group (and ungroup) queues by call center.

5.3.11 Custom Directories Tabs (Enterprise Edition)

If your administrator has configured custom contact directories for your group, you can access them from Receptionist.

> **NOTE**: A custom directory has the same properties as the *Group/Enterprise* directory, and you can perform the same operations on contacts in a custom directory as in the *Group/Enterprise* directory.

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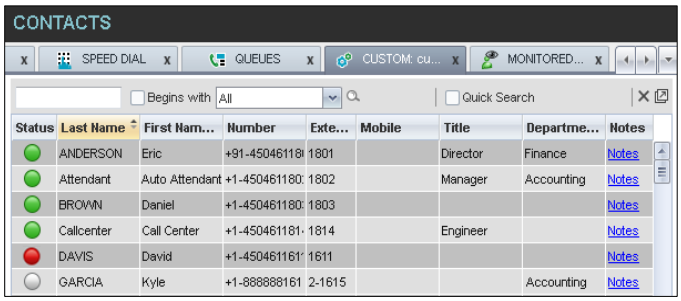

Figure 48 Contacts Pane – Custom (Directory) Tab

5.3.12 Instant Message Tab

The *Instant Message* tab displays IM&P contacts to which you have are subscribed. The information displayed for each contact includes the contact's name, IM&P ID, and unified IM&P presence state. For information on subscribing to and chatting with IM&P contacts, see section *8 Monitor IM&P Contacts and Chat with Contacts*.

The tab is available if you have been assigned the Integrated IM&P or Third-Party IM&P service.

When your presence state is set to "Offline", the tab is empty. To change your IM&P presence state, see section *4.8 Change Your IM&P Presence State*.

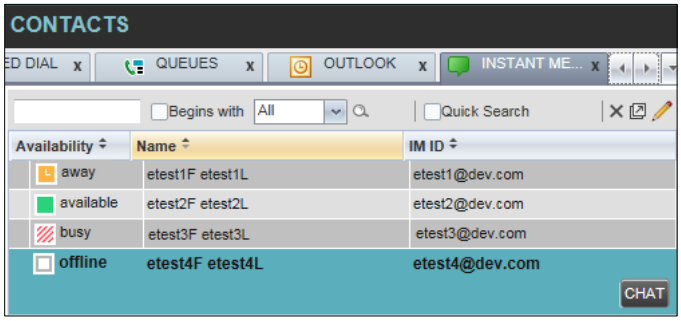

Figure 49 Contacts Pane – Instant Message Tab

5.3.13 Outlook Tab (Enterprise Edition)

The *Outlook* tab contains your Outlook contacts. The information displayed for each contact includes the contact's last and first name, phone number, mobile number, and home phone number. This feature is available to you if you have the Outlook Integration feature enabled and configured. For more information, see section *13.4 Settings – Plug-ins*.

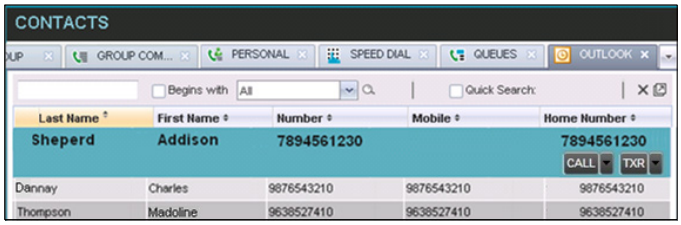

Figure 50 Contacts Pane – Outlook Tab

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5.3.14 Search Results Tabs

When you perform a search on a directory, you can keep the results of the search and save them in a new contacts directory. The name of the new directory is the same as the name of the directory on which the search was performed, but the directory icon has an arrow similar to the arrow used on shortcut icons .

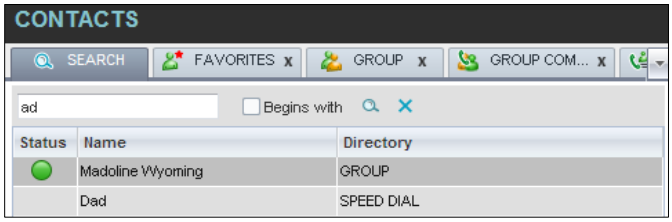

Figure 51 Contacts Pane – Search Results Tab

> **NOTE:** A search results directory has the same properties as the original directory, and you can perform the same operations on contacts in a search results directory as in the original directory.

You can perform a search on a search results directory and keep the results under another tab. The number of search results directories you can create is limited to ten.

Search results directories are only available for the current sign-in session. In addition, once closed, they cannot be restored. If required, perform the same search again.

5.4 Queued Calls Pane (Enterprise Edition)

You use the *Queued Calls* pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section *12 Manage Queued Calls (Enterprise Edition)*.

Figure 52 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section *12.1 Select Call Centers to Manage*.

Each call center is displayed in a separate panel. The panel's header displays the following information:

- The name of the call center.
- The primary phone number of the call center.
- The number of calls currently displayed for the queue against the maximum number of calls that can be displayed for a queue.

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- The number of calls in queue against the queue length.

A *Message Waiting* icon indicates that there are outstanding messages for the call center.

When you expand the panel for a call center, the list of calls queued in that call center appears, with calls listed according to their position in the queue.

Figure 53 Queued Calls Pane – Call Center Panel (Expanded)

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of the following:
  - *Waiting* – The call is queued, waiting to be answered.
  - *Announcement* – An announcement is being played to the caller.
  - *Reordered* – The position of the call in the queue has been changed.
  - *Bounced* – The call has been bounced.
- Name (if available) and phone number of the calling party.
- The total call time, including the time in the current priority bucket (in parentheses).

Clicking a call expands the call to show additional data:

- Position of the call in the queue.
- Priority of the call (Premium Call Center).
- The name (if available) and the phone number of the call center (or DNIS, if applicable) that was called.

When you move the mouse over a queued call, the action buttons that can be applied to the call appear. For information, see section *5.5.1 Call Action Buttons*.

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5.5 Controls

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons. They are described in section *5.5.1 Call Action Buttons*.

The following table lists the general controls used in Receptionist and the controls displayed on the headers in the panels, windows, or tabs.

Name	Description
Common Controls	
Options	This allows you to organize items in lists.
Expand/Collapse	This shows or hides the contents of a window, panel, or tab.
Close	This closes an interface element, such as window, pane, tab, or panel.
Edit	This allows you to edit contacts in some directories.
Call Console Controls	
Call History	This displays your call logs.
Call Waiting	This allows you to turn Call Waiting on or off.
Auto Answer	This automatically answers your incoming calls.
END End Conference	This ends a conference call.
LEAVE Leave Conference	This allows you to leave the conference while allowing other participants to continue the call.
HOLD Hold Conference	This places a conference call on hold.
ANS Resume Conference	This resumes a held conference.
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
Pull Out	This places directory search results in a new tab.
Clear Search	This clears the search results.
Group Queues	This groups queues by call center.

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Name	Description
Call Notification Pop-up Window	
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
vCard	This saves the caller's phone number and personal information as a vCard in Microsoft Outlook.
Transfer to Voice Mail	This transfers an incoming call to your voice mail.
Chat Window	
Call	This places a call to your chat partner.
Add User to Chat	This allows you to select users to add to the chat.
Invite	This invites selected users to the chat.
Pop out	This takes a chat window out of the main interface and makes it a free-floating window.
Pop in	This anchors a free-floating chat window inside the main interface.
Minimize	This minimizes the chat window.
Close	This closes the chat window.
Outlook Calendar Integration	
Forward	This shifts forward the displayed time period in the monitored user's calendar by one day/hour.
Back	This shifts back the displayed time period in the monitored user's calendar by one day/hour.

5.5.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, a call line, a call history log, or a directory entry.

Action buttons are contextual, that is, they appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry (with the exception of the Mon button on virtual user entries).

NOTE: Virtual users cannot be monitored even when the Mon button appears on expanded virtual user entries.

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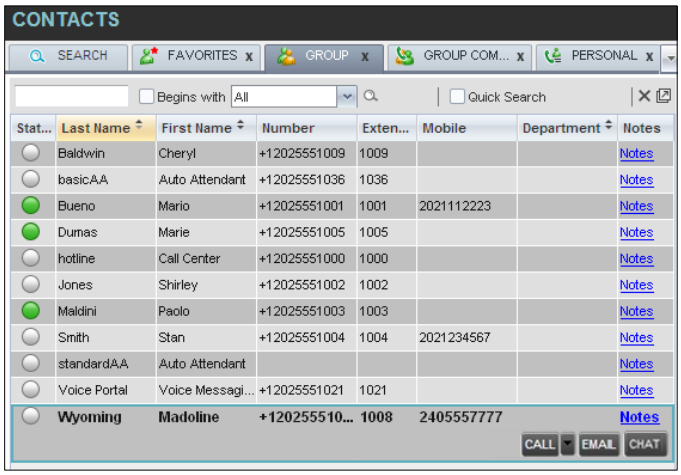

Figure 54 Group Directory – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist.

Button	Description
Dial	This dials the number you entered in the *Dialer*.
CALL Call	This places a call to the selected contact or to a number from Call History. This button is used when there is only one number available for the contact.
CALL split Call	When there is more than one number available for a contact, the split Call button is displayed for the contact. Clicking the Call button, places a call to the default destination number of the contact. Clicking the drop-down arrow (the right Call button), displays the list of available numbers for the contact. Selecting a number places a call to that number.
Redial Redial	This redials the last dialed number.
MOB Mobile	This dials the contact's mobile number.
EMAIL Email	This brings up a new email message window with the contact's email address, allowing you to send an email to the contact.
Transfer Transfer	This transfers a call to an ad hoc number entered in the Dialer.
TXR Transfer	This transfers a call to a selected number or contact. This button is used when there is only one number available for the contact.
TXR split Transfer	When there is more than one number available for a contact, the split Transfer button is displayed for the contact. Clicking the Transfer button, transfers the call to the default destination number of the contact. Clicking the drop-down arrow (the right Transfer button), displays the list of available numbers for the contact. Selecting a number transfers the call to that number.
VM Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.

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Button	Description
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK Park	This parks a call on a contact.
RECORD Record	This records a call.
PAUSE Pause	This pauses call recording.
RESUME Resume	This resumes call recording.
STOP Stop	This stops recording a call.
MON Monitor	This starts monitoring the state of the selected contact, except if the contact is a virtual user. Virtual users cannot be monitored.
CHAT Chat	This opens a chat window allowing you to chat with an IM&P contact.
PROMOTE Promote	This promotes a selected call to the next higher priority bucket.
RETRIEVE Retrieve	This retrieves a selected call from the queue to the supervisor's device.
REORDER Reorder	This changes a selected call's position in the queue.
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
Delete Call Log	This deletes a call log from Call History.

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6 Manage Calls

This section includes information and procedures on how to manage current calls. You use the *Call Console* to view and manage your current calls.

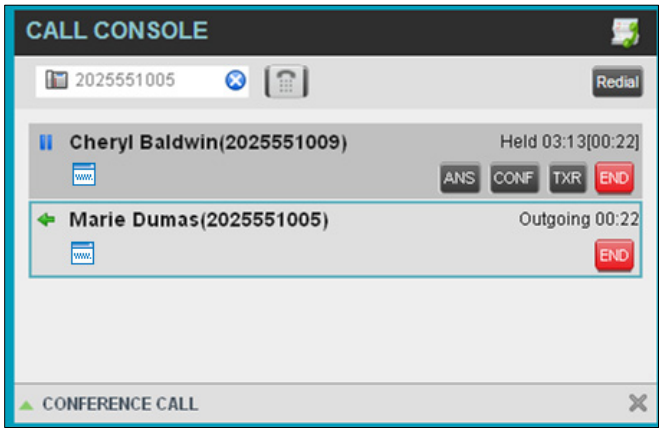

Figure 55 Call Console

6.1 Drag and Drop Call onto Contact

For operations on calls that involve a contact, you can drag a call from the *Call Console* and drop it on a target contact in one of your contact's directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green arrow appears. By default, when the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

However, you can enable automatic call transfer on *Drag and Drop* (if available). If automatic transfer is enabled, then the call is transferred to the contact's phone number when you drop the call on the contact. For more information, see section *13.1.7 Drag and Drop*.

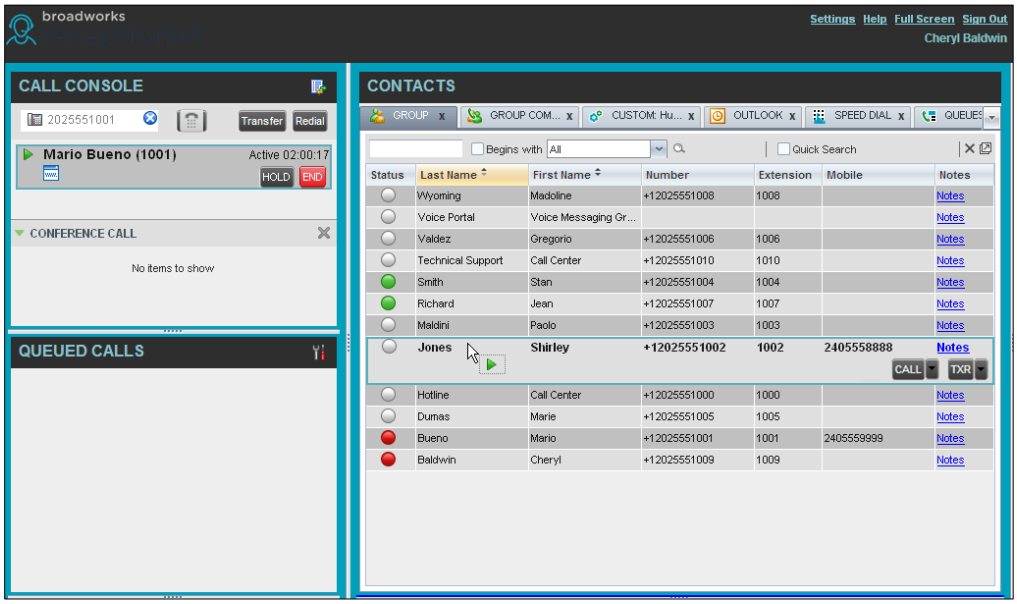

Figure 56 Drag Call and Drop Call on Contact

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6.2 View Call Information

Call information is provided in the *Call Console* and in the *Call Notification* pop-up window that appears on top of the system tray for incoming calls.

6.2.1 View Current Calls

Your current calls are always visible in the *Call Console*.

To view your conference call:

In the *Conference Call* panel, click the **Expand** button .

For details on the call information displayed in the *Call Console*, see section *5.2.3 Current Calls*.

6.2.2 View Incoming Call Details

If the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when an inbound call is received.

- *Direct inbound calls* – For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

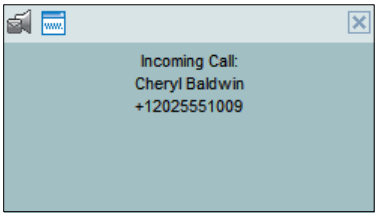

Figure 57 Call Notification Pop-up Window for Non-ACD Call

- *Calls from a call center* (Enterprise Edition) – For calls from a call center, the call center name is displayed in addition to the caller's name and phone number.

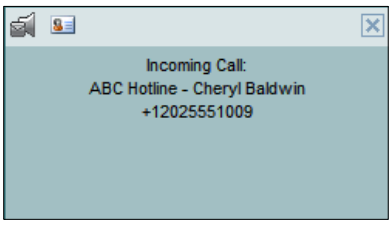

Figure 58 Call Notification Pop-up Window – Call from Call Center

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- In addition, for diverted calls, that is, calls that were forwarded or transferred before being delivered to you, the diversion information is also displayed.

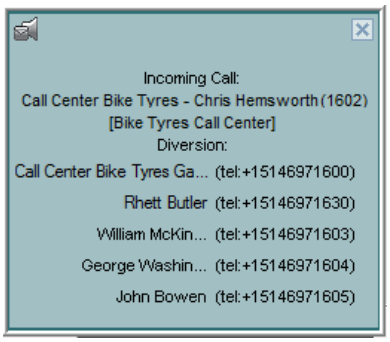

Figure 59 Call Notification Pop-up Window with Diversion Information

NOTE 1: You must have only one tab open in the browser running Receptionist to receive call notifications.

NOTE 2: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

6.2.3 Save vCard

When you receive a call, a *Call Notification* pop-up window is visible on top of the system tray. From this window, you can save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save caller's information as a vCard:

In the *Call Notification* pop-up window, click the **Add vCard** button .

This button is present only when Outlook is running.

6.2.4 Open URL

For any current call, you can open a page in your browser that contains information about the calling party encoded in its URL.

This can be done either from the *Call Notification* pop-up window that appears on top of the system tray for an incoming call or from the *Call Console* for any current call.

This feature is configured on the *Settings – General* configuration page. For more information, see section *13.1 Settings – General*.

To open a URL for the incoming call:

In the *Call Notification* pop-up window, click the **Web Pop URL** button .

To open a URL for any call:

In the *Call Console*, click the **Web Pop URL** button for the target call.

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6.3 View and Change Security Classification of Calls

Receptionist displays the security classification level of your current calls and allows you to change your assigned security classification level if you have the Security Classification service assigned and your security classification level is not “Unclassified”, which is the lowest level.

The security classification level of a call is the lowest security classification level for all call participants. Users who do not have a security level assigned are considered to have the security level of “Unclassified”.

Figure 60 Security Classification of Calls

6.3.1 Change Security Classification

You can change your security classification, but only to a level lower than your assigned level, and you can only do so while in an active call. The security classification level of your calls is then recalculated.

The security classification of a call can also change when other participants change their security classification level or when participants join or leave the call. If a security classification level of a call changes the new level is displayed.

After all your calls end, your security classification level is reset to your assigned security classification level.

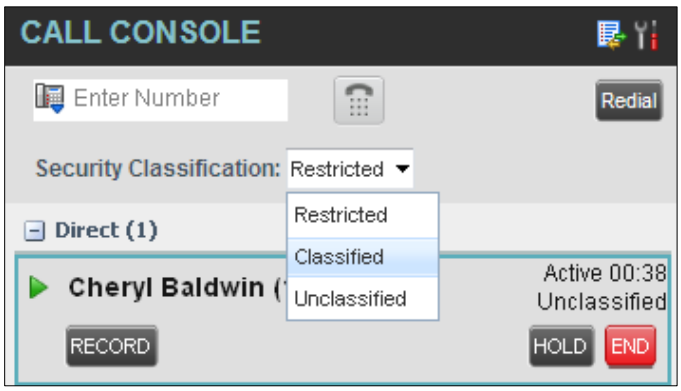

Figure 61 Security Classification Levels

To change your current security classification:

From the *Security Classification* drop-down list, select a new security classification level.

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6.4 Answer Calls

You can answer your own incoming calls and calls for other users in your group. If you have the Auto Answer service, you can also answer calls automatically.

6.4.1 Answer Call

Your incoming calls appear in the *Call Console*. To answer a call, the call state must be *Incoming.*

To answer an incoming call:

Move the mouse over the call and click **Answer** ANS. The call state changes to *Active*.

> **NOTE**: Double-clicking a call, does not answer it.

To answer an incoming call from a Call Notification pop-up window:

Click anywhere on the text in the window.

To answer calls automatically:

In the *Call Console*, click the **Auto Answer** button. The button changes to this to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click To Dial calls.

The Auto Answer feature may be enabled manually in the client or by the administrator on the server.

> **NOTE**: If this feature is enabled by your administrator, you must **not** enable the client-based Auto Answer using the Auto Answer button.

6.4.2 Pick Up Call

The Directed Call Pickup service allows you to answer a call that is incoming on another user. Depending on your setup, you can answer calls for users in your group or in the entire enterprise. This is useful when the user is currently not on hand to answer the call.

> **NOTE**: To pick up a contact's call, you must have the Directed Call Pickup service assigned.

To answer a call for a contact:

1) Expand your *Group/Enterprise* or *Favorites* directory and click the target contact to expand it. The contact's state must be *Ringing*.

2) Move the mouse over the contact and click **Answer** ANS.

   The call appears as *Incoming* in the *Call Console*.

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6.5 Hold and Resume Calls

You can only put an active call on hold.

6.5.1 Put Call on Hold

To put a call on hold:

Move the mouse over the call and click **Hold** HOLD.

6.5.2 Resume Held Call

To resume a held call:

Move the mouse over the call and click **Answer** ANS.

> **NOTE**: Double-clicking a call does not take the call off hold.

6.6 Make and End Calls

Receptionist provides you with several ways in which you can make calls. When you dial a number or contact, the call appears in the *Call Console* as *Incoming Local.*

6.6.1 Dial Ad Hoc Number

You use the *Dialer* to place a call to an ad hoc number.

Figure 62 Dialer

To dial an ad hoc number:

1) In the *Dialer*, enter the phone number and click **Dial** . The call appears in the *Call Console* as *Incoming Local* and your phone rings.

2) Click **Answer** ANS for that call. An outbound call is placed and the call state changes to *Outgoing*.

