

# **UC for Enterprise (UCE) Attendant (UNIVERGE UA5200)**

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## **Procedure Manager Administrator**

### **Operations Guide**

**NEC** NEC Corporation

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# 1

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## Introduction

Welcome to the *UC for Enterprise (UCE) Attendant (UNIVERGE UA5200) Procedure Manager Administrator Operations Guide*. This guide provides step-by-step instructions for installing and managing the UA5200 Procedure Manager Administrator.

- Chapter Topics*
- [Overview](#)
  - [How This Guide is Organized](#)

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### Overview

UA5200 Procedure Manager is a web-based application that interacts with the OW5000 system that allows administrators to create a series of consistent steps, or procedures, to be taken by attendants and then saved under a specific name.

Procedures created in Procedure Manager are viewable by clicking the Procedure Manager menu option in the UNIVERGE OW5000 Administrator. The Procedure Manager dialog box is also integrated with other Attendant applications.

Some of the functions provided by the Procedure Manager Administrator include:

- Create a new procedure
- View or search for existing procedures
- Delete existing procedures
- Utilize integration with other UA5200 applications

UA5200 Procedure Manager Administrator relies on role-based permissions. Each user that is allowed to log in to the system may be assigned roles. These assigned roles control their access to screens.

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## How This Guide is Organized

*Chapter 1*  
*Introduction* This chapter outlines how to use the guide, including the organization and chapter layout for the Procedure Manager Administrator application.

*Chapter 2*  
*Installing Procedure*  
*Manager Administrator* This chapter describes the initial requirements for installing UA5200 Procedure Manager Administrator, along with the step-by-step procedures needed to install the application.

*Chapter 3*  
*Managing Procedures* This chapter describes the functions and associated screen displays for configuring and using the UA5200 Procedure Manager Administrator application in the OW5000 Administrator.

# 2

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## Installing Procedure Manager Administrator

This chapter provides step-by-step procedures to install the UA5200 Procedure Manager Administrator application.

### Chapter Topics

- [Before Starting the Installation Procedure](#)
- [Installing UA5200 Procedure Manager Administrator](#)
- [Uninstalling Procedure Manager Administrator Software](#)

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### Before Starting the Installation Procedure

The following sections describe the required components that must be in place before installing the UA5200 Procedure Manager Administrator software.

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#### Hardware and Software Requirements

Prior to installing any UA5200 software, refer to the Requirements section in the *UC for Enterprise (UCE) Application Platform (UNIVERGE OW5000) Getting Started Guide* for more details about the UA5200 Application Environment requirements.

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#### Web Client Requirements

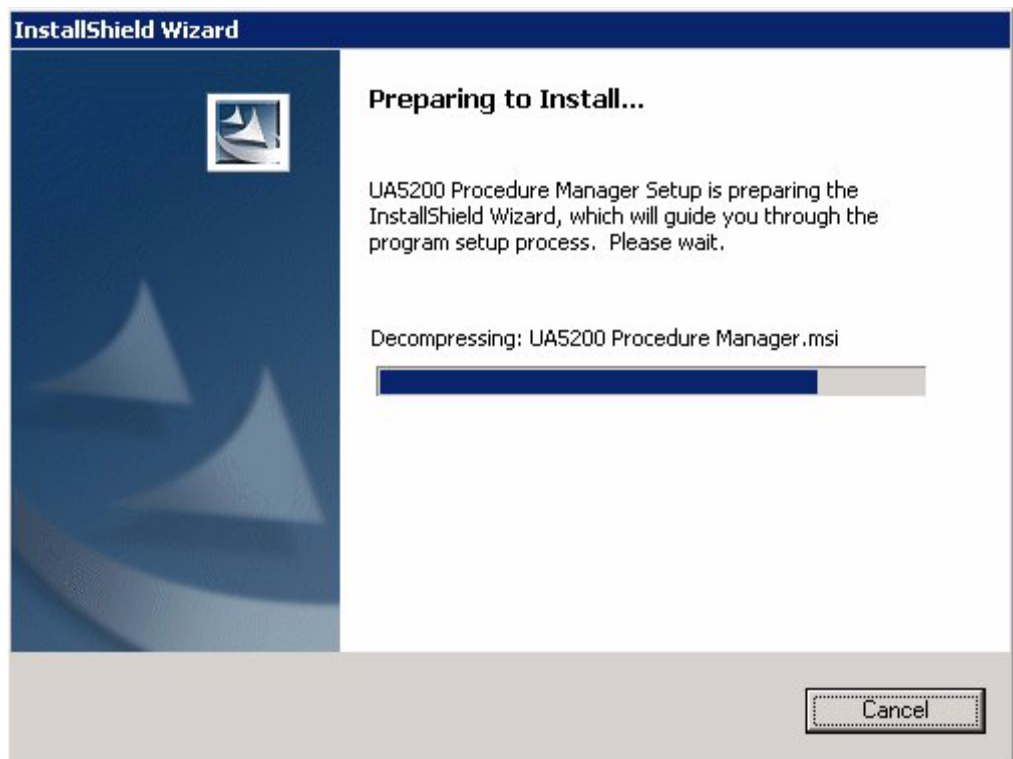
Please refer to the *UC for Enterprise (UCE) Application Platform (UNIVERGE OW5000) Getting Started Guide* for OW5000 Admin web client requirements.

