

OW5000

Incoming Call Assistant

An OW5000 Solution

User Guide

NEC NEC Infrontia Corporation

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1

Introduction

Welcome to the *OW5000 Incoming Call Assistant User Guide*. The *OW5000 Incoming Call Assistant User Guide* provides the information you need to work with the Incoming Call Assistant application.

Chapter Topics

- [Overview](#)
- [How This Guide is Organized](#)
- [Incoming Call Assistant Keys and Prompts](#)

Overview

Incoming Call Assistant (ICA) is an OW5000 Windows service that gives Dterm users a powerful tool to manage incoming and outgoing calls. Using any Dterm phone with an associated function key, you can use ICA to:

- Automatically view your caller's name or telephone number on the LCD display when a new call is received on your prime or sublines.
- Check for incoming calls from any Dterm on the PBX by entering your extension and password, if applicable.
- Track up to 99 inbound calls from your office or from anywhere in the building even if your callers do not leave a message.
- View a history of up to 99 calls placed from your extension, and retry these calls with a single key stroke.
- Use your outbound call history to call recently dialed numbers from any Dterm with ICA configured.

Incoming Call Assistant integrates with the OW5000 database. The following information is available for calls that you receive or place when you use ICA:

- Caller's name as it is listed in the OW5000 employee, external, or personal contact tables.



NOTE

Your personal contact table can be imported from other sources such as Microsoft Outlook Contacts or other text files using the separately available UC700 application.

- Caller's phone number.
- Date and time of the call.
- If an inbound call was transferred and by whom.
- If an inbound call was forwarded and by what line.
- The direct number that was dialed for inbound calls (if ICA is configured to show this information).

How This Guide is Organized

Chapter 1 Introduction

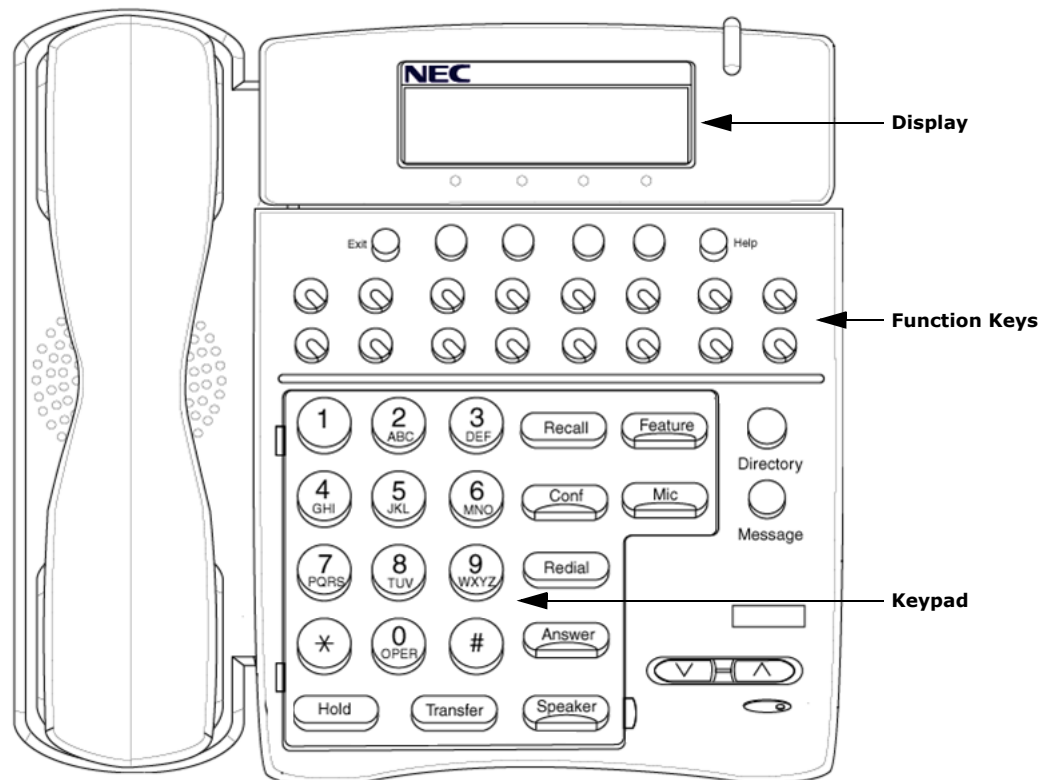
This chapter outlines how to use the manual, including the actual manual organization, chapter layout, conventions, and function keys for the Incoming Call Assistant application.