6.6.2 Redial Number

Receptionist keeps up to ten most recently dialed numbers.

To redial one of the recently dialed numbers:

1) In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

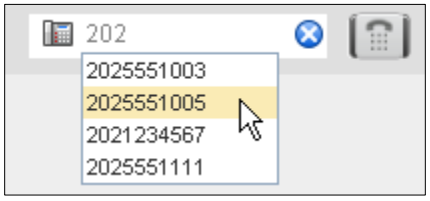

Figure 63 Dialer – Select Recently Dialed Number

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2) Select the number to dial and click **Dial** .

The client issues a Click To Dial attempt to the selected number.

Alternatively, click the **Redial** button and select the number from the list that appears.

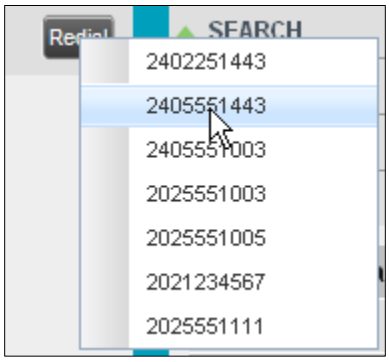

Figure 64 Dialer – Redial Number

6.6.3 Dial Contact

You can dial contacts from any directory available in Receptionist.

To dial a contact:

1) In the *Contacts* pane, expand the directory from which you want to dial a contact.

2) Click the contact to expand it and click **Call** CALL for that contact. A Click To Dial action is initiated and your phone rings.

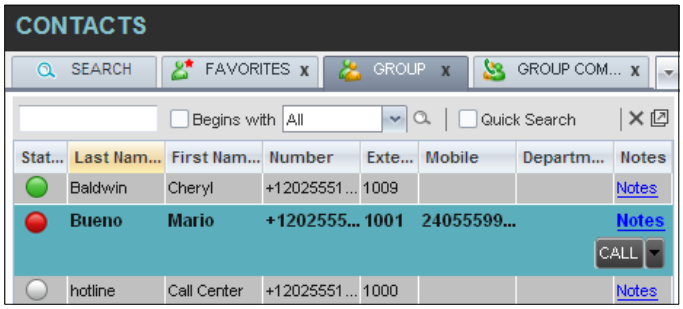

Figure 65 Group Directory – Contact in Focus with Split Call Button

3) Answer the phone. An outbound call is placed.

4) Alternatively, to dial the contact's alternate number, if available, click the **right Call** CALL button and select the number from the list.

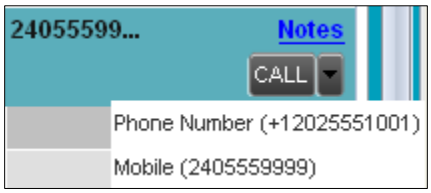

Figure 66 Split Call Button – List of Contact's Alternate Numbers

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6.6.4 Speed Dial

To speed dial a contact:

1) In the *Contacts* pane, click the **Speed Dial** tab.

2) Click the contact to expand it and click **Call** CALL.

6.6.5 Dial from History

You can dial any number that is available in Call History.

To dial from Call History:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

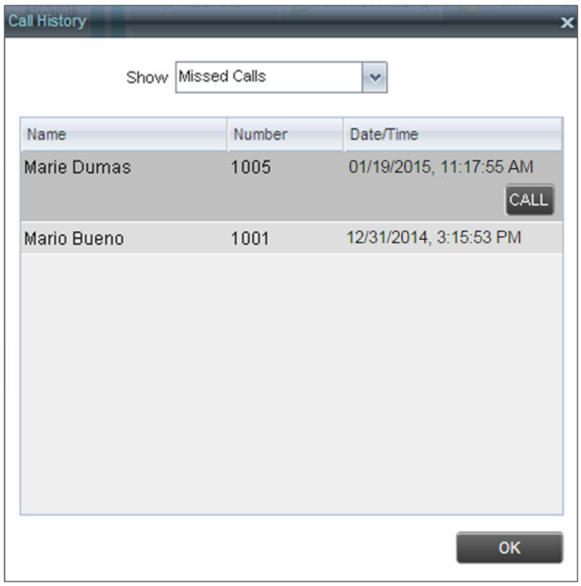

Figure 67 Call History Dialog Box

2) From the *Show* drop-down list, select the grouping you want.

3) Scroll through the list of call logs to find the entry you need.

4) Click the entry to expand it and then click **Call** CALL.

6.7 End Call

To end a call:

Click **End** END for that call.

> **NOTE**: If the call has not yet been answered, then the calling party continues to ring until there is no answer, another applicable timer expires, or the user hangs up.

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6.8 Transfer Calls

There are a number of ways that you can transfer a call. You can blind transfer calls or transfer calls with consultation or supervision. You can also transfer calls directly to voice mail or to a queue.

6.8.1 Blind Transfer Call

A blind transfer occurs when a call is transferred without an introduction. Calls may be blind transferred while active, held, or ringing (in) on your phone. If a call is ringing (in), blind transfer allows the call to be redirected before it is answered. You can blind transfer a call to an ad hoc number or to a contact.

To blind transfer a call to an ad hoc number:

1) In the *Call Console*, select the call to transfer.
2) In the *Dialer*, enter the destination number and click **Transfer** Transfer. The call is transferred and removed from the *Call Console*.

To blind transfer a call to a contact:

1) In the *Call Console*, select the call to transfer.
2) In the *Contacts* pane, click the tab from which you want to select a contact.
3) Click the destination contact to expand it, and click **Transfer** TXR for that contact. The call is transferred and removed from the *Call Console*.

   Alternatively, drag the call onto the target contact and click **Transfer** TXR for that contact.
4) To transfer the call to the contact's alternate number, if available, click the right Transfer button TXR and select the number form the list.

6.8.2 Conduct Supervised Transfer

When you have an active inbound call that you want to transfer, you can follow this procedure.

To conduct a supervised transfer:

1) In the *Call Console*, select the call to transfer.
2) Dial the number or contact to whom you want to transfer the call.
3) If the dialed contact is busy, either retry or dial another contact.
4) Move the mouse over the new, non-selected call and click **Transfer** TXR.

6.8.3 Transfer with Consultation

Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To transfer a call with consultation:

1) Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold. The new call appears in the *Call Console*.
2) Wait until the called party accepts your call and speak to the party.

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3) When ready to transfer, in the *Call Console*, select one of the two calls.

4) Move the mouse over the non-selected call and click **Transfer** TXR.

   The calls are connected and removed from the *Call Console*.

6.8.4 Transfer to Voice Mail

You can transfer a call to a monitored contact's voice mail or to your own voice mail. Calls may be transferred while active, held, or ringing (in) on your phone.

To transfer a call to voice mail:

1) In the *Call Console*, select the call to transfer.

2) In the *Contacts* pane, expand the *Group/Enterprise* or *Favorites* directory and find the contact. Find yourself if you want to transfer the call to your voice mail.

3) Click the contact and click **Transfer to Voice Mail** VM for that contact.

Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail** VM for that contact.

> **NOTE**: This option is only available if the contact has the Voice Messaging service assigned and enabled.

You can also transfer an incoming call to voice mail from the *Call Notification* pop-up window.

To transfer an incoming call to your voice mail:

In the *Call Notification* pop-up window that appears when you receive a call, click **Transfer to Voice Mail** .

6.8.5 Transfer to Queue (Enterprise Edition)

You can transfer a current call to any queue that appears in your *Queues* tab. The call is placed at the bottom of the new queue.

To transfer a call to a queue:

1) In the *Call Console*, select the call to transfer.

2) Click the **Queues** tab.

3) Click the destination queue and click **Transfer** TXR.

   The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target queue and click **Transfer** TXR for that queue.

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6.9 Park and Camp Calls

Call parking or camping allows you to find a temporary parking place for the call. If the parked or camped call is not answered within the predefined time, then the call is recalled and it reappears in your *Call Console*.

6.9.1 Conduct Busy Camp On (Enterprise and Small Business Editions)

Busy Camp On allows you to place a call at a busy contact. The call is automatically transferred to the destination when the contact becomes available to take the call. A call to camp must be active or held, and the destination contact must be either *Busy* or *Ringing*.

> **NOTE**: To use the feature, you must have the Busy Camp On service assigned and active.

To camp a call on a busy contact:

1) In the *Call Console*, select the call to camp.
2) In your *Group/Enterprise* or *Favorites* directory, click a *Busy* or *Ringing* contact and click **Camp** CAMP. Once the call is camped, it is removed from the *Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

6.9.2 Conduct Group Call Park (Enterprise Edition)

Group Call Park searches within a predefined hunt group for an available line on which to park a call. After a designated time, the call returns to the originating operator or a specified hunt group (depending on how the service is configured). If the parking attempt fails for any reason, the call remains in your *Call Console*.

To perform a Group Call Park:

In the *Call Console*, move the mouse over an active or held call and click **Park** PARK. The call is parked on an available extension and removed from *the Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call may be recalled to your device and reappear in your *Call Console*.

6.10 Manage Conference Calls

You manage your conferences in the *Call Console*.

- You use the top area of the *Call Console* to establish a conference and add participants to it.
- You use the *Conference Call* panel to manage or end an active conference.

You can only have one active conference at a time.

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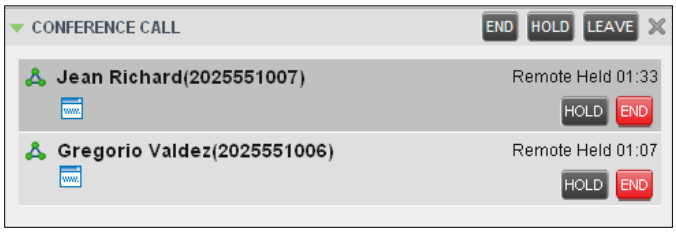

Figure 68 Call Console – Conference Call Panel

To conduct an n-way conference you must first start a three-way conference and then add participants to it.

NOTE: To conduct a conference you must have the Three-Way Call or N-Way Call service assigned.

6.10.1 Start Three-Way Conference

To start a conference, you must have at least two current calls.

To start a conference:

1) If necessary, place calls to participants using any of the methods described in section *6.6 Make and End Calls*.

2) In the *Call Console,* select one of the two calls.

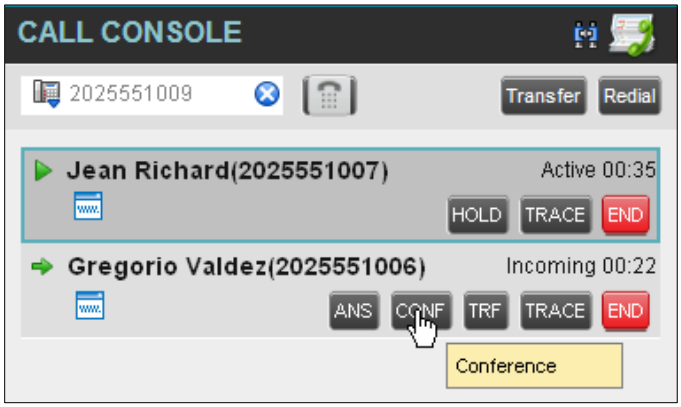

Figure 69 Start Conference

3) Move the mouse over the non-selected call and click **Conference** CONF. A three-way conference is established and the connected calls are moved to the *Conference Call* panel.

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6.10.2 Add Participant to Conference

To perform this operation, you must have the N-Way Call service assigned.

To add participants to a conference:

1) If the call you want to conference in is not yet established, place the call using any of the methods described in section *6.6 Make and End Calls*.

2) In the *Call Console*, move the mouse over the call to add and click **Conference** CONF. The caller is added to the conference.

6.10.3 Hold Conference

To put an active conference on hold:

In the *Conference Call* panel, click **Hold Conference** HOLD. This allows other conference participants to continue their conversation.

6.10.4 Resume Held Conference

To resume a held conference:

In the *Conference Call* panel, click **Resume Conference** ANS. All the calls in the conference become active.

6.10.5 Put Conference Participant on Hold

To put a specific conference participant on hold:

1) Expand the *Conference Call* panel.

2) Move the mouse over the target call and click **Hold** HOLD.

6.10.6 Resume Conference Participant

To resume a conference participant:

1) Expand the *Conference Call* panel.

2) Move the mouse over the target call and click **Answer** ANS.

6.10.7 Leave Conference

To leave the conference:

In the *Conference Call* panel, click the **Leave Conference** LEAVE button.

> **NOTE**: This function is only available for Three-Way Conferences.

6.10.8 Remove Conference Participant

To end a selected call in the conference:

1) Expand the *Conference Call* panel.

2) Move the mouse over the call and click **End** END.

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6.10.9 End Conference

To end the conference:

In the *Conference Call* panel, click **End Conference** END. This releases all the calls that participate in the conference.

6.10.10 Barge in on Call

Call Barge-in allows you to barge in on a contact's call. This is useful when you want to enter a call that is already established between two other people.

> **NOTE**: This functionality is only available if you have been assigned this service by your administrator.

Depending on your setup, you can barge in on contacts in your group or enterprise.

To barge in on a call:

1) Expand the *Group/Enterprise* or *Favorites* directory.

2) Click the target contact and click **Barge In** BARGE. The contact's status must be *Busy*.

   You enter an ongoing call, thereby establishing a Three-Way Conference. The calls appear in the *Conference Call* panel.

Alternatively, drag the call onto the target contact and click **Barge In** BARGE for that contact.

You can now perform any conference operation on the call.

6.11 Record Calls

To record calls, you have to have the Call Recording service assigned and configured. You can record calls manually or have the system automatically record your calls. Depending on your Call Recording mode, Receptionist may allow you to manually start, pause, resume, or stop recording a call.

For information on configuring your services, see the *Cisco BroadWorks User Web Interface Administration Guide*.

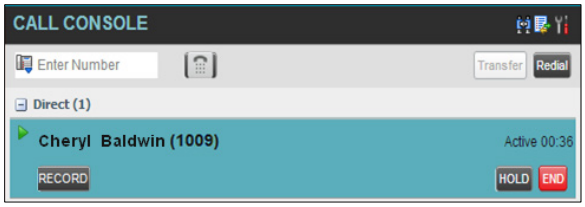

Figure 70 Call in Call Console with Record Button

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When a call is being recorded, the recording state, (which can be either *Recording* or *Paused*) appears on the line for the call.

Figure 71 Call Being Recoded

6.11.1 Start Call Recording

To manually record calls, you have to have your Call Recording service mode set to the *On Demand* or *On Demand with User Initiated Start*.

To record a call, select the call in the *Call Console* and click **Record** RECORD.

In the *On Demand* mode, the call is recorded from the beginning, and you have to request the recording before the end of the call to keep the recording. In the *On Demand with User Initiated Start* mode, the recording starts from the moment when you click the **Record** button.

6.11.2 Pause and Resume Call Recording

To pause and resume a recording, you have to have your Call Recording service mode set to *On Demand, On Demand with User Initiated Start*, or *Always with Pause/Resume*.

To pause a recording, select a call that is being recorded in the *Call Console* and click **Pause** PAUSE.

The recording pauses until you resume it or the call ends.

To resume a paused recording, select a call whose recording has been paused in the *Call Console* and click **Resume** RESUME.

When you pause and resume a recording, only one call recording is generated for the call.

6.11.3 Stop Call Recording

You can only stop recording a call if your Call Recording service mode is set to the *On Demand with User Initiated Start*.

To stop recording a call, select the call that is being recorded (or whose recording has been paused) in the *Call Console* and click **Stop** STOP.

If you click **Start** after a call recording has been stopped, a separate recording is created.

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7 Message Contacts (Enterprise Edition)

Receptionist allows you to send email messages to contacts that have messaging configured in the system. You must also have the Messaging feature enabled within Receptionist. For information, see section *13.5 Settings – Messaging*.

7.1 Send Email to Contact

To send an email message to a contact:

1) In the *Group/Enterprise*, *Favorites, Custom, or Monitored Contacts* directory, click the contact that has an email address configured.

2) Click the **Email** button

for the contact. This shows a new email window for the configured Messaging service.

3) Type your message and click **Send**.

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8 Monitor IM&P Contacts and Chat with Contacts

When you have an IM&P service assigned on Cisco BroadWorks, you can chat with other IM&P users and see the unified IM&P presence state of selected IM&P users directly from Receptionist.

The unified presence state of a contact is their combined instant messaging presence state when they are logged in through multiple devices or applications. For more information, see section *8.1.6 View Presence State of Contacts*.

You have to be online to use IM&P capabilities of Receptionist. For information on setting your IM&P presence state, see section *4.8 Change Your IM&P Presence State*.

8.1 Monitor IM&P Contacts

To view the presence state of an IM&P contact, you first have to subscribe to the contact. Otherwise, Receptionist displays the contact's state as *Unsubscribed*. If you send a subscription request to a contact and you are waiting for a reply, Receptionist displays the contact's state as *Pending Subscription*.

The following directories display the IM&P state of contacts: *Instant Message, Enterprise/Group*, *Favorites*, *Custom,* and *Search* (for contacts from directories that display in the IM&P state).

NOTE: The Instant Message tab does not include IM&P contacts in the *Unsubscribed* state.

You can subscribe to a contact either by sending a subscription request to the contact or by adding the contact to the *Instant Message* directory.

For information about the operations related to subscribing to contacts and viewing their presence state, see the following sections:

- Subscribe to Contact
- Add Contact to Instant Message Directory
- Modify Contact Name
- Unsubscribe from Contact
- Accept or Reject Subscription Request
- View Presence State of Contacts

8.1.1 Subscribe to Contact

To send a subscription request to a contact:

1) Click the IM&P presence icon of an unsubscribed contact in any directory where the presence state of contacts is displayed. The *Contact (IM) Subscribe* dialog box appears.

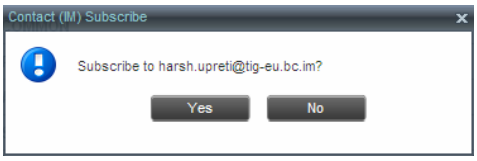

Figure 72 Contact (IM) Subscribe Dialog Box

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2) Click **Yes**.

A subscription request is sent to the contact, and the contact is added to the *Instant Message* directory. The contact's state is set to "Pending Subscription" .

When the subscription is accepted, the contact's presence state is updated to their actual presence state.

3) To resend a subscription request at any time, click the contact's presence icon again and click **Resend** in the dialog box that appears.

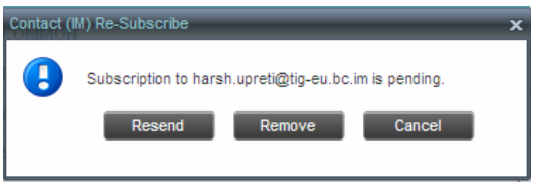

Figure 73 Contact (IM) Re-Subscribe Dialog Box

8.1.2 Add Contact to Instant Message Directory

When you add a contact to the *Instant Message* directory, the system automatically sends a subscription request to the contact.

To add a contact to the Instant Message directory:

1) In the *Instant Message* tab, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.

2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

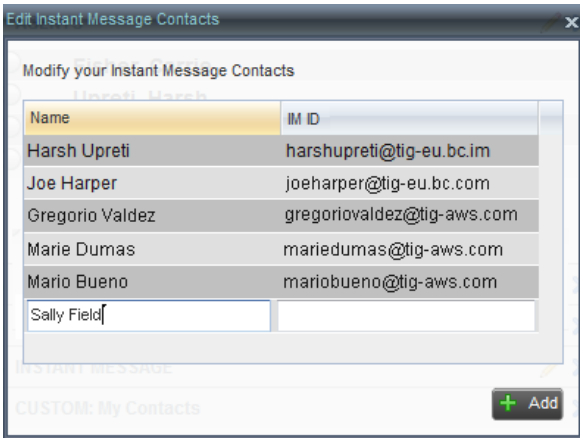

Figure 74 Edit Instant Message Contacts Dialog Box – Add Contact

3) In the *Name* text box, enter the display name of the contact to add.

4) In the *IM ID* text box, enter a valid IM&P ID of the contact.

5) To save the changes, click anywhere in the dialog box outside the entry.

A subscription request is sent to the contact, the contact's presence state is set to "Pending Subscription", and the contact is added to the *Instant Message* tab.

If the contact accepts your request, then the contact's state changes to the actual presence state.

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8.1.3 Modify Contact Name

You can modify the display name of an existing contact.

To modify the display name of a contact:

1) In the *Instant Message* tab, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.

2) Double-click the contact and enter the new name in the *Name* text box.

3) To save your changes, click anywhere in the dialog box outside the entry.

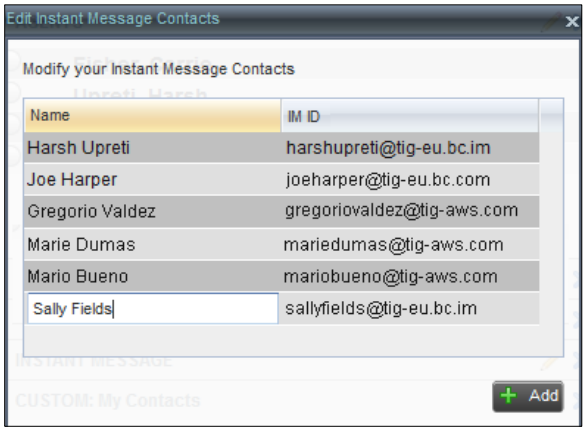

Figure 75 Edit Instant Message Contacts Dialog Box – Modify Contact

8.1.4 Unsubscribe from Contact

To stop monitoring a contact:

1) Click the presence icon of the contact. The *Contact (IM) Unsubscribe* dialog box appears.