## Installing UA5200 Procedure Manager Administrator

Use the following steps to install the Procedure Manager Administrator software.

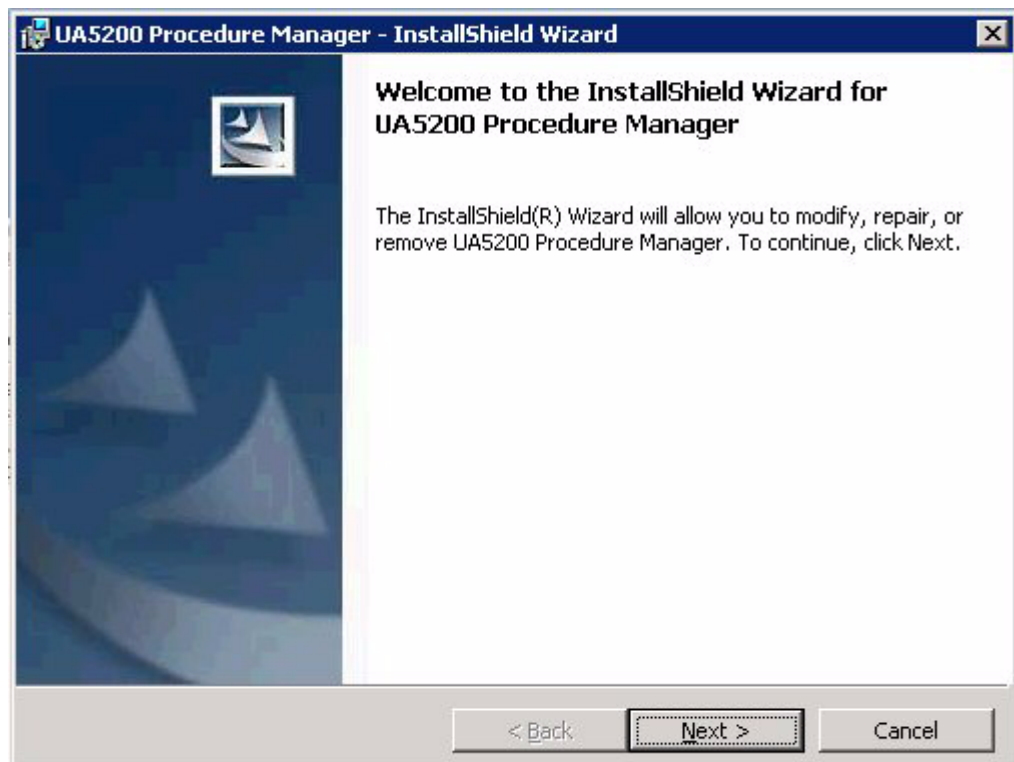
- Step 1** Place the UCE DVD into the computer's DVD/CD drive. On most computers, setup will automatically start when the DVD is loaded. If Autorun is not enabled on the computer, then do the following:
- After placing the UCE DVD into the computer's DVD/CD drive, open Windows Explorer and double-click the **DVD/CD drive** icon.
  - In the DVD/CD file list, double-click the **Setup.exe** file.
- Step 2** Select **UA5200 Procedure Manager** to start the Procedure Manager Administrator installation program. A Preparing to Install dialog box displays (Figure 2-1).