Chapter 2 Using Incoming Call Assistant

This chapter explains how to manage incoming calls using the Incoming Call Assistant application.

Incoming Call Assistant Keys and Prompts

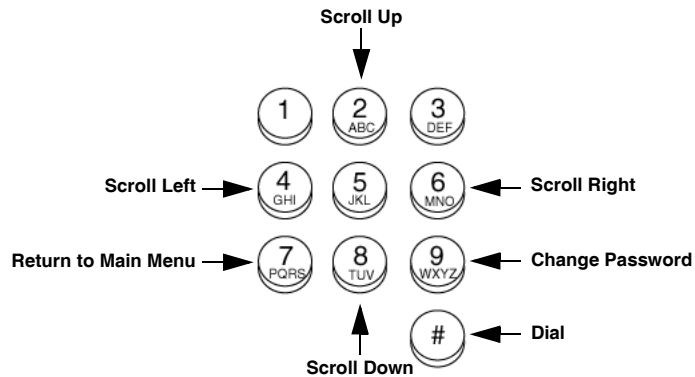
Figure 1-1 Dterm Components



Keypad Conventions

The general keys used throughout the Incoming Call Assistant application are listed in [Figure 1-2](#).

Figure 1-2 Scroll List Function Keys



Incoming Call Assistant Prompts

[Table 1-1](#) details the standard prompts encountered throughout the Incoming Call Assistant application.

Table 1-1 Incoming Call Assistant Prompts

Prompt	All listings are circular
[Extension:]	At this prompt, enter the extension where the last nine calls you want to view are located. Entering # at this prompt will assume the current extension. If multiple users are assigned to an extension, x Users displays for name selection.
[X Users:]	Indicates an extension assigned to multiple users. Use 2 or 8 to scroll through the available users. Enter # to select the desired user and continue.
[New Password:]	At this prompt, enter the new password or press # to skip the user password. If you have selected to skip the password, this prompt will not appear again when you attempt to view your calls. However, if you want to add a password later, press 9 to bring up the New Password prompt and enter the new password.
[Skip PW? Y-1 N-2]	Displays after entering # at the New Password prompt. Select 1 to skip entering the user password in ICA.
[Password:]	Enter the user password.
[InBnd-1 OutBnd-2]	Choose if you wish to view previously received inbound calls or previously placed outbound calls for the extension you entered when logging in to ICA.

Prompt	All listings are circular
[1 * John Smith] or [1 (555) 555-1212]	Displays the name (if available) and telephone number of the calling party. Calls can be numbered from 1 to 99, depending on the configuration, beginning with the latest call received. An asterisk [*] displays before the caller's name or telephone number if that call has not yet been reviewed.
[DID:]	Displays the name associated with the extension that the call was forwarded from when an outside caller dialed directly to a number that is in the OW5000 DID (Direct Inward Dial) database and the call was forwarded to your extension.
[XFR:]	Displays the name or number of the party who transferred an incoming call. This display will not appear if the call was not transferred.
[Rang:]	Displays the number that the calling party actually rang.
[FWD:]	Displays the name or number of the party who forwarded the call. This display will not appear if the call was not forwarded.
[Invalid, Retry]	Indicates an input error.

2

Using Incoming Call Assistant

- Chapter Topics*
- *Basic Operating Procedures*
 - *Using Incoming Call Assistant*
 - *Viewing Inbound Call Information*
 - *Viewing Outbound Call Information*
 - *Redialing A Call*
 - *Changing User Passwords*
 - *Exiting Incoming Call Assistant*

Incoming Call Assistant (ICA) gives you the ability to track your calls from your own office or from anywhere in the building, even if the caller does not leave a message. It also lets you track calls you manually placed from your Dterm or from any telephony application.

Using any Dterm phone with an associated function key, you can use ICA to:

- Immediately review or hold call information on your display so that you can decide whether to release your current call or let the new call follow your forward no answer setting (typically to voice mail).
- Review call information for transferred and/or forwarded calls.
- Return a call by the single press of a button.
- View your previous outbound call history, and redial a number with a single button press.

Incoming Call Assistant integrates with the OW5000 database. The following information is available for calls that you receive when you use ICA:

- Caller's name as it is listed in the OW5000 database (employee, external record, personal entry).
- Caller's phone number.
- Date and time of the call.
- If the call was transferred and by whom.
- If the call was forwarded and by what line.
- The direct number that was dialed (if ICA is configured to show this information).