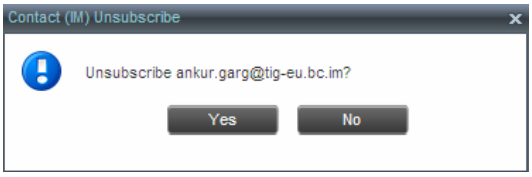

Figure 76 Contact (IM) Unsubscribe Dialog Box

2) Click **Yes**. The contact is removed from the *Instant Message* directory and its presence status changes to *Unsubscribed* in other directories.

8.1.5 Accept or Reject Subscription Request

When you receive a request from another user, a dialog box appears allowing you to accept or deny the request.

Figure 77 Contact (IM) Request Dialog Box

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To accept the request, click **Yes**. If the contact is not yet in your *Instant Message* directory, a request is sent to add the user to the directory.

To reject the request, click **No**.

You can also close the dialog box and ignore the request. If you ignore the request, the dialog box will reappear the next time you go online.

8.1.6 View Presence State of Contacts

You can view the presence state of IM&P contacts in the *Instant Message, Enterprise/Group*, *Favorites*, *Custom,* and *Search* tabs. The presence icon is displayed to the left of the contact's name.

Receptionist displays the unified instant messaging presence states, which indicates your contacts' availability to communicate using client applications such as Hosted Thin Call Center, Hosted Thin Receptionist, UC-One Communicator Desktop, or UC-One Communicator Mobile.

The actual unified presence state of a contact is displayed only if you are subscribed to the contact. Otherwise, the contact's state is displayed as *Unsubscribed* or *Pending Subscription*. Manual states are the states that you can set yourself and automatic states are the states set by the system based on the information received from other applications.

NOTE: The Instant Message panel does not include IM&P contacts in the *Unsubscribed* state.

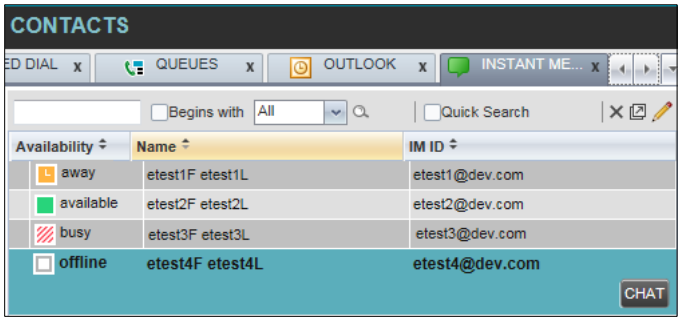

Figure 78 Instant Message Tab – Unified Presence State of Contacts

The following table lists the possible unified presence states of contacts in Receptionist:

Presence State	Icon	Display Name	Description
Manual States			
Available		available	The contact is online, available on one or more devices, and not busy on any device.
Busy		busy	The contact is online, but currently busy on one or more devices. Do not disturb.
Away		away	The contact is connected but away from one or more devices and not busy on any device.
Offline		offline	The contact is offline on all devices.

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Presence State	Icon	Display Name	Description
Automatic States			
Mobile Away		mobile	The contact is online on their mobile client but has been idle or away from their device for more than 10 minutes.
Busy-Call		Call	The contact is busy due to a call.
Busy-Meeting		Meeting	The contact is busy due to a meeting. The Busy-Call state overrides the Busy-Meeting state so this state is only seen if the contact has a meeting but no call. Your state is published as Busy-Meeting when your Outlook Calendar shows that you are in a meeting.
Offline In-Call		call	The contact is offline and the only available contact method is calling or leaving a chat message.
Unsubscribed States			
Pending Subscription			You sent a subscription request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
Not subscribed			The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the *Instant Message* tab. Clicking this icon sends a subscription request to the contact.

8.2 Chat with IM&P Contacts

You can chat with more than one contact at the same time, either in one-on-one sessions or by participating in multi-user chats. Each session requires a separate window.

Chat windows appear at the bottom right-hand side of the Receptionist main interface. Subsequent windows open to the left of the latest opened *Chat* window.

Chat windows can be taken out of the main interface and placed elsewhere on the screen.

The number of concurrently open *Chat* windows depends on the browser window size and screen resolution. The oldest *Chat* window is closed when there is no more room for a new *Chat* window to open. This only applies to *Chat* windows that are placed within the main interface.

You can start a chat session with a contact or accept a request from another user. A one-on-one session can be converted into a multi-user chat by inviting more participants. You can also receive an invitation to a multi-user chat from another user.

When your IM&P contact is in your group/enterprise, you can phone them directly from the *Chat* window.

The tasks related to instant messaging are described in the following sections:

- Start Instant Messaging Session
- Place Call from Chat Window
- Establish Multi-user Chat Session

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- Manage Instant Messaging Sessions

8.2.1 Start Instant Messaging Session

You can start an instant messaging session with an IM&P contact from any of the following directories: *Instant Message, Enterprise/Group*, *Favorites*, *Custom, and Search*.

To start an instant messaging session with a contact:

1) In the *Contacts* pane, click the target contact. The entry expands displaying available action buttons.

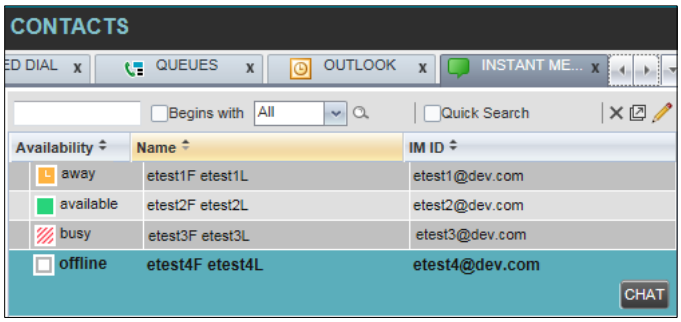

Figure 79 IM&P Contact with CHAT button

2) Click **CHAT** on the line for the contact. A *Chat* window appears, displaying your contact's information on the title bar.

Figure 80 Chat Window

> **NOTE**: A *Chat* window also appears when another IM&P user initiates a chat session with you.

3) Type your message in the text box at the bottom of the window and press **ENTER** on the keyboard. Your message is sent to your contact.

   The messages you send and receive appear in the *Chat Logs* area at the top of the window, below the title bar. Up to 50 messages per contact are kept in the log for the duration of your IM&P session, even if you close the *Chat* window and later start exchanging messages again with the same contact. The messages are cleared when you go offline.

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8.2.2 Place Call from Chat Window

If the user with whom you are chatting is also a contact in your *Group/Enterprise* directory, you can call the contact directly from the *Chat* window.

To place a call from the *Chat* window:

Click the **Call** button at the top right-hand side of the *Chat* window.

The Receptionist client issues a Click To Dial attempt to the contact's phone number and the call appears in the *Call Console*.

8.2.3 Establish Multi-user Chat Session

You can invite other contacts to your chat session, thus converting your one-on-one chat to a multi-user chat. An incoming multi-user chat invitation opens a window for a new multi-user chat.

To add users to a chat:

1) Click the **Add User to Chat** button in the *Chat* window. A drop-down list of available contacts appears.

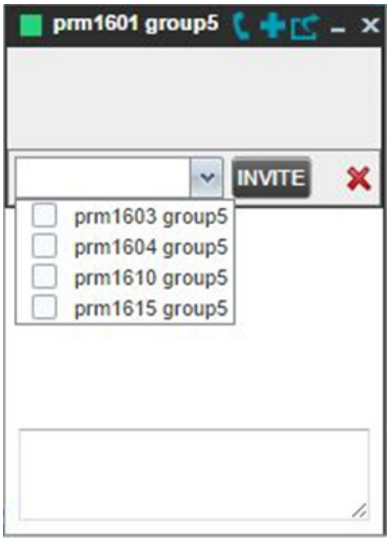

Figure 81 Add Participants to Chat

2) Select the check box next to each contact to invite and then click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the *Chat* window. The participants (other than you) are also listed at the top of the window.

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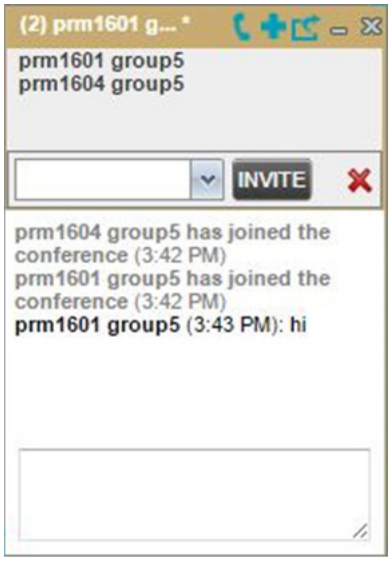

Figure 82 Multi-user Chat

3) To leave the multi-user chat, close the *Chat* window.

8.2.4 Manage Instant Messaging Sessions

If a *Chat* window is not in focus and an incoming message is available for you to read, the color of the window is light brown as shown in the following figure. This changes back to black as soon as the window is in focus.

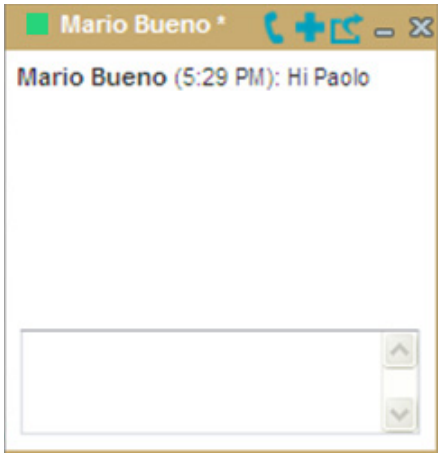

Figure 83 Chat Window

You can also close, minimize, or pop out a *Chat* window, that is, take the *Chat* window out of the Receptionist main interface and place in elsewhere on the desktop.

To pop out a *Chat* window:

Click the **Pop out** button at the top right-hand side of the window.

The window is placed on the desktop outside of Receptionist main interface and the Pop out button becomes the Pop-in button.

To place the window back within the Receptionist main interface:

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Click the **Pop in** button at the top right-hand side of the window.

To minimize or close a *Chat* window:

Click the **Minimize** or **Close** button at the top right-hand side of the window. When a window is closed, the windows to the left (if present) shift to the right. This only applies to *Chat* windows that are placed within the Receptionist main interface.

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9 Manage Contacts

Receptionist allows you to view, search, and organize your contact directories.

You use the *Contacts* pane to manage your contact directories, to monitor selected contacts, and to use your contacts to make or manage calls.

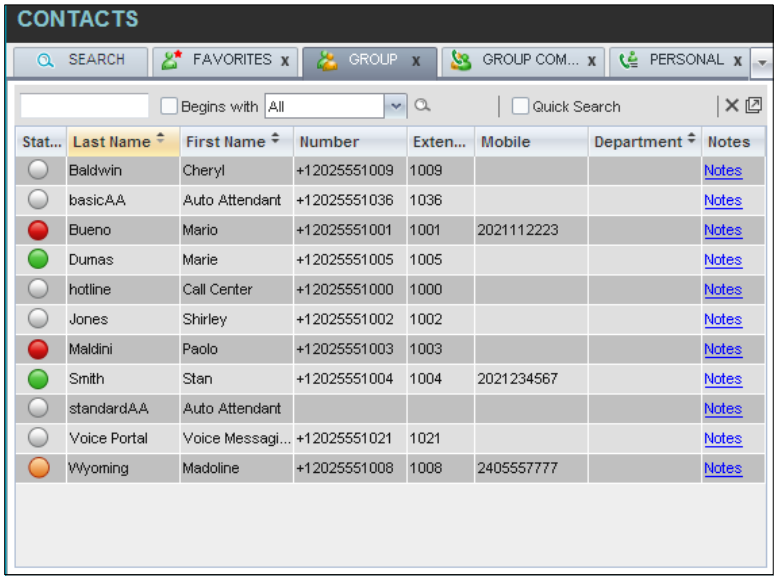

Figure 84 Contacts Pane

For the list of contact directories available in your version of Receptionist, see section *3 Introduction to Receptionist*.

For information on monitoring contacts, see section *10 Monitor Contacts*; for information on managing IM&P contacts, see section *8.1 Monitor IM&P Contacts*; for information on call-related functions, see section *6 Manage Calls*.

This section describes the following directories management functions provided by Receptionist:

- Show/Hide Directories
- View Directory Content
- Search Contacts
- Order Directory Entries
- Make Notes about Contact (Enterprise Edition)
- Manage Personal Contacts
- Manage Speed Dial Entries

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9.1 Show/Hide Directories

Receptionist allows you to specify which directory tabs should be visible in the *Contacts* pane.

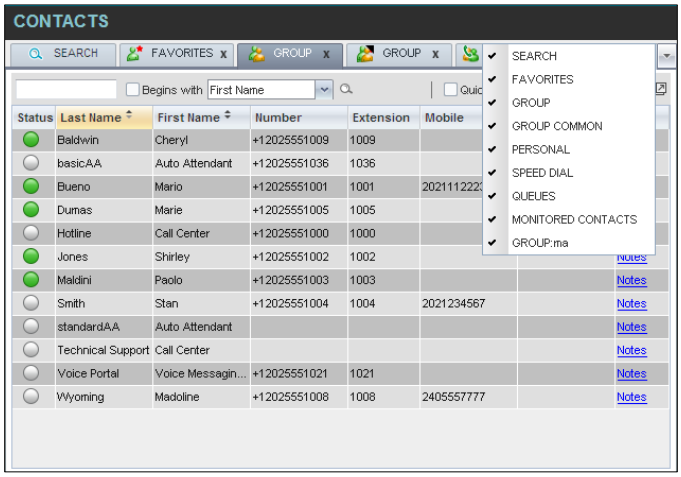

Figure 85 Contacts Pane – Expanded Directories List

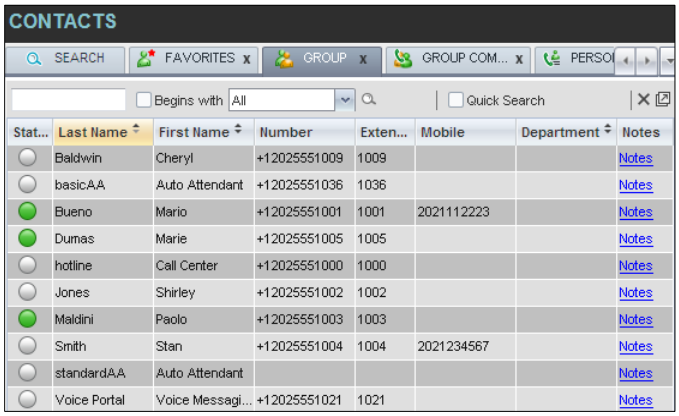

Figure 86 Contacts Pane with Contact Tabs Scroll Arrows

To display or hide a directory tab in the Contacts pane:

1) At the top right-hand side of the *Contacts* pane, click the drop-down arrow .

2) From the list that appears, select the directory to display. The selected directory appears and its tab is displayed at the top of the *Contacts* pane.

   To hide a directory tab, click the **Close** button on that directory's tab.

   Note that once you close a directory containing search results, you cannot display it again by selecting it from the list.

3) To display a directory tab that is selected but not visible, click one of the scroll arrows to move left or right until the directory tab you are looking for becomes visible.

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9.2 View Directory Content

Your directories are displayed as tabs at the top of the *Contacts* pane, with the details of only one directory visible at a time. The information displayed about each contact depends on the directory you are viewing.

To view contacts in a directory:

In the *Contacts* pane, click the tab for that directory. The directory listing appears in the *Contacts* pane.

To view additional information about a contact:

Click the contact to view. This expands the row for the contact displaying applicable action buttons and in some directories also the contact's Exchange calendar. For more information about the action buttons, see section *5.5.1 Call Action Buttons*. For more information about the contact's calendar, see section *10.4 Monitored Contact's Calendar (Enterprise and Small Business Editions)*.

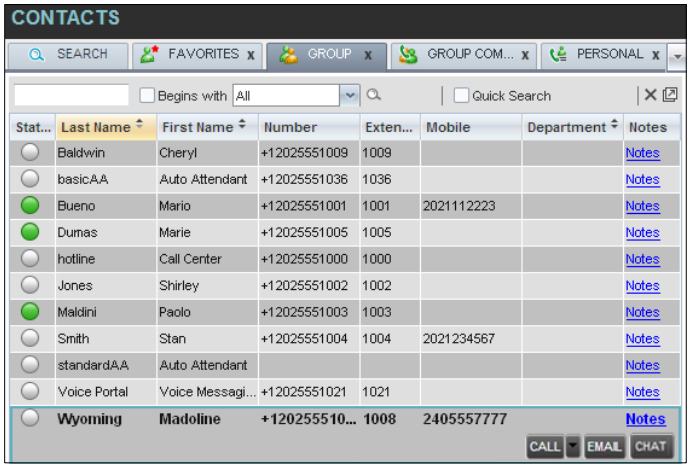

Figure 87 Group Directory – Contact Details

Only one contact can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

9.3 Search Contacts

Receptionist allows you to search for contacts several different ways. You can perform a search on a specific directory or on all directories at once. You can perform a regular search or a quick search, and you can create a new directory from search results.

You use the following procedures to search for contacts:

- Perform Quick Search
- Perform Regular Search
- Create Directory from Search Results
- Perform Search on Search Results

9.3.1 Perform Quick Search

A quick search searches on a specific column in a selected directory for entries that start with a character entered by you. The column on which the search is performed is the column by which the directory is currently ordered.

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A quick search can be performed on any directory, but is not available in the *Search* tab.

> **NOTE**: The search is not case-sensitive; the search for “Ann” and “ann” returns the same results.

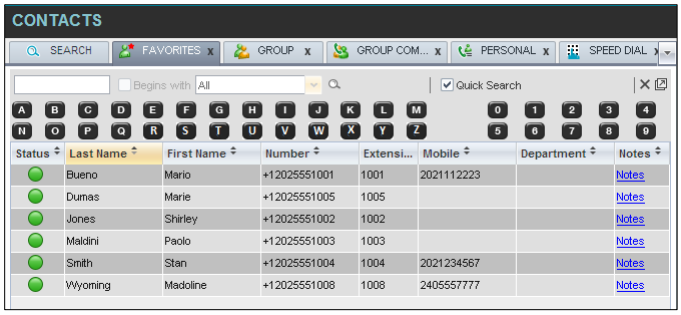

Figure 88 Contacts Pane – Perform Quick Search

To perform a quick search:

1) Click the directory tab where you want to perform the search.
2) Order the directory by the column on which you want to perform the search.
3) Check the *Quick Search* box.
4) From the keypad that appears, select a character (a single letter or digit) by which you want to search. The contacts that start with the selected character (in the selected column) are displayed in the directory.
5) To perform another search on the same column, select another character. The new search is performed on the original directory and not on the results of the previous search.

9.3.2 Perform Regular Search

You can search for contacts in a specific directory or in all directories at once.

When you search for contacts in a specific directory, you can search on a specific column or on all columns. When you use the *Search* tab, the search is always performed on all directories and columns.

> **NOTE**: The search is not case-sensitive; the search for “Ann” and “ann” returns the same results.

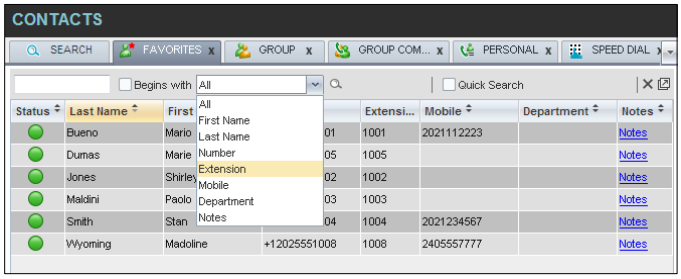

Figure 89 Contacts Pane – Perform Regular Search

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To search in a specific directory:

1) Select the directory.

2) Make sure that the *Quick Search* box is unchecked.

3) In the *Search* text box, enter the text for which you want to search. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

   For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

4) To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise, the search results also include contacts that contain the entered string.

5) From the drop-down list, select the column by which you want to search. You can select a specific column or all columns.

6) Click the **Search** button .

   The text you entered is matched against the selected column (or all columns) of every entry of the selected directory. Search results are displayed in the tab where the search was performed.

   Duplicate search results in Cisco BroadWorks directories are not displayed; the first match for a given contact is displayed.

   Duplicate search results in other directories are displayed.