**Figure 2-1** Preparing to Install dialog box



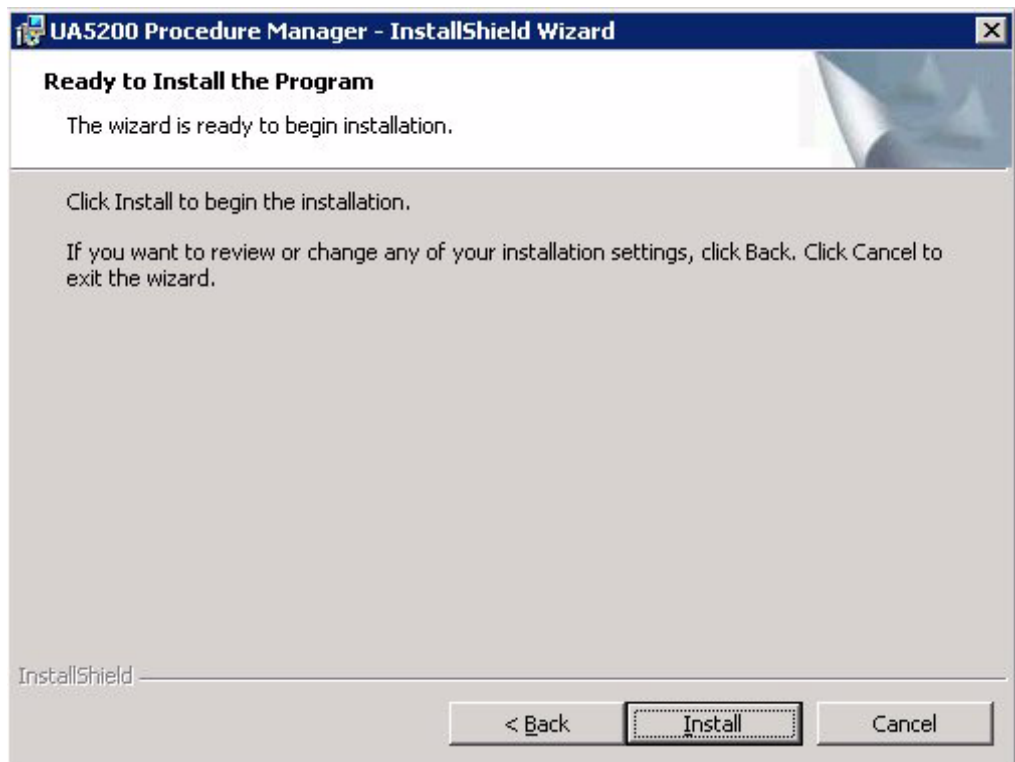
After InstallShield has completed the setup procedure, a Welcome dialog box displays (Figure 2-2).

**Figure 2-2** Welcome dialog box



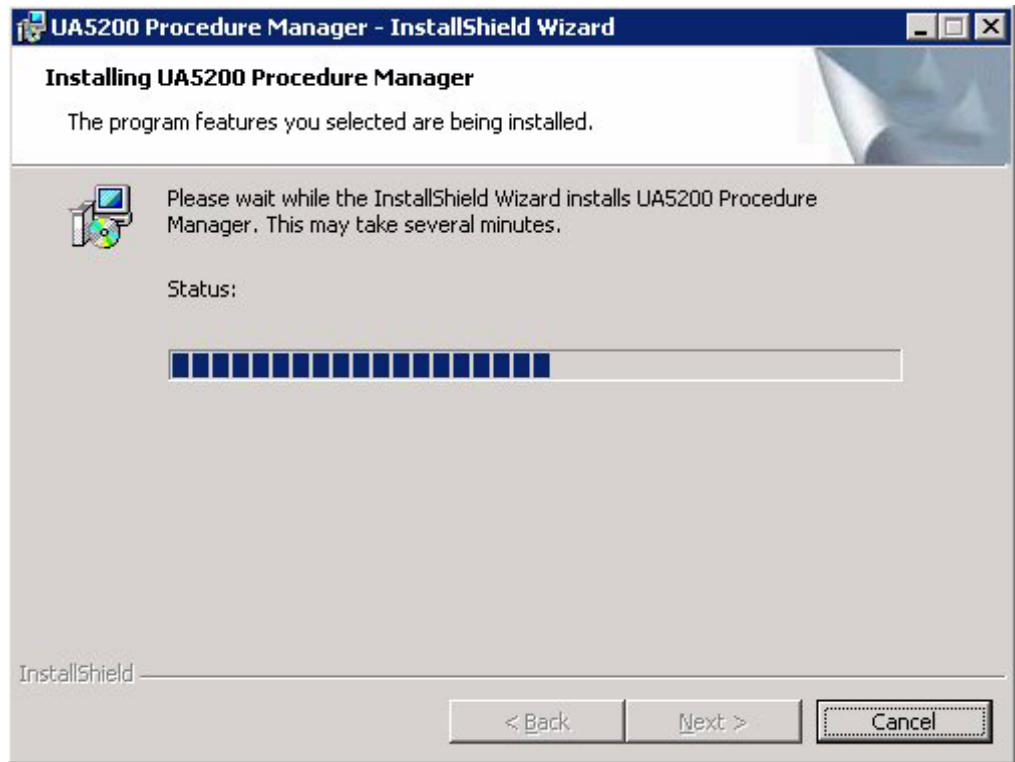
**Step 3** Click **Next**. A Ready to Install dialog box displays ([Figure 2-3](#)).