When viewing your information about calls that you placed, the following information is available when you use ICA:

- The name of the party called is listed in the OW5000 database (employee, external record, personal entry).
- The phone number of the party called.
- Date and time of the call.

Basic Operating Procedures

When using Incoming Call Assistant, incoming calls will ring as configured in the PBX, and you will see the caller's name on the display for eight seconds. If the caller's name is not listed in the OW5000 database, the caller's number displays for eight seconds, if available. The route and trunk will appear if the caller's name and number is inaccessible. If you are on another line and you would like to answer the second call, you may do one of the following:

- Place your current call on hold by pressing the Hold button.
 - Press the flashing **Subline** button to answer the second call.
 - To retrieve your first call and disconnect from your current caller, press the held line and begin speaking.
- Hang up your current call by pressing the **Switch Hook**.
 - Press the flashing **Subline** button to answer the second call.

If you are already on the line, and you do not want to answer the incoming call, the second call will follow your Dterm phone's no answer forwarding pattern for your subline. Contact your phone system administrator for more information on how to set forwarding on your Dterm.

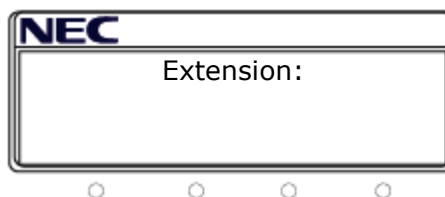
Calls that ring your phone are automatically recorded so that you may view the inbound call history at a later time by using the assigned ICA function key on your Dterm. Calls that are placed from your phone are also recorded and may be viewed via the same mechanism. Both inbound and outbound calls can be easily recalled/redialed when they are viewed.

Using Incoming Call Assistant

Use the following procedures to start ICA on any Dterm with an associated function key:

- Step 1** Press the function key on the Dterm associated with ICA. The **Extension:** prompt displays (Figure 2-1), requesting the extension number you want to review.

Figure 2-1 Extension Prompt



If you are away from your own extension when you want to check your calls, you must enter your extension's number to check the calls that you have received. If you are at your own extension, press the # key to default to your number.



NOTE

You can exit the Incoming Call Assistant application at any time by pressing the associated ICA function key again.

Do one of the following:

- Press the # key to default to the current extension.
- Enter the extension number for your extension and press the # key.

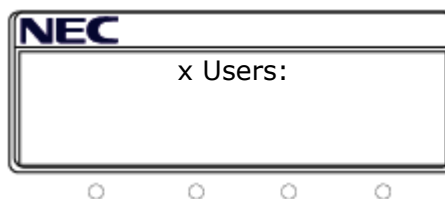


NOTE

If the extension number was not a valid entry, the error message **Invalid, Retry** will display. Enter a valid extension number and press # to clear the message.

- Step 2** If multiple users are assigned to this extension, ICA will display the number of users assigned to this extension. To select the correct user, do one of the following at the **x Users** prompt (Figure 2-2).

Figure 2-2 Multiple User Prompt



- Press **8** to scroll down the list of names. When the desired name appears in the display, press # to select that name.
- Press **2** to scroll up the list of names. When the desired name appears in the display, press # to select that name.

- Press **4** to go back to the **Extension:** prompt.
- Press **#** to select the displayed user name.

Step 3 If you are logging in for the first time, ICA prompts you to create a new password by displaying the **New Password:** prompt (Figure 2-3).

Figure 2-3 New Password Prompt

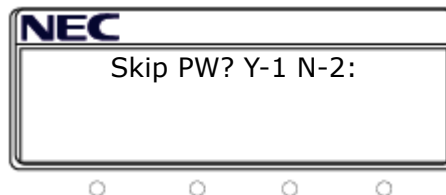


Do one of the following:

- If you want to create a password, enter a password and then press the **#** key.
- If you do not want to create a password, press the **#** key.

The **Skip PW? Y-1 N-2** prompt displays (Figure 2-4) if this is an available option allowed by your OW5000 Administrator. Otherwise, the prompt does not change, and you are required to enter a password:

Figure 2-4 Skip Password Prompt



Do one of the following:

- To skip entering a password, press **1** for Yes.



NOTE

If you select option 1, you can still activate or change a password at a later date. See [Changing User Passwords](#).