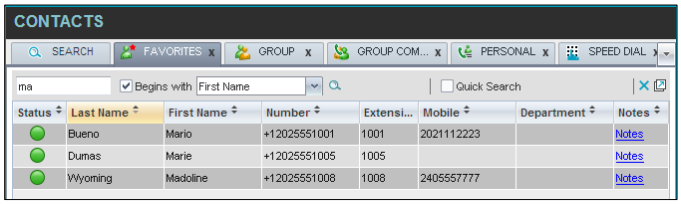

Figure 90 Contacts Pane – Search Results

   The search returns either all the contacts (in the selected directory) that contain the entered keyword or all the contacts that start with the entered keyword.

   In the first case (*Begins with* not checked), entering "Ann" returns all contacts with the name "Ann", but it also returns all contacts with names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.

   In the second case (*Begins with* checked), entering "Ann" returns all contacts with names such as "Ann", Anne", and Ann Marie", but not "Marianne" or "Mary Ann".

7) To clear the search results, click **Reset** .

To search in all directories:

1) Click the **Search** tab.

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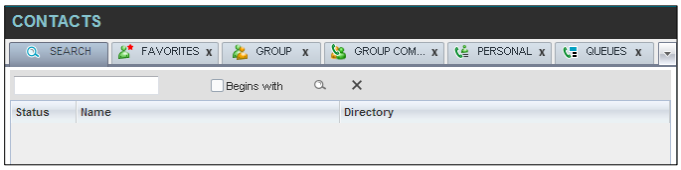

Figure 91 Perform Search Using Search Tab

2) In the *Search* text box, enter the text for which you want to search. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

   For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

3) To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise, the search results also include contacts that contain the entered string.

4) Click the **Search** button .

   The text you enter is matched against all columns in all directories. Search results are displayed in the *Search* tab.

   Duplicate search results in Cisco BroadWorks directories are not displayed; the first match for a given contact is displayed. Duplicate search results in other directories are displayed.

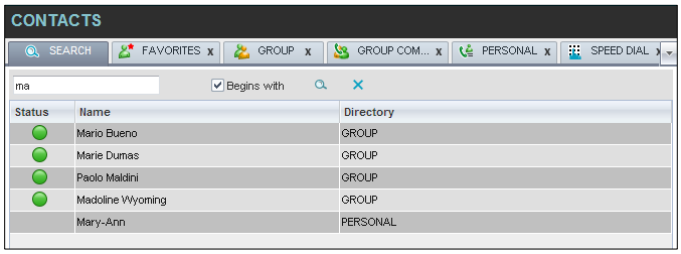

Figure 92 Contacts Pane – Search Results in Search Tab

5) When you click a contact, the entry expands displaying contact details. The information depends on the directory for which the contact was selected.

> **NOTE**: Contact entries displayed in the Search tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

9.3.3 Create Directory from Search Results

When you perform a search in a directory, you can create a new directory from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.

> **NOTE**: The Pullout button is not available in the Search directory.

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To create a directory from search results:

1) Select the directory where you want to perform the search.
2) Perform a quick search or enter the search criteria.
3) When the results are displayed, click the **Pullout** button , which becomes active. A new tab is created containing the results of the search.

> **NOTE**: Contact entries displayed in a search results tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform operations directly from the search results.

9.3.4 Perform Search on Search Results

If you perform a search in a specific directory, the search is always performed on the entire directory even if only search results are displayed. To search in search results, you must first create a new directory from the search results.

To perform a search on search results:

1) After you perform the original search, create a directory from the search results.
2) Perform a new search in the new directory.

> **NOTE**: Searching within the search results cannot be performed on the same column that the original search was performed.

9.4 Order Directory Entries

Receptionist allows you to order directory entries is ascending or descending order. The columns by which the directory can be ordered have the sort icon displayed ⬍ next to their name. The following table lists the directories and the columns by which they can be ordered.

Directory	Sort Columns	Default Sort Column
Enterprise/Group	First Name, Last Name, Department, Notes	Last Name
Favorites	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM	Last Name
Group/Enterprise Common	Name, Number	Name
Personal	Name, Number	Name
Speed Dial	Code, Description, Number	Code
Queues	Name, Number, Extension, Department	Name
Custom	First Name, Last Name, Department, Notes	Last Name
Outlook	Last Name, First Name, Number, Mobile, Home Phone	Last Name
Instant Message	Name, IM ID, IM	Name
Monitored Contacts	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM	Last Name

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Note that you cannot order the contacts in the Search directory.

The sorting order for the *Status* column is as follows (from highest to lowest): Private, On a Call, Ringing, Away, In a Meeting, Call Forwarding Always, Do Not Disturb, and Available. For information on the different states, see section *16.1 Monitored User States*.

The sorting order for the IM column is as follows (from highest to lowest): Busy, Busy-Call, Busy-Meeting, Away, Mobile Away, Available, Offline In-Call, Offline, Pending Subscription, Not subscribed. For information on the different states, see section *16.3 Unified Instant Messaging and Presence States*.

To order a directory:

1) Click the header of the column by which you want to order the directory.

2) To reverse the order, click the same column header again.

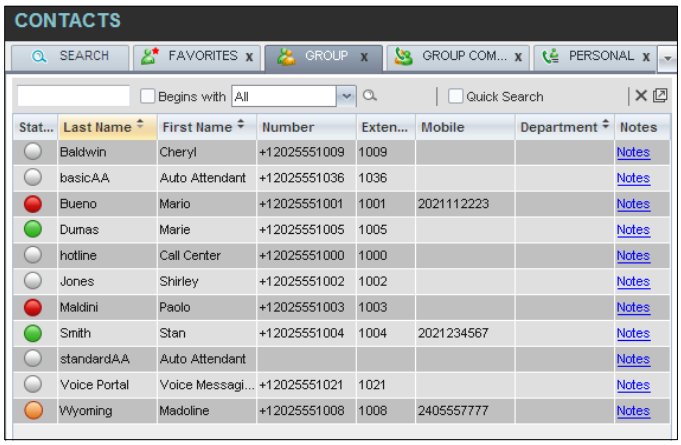

Figure 93 Sort Directory

The contacts in the selected directory are reordered based on the selected column. The sort order is saved on sign-out and preserved between sessions.

9.5 Make Notes about Contact (Enterprise Edition)

Receptionist Enterprise allows you to make notes about the contacts in your *Group/Enterprise, Favorites,* or *Monitored Contacts* directory. The maximum length of the notes for a contact is 256 characters.

> **NOTE**: The zoom level of the browser should be at 100% to prevent the *Notes* dialog box from flickering.

To make a note about a contact:

1) In the *Group/Enterprise, Favorites, Custom, or Monitored Contacts* directory, click the **Notes** link. The *Notes for <Contact Name>* dialog box appears.

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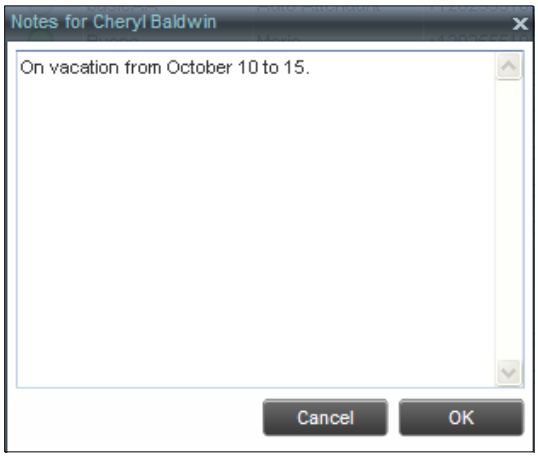

Figure 94 Notes for Contact Dialog Box

2) Enter the desired text or view or modify the existing text in the *Notes* text box.

   Any leading and trailing whitespace (spaces, tabs, and newlines) are removed from the note. If a note contains only whitespace, any existing note for the contact is deleted.

3) To save your changes and close the dialog box, click **OK**.

   To close the dialog box without saving, click **Cancel**.

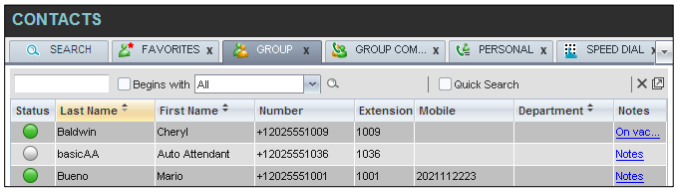

Figure 95 Group Directory – Contact Notes

9.6 Manage Personal Contacts

You can add or remove personal contacts via the web portal or in Receptionist, and the updates appear in both places. However, the updates that you make via the web portal appear in Receptionist at the next sign-in.

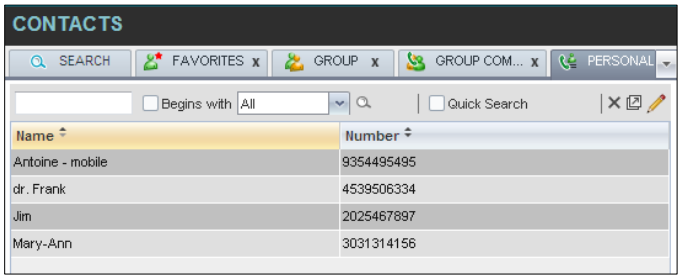

Figure 96 Personal Tab

You can perform the following operations on personal contacts:

- Add Personal Contact
- Delete Personal Contact

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You cannot modify a personal contact entry in Receptionist. To modify information for a personal contact, delete the entry and add it again.

9.6.1 Add Personal Contact

To add a personal contact:

1) In the *Personal* tab, click **Edit** . The *Edit Personal Contacts* dialog box appears.
2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

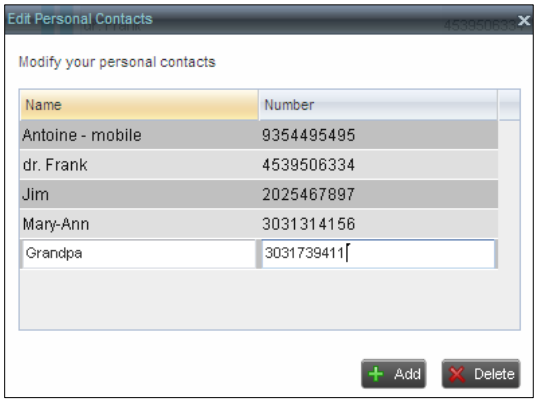

Figure 97 Edit Personal Contacts Dialog Box – Add Entry

3) In the *Name* text box, enter the contact's name or description, as you want it to appear.
4) In the *Number* text box, enter the phone number of the contact.
5) To save the changes, click anywhere in the dialog box outside the entry.

9.6.2 Delete Personal Contact

To delete a speed dial entry:

1) In the *Personal* tab, click **Edit** . The *Edit Personal Contacts* dialog box appears.
2) Select the entry to delete and click **Delete**.

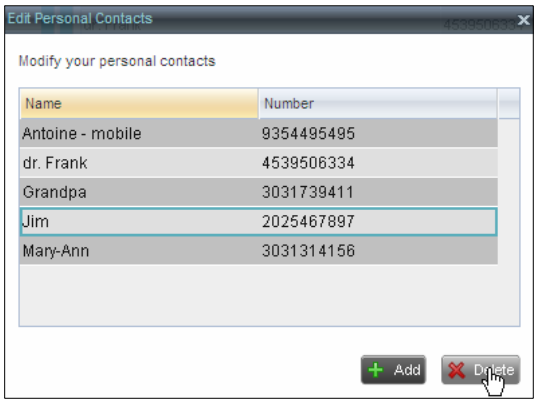

Figure 98 Edit Personal Contacts Dialog Box – Delete Entry

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9.7 Manage Speed Dial Entries

This directory is available in all editions of Receptionist. It allows you to manage and use your Speed Dial 8 and Speed Dial 100 entries. To use this feature, you must have Speed Dial 8 and/or Speed Dial 100 service assigned. If you only have one of these services, you see the entries for that service only in your *Speed Dial* tab.

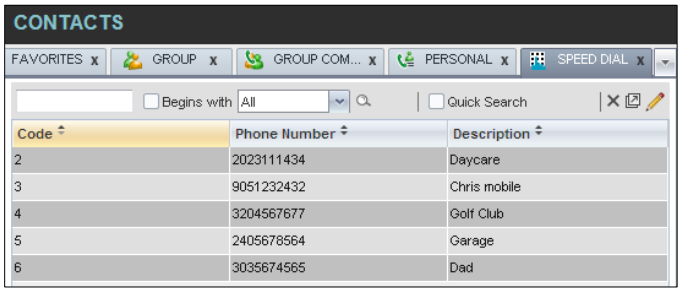

Figure 99 Speed Dial Tab

You can add or remove entries via the web portal or the Receptionist client, and the updates appear in both places. However, the updates that you make via the web portal appear only at the next sign-in to Receptionist.

To update speed dial entries using the client, perform the following operations:

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

9.7.1 Add Speed Dial Entry

To add a speed dial entry:

1) In the *Speed Dial* tab, click **Edit** . The *Edit Speed Dials* dialog box appears.

2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

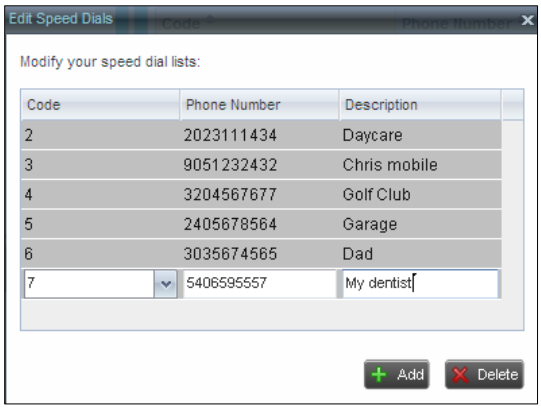

Figure 100 Edit Speed Dials Dialog Box – Add Entry

3) From the *Code* drop-down list on the left, select a speed dial code.

4) In the *Phone Number* text box, enter the phone number to assign to the code.

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5) In the *Description* text box, enter a description that allows you to identify the entry.

6) To save the entry, click anywhere in the dialog box outside the entry.

9.7.2 Modify Speed Dial Entry

To modify a speed dial entry:

1) In the *Speed Dial* tab, click the **Edit** button. The *Edit Speed Dials* dialog box appears.

2) Double-click the entry to modify. The entry becomes modifiable.

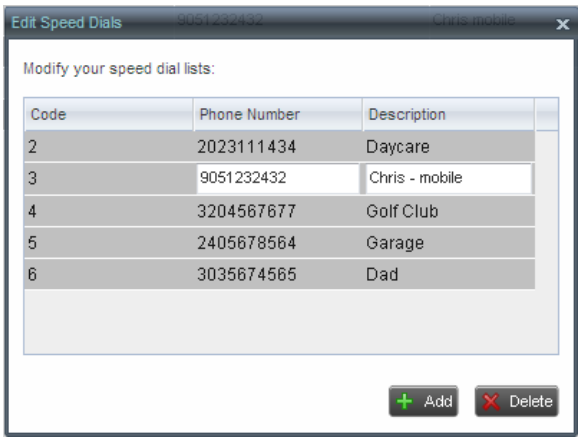

Figure 101 Edit Speed Dials Dialog Box – Modify Entry

3) Modify information as required.

4) To save the changes, click anywhere in the dialog box outside the entry.

9.7.3 Delete Speed Dial Entry

To delete a speed dial entry:

1) In the *Speed Dial* tab, click **Edit**. The *Edit Speed Dials* dialog box appears.

2) Select the entry to delete and click **Delete**.

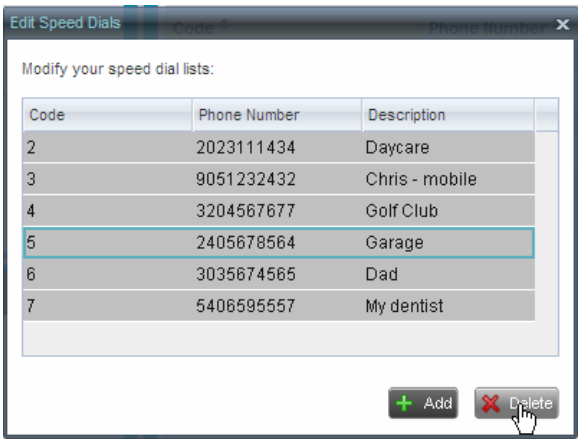

Figure 102 Edit Speed Dials Dialog Box – Delete Entry

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10 Monitor Contacts

Receptionist allows you to monitor the call state of selected contacts. All editions of Receptionist allow you to monitor contacts configured through the web portal. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

The following table summarizes the monitoring capabilities of the different editions of Receptionist.

Edition	Description
Enterprise	This is the static monitoring of up to 200 contacts and the dynamic monitoring of a configurable number of contacts enterprise-wide. The maximum number of contacts you can dynamically monitor is configured by your administrator and it cannot exceed 100.
Small Business	This is the static monitoring of up to 30 contacts enterprise-wide.
Office	This is the static monitoring of up to 8 contacts group-wide.

You use the *Favorites* tab to view the phone state of statically monitored contacts and the *Group/Enterprise* tab to view the phone state of dynamically monitored contacts.

NOTE: If a call is parked against the contact that you are monitoring, the information about the parked call also appears.

The following sections describe information and procedures related to monitoring contacts:

- Static Monitoring
- Dynamic Monitoring (Enterprise Edition)
- Request Dynamic Monitoring
- Monitored Contact's Calendar (Enterprise and Small Business Editions)
- Contact States

10.1 Static Monitoring

To statically monitor contacts, the list of contacts to monitor must be configured on your web portal. The selected contacts appear in your *Favorites* directory. However, the updates that you make to the list of contacts to monitor appear in Receptionist at the next sign-in.

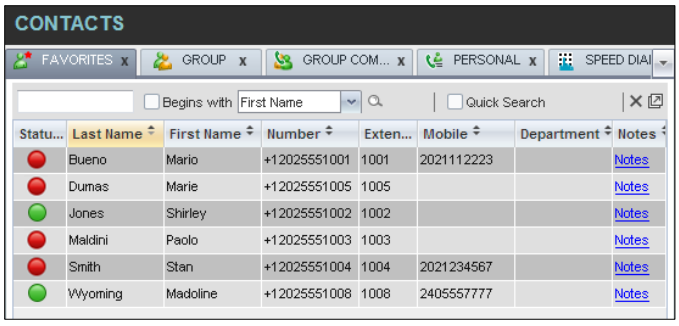

Figure 103 Favorites Directory with Monitored Contacts

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10.2 Dynamic Monitoring (Enterprise Edition)

Dynamic Monitoring allows you to view the call state of selected contacts in your *Group/Enterprise, Search, Custom,* and *Monitored Contacts* directories. When you start dynamically monitoring a contact, that contact is added to the *Monitored Contacts* directory. This directory is only visible if there are any dynamically monitored contacts.

You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit, the first contact that was selected for monitoring, is unselected, and is no longer monitored. The state of a contact that is not monitored is shown as *Unknown*.

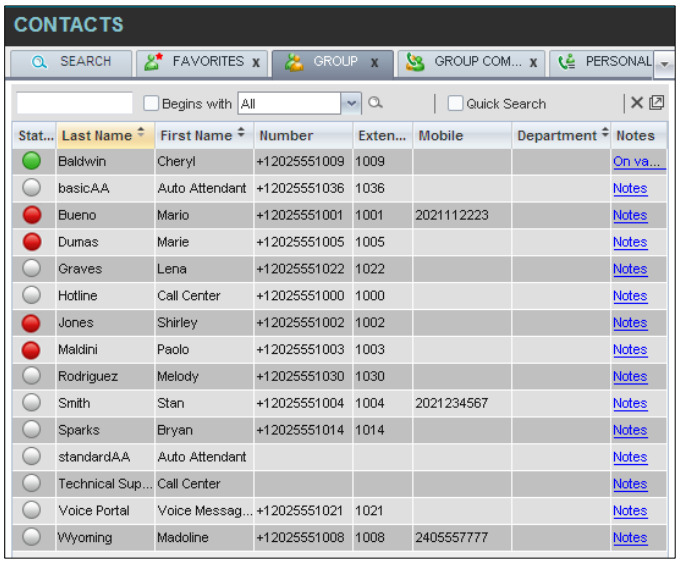

Figure 104 Group Directory with Monitored Contacts

> **NOTE**: If a contact in your *Enterprise/Group* directory is statically monitored, then their phone state is displayed without the need to explicitly request dynamic monitoring; however, it counts toward the total number of dynamically monitored contacts.

10.3 Request Dynamic Monitoring (Enterprise Edition)

The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

To monitor a contact:

In the *Group/Enterprise, Search, or Custom* directory, click the **Status** icon of the contact to monitor.

The contact is also added to the *Monitored Contacts* directory and the contact's state is displayed in the *Group/Enterprise*, *Search*, *Custom*, and *Monitored Contacts* directories.

> **NOTE**: You cannot monitor the state of virtual users. Only regular users can be monitored.