**Figure 2-3** Ready to Install the Program dialog box



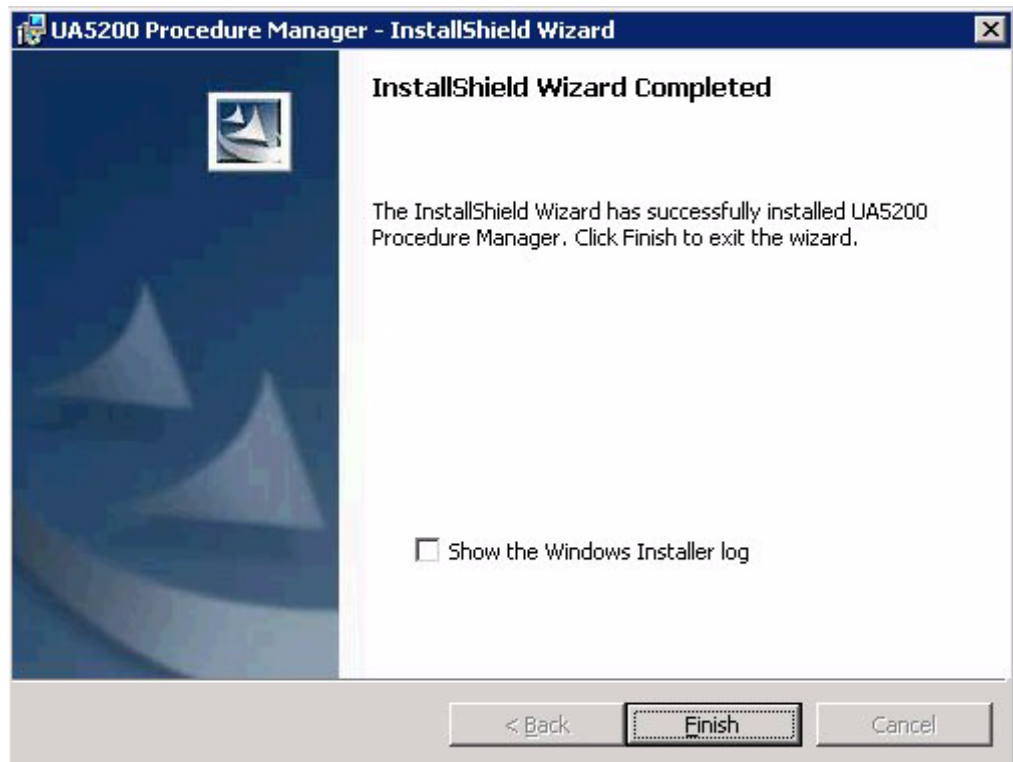
**Step 4** Click **Install** to begin installation. An Installing Procedure Manager dialog box displays (Figure 2-5).

Figure 2-4 Installing Procedure Manager dialog box



**Step 5** After all the files are copied, click **Next**. [Figure 2-5](#) displays.

**Figure 2-5** InstallShield Wizard Complete dialog box



**Step 6** Click **Finish**. To **Show the Windows Installer log**, click the checkbox.

---

## Uninstalling Procedure Manager Administrator Software

The UA5200 Procedure Manager Administrator software can be uninstalled using the Windows operating system Add/Remove software function in the Windows Control Panel.

**Step** In the Add/Remove dialog, select **UA5200 Procedure Manager** and click **Remove**. Follow the displayed instructions and remove all components when prompted.



REFERENCE

Refer to Microsoft Windows documentation for the specific version of Windows installed for more information about adding and removing software applications.



# 3

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## Managing Procedures

The functions and associated screen displays for Procedure Manager Administrator, in the OW5000 Administrator, are described in this chapter.

- Chapter Topics*
- [Logging into UA5200 Procedure Manager Administrator](#)
  - [Viewing Procedures](#)
  - [Managing Procedures](#)
  - [Configuring Event Info Fields](#)
  - [Configuring Procedure Steps](#)
  - [Generating Reports](#)
  - [Procedure Manager Help](#)

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### Logging into UA5200 Procedure Manager Administrator

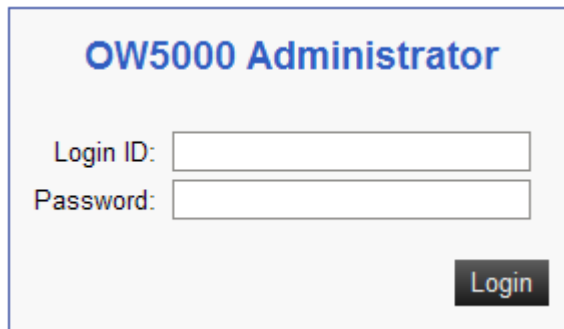
Log in to the OW5000 Administrator to configure the Procedure Manager Administrator application.

#### To Log into Procedure Manager Administrator

- Step 1** Open the Internet Explorer or Netscape web browser to the OW5000 Administrator Login window ([Figure 3-1](#)).

---

**Figure 3-1** OW5000 Administrator Login



OW5000 Administrator

Login ID:

Password:

Login

**Step 2** Type your **Login ID** and **Password** into the appropriate fields and click **Login**. The main OW5000 Administrator displays (Figure 3-2).