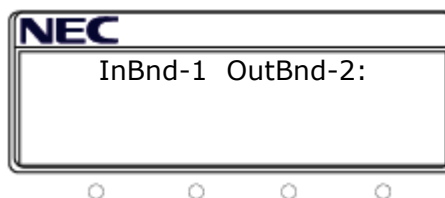
- To enter a password in the future, press **2** for No.



NOTE

Selecting this option prevents others without a valid password from viewing your Incoming Call Assistant call information.

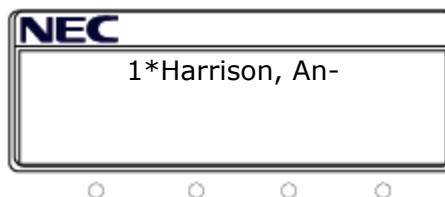
Step 4 After making your password choice, press the **#** key and you will be prompted if you would like to view calls that you received (“InBnd”) or calls that you placed (“OutBnd”). See [Figure 2-5](#).

Figure 2-5 Inbound/Outbound Prompt

- Press **1** to view call received by the extension entered. Proceed to [Viewing Inbound Call Information](#).
- Press **2** to view calls placed from the extension entered. Proceed to [Viewing Outbound Call Information](#).

Viewing Inbound Call Information

Reviewing received calls on Incoming Call Assistant is very simple. New calls are displayed before old calls and are marked with an asterisk (*) if they have not yet been viewed ([Figure 2-6](#)). Once a call's information is viewed the (*) will be removed.

Figure 2-6 New Calls

ICA display screens only hold 16 characters. A dash after the last character indicates that additional characters will be continued on the following screen.

**NOTE**

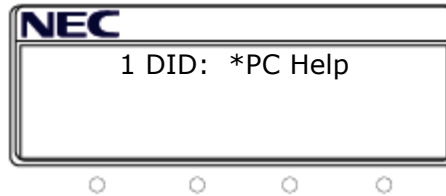
1. Press **#** to return a call while viewing any of the call information screens.
2. To navigate through all of the available screens, do one of the following:
 - Press **2** to return to the previous call and **8** to view the next call.
 - Press **4** to scroll left and **6** to scroll right.
 - Press **7** to return to the Inbnd/Outbnd prompt.
3. Not all screens described below will appear with every call. If the screen is present, it will be appear in the following order:

Order of Inbound Call Information Displays

1. DID (Direct Inward Dialing) Display

This display shows the name assigned to the extension in the OW5000 DID Database that received a directly dialed call and forwarded the call to you. See [Figure 2-7](#).

Figure 2-7 DID Display



NOTE

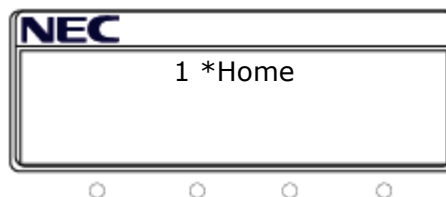
If this is not a DID call, you will not see this display.

- Press **6** to view the caller's name and/or number.
- Press **4** to scroll left and see on what line the call arrived.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **7** to return to the Inbnd/Outbnd prompt.

2. Name OR Number Display

Calls are numbered 1 through 99, beginning with the latest call received. Then the caller's name or number displays. See [Figure 2-8](#).

Figure 2-8 Caller Name or Number Display



- Press **6** to scroll right one screen to view the date and time that the call was received.
- Press **4** to scroll left one screen to view the last display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.



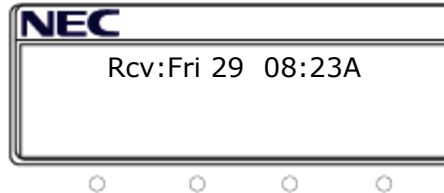
NOTE

If you do not see 99 calls stored in your inbound call history, your OW5000 administrator has selected a lower number for your site.

3. Rcv: Display

Figure 2-9 shows the date and time that the call was received.

Figure 2-9 Call Time and Date Display

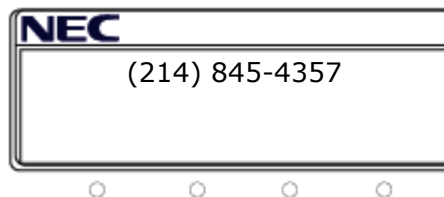


- Press **6** to scroll right one screen to view the calling party's number.
- Press **4** to scroll left one screen to view the last display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.