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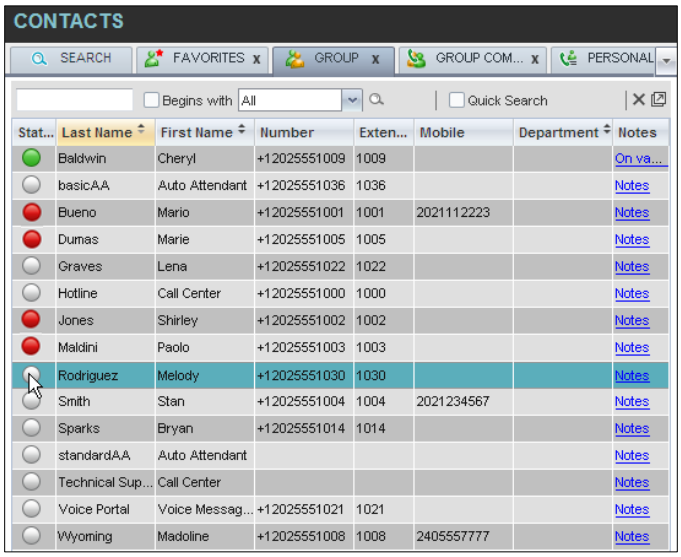

Figure 105 Group Directory – Request Contact Monitoring

This requests state notifications from Cisco BroadWorks for this contact; the contact's state is updated in real time.

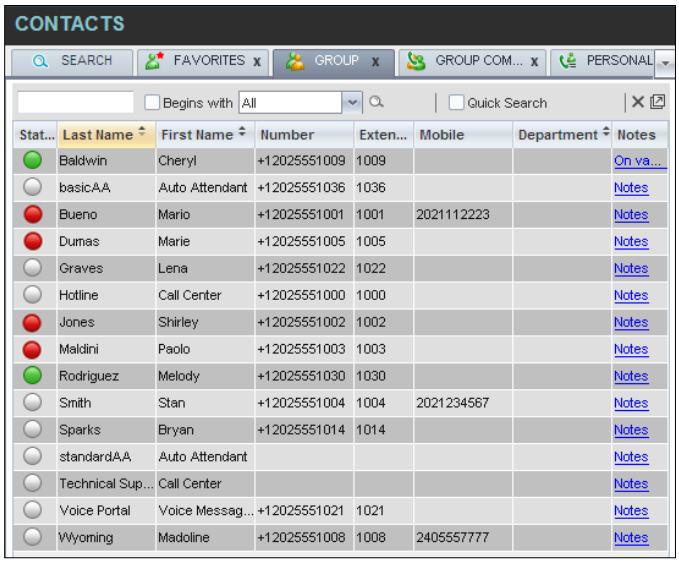

Figure 106 Group Directory – Monitored Contact

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10.4 Monitored Contact's Calendar (Enterprise and Small Business Editions)

When you expand the entry for a monitored contact, the entry displays calendar details for the contact, with information downloaded from the Microsoft Exchange server, if the Calendar Presence Integration feature is enabled.

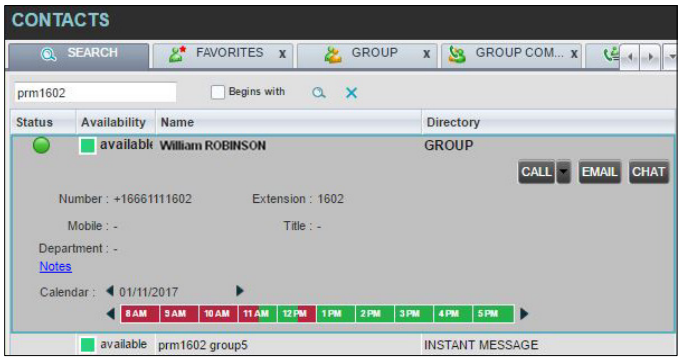

Figure 107 Contacts Pane – Monitored User's Calendar Details

The calendar is divided into one hour blocks. Those blocks can be displayed in red (when the user is busy), green (when the user is free), or partly in red and partly in green (when the user is busy only during part of the one hour block). When you move the mouse over a partially busy time block, the ToolTip shows the meeting's start and end time (for example, 9:00 AM to 9:30 AM).

By default, the calendar displays the time between 8:00 AM and 6:00 PM for the current day. You can change the date and the time displayed on the calendar, by using the Back ◀ and Forward ▶ buttons. Clicking the button shifts the displayed time period by one day/hour. The calendar details are displayed in the time zone of your local machine.

10.5 Monitored Contact's Personal Assistant State

When a monitored contact has the Personal Assistant service, the Personal Assistant presence state of the contact is integrated with the contact's line state and other services' state.

A user can set their Personal Assistant to one of the following states, and can optionally provide a date and time when they are planning to be back:

- None
- Business Trip
- Gone for the Day
- Lunch
- Meeting
- Out of the Office
- Temporarily Out
- Training
- Unavailable
- Vacation

For information on how the Personal Assistant presence of a contact is integrated with Receptionist, see section *10.6 Contact States*.

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10.6 Contact States

The state of a monitored contact is represented by an icon located to the left of the contact's name. This state integrates the state of the contact's line, the contact's Microsoft Exchange calendar presence, and the state of services such as Call Forwarding Always, Do Not Disturb, Personal Assistant, and Privacy.

The following table lists the possible contact states.

Icon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar	Personal Assistant	Call State
	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
	In a Meeting	N/A	N/A		Free or Tentative	Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	None	No active calls

NOTE: When a contact enables Privacy, this terminates monitoring of the contact's state for the current login session. To be able to monitor their state again, you must sign out and then sign in after the contact has disabled Privacy.

When you place the mouse over the Status icon of a monitored contact, a ToolTip appears providing additional information, as applicable. The ToolTip displays the information about the state that has the highest precedence. For example, if a monitored contact enables Privacy, the ToolTip displays "Private" independent of whether the contact is on a call, in a meeting, or away. See the following table for information about ToolTip messages displayed for a contact in the different states.

ToolTip Message	State in Receptionist	Additional Conditions
Private	Private	
On a Call	On a Call	
Ringing	Ringing	

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ToolTip Message	State in Receptionist	Additional Conditions
Away	Away	Contact's calendar shows Out of Office
<Contacts's first an last name> is on a business trip/gone for the day/at lunch/out of the office/temporarily out/on vacation/unavailable [until <date/time>]	Away	Contact's calendar shows Free or Tentative and their Personal Assistant is set to any state except None, Meeting, or Training
In a Meeting	In a Meeting	Contact's calendar shows Busy
<Contacts's first an last name> is in a meeting/training [until <date/time>]	In a Meeting	Contact's calendar shows Free or Tentative and their Personal Assistant is set to Meeting or Training
Call Forwarding Always	Call Forwarding Always	
Do Not Disturb	Do Not Disturb	
Available	Available	

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11 Manage Call History

You can organize call logs and delete selected call logs or all call logs from Call History.

11.1 View Call History

Receptionist allows you to view your passed calls. By default, the calls are grouped into dialed, received, and missed calls.

> **NOTE**: The format in which date and time are displayed in the *Call History* dialog box depends on the date and time settings selected on the *Settings* → *General* configuration page. For more information, see section *13.1.4 Date Format* and *13.1.5 Time Format*.

To view your call history:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears displaying your past calls. The calls are grouped into dialed, received, and missed calls. By default, missed calls are displayed.

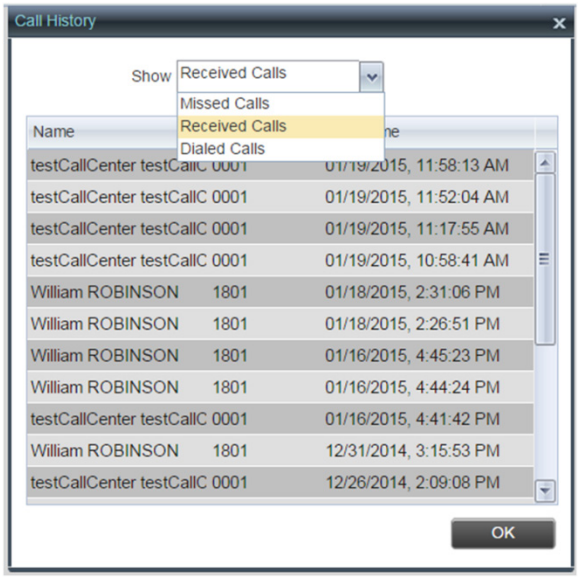


Figure 108 Call History Dialog Box

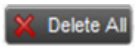
2) To show calls in a specific group, select that group from the *Show* drop-down list.

11.2 Delete Call History

You can delete a selected call log or all call logs from Call History.

To delete call logs from Call History:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

2) To delete all call logs, click **Delete All**  .

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3) From the *Show* drop-down list, select a grouping.

4) To delete a selected log, click **Delete Call Log** for that log.

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12 Manage Queued Calls (Enterprise Edition)

Receptionist allows you to manage calls in selected call centers (up to five) and monitor calls in real time. You manage queued calls using the *Queued Calls* pane. This functionality is only available if you have the Receptionist – Enterprise license assigned and either you are assigned to a call center (as a supervisor or agent) or you have the BroadWorks Supervisor license assigned.

Figure 109 Queued Calls Pane

This section describes the following procedures you perform to manage queued calls:

- Select Call Centers to Manage
- Modify Number of Calls to Display
- Retrieve Call from Queue
- Transfer Call to Ad Hoc Number
- Transfer Call Between Queues
- Transfer Call to Top of Queue (Premium Call Center)
- Promote Call in Queue (Premium Call Center)
- Group Calls
- Order Queued Calls

12.1 Select Call Centers to Manage

After you sign in to Receptionist, select the call centers you want to manage (up to five).

To select call centers:

1) In the *Queued Calls* pane, click **Options** and select the *Edit Queue Favorite Dialog* option.

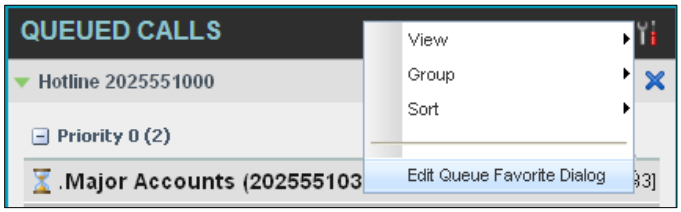

Figure 110 Queued Calls – Options – Edit Queue Favorite Dialog

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The *Edit Queue Favorites* dialog box appears.

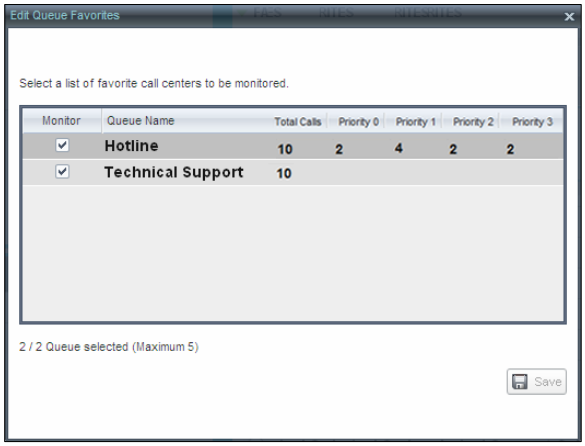

Figure 111 Edit Queue Favorites Dialog Box

2) Select the check boxes for the call centers you want to monitor.

3) Click **Save**.

   The selected call centers appear in your *Queued Calls* pane.

12.2 Modify Number of Calls to Display

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed. For each Premium call center, you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

1) In the *Queued Calls* pane, click **Options** and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.

2) For each Standard call center you are monitoring, set the total number of calls to display.

3) For each Premium call center you are monitoring, set the number of calls to display in each priority bucket. The total number of calls in all priority bucket cannot exceed 50.

12.3 View Queued Calls

To view calls in a queue:

Click the **Expand** button for that queue.

12.4 Retrieve Call from Queue

You can retrieve a call from a queue to your phone device.

To retrieve a call from the queue:

In the *Queued Calls* pane, click the call to expand it and click **Retrieve** RETRIEVE for that call.

Once you retrieve the call, the call appears in the *Call Console*, and you treat it as any other call.

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12.5 Transfer Call to Ad Hoc Number

To transfer a call to an ad hoc number:

1) In the *Queued Calls* pane, select the call.

2) In the *Dialer*, enter the destination number and click **Transfer** Transfer.

Figure 112 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

12.6 Transfer Call Between Queues

To transfer a call to another queue:

1) In the *Queued Calls* pane, select the call.

2) In the *Contacts* pane, expand the *Queues* tab.

3) Click the target queue and click **Transfer** TXR for that queue.

   The call is transferred and removed from the original queue.

12.7 Change Position of Call in Queue

To change the position of a call in the queue:

1) In the *Queued Calls* pane, click the call and click **Reorder** REORDER.

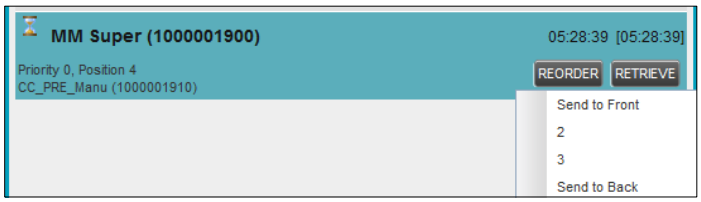

Figure 113 Reorder Queued Call

2) In the drop-down box that appears, select the new position in the queue.

   The call is placed at the new position.

> **NOTE:** The list can contain a maximum of 24 reorder positions that you can choose from to reorder a call in the queue, in addition to the *Send to Back* and *Sent to Front* options.

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12.8 Transfer Call to Top of Queue (Premium Call Center)

If your administrator has configured the call center with the Transfer to Top feature, follow this procedure to transfer the call to the top of the queue.

You can only transfer a call to the top of the highest priority bucket (bucket with priority "0"). There must be at least two calls in the target queue.

1) In the *Queued Calls* pane, click the target call to expand it.

2) Click **Reorder**

and select *Send to Front* from the list that appears.

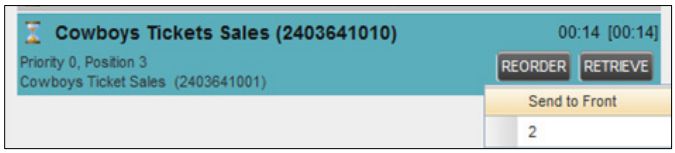

Figure 114 Transfer Call to Top of Queue

12.9 Promote Call in Queue (Premium Call Center)

In Premium call centers, a priority is attached to an incoming call based on the DNIS number on which the call is received. You can manually promote calls from a lower priority bucket to a higher priority bucket. A promoted call ends up as the last call in the higher priority bucket with a wait time of zero seconds.

To promote a call, that is, to change its priority:

In the *Queued Calls* pane, select the call to promote and click **Promote**

.

The queued call is promoted to the end of the next highest priority bucket.

12.10 Group Calls

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

1) In the *Queued Calls* pane, click **Options**
, select *Group,* and then select or deselect *Group by priority*. This action applies to all monitored call centers.

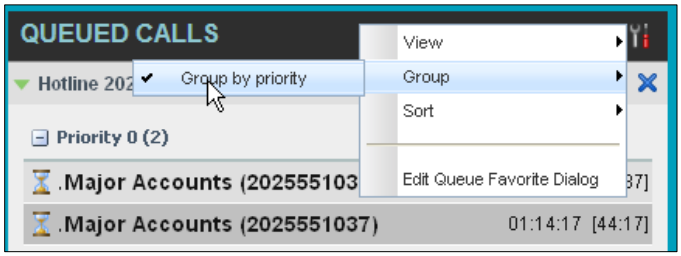

Figure 115 Queued Calls – Options – Group

2) To ungroup calls, unselect the *Group by priority* option.

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12.11 Order Queued Calls

Queued calls can be ordered according to their total waiting time or according to their waiting time in the current priority bucket.

To order queued calls:

1) In the *Queued Calls* pane, click **Options** .

2) Select *Sort* and then the ordering option you want. This operation applies to all monitored call centers.

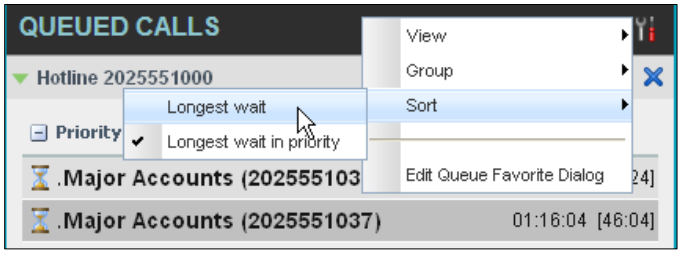

Figure 116 Queued Calls – Options – Sort

NOTE: The ordering does not work when calls are grouped. If required, first ungroup the calls.

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13 Configure Receptionist

You use the Settings link at the top right-hand corner of the main page to access the *Settings* page where you can configure various aspects of the Receptionist application.

> **NOTE**: Do **not** use the internet browser's Back button to return to the main interface.

This section describes the *Settings* pages that you use to configure Receptionist:

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – About

> **NOTE**: Depending on your system configuration, some settings may not be available.

13.1 Settings – General

You use the *General* tab to configure miscellaneous settings that improve the usability of Receptionist.

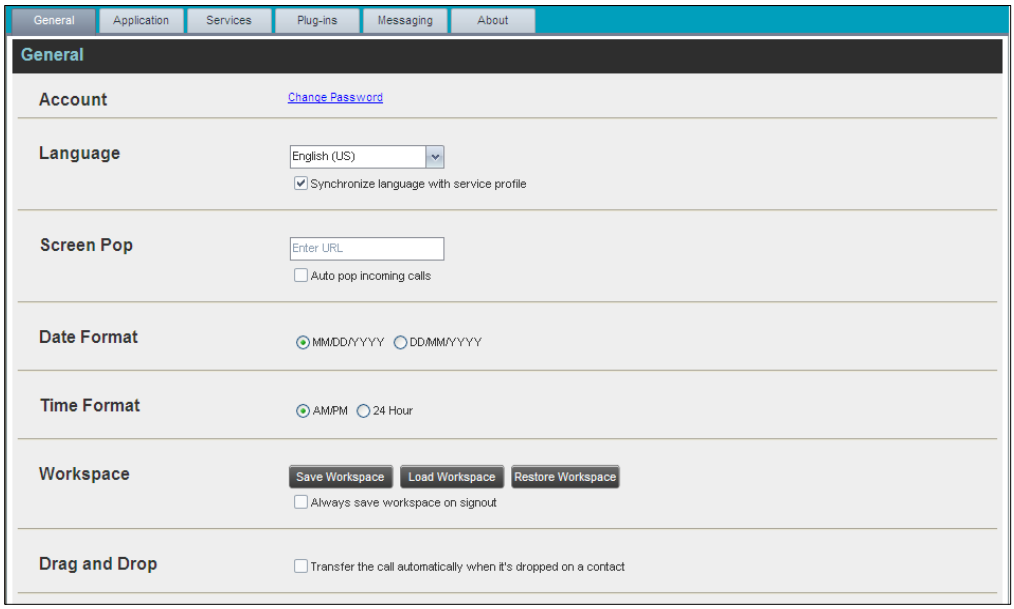

Figure 117 Settings – General

The following subsections describe the settings that can be configured on this page.

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13.1.1 Account

You use this area to change your Cisco BroadWorks password. Note that this option is only available when you use your Cisco BroadWorks credentials to sign in to Receptionist.

Receptionist shares login credentials with Cisco BroadWorks. So when you change your password here, remember to use this new password when accessing your web portal.

> **NOTE**: The password you enter must meet password requirements set on Cisco BroadWorks.

To change your password:

1) Click the **Change Password** link. The section expands, allowing you to change your password.

Figure 118 Account – Change Password

2) Enter your current and new password and click **Change Password**.

   Note that the Reset button does not reset your password. It only clears the input boxes.

13.1.2 Language

The *Language* settings allow you to select the language of the user interface.

- The drop-down list identifies the languages available in your edition of Receptionist. To change the language, select a new language from the list.
- *Synchronize language to my profile* – When this option is checked, Receptionist synchronizes the language with your Cisco BroadWorks profile and ignores the language selection on this page.

13.1.3 Screen Pop

You use the *Screen Pop* settings to configure the URL that may be launched on incoming calls.

- *Enter URL* – This text box allows you to enter the URL address of the web page that Receptionist opens using the default browser when you click the Web Pop URL button in the *Call Notification* pop-up window.
- *Auto pop for Incoming Calls* – When this option is checked, Receptionist launches the Web Pop URL without your being required to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

The Customer Experience (CX) team is available to design web applications that can interface with different databases.

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The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database. For example:

```
http://www.mysite.com/webapp.php?remoteNumber=__REMOTE_PHONE__&sp=__S
ERVICE_PROVIDER__
```

This URL passes the incoming calling number and the service provider ID to the web application at www.mysite.com. The web application formats the data for the applicable database and launches the web page on your PC.