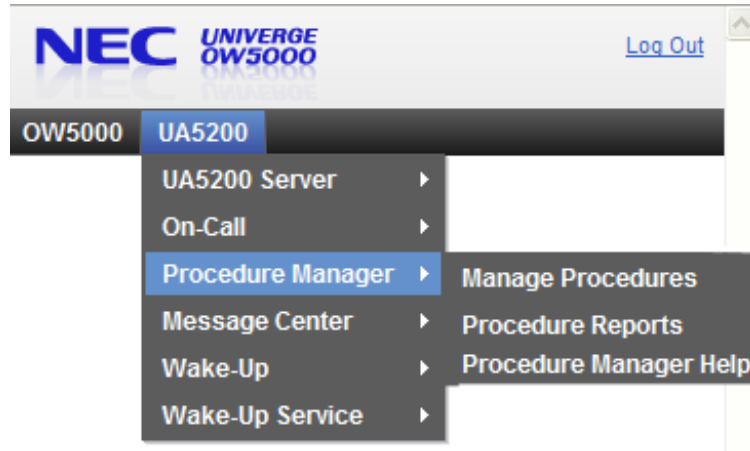


NOTE

Click **UA5200 > Procedure Manager** to display Figure 3-2.

Not all features displayed in the OW5000 Administrator shown in Figure 3-2 may be available. Available features are dependent on installed products and user access rights.

**Figure 3-2** OW5000 Administrator - UA5200 Procedure Manager



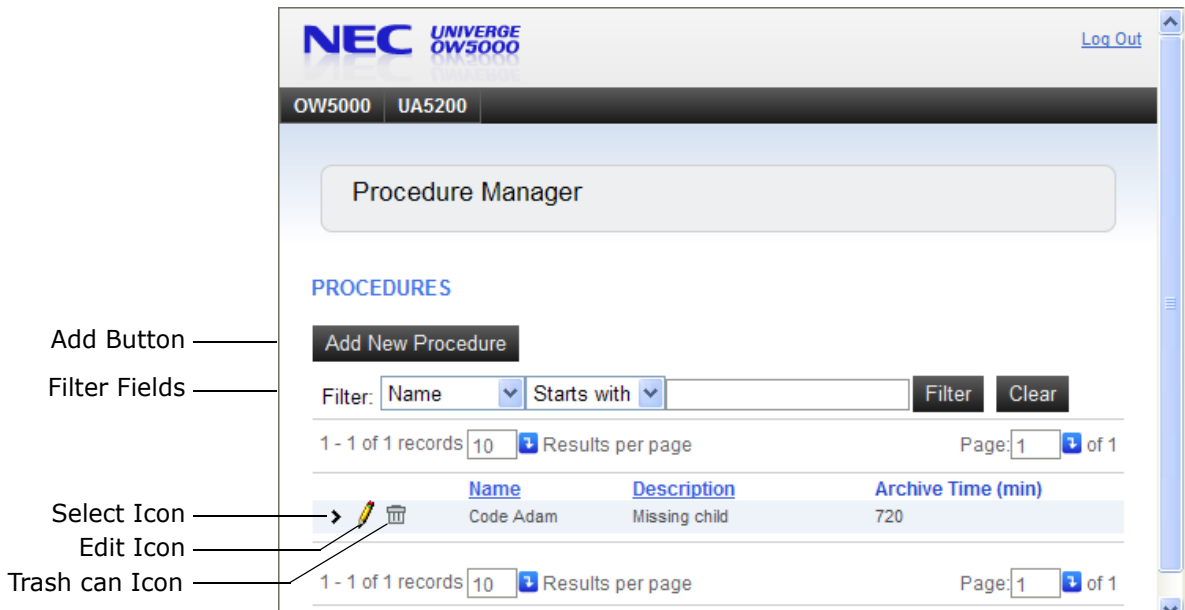
## Viewing Procedures

The Procedure Manager dialog box helps administrators manage procedures created for use on the UA5200 application by displaying a list of all procedures. This list can be searched for specific procedures.

### To View the Procedure Manager Dialog Box

**Step 1** Open the OW5000 Administrator (Figure 3-2) in your browser, click **UA5200 > Procedure Manager > Manage Procedures**. A Procedure Manager—Procedures dialog box displays (Figure 3-3).

**Figure 3-3** Procedure Manager—Procedures dialog box



A list of all the procedures previously created are listed in this dialog box. By default, 10 procedures can be displayed simultaneously, and the number displayed can be changed. [Table 3-1](#) explains onscreen elements in the Procedures dialog box ([Figure 3-3](#)).