4. Calling Party Number Display

Figure 2-10 shows the calling party's number, if it is available. If the number is unavailable, the PBX information showing how the call arrived will be displayed.

Figure 2-10 Calling Party Number Display

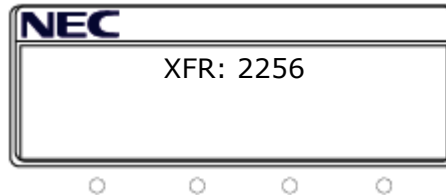


- Press **6** to scroll right one screen to view the extension number of the person that transferred the call *if* the call was transferred.
- If the call was not transferred, you will view the **Rang:** display next.
- Press **4** to scroll left one screen to view the previous display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.

5. XFR (Call Transfer) Display

If a call was transferred internally to your extension, then the extension number of the person that transferred the call will display (Figure 2-11).

Figure 2-11 XFR Display



NOTE

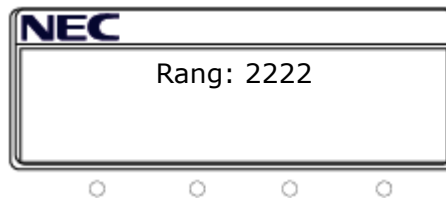
If the call was not transferred from another extension, this screen will not appear.

- Press **6** to scroll right one screen to view the number that the calling party called.
- Press **4** to scroll left one screen to view the last display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.

6. Rang Display

This is the number that the calling party called. See Figure 2-12.

Figure 2-12 Rang Display



NOTE

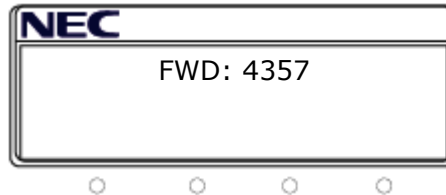
*If the call was not forwarded, then the Rang Display will be the last screen for this number. If the Rang Display is your last screen, then pressing **6** will scroll back to the first screen to display the Caller's Information as displayed in Figure 2-1.*

- Press **6** to scroll right one screen to view the number of the extension that forwarded the call.
- Press **4** to scroll left one screen to view the last display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.

7. FWD (Forwarding) Number Display

If a call was forwarded to your extension, then the number of the extension that forwarded the call will show in this display (Figure 2-13).

Figure 2-13 FWD Number Display



NOTE

If the call was not forwarded from another extension, this screen will not appear.

- Press **4** to scroll left and return to the previous screen.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **6** to scroll back to the first screen to display the Caller's Information as displayed in Figure 2-1.
- Press **7** to return to the Inbnd/Outbnd prompt.

Returning A Call

To return a call while viewing your inbound call history, press the **#** key on your Dterm phone.



NOTE

ICA will apply the Dialing Properties configured on the OW5000 Server prior to placing the call.

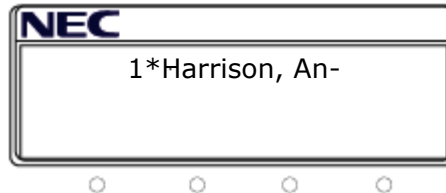
If the call is not successful, ICA will display the following:

- **Line Busy** if the called party is busy.
- **Invalid Number** if the number cannot be found.
- Otherwise, **Unable to Call** will be displayed.

Viewing Outbound Call Information

Reviewing outbound calls on Incoming Call Assistant is also very simple. Newly placed calls are displayed before old calls and are marked with an asterisk (Figure 2-14) if they have not yet been viewed. Once a call's information is viewed the (*) will be removed.

Figure 2-14 New Calls



ICA display screens only hold 16 characters. A dash after the last character indicates that additional characters will be continued on the following screen.



NOTE

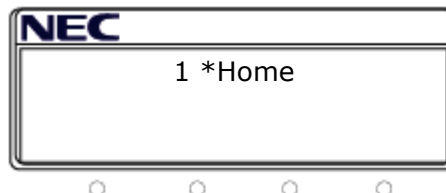
1. Press # to redial a call while viewing any of the call information screens.
2. To navigate through all of the available screens, do one of the following:
 - Press 2 to return to the previous call and 8 to view the next call.
 - Press 4 to scroll left and 6 to scroll right.
 - Press 7 to return to the Inbnd/Outbnd prompt.
3. Not all screens described below will appear with every call. If the screen is present, it will be appear in the following order:

Order of Outbound Call Information Displays

1. Name OR Number Display

Calls are numbered 1 through 99, beginning with the latest call placed. Then the called party's name or number displays (Figure 2-15).