There are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- __USER__: The user's Cisco BroadWorks ID (Note that in this case, the "user" is the Cisco BroadWorks subscriber.)
- __FIRST__: The first name of the user
- __LAST__: The last name of the user
- __EMAIL__: The email address of the user
- __GROUP__: The name of the Cisco BroadWorks group to which the user belongs
- __SERVICE_PROVIDER__: The name of the Cisco BroadWorks service provider to which the user belongs
- __PHONE__: The phone number of the user
- __REMOTE_PHONE__: The phone number of the remote party
- __REMOTE_NAME__: The name of the remote party (when available)
- __CALL_TYPE__: "Incoming" or "Outgoing"
- __DNIS_NAME__: The name of the DNIS on which the call was received
- __DNIS_PHONE__: The phone number of the DNIS on which the call was received
- __CLIENT_SESSION_INFO__: The client session identifier (when available)
- __EXT_TRACKING_ID__: The external tracking ID for the call
- REDIRECTED_NAME_1__ , __REDIRECTED_NAME_2__, and so on: The name of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- __REDIRECTED_PHONE_1__, __REDIRECTED_PHONE_2__, and so on: The phone number of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- __REDIRECTED_USERID_1__, __REDIRECTED_USERID_2__, and so on: The user ID of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent

NOTE: The maximum number of redirections that can be displayed on a *Web Pop URL* page is configured by your administrator.

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13.1.4 Date Format

This setting allows you to select the format to use for displaying the date in the calendar details for a contact and in the *Call History* dialog box. The possible options are:

- MM/DD/YYYY
- DD/MM/YYYY

13.1.5 Time Format

This setting allows you to select the format to use for displaying the time in chat windows and in the calendar details for a contact and in the *Call History* dialog box. The possible options are:

- AM/PM
- 24 hours

13.1.6 Workspace

Receptionist allows you to customize elements of your workspace, such as the size and placement of the main window on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed
- The size of the panes (*Call Console, Contacts*, and *Queued Calls*)

NOTE 1: This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

NOTE 2: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Buttons:

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore Workspace* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Receptionist asks you whether you want to save your current workspace. To save your workspace automatically when signing out without being asked, check the *Always save workspace on signout* box.

To customize your workspace:

1) Arrange the windows the way you like.
2) Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore Workspace**.

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3) At any time to return to the last saved configuration, click the **Load Workspace** button.

13.1.7 Drag and Drop

You use the *Drag and Drop* area to specify whether a call should be automatically transferred when dropped on a contact.

- *Transfer the call automatically when it's dropped on a contact* – This setting allows you to enable or disable automatic call transfer when you drag and drop. When this box is checked, the call is automatically transferred to the contact's phone number when the call is dropped on the contact.

13.2 Settings – Application

You use the *Application* tab to configure your availability to take calls as well as the policies used to process calls.

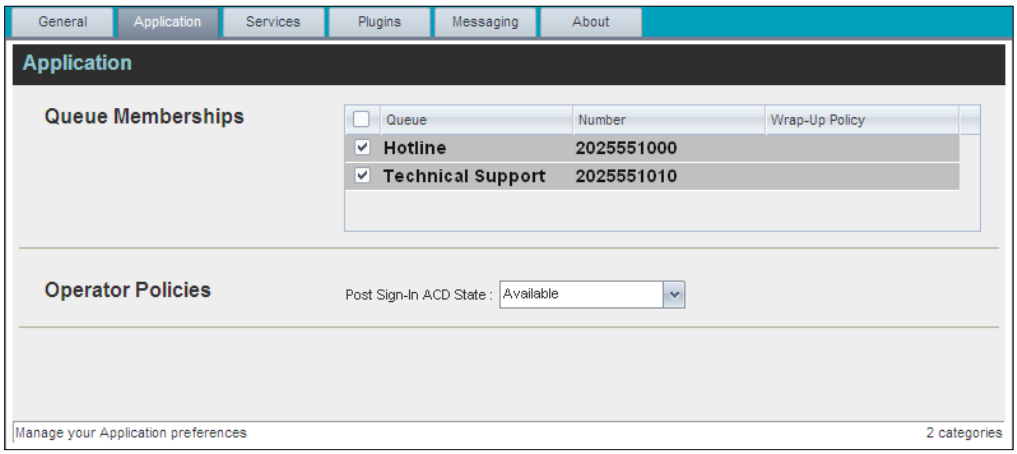

Figure 119 Settings – Application

The settings can be configured on this page and are described in the following subsections.

13.2.1 Queue Membership

These settings allow you to select which queues you want to join.

To join queues:

1) To join a specific queue, select the check box on the line for the queue.

2) To join all queues, select the check box in the column header.

> **NOTE**: If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue if you are not allowed to do it yourself, contact your administrator.

For queues on this page, you can select columns to appear and you can sort and group queues by any column.

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13.2.2 Operator Policies

The *Operator Policies* setting allows you to select your post sign-in state in your queues.

Post Sign-In ACD State – This drop-down list allows you to select your availability to receive calls from queues upon signing in to Receptionist.

13.3 Settings – Services

You use the *Services* tab to configure various services assigned to you by your administrator on Cisco BroadWorks, which are applicable to Receptionist. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

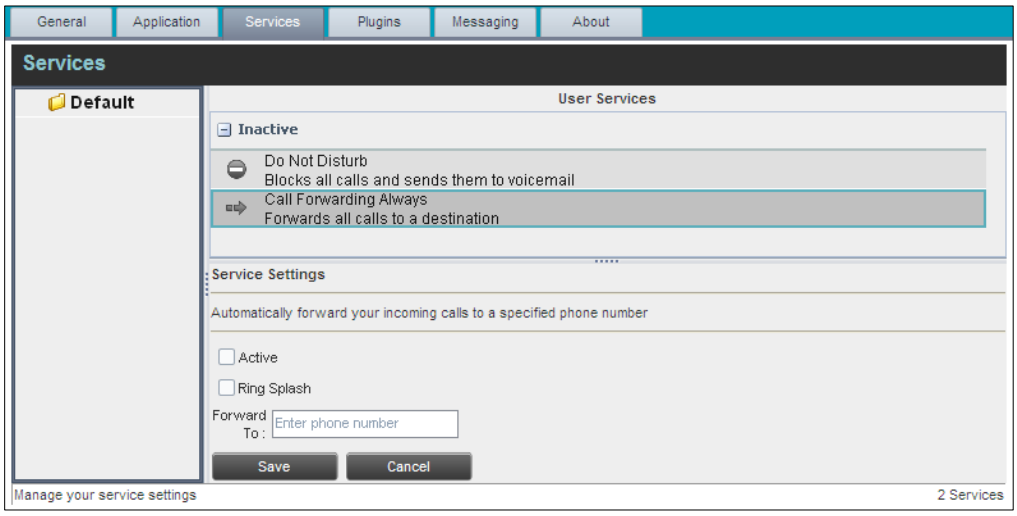

Figure 120 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- Call Forwarding Always – When you activate this service, you must provide the phone number to which your calls are forwarded. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1) Select the service and check the *Active* box. The service is moved from the *Inactive* to *Active* category.
2) If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to which your calls are forwarded.
3) To generate a ring splash for incoming calls, check the *Ring Splash* option.
4) To save your changes, click **Save**.

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13.4 Settings – Plug-ins

You use the *Plug-ins* tab to configure the desktop integration components used by Receptionist to provide functionality such as call notification, LDAP and Outlook directories, program shortcuts, and call logs.

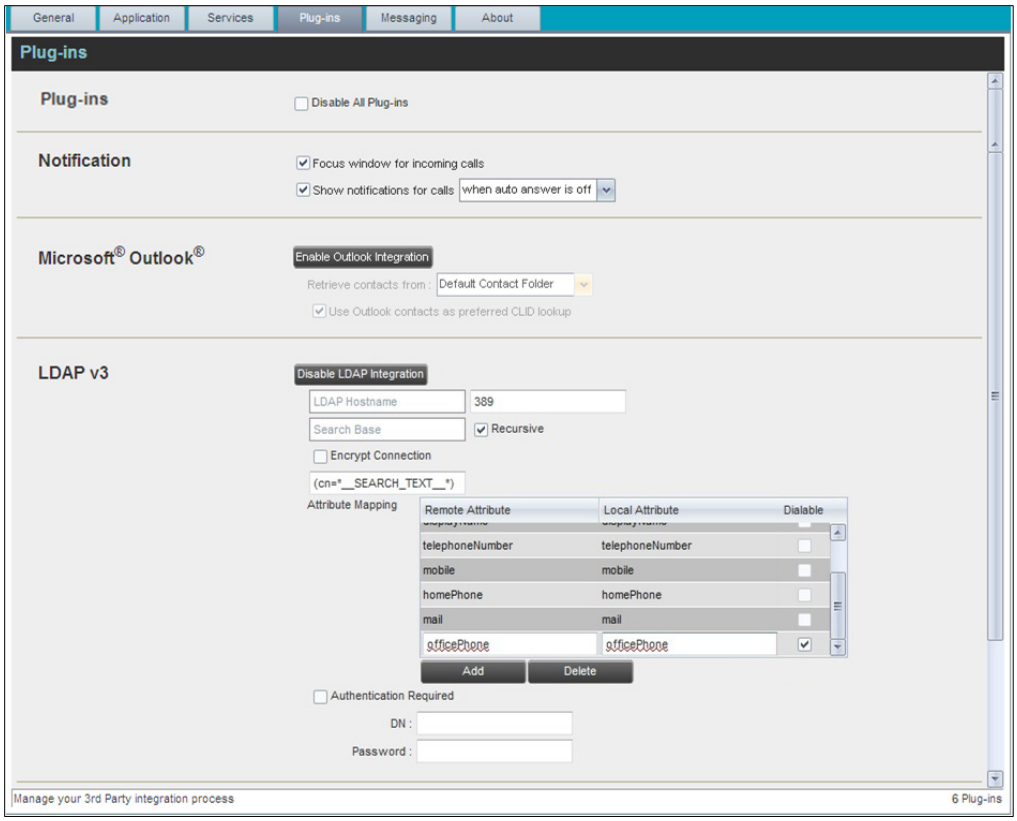

Figure 121 Settings – Plug-ins (Top of Page)

13.4.1 Plug-ins

Check the *Disable All Plug-ins* box to disable all desktop integration components of Receptionist.

13.4.2 Notification

These options control when and how incoming call notification "pop-up toasts" are displayed. The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window on incoming calls.

  This does not work in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist.

- *Show notifications for calls* – When this option is checked, Receptionist displays the *Call Notification* pop-up window on top of other applications' windows when you receive a call. When you check this box, you must select an option from the drop-down list to specify the condition under which notifications are displayed.

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This does not work if there are other tabs open in the same web browser window as Receptionist. In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

13.4.3 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Receptionist. They are only visible if Outlook integration is enabled in Receptionist.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from Cisco BroadWorks.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

NOTE: The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts.

13.4.4 LDAP v3

LDAP settings allow you integrate an *LDAP* directory with Receptionist. These options are only visible if LDAP integration is enabled in Receptionist. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

To import a certificate:

1) Click **Start** and then select *Run…*
2) Type “cmd” and click **OK**.
3) Type “<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts”.

To verify the certificate:

1) Click **Start** and select *Run…*
2) Type “cmd” and click **OK**.
3) Type “<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>”.

The *LDAP* directory options are as follows:

- *Enable/Disable LDAP Integration* – This determines whether Receptionist provides *LDAP* directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.
- *LDAP Hostname* – This is the network address of the LDAP server.
- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.

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- *Search Base* – The text box determines the location in the LDAP server tree that Receptionist looks in when executing a search. The check box, when checked, searches all sub-trees within the search base until the specifications are found.
- *Encrypt Connection* – This option determines whether Receptionist uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.
- *("cn=__Search__Text")* – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively, in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Attribute Mapping* – This table controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.

  In each row of the table, do the following:

  - Enter an LDAP attribute in the *Remote Attribute* column.
  - Enter a corresponding local attribute in the *Local Attribute* column. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".
  - For dialable attributes such as "phoneNumber" or "mobile", check the *Dialable* box to be able to dial the number from Receptionist by simply clicking the contact.
- *Authentication Required* – When this box is checked, Receptionist must provide a user name and password to the directory server to conduct searches.
- *DN* – This is the user name Receptionist uses when connecting to the LDAP server when *Authentication Required* is checked.
- *Password* – This is the password that corresponds to the authentication *DN*.

13.4.5 Program Shortcuts

You use the *Program Shortcuts* settings to create Receptionist shortcuts on your desktop for convenient access to Receptionist.

The program shortcuts plug-in allows for the creation of a desktop shortcut on a Windows platform, which when clicked, launches Receptionist in your default web browser.

- *Add Shortcut* – This button, when clicked, creates a Receptionist shortcut on your desktop.
- *Remove Shortcut* – This button, when clicked, removes the previously created Receptionist shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

NOTE: A shortcut created with the same name as that of an already existing shortcut but with a different launch URL may not point to the new launch URL until you sign out and restart the machine.

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13.4.6 Activity Archive

This plug-in software provides the ability to store call event statistics locally on your computer.

- *Enable/Disable Call Event Log Integration* – This double-action button allows you to enable or disable log archival on your computer.
- *Rotate Log* – This parameter allows you to specify the frequency with which the log is rotated. You select the frequency from the drop-down list.
- *Open Log Location* – This link, when clicked, goes to the location on your computer where the log is stored.

The log is saved at the desired interval as a comma-separated value (CSV) file in the following path:

```
<Drive>:\Documents and Settings\<Windows_Username>\Application
Data\BroadSoft\BW Receptionist\profiles\<BW_UserID>\statistics
```

where:

- *Drive* is the drive letter where your profile is stored (typically C)
- *Windows_Username* is your Windows user name
- *BW_UserID* is your Cisco BroadWorks user ID

The following events are captured based on activity that occurs on the Receptionist client.

Statistic	Description	Allowed Values	Example Value
BroadWorks User ID	Cisco BroadWorks user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound queued calls only	String, null	ABCSales
Availability	Operator's *joined* state	Joined, Not Joined, null	Joined
ACD State	Operator's *ACD* state. Typically, operators should always be Available. This value cannot be changed in Receptionist.	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	null
Call ID	ID of the call	String, null	192.168.1.5:1
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2) 0 = BroadWorks Originator 1 = Originator 2 = Terminator	0
Remote Name	External caller name	String or null	null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe

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Statistic	Description	Allowed Values	Example Value
Last Redirected Number	Last redirected number	String or null	null
Time	Date stamp of record	Long date/time format	2008-04-03 12:08:17.859

NOTE: Each row in the archive file records a *single* event change and as such, columns such as *Availability*, *ACD State*, and *Call State* may contain null values since an alternate column value caused the event change. For example, *Incoming* is stored in *Call State* while *Availability* (and other columns) store null.

13.5 Settings – Messaging

The *Messaging* tab allows you to configure various messaging options for Receptionist. Currently, email messaging and instant messaging are supported.

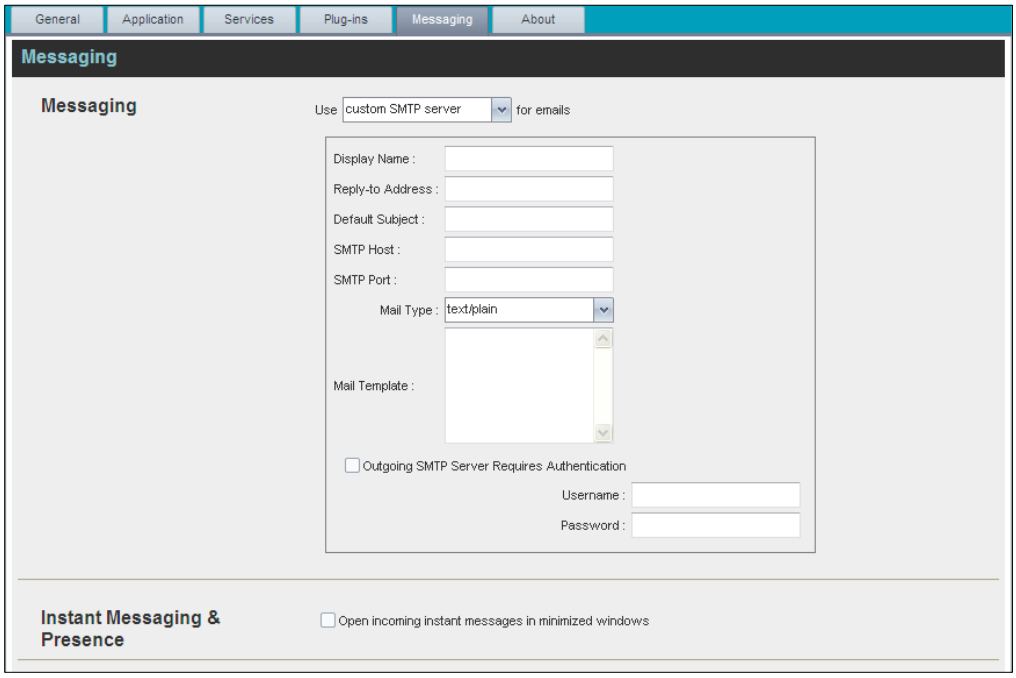

Figure 122 Settings – Messaging

13.5.1 Messaging

These options allow you to specify the mail client to use for sending email messages.

From the drop-down list, select the mail client to use for emails.

If you selected the *custom SMTP server* option, you must also configure the following options:

- *Display Name* – This is the name that is displayed in the *From* field.
- *Reply-to Address* – This is the address where reply messages can be sent.
- *Default Subject* – This is the subject that appears when you generate an email message in Receptionist.

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- *SMTP Host* – This is the IP address of the SMTP host.
- *SMTP Port* – This is the port of the SMTP host.
- *Mail Template* – This is the mail template to use.
- *Outgoing SMTP Server Requires Authentication* – When this option is set, authentication is required to send emails.
- *Username* – This is the name you must enter to authenticate yourself.
- *Password* – This is the password part of your authentication credentials.

13.5.2 Instant Messaging and Presence

Check the *Open incoming instant messages in minimized windows* check box if you want the chat windows that appear when you receive an instant message to be displayed in minimized format.

13.6 Settings – About

Use the *About* tab to view information about Receptionist.

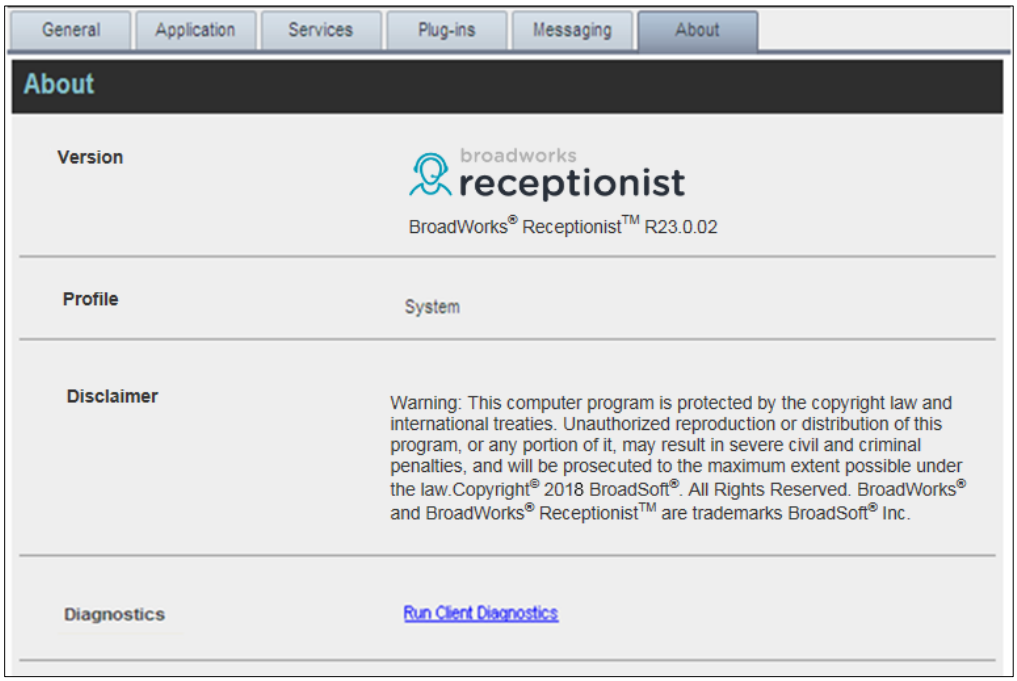

Figure 123 Settings – About Page with Link to Diagnostics Tool

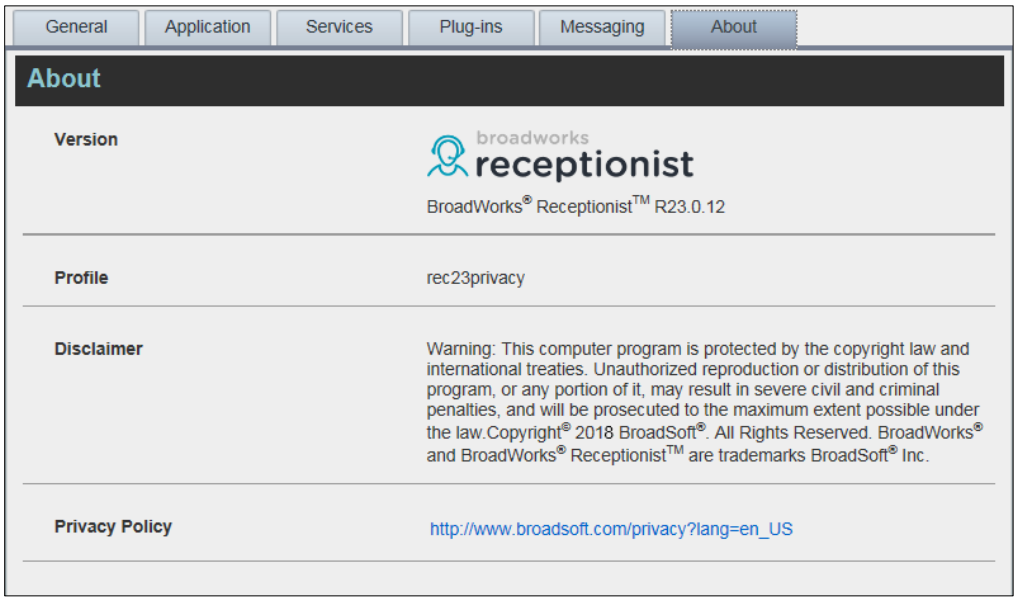

Figure 124 Settings – About Page with Link to Privacy Policy Page

The following information is provided on this page:

- *Version* – This is the software version of the Receptionist client.
- *Profile* – This is the Receptionist client profile used.
- *Disclaimer* – This is the Receptionist copyright Information.
- *Diagnostics* – When available, this allows you to access the Diagnostic Tool. For more information about the tool, see *Appendix B: Diagnostic Tool*.
- *Privacy Policy* – When available, this allows you to access the *Privacy Policy* page. Note that each time you click the Privacy Policy link, the page is displayed in a new window. For an example of the *Privacy Policy* page, see section *4.2.4 Display Privacy Policy*.