**Table 3-1** Procedures Manager—Procedures Field Descriptions

Onscreen Elements	Descriptions
Filter fields	Allows field entries to be filtered by procedure name, description, or if known, by entering the name in the <b>Starts with</b> or <b>Is exactly</b> text box and then clicking the <b>Filter</b> button.
Add New Procedure button	Click the <b>Add New Procedure</b> button to launch a new procedure dialog box. This allows an administrator to create a new procedure.
> (Select) icon	Click to open the <b>Event Info Fields</b> and <b>Steps</b> dialog box.
Pencil (Edit) icon	Allows an administrator to edit the procedure.
Trash can (Delete) icon	Allows an administrator to delete the procedure and all of the associated data from the database. A confirmation dialog box displays when deleting a procedure.
Name Column	The name of the procedure.
Description	A description of the procedure.
Archive Time	Backs up event data after the configured amount of minutes.

---

## Managing Procedures

Procedures can be created, edited, searched, and deleted through the Procedure Manager dialog box (Figure 3-3). Search queries are only processed through this dialog box, not saved. The following procedures are described in this section:

- [Searching for Procedures](#)
- [Creating and Editing Procedures](#)
- [Deleting Procedures](#)

---

### Searching for Procedures

The Procedure Manager's list view can be used to search for an existing procedure.

#### To Search for an Existing Procedure

- Step 1** Open the OW5000 Administrator in your browser (Figure 3-2).
- Step 2** Select **UA5200 > Procedure Manager > Manage Procedures**. A Procedures dialog box displays (Figure 3-3) containing a list of existing procedures if any have been written.
- Step 3** Click the first **Filter** drop-down menu and select an option to search for a procedure based on its **Name** or **Description**.
- Step 4** Click the second **Filter** drop-down menu to select an option to search for a procedure whose name or description **Starts with** entered text or by exact words (**Is Exactly**).
- Step 5** Enter the name or description of the procedure to be located in the Search text field and click **Filter**. The list displays results that match the specified search criteria.
- Step 6** (Optional) Click **Clear** to remove the search text and display the complete list again.

---

## Creating and Editing Procedures

Procedures consist of steps which list actions taken when the procedure is activated, such as notifying a group of users or sending a page. The following must be done to configure a procedure.

- Create and name the procedure.
- Create, name, and configure the steps that the procedure contains.
- Specify whether an attendant should gather any additional information while the procedure runs.

An administrator can create a new procedure manually or by selecting an existing procedure to use as a template.

### To Create or Modify Procedures

- Step 1** Open the OW5000 Administrator in your browser (Figure 3-2).
- Step 2** Click **UA5200 > Procedure Manager > Manage Procedures**. A Procedure Manager dialog box displays (Figure 3-3) containing a list of existing procedures, if any have been previously created.
- Step 3** Click the **Add New Procedure** button in the Procedure Manager dialog box (Figure 3-3). A New Procedure dialog box displays (Figure 3-4).



*Identical procedures are used for editing procedures except for the following differences:*

- The Pencil icon in the Procedures dialog box (Figure 3-3) is clicked to open the **Edit Procedures** dialog box.
- The Template field is unavailable.

Refer to [Table 3-2](#) for descriptions of each field.

**Figure 3-4** Procedures Manager—New Procedure

Table 3-2 describes each field in the New Procedure dialog box (Figure 3-4).

**Table 3-2** Procedure Manager - New Procedure Field Descriptions

Field Names	Descriptions
Name	(Required) Name of the procedure you want to create.
Description	(Optional) Description of the procedure.
Templates	(Optional) Displays a drop-down list of current procedures that can be used as a starting point for creating new procedures.
Archive Time	A text box for entering the time, in minutes, before a procedure is archived.

**Step 4** Type a name to identify the procedure in the **Name** field.

**Step 5** Type descriptive text into the **Description** field.

**Step 6** (Optional) Use the **Templates** drop-down menu to select a previously defined procedure to use as a model for the new procedure.

**Step 7** Type a number in the **Archive Time** field to specify how many minutes Procedure Manager waits before archiving the new procedure.



NOTE

When a required field hasn't been filled in or selected, a warning message displays indicating that it is a required field.

**Step 8** Click **Apply** when finished or **Cancel** to close the dialog box without saving the information entered and/or modified.

## Deleting Procedures

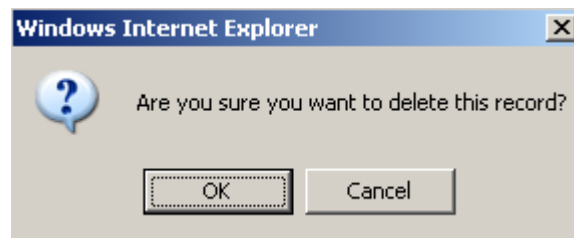
Selecting an existing procedure in the Procedure Manager dialog box (Figure 3-3 on page 3-3), and clicking the **Trash can** icon deletes the procedure and all of the associated data from the database. A Delete Confirmation dialog box displays (Figure 3-5) to confirm deletions.



REFERENCE

Refer to "Creating and Editing Procedures" on page 3-5 for step-by-step instructions to open the Procedures dialog box (Figure 3-3 on page 3-3).