Figure 2-15 Caller Name or Number Display



- Press 6 to scroll right one screen to view the date and time that the call was placed.
- Press 4 to scroll left one screen to view the last display.
- Press 2 to scroll up one call. If you are at the first call in the list when you press 2, you will go to the last call in the list.

- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.



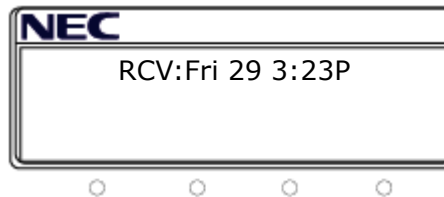
NOTE

If you do not see 99 calls stored in your inbound call history, your OW5000 administrator has selected a lower number for your site.

2. Cld: Display

Figure 2-16 displays the date and time that the call was placed.

Figure 2-16 Call Time and Date Display

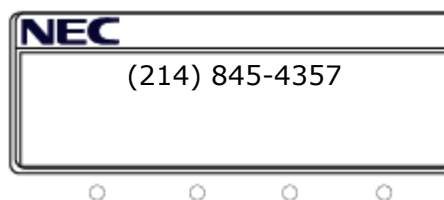


- Press **6** to scroll right one screen to view the called party's number.
- Press **4** to scroll left one screen to view the last display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.

3. Called Party Number Display

Figure 2-17 displays the called party's number that was dialed without access codes.

Figure 2-17 Calling Party Number Display



- Press **4** to scroll left one screen to view the previous display.
- Press **2** to scroll up one call. If you are at the first call in the list when you press **2**, you will go to the last call in the list.
- Press **#** to return the call or **8** to view the next oldest call.
- Press **7** to return to the Inbnd/Outbnd prompt.

Redialing A Call

To dial the same party again while viewing your outbound call history, press the **#** key on your Dterm phone.



ICA will apply the Dialing Properties configured on the OW5000 Server prior to placing the call.

If the call is not successful, ICA will display the following:

- **Line Busy** if the called party is busy.
- **Invalid Number** if the number cannot be found.
- Otherwise, **Unable to Call** will be displayed.

Changing User Passwords

The first time you log in to ICA, you can enter a new password or configure ICA to allow you to log in without entering a password if this feature is enabled by your system administrator. When you are logged in to ICA, you can change your password and change the password entry option from any display by pressing the 9 key.



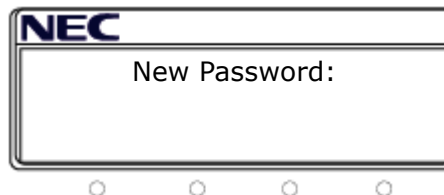
If you have forgotten your password, contact your OW5000 administrator.

Use the following steps to change your user password and password entry option.

Step 1 Log in to ICA.

Step 2 From any display, press **9**. The **New Password:** prompt displays (Figure 2-18).

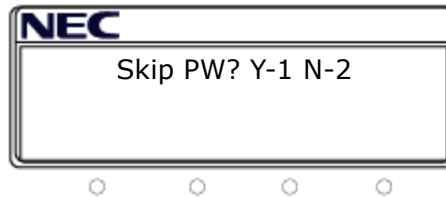
Figure 2-18 New Password Prompt



Step 3 If you want to create a password, enter a password and then press the **#** key.

Step 4 If you want to change the password entry requirement, press the **#** key. If the system administrator will allow you to operate ICA without a password, the **Skip Password** prompt displays (Figure 2-19) for you to choose one of the following:

Figure 2-19 Skip Password Prompt



- To skip entering a password in the future, press **1** for Yes.
- To enter a password in the future, press **2** for No.



NOTE

Selecting this option prevents others without a valid password from viewing your Incoming Call Assistant call information.

Exiting Incoming Call Assistant

To exit ICA, press the function key on the Dterm associated with ICA.



NOTE

You will automatically exit ICA if you attempt to return a phone call. You will also be automatically released from ICA mode after a configured amount of time has passed based on data entered by your OW5000 system administrator.

***For additional information or support on this NEC Infrontia product,
contact your NEC Infrontia representative.***

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OW5000 Incoming Call Assistant User Guide

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