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14 Configure Web Browser

14.1 Internet Explorer Settings for Full Screen Mode

For the supported versions of Internet Explorer, see the *Third-Party Software Dependencies for Hosted Thin Clients* matrix available from Cisco at xchange.broasoft.com. If you have trouble with the Xchange link, copy and paste it into a web browser.

Internet Explorer must be configured as follows to enable the Full Screen link in Receptionist. Otherwise, the link has no effect; Receptionist is not displayed in full screen mode when the Full Screen link is clicked and no error message is displayed to the user.

1) On the Internet Explorer *Menu* bar, select the *Tools* menu and then click **Internet Options**.

2) In the *Internet Options* dialog box, click the **Security** tab and then click the **Custom level...** button.

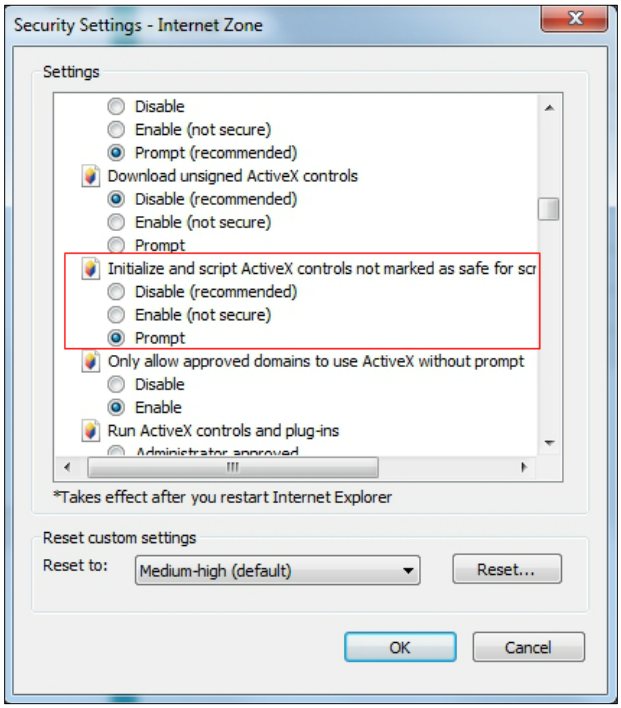

Figure 125 Security Settings – Internet Zone Dialog Box

3) In the *Security Settings – Internet Zone* dialog box, scroll down to *Initialize and script ActiveX controls not marked as safe for scripting* setting in the *ActiveX controls and plug-ins* section.

4) Select *Enable* or *Prompt*.

5) Restart Internet Explorer.

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14.2 Certificate for Desktop Integration Components

A certificate required to run Receptionist desktop integration features must be added to the browser-specific certificate store location on your machine. For the list of the desktop integration components, see section *13.4 Settings – Plug-ins*.

The following table displays the list of browsers and their respective certificate trust store location.

Browser	Windows	Mac OS
Chrome	Windows Certificate Store	System Keychain
Internet Explorer	Windows Certificate Store	Not Applicable
Safari	Not Applicable	System Keychain
Firefox	Firefox Certificate Store	Firefox Certificate Store

The following subsections provide instructions for adding the certificate in the different environments.

14.2.1 Microsoft Windows Certificate Store

If the certificate is not yet imported to the certificate store, the following dialog box appears.

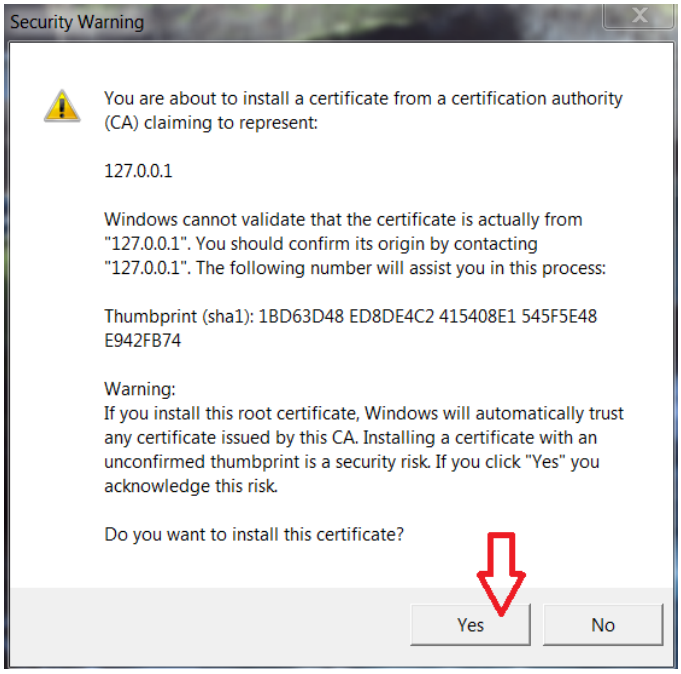

Figure 126 Microsoft Windows – Security Warning

1) Click **Yes** to install the certificate.

   If you are denied access to the certificate trust store to import the certificate, the following dialog box appears.

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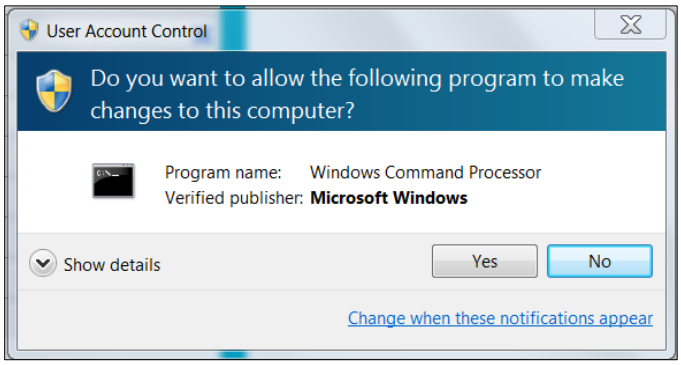

Figure 127 Microsoft Windows – User Account Control

2) Click **Yes** to install the certificate.

14.2.2 Apple System Keychain

If the certificate is not previously imported to the Apple System Keychain, the certificate is automatically installed with the name “127.0.0.1”.

Once the certificate is successfully added, do the following to accept the certificate:

1) In the *Dock*, open *Finder*.

2) Select *Applications* and then *Utilities*.

3) In the list of utilities, double-click **Keychain Access**. The *Keychain Access* window appears.

4) In the *Keychain Access* window, double-click the certificate. The *Certificate* window appears.

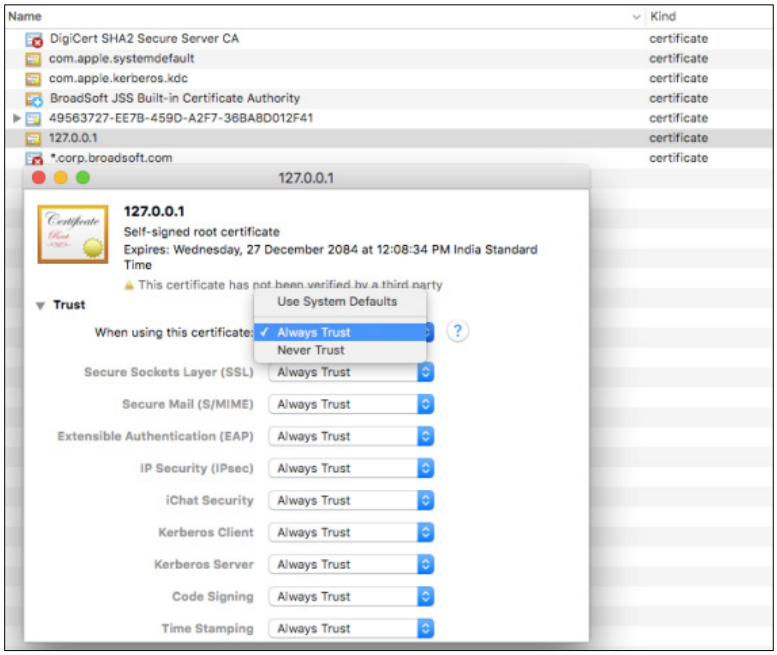

Figure 128 Mac OS – Certificate Window

5) In the *Trust* section, select *Always Trust* for *When using this certificate*.

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14.2.3 Firefox Certificate Store

Mozilla Firefox has its own certificate store. If the certificate is not yet imported to the Firefox certificate store and if the browser is open during the current session, the following dialog box appears.

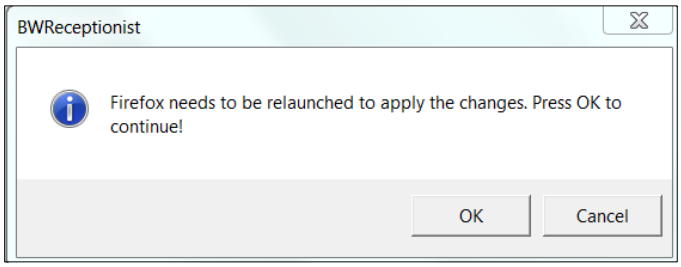

Figure 129 Receptionist – Request to Relaunch Firefox

- Click **OK** to import the certificate to Firefox.

14.3 Security Settings for Desktop Integration Features

As you sign to Receptionist, a JNLP file is downloaded and you are asked to click the link shown in the browser. Due to security restrictions the application may not run. If this occurs, perform the steps specified in the following subsections.

NOTE: You should run Java JRE 1.6 or higher.

14.3.1 In MAC OS X

In MAC OS X, due to security-related restrictions, the JNLP may not execute even if you click on it. If this occurs, perform the following steps.

1) Open *System Preferences* and select *Security and Privacy*. The *Security & Privacy* window appears, displaying the *General* tab.

Figure 130 Mac OS X – Security & Privacy

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2) Unlock the panel with the lock icon.

3) In the *Allow applications downloaded from* section, select *Anywhere*.

14.3.2 In Internet Explorer

If you are running Internet Explorer, you must perform the following steps to run JNLP.

NOTE: You must run Receptionist over HTTPS with Internet Explorer.

1) From the Internet Explorer *Menu* bar, select *Tools* and then *Internet Options*. The *Internet Options* window appears.

2) Click the **Security** tab.

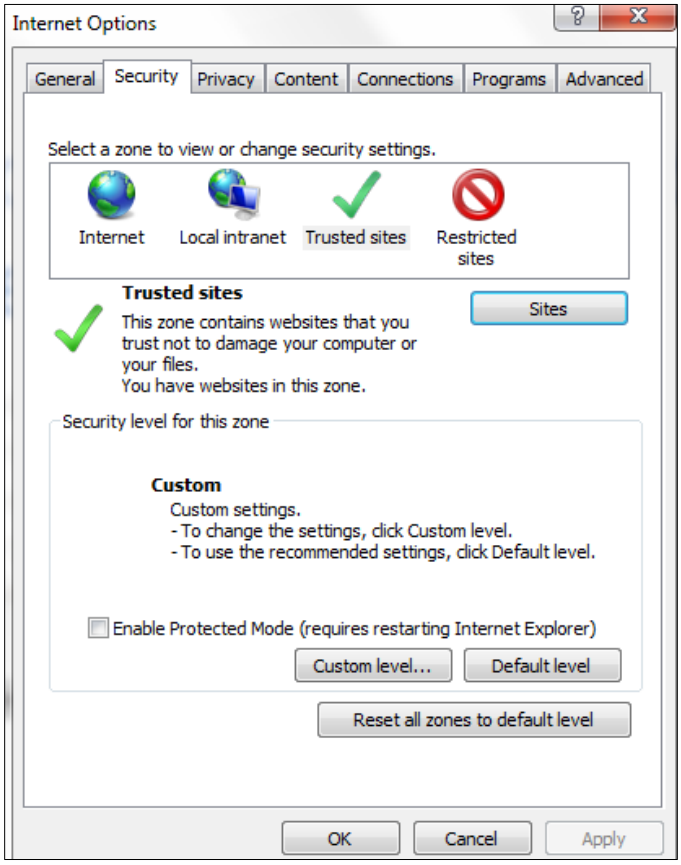

Figure 131 Internet Explorer – Internet Options – Security

3) Click **Trusted sites** and then click **Sites**. The *Trusted sites* window appears.

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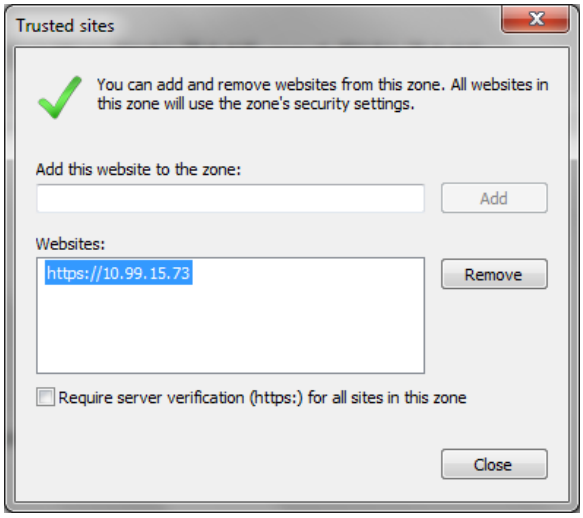

Figure 132 Internet Explorer – Trusted Sites

4) In the *Add this website to the zone* text box, enter the Receptionist client URL and then click **Add**. The URL appears in the *Websites* box.

5) Click **Close**.

6) In the *Internet Options* window, click **Custom level**. The *Security Settings – Trusted Sites Zone* window appears.

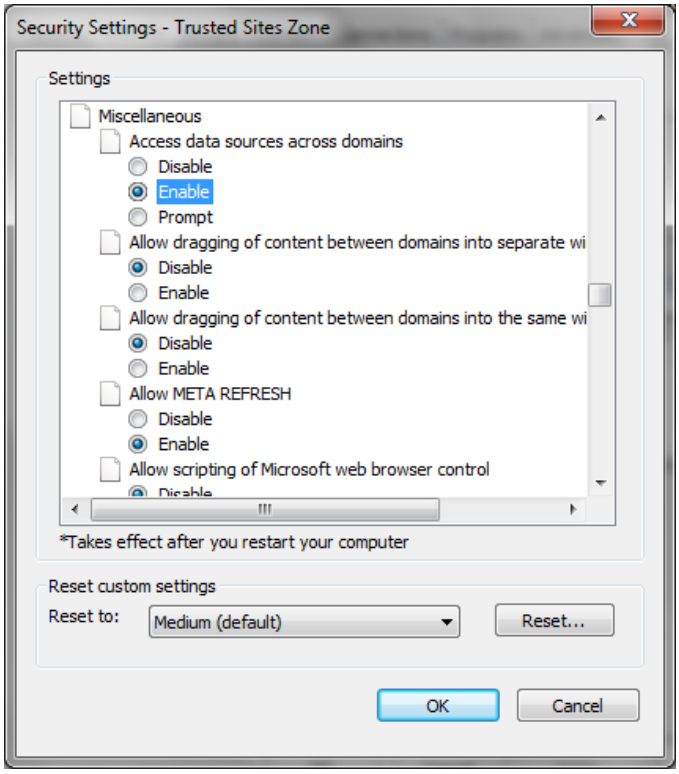

Figure 133 Internet Explorer – Security Settings – Trusted Sites Zone

7) Scroll down to *Miscellaneous* settings section and select *Enable* for the *Access data sources across domains*.

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8) Click **Yes** in the *Warning!* window that appears.

9) Click **OK** and then click **OK** in the *Internet Options* window.

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15 Restrictions and Limitations

Receptionist limitations are due mainly to the restrictions imposed by the web browsers.

15.1 Tab Button in Microsoft Edge

The Tab button does not work when running Receptionist in the Edge browser.

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16 Appendix A: Glossary and Definitions

16.1 Monitored User States

The following table lists the possible states for monitored users.

Icon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar	Personal Assistant	Call State
	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
	In a Meeting	N/A	N/A		Free or Tentative	Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	None	No active calls

NOTE: When a user enables Privacy, this terminates your monitoring of the user's state for the current session. To be able to monitor their state again, you must sign out and then sign in after the user has disabled Privacy.

16.2 Call States

Call states are the available states for your current calls. They are described in the following table.

Call State	Display Name	Icon	Description
Ringing In (Local)	Incoming Local		This represents a Click To Dial call ringing on your phone.
Ringing In (Remote)	Incoming		The call is coming in and ringing on your phone.
Ringing In (Recalled Call)	Call Recalled		The call was parked or camped and is being recalled because its timer has expired.

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Call State	Display Name	Icon	Description
Ringing Out	Outgoing		The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.
Active	Active		The call is an active call.
On Hold	Held		The call is on hold.
On Hold (Remote Held)	Remote Held		The call is held by the remote party.
Active (In Conference)	Active		The call is in a conference and active.
Held (In Conference)	Held		The call is in a conference and on hold.

16.3 Unified Instant Messaging and Presence States

IM&P states indicate you or your contacts' availability to communicate using an IM&P client. The possible states are described in the following table.

Presence State	Icon	Display Name	Description
Manual States			
Available		available	The contact is online, available on one or more devices, and not busy on any device.
Busy		busy	The contact is online, but currently busy on one or more devices. Do not disturb.
Away		away	The contact is connected but away from one or more devices and not busy on any device.
Offline		offline	The contact if offline on all devices. If you are offline, you do not receive any presence updates or instant messages. In addition, your Instant Message directory is empty and the presence state of your contacts in other directories is set to "Offline".
Automatic States			
Mobile Away		mobile	The contact is online on their mobile client but has been idle or away from their device for more than 10 minutes.
Busy-Call		Call	The contact is busy due to a call.
Busy-Meeting		Meeting	The contact is busy due to a meeting. The *Busy-Call* state overrides the *Busy-Meeting* state so this state is only seen if the contact has a meeting but no call. Your state is published as *Busy-Meeting* when your Outlook Calendar shows that you are in a meeting.
Offline In-Call		call	The contact is offline and the only available contact method is calling or leaving a chat message.

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Presence State	Icon	Display Name	Description
Unsubscribed States			
Pending Subscription			You sent a subscription request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
Not subscribed			The contact has an IM&P service but you are not subscribed to monitor their state and the contact is not listed in the *Instant Message* directory. Clicking this icon sends a subscription request to the contact.

16.4 Call Redirection Reasons

The following table lists the possible reasons for redirecting calls.

Redirection Reason	Description
busy	The call was redirected to a specified destination because the Call Forwarding Busy service was activated and the subscriber was busy. A subscriber is considered busy when there are too many active calls.
no answer	The call was redirected because the Call Forwarding No Answer service was activated and the subscriber did not answer within the specified number of rings.
unavailable	The call was redirected because the Call Forwarding Not Reachable service was activated and the subscriber's device was either unreachable or unregistered.
unconditional	The call was redirected because the Call Forwarding Always service was activated. When active, the Call Forwarding Always service redirects all incoming calls.
time of day	The call was redirected because the Call Forwarding Selective service was activated and the incoming call matched the specified time of day value.
do not disturb	The call was redirected because the Call Forwarding Busy service was enabled and the Do Not Disturb service was activated.
deflection	The call was transferred before being answered.
follow me	The call was redirected because one of the following services was activated: Simultaneous Ringing, Sequential Ringing, or BroadWorks Anywhere.
out-of-service	The call session was redirected by the network with the reason set to "out-of-service?".
away	The call was redirected by the network with the reason set to "away".
transfer	The call was transferred after being answered.
voice mail	The call was redirected because the Call Forwarding Always to Voice Mail service was activated, the Call Forwarding Busy to Voice Mail service was activated, and the subscriber was busy, or the Call Forwarding No Answer to Voice Mail service was activated and there was no answer.
hunt group	The call was redirected to an agent by a hunt group.
call center	The call was redirected to an agent by a call center.