**Figure 3-5** Delete Configuration dialog box



**Step 1** Click **OK** to confirm the deletion or **Cancel** to stop the deletion of the selected procedure. If the deletion is confirmed, the procedure is deleted from the list of procedures in the Procedure Manager dialog box (Figure 3-5).

## Configuring Event Info Fields

Administrators can create new, edit, or delete existing labels for the Procedures client screen on the Event Info Fields tab. Fields can also be reordered by using the **Up Arrow** and **Down Arrow** to modify field order.



REFERENCE

Refer to *“To Create or Modify Procedures”* on page 3-5 for step-by-step instructions to open the Procedure Manager dialog box (Figure 3-3 on page 3-3).

### Adding or Editing Events

**Step 1** Open the Procedure Manager dialog box (Figure 3-3 on page 3-3), and click the **Select (>)** icon next to a procedure to display the Event Info Fields and Steps tabs, in the lower part of the browser window. An Add Event Info dialog box displays (Figure 3-6).

**Figure 3-6** Procedure Manager—Add Event Info

The screenshot shows the NEC UNIVERGE OW5000 Procedure Manager interface. At the top, there are navigation tabs for 'OW5000', 'UA5200', and 'Unified Communications'. The main area is titled 'Procedure Manager' and contains a table of procedures. Below the table, there are two tabs: 'Event Info Fields' (selected) and 'Steps'. The 'ADD EVENT INFO' dialog box is open, showing fields for 'Field' and 'Caption', a 'Required' checkbox with 'Yes' selected, and 'Apply' and 'Cancel' buttons.

Name	Description	Archive Time (min)
>   Reconciling a Checking Account	Balancing checkbooks	720
>   Recovering outstanding assets	Gathering remote equipment for storage	720

**Step 2** Enter new information or edit existing information in the **Field Caption** text box. This text box displays the field name, which displays on the Procedures client screen for the user to complete.



**Step 3** Select **Yes** or **No** in the **Is Required** field to designate whether the completion of this field is necessary before the user can continue.



IMPORTANT

*Yes must be selected for the first field caption entered. Yes or No can be selected for the following field captions.*

**Step 4** Do one of the following:

- Click **Apply** to save the information.
- Click **Cancel** to close the dialog box without saving any changes and return to the Event Info Fields tab.

**Step 5** Click the **Pencil** icon to edit an existing field label for an event.



NOTE

*The Edit Event Info dialog box contains a Delete button that can be used to delete the selected event information previously added. The Add Event Info dialog box does not contain the Delete button.*

An Event Info Fields dialog box displays with all Event information, including recent changes.

**Step 6** Click the **Up Arrow** or **Down Arrow** under the **Reorder** column to modify field order.



NOTE

*As stated in [Step 3](#), the first Field Caption must have **Yes** selected in the **Required** field. When a field caption, that has **No** in the **Required** field, is moved to the first position, using the **Up Arrow**, this field should update automatically to display **Yes**. If this does not occur, please click the **Edit** icon to open the Edit Event Info dialog box, and select **Yes** in the Requirement field manually. Click **Save** and the Event Info Fields dialog box summary displays again showing the updated selection.*

### To Delete Event Info Fields

The procedure to delete an Event Info Field is identical to the procedure used to delete a procedure.



REFERENCE

*Please refer to the instructions under "[Deleting Procedures](#)" on page [3-7](#) for more information.*

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## Configuring Procedure Steps

After a new procedure is created and Event Info Fields have been entered, a series of steps must be created for the attendant to complete the procedure.

The type of action each step requires can be specified, such as notifying contacts, alerting a group, or making an overhead paging announcement. Individual steps that must be completed before a user continues to the next step in the procedure can also be specified.

### To Open Steps Dialog Boxes

- Step 1** Open the OW5000 Administrator in your browser (Figure 3-2).
- Step 2** Select **UA5200 > Procedure Manager > Manage Procedures** icon. A Procedure Manager dialog box displays (Figure 3-3 on page 3-3) containing a list of existing procedures.
- Step 3** Select the desired procedure to add steps. Event Info Fields/Steps Summary tabs display in the lower part of the browser window.
- Step 4** Click the **Steps** tab to display the Steps summary list of any existing steps (Figure 3-7). If no steps have been defined, only the Add New button displays.