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Redirection Reason	Description
route point	The call was redirected to an agent by a route point.
unknown	The call was redirected for an unknown reason.

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17 Appendix B: Diagnostic Tool

The Diagnostic Tool provides client-side performance measurements for the Receptionist client to help troubleshoot client application performance problems. It should only be used when performance problems occur and with the assistance of a support person.

NOTE: The Diagnostic Tool is available only if enabled by the service provider.

17.1 Launching Diagnostic Tool

To start the Diagnostic Tool, go to the *Settings – About* page and then click the **Run Client Diagnostics** link.

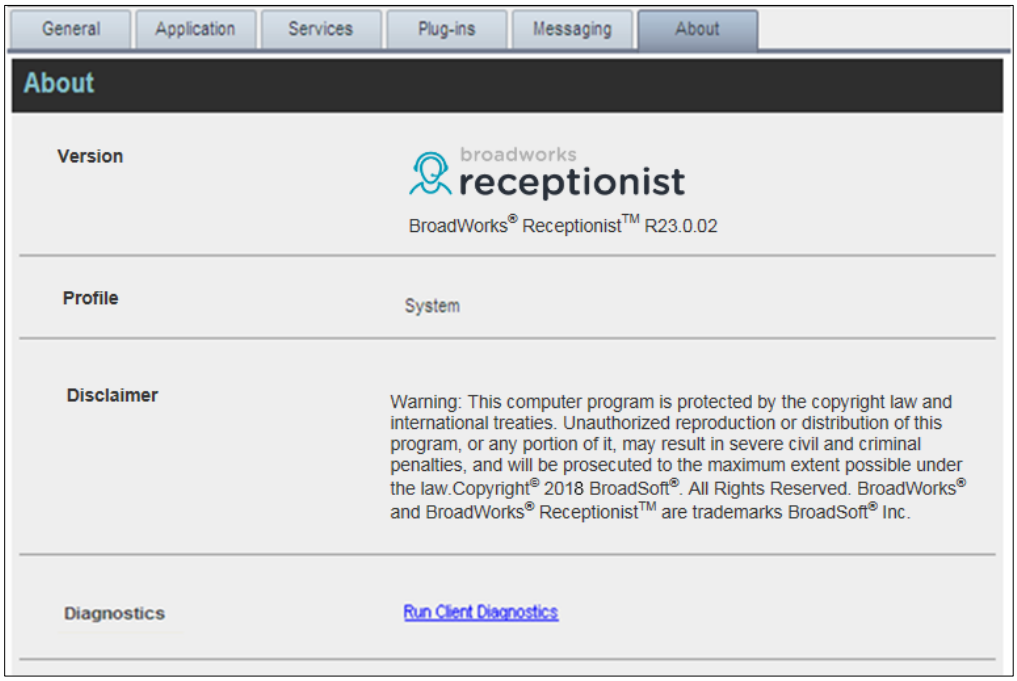

Figure 134 Settings – About (Launching Diagnostic Tool)

17.2 Diagnostic Tool GUI

The Diagnostic Tool runs in a separate browser window. Its user interface consists of six tabs: *Session*, *Long Polling*, *Calls*, *Service*, *Monitoring*, and *Support*. Each tab is described in a separate subsection.

17.2.1 Session Tab

The *Session* tab displays session information stored for the user on Cisco BroadWorks. It provides information about the logged user, connection, and subscriptions.

- The user information includes your name, user ID, phone number, extension, and the list of services assigned to you.
- The connection information includes the session ID for the current session, the channel ID for the OCI-C channel, and the address of the Xtended Services Platform (Xsp) the client is running on.

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- The subscription table shows all active subscriptions for the logged in user and is updated in real time.

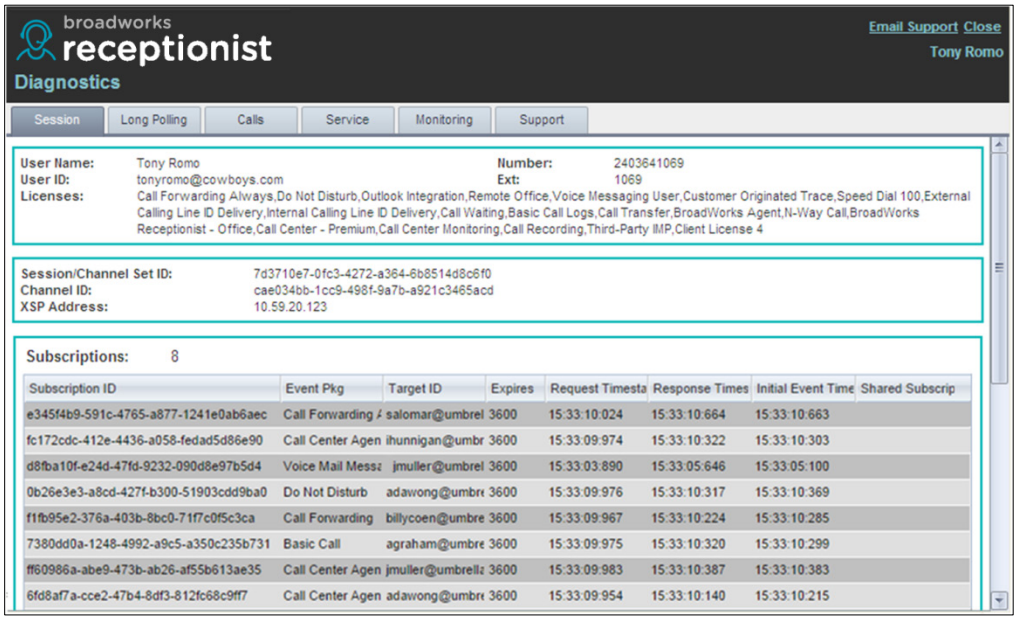

Figure 135 Diagnostic Tool – Session Tab

17.2.2 Long Polling Tab

The *Long Polling* tab shows, in real time, statistics on long polls performed by the client. The Polls table lists long polls and includes the request timestamp, response timestamp, status, and poll time of each long poll.

By default, the number of long polls retained in the Polls table is 10.

To change the number of displayed long polls, click the drop-down arrow in the *Polls* combo box, and select a new number from the drop-down list.

The *Data* column of the Polls table indicates whether the long poll contains data or not. If the icon in the *Data* column is a green icon, then the corresponding long poll contains data and clicking on the row for the long poll displays detailed data in the Poll Details table at the bottom of the page.

The Poll Details table displays the feature data that is contained in the update, and the event type and event ID that triggered the data update.

To clear the tab and start fresh captures of the long polls, click the **Clear** button.

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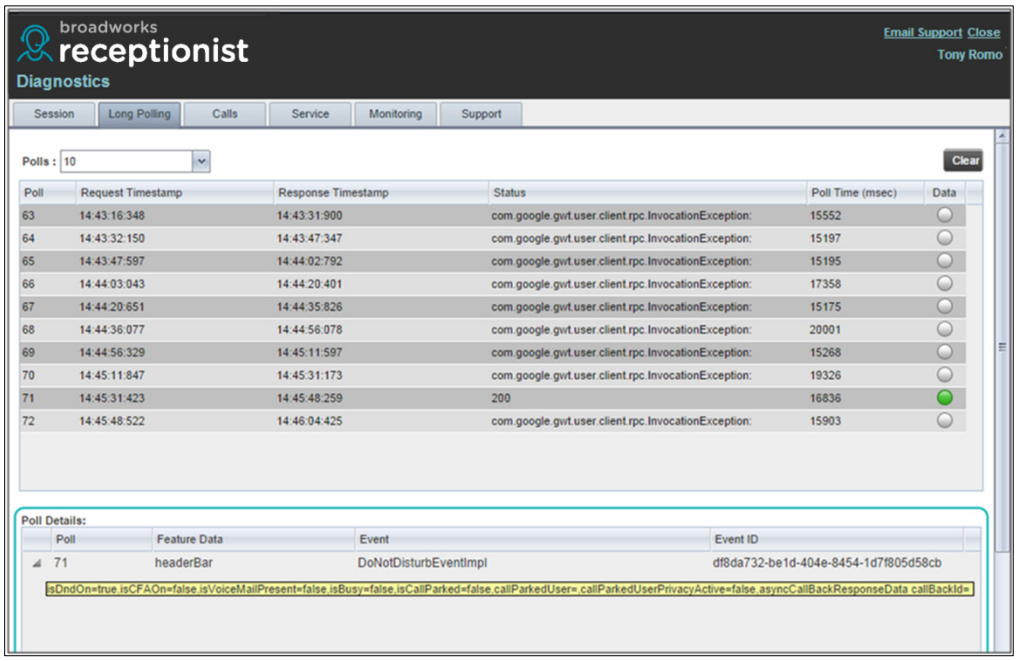

Figure 136 Diagnostic Tool – Long Polling Tab

17.2.3 Calls Tab

The *Calls* tab shows call statistics for calls placed through the *Dialer*. For each call, the following information is displayed: the called destination, the call ID of the outbound call, the time the number was dialed, the time the client received the incoming alerting call update, the client answer time (if the call was answered from the client), and the time the client received the outgoing call update.

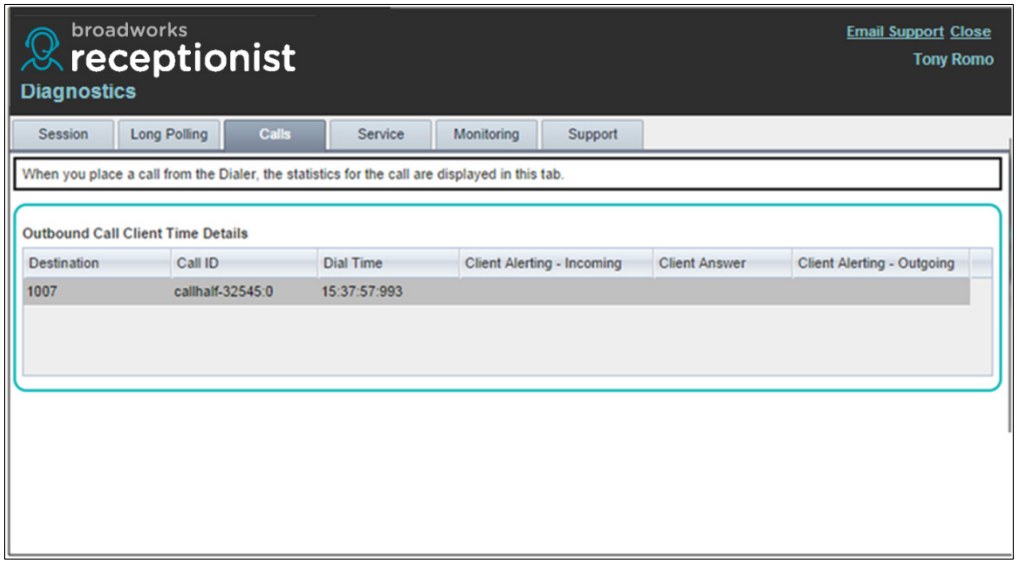

Figure 137 Diagnostic Tool – Calls Tab

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17.2.4 Service Tab

The *Service* tab measures the time for enabling/disabling the Do Not Disturb (DND) service from the client. It is only shown if you have the DND service assigned.

For each service action, the tool displays the command that was invoked (DND On or DND Off), the time the command was invoked from the client, the time the command response was received by the client, and the time difference in milliseconds between the request time and the response time.

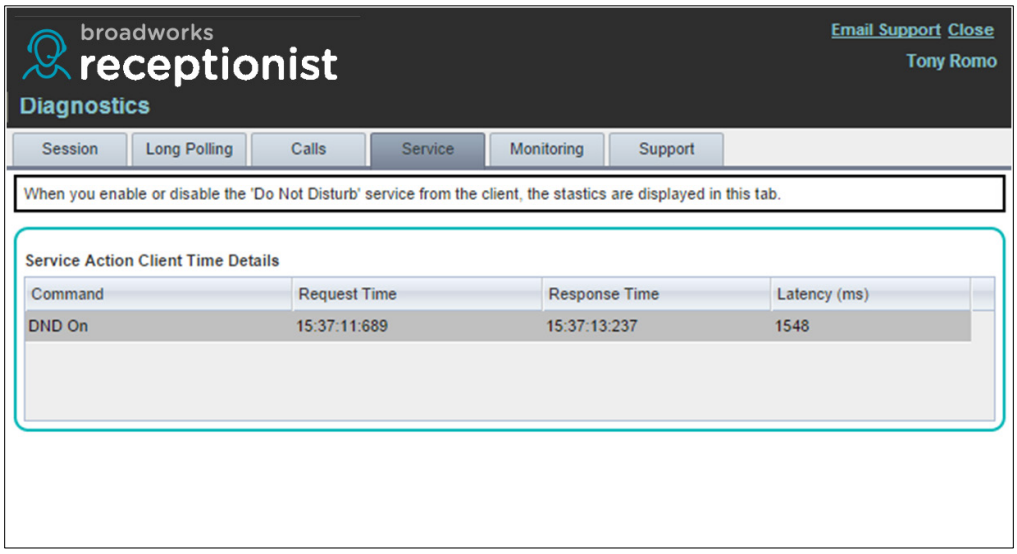

Figure 138 Diagnostic Tool – Service Tab

17.2.5 Monitoring Tab

The *Monitoring* tab displays statistics on dynamically monitored contacts. The *Target* column displays the user ID of the contacts being monitored.

The Monitoring tab is only available in Receptionist – Enterprise and if dynamic monitoring is enabled.

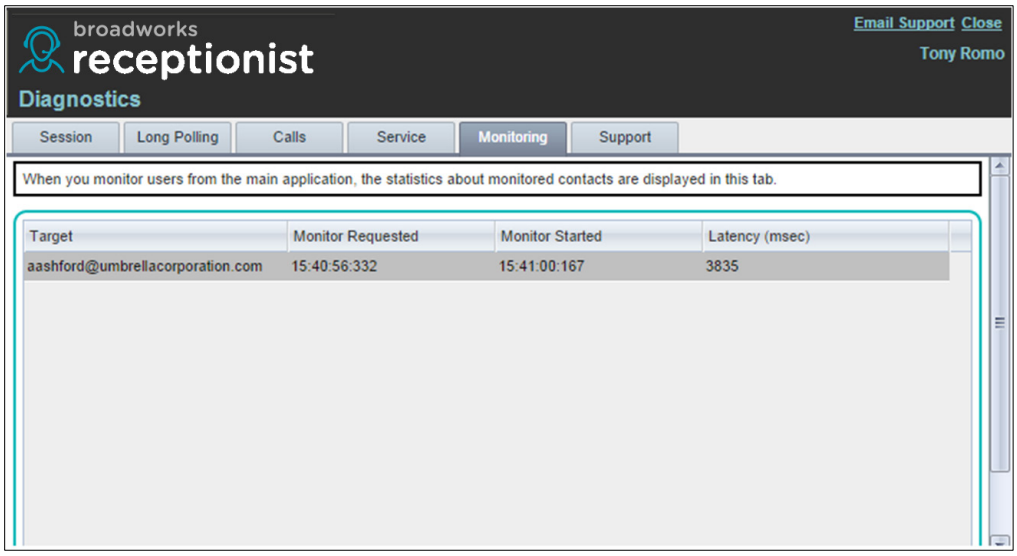

Figure 139 Diagnostic Tool – Monitoring Tab

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17.2.6 Support Tab

The *Support* tab is a textual representation of all data contained in the other tabs. The text in this tab should be copied and pasted into the body of the email that you sent to the technical support of your service provider.

The Email Support link in the upper right-hand corner of the Diagnostic Tool can be used to open the default email client on your machine. If the “To” address is not preconfigured by the service provider, the support person should provide it to you.

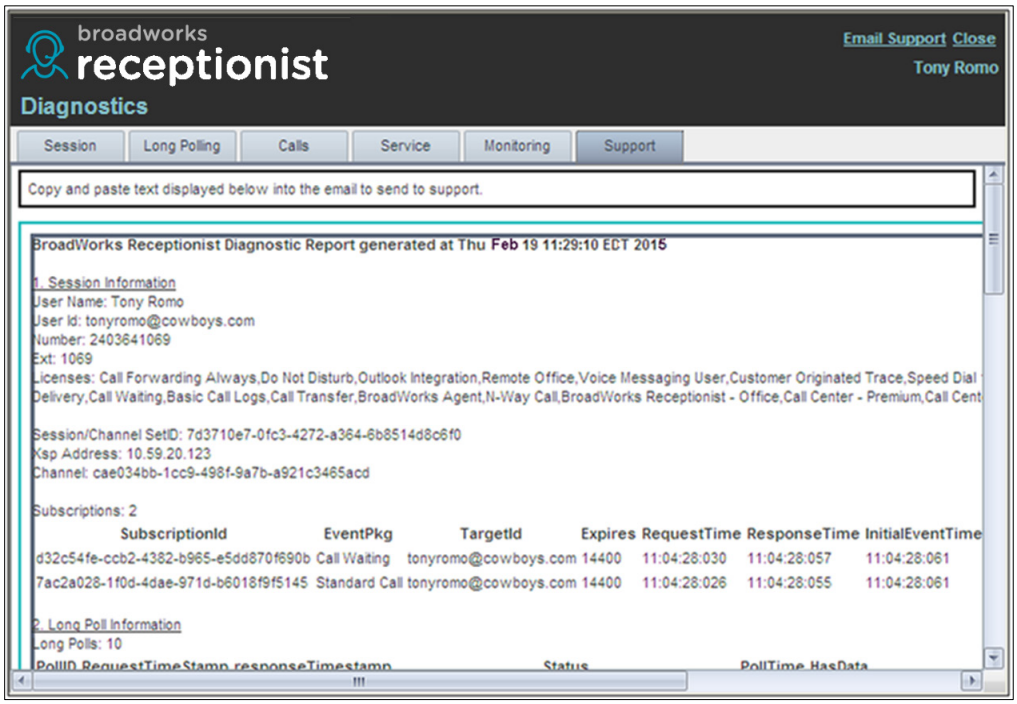

Figure 140 Diagnostic Tool – Support Tab

17.3 Known Issues

If you are using the Chrome browser to run Receptionist, and you click the *Diagnostic Tool Email Support* link, an untitled tab may open in the Receptionist window, in addition to the new message window of your default email application.

The issue can occur if the Chrome browser attempts to process the request with a different mail protocol than the one defined on your computer.

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18 Appendix C: Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

The following table specifies default keyboard shortcuts.

NOTE 1: These default keys are mapped according to the US keyboard.

NOTE 2: SHIFT1|2|3|4|5|6|7|8|9 denotes !|@|#|$|%|^|&|*|(|) on the US keyboard.

Key	Equivalent Mouse Action	Description
ESC	Click the **Close** button in a dialog box.	This closes the open dialog box.
ESC	Cancel the changes.	This exits the currently selected editable item, such as a text box.
/	Click the *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item in a list.	This selects the next item in the *Call Console* or *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or *Queued Calls* pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing "1" selects the first call, pressing "2" selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click **End** on a selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor in placed in the *Dialer* text box, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.

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Key	Equivalent Mouse Action	Description
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and then places the first active call on hold. Pressing **SHIFT+2** selects and then answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.
S or s	Click on **Settings** link.	This opens the *Settings* page if main window is in focus.
B or b	Click on **Back to Application** link.	This goes back to the main page from the *Settings* page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.

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Acronyms and Abbreviations

ACD	Automatic Call Distribution
ANS	Answer
CFA	Call Forwarding Always
CLID	Calling Line ID
CONF	Conference
CRM	Customer Relationship Management
CSV	Comma-separated value
DND	Do Not Disturb
DNIS	Dialed Number Identification Service
HTTPS	Hypertext Transfer Protocol Secure Sockets
IdP	Identity Provider
IM	Instant Message
IM&P	Instant Messaging and Presence
IP	Internet Protocol
JKS	Java Keystore
JNLP	Java Network Launch Protocol
JRE	Java Runtime Environment
LDAP	Lightweight Directory Access Protocol
MOB	Mobile
MON	Monitor
OCI-C	Open Client Interface-Call Control
PDF	Portable document format
PIV	Personal Identity Verification
RIA	Rich Internet Application
SaaS	Software as a Service
SMTP	Simple Mail Transfer Protocol
SSO	Single Sign-On
TXR	Transfer
URL	Uniform Resource Locator
VM	Voice Mail
Xsp	Xtended Services Platform

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