Figure 3-7 Steps Tab

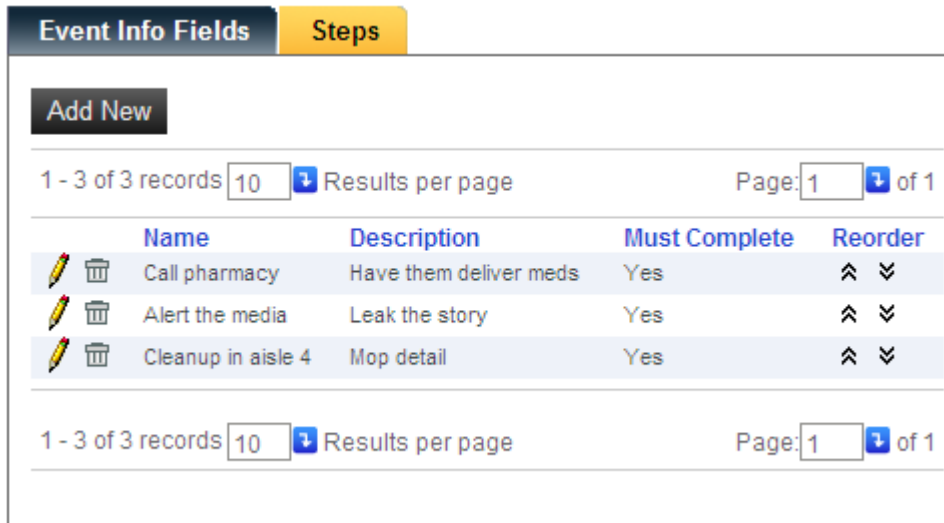


Table 3-3 describes the possible on-screen elements in the New Procedure Step tab dialog box (Figure 3-7).

Table 3-3 New Procedure—Step Tab Field Descriptions

Items	Descriptions
Add New	Launches the new step dialog box.
Pencil icon (Edit)	Allows the user to edit the step.
Trash can (Delete)	Deletes the selected step from the list.
Up Arrow	Moves the selected custom field position up.
Down Arrow	Moves the selected custom field position down.
Columns	
Name	Name of step.

Items		Descriptions
Description		Step description.
Must Complete		Step must be completed before proceeding to the next step.
Reorder		Use the Up Arrow and Down Arrow to change the order of the procedure step.

### To Add/Edit New Steps



Identical procedures are used for editing procedure steps **except**:

- The user clicks the **Pencil** icon in the Steps summary list dialog box (Figure 3-7) to open the Edit Procedure Step dialog box, and
- The Edit Procedure Step dialog box contains a **Delete** button to delete a previously added step.

**Step 1** Click the **Add New** button on the Steps summary tab (Figure 3-7) to create a new step. A Default New Procedure Step dialog box displays (Figure 3-8).

Figure 3-8 Default New Procedure Step

Refer to the following sections for configuration information for the different step types that determine required procedural steps.

- [Adding/Editing a Group Alert Step](#)
- [Adding/Editing an Instruction Step](#)
- [Adding/Editing a Notify/Contact Step](#)
- [Adding/Editing an Overhead Page Step](#)
- [Deleting a Procedure Step](#)

---

## Adding/Editing a Group Alert Step

A Group Alert step specifies a previously defined call group whose members will be contacted during a procedure.



Identical procedures are used for editing procedure steps except that the Pencil icon in the Steps summary list dialog box (Figure 3-6) is clicked to open the **Edit Procedure Step** dialog box. The user can modify the same fields in the **Edit Procedure Step** dialog box that are in the **New Procedure Step** dialog box.



Refer to the information below to open or add new procedure steps:

- “[To Open Steps Dialog Boxes](#)” on page 3-10 for instructions to open the Steps tab.
- “[To Add/Edit New Steps](#)” on page 3-11 for descriptions of on-screen dialog box elements and general information about adding new procedure steps.

### To Add/Edit a Group Alert Step to an Existing Procedure

**Step 1** Select **Group Alert** from the **Step Type** drop-down menu in the default **New Procedure Step** dialog box. The dialog box refreshes to display the additional Group Alert fields (Figure 3-9).



The Group Alert dialog box is divided into 3 sections (General Information, Directory, and On Call). The following steps include detailed instructions for configuring each section, but they are all included in the Group Alert dialog box.

**Figure 3-9** New Procedure Step—Group Alert—General Information

**Event Info Fields** **Steps**

**NEW PROCEDURE STEP**

Step Type: Group Alert

Name: Group Alert

Description: Recognizing need for sequencing

Must Complete:  Yes  No

Info Gathering Required:  Yes  No

Contact Method:  Email  Pager

Instructions:

**Step 2** Type a descriptive name for the step in the **Name** field.

**Step 3** Type descriptive text in the **Description** field. Select **Yes** or **No** in the **Must Complete** field to specify whether the attendant must complete this step before executing the rest of the procedure.

**Step 4** Select **Yes** or **No** in the **Info Gathering Required** field to specify whether the attendant must complete the information gathering steps before executing the step procedures.

**Step 5** Select **Email** or **Pager** for the Contact Method.



**NOTE**

*The people selected for a group alert must already have the selected Contact Method configured: either Email or Pager.*

**Step 6** (Optional) Type descriptive text in the **Instructions** field.

[Table 3-4](#) describes some of the on-screen elements that may display depending on the type of step that is selected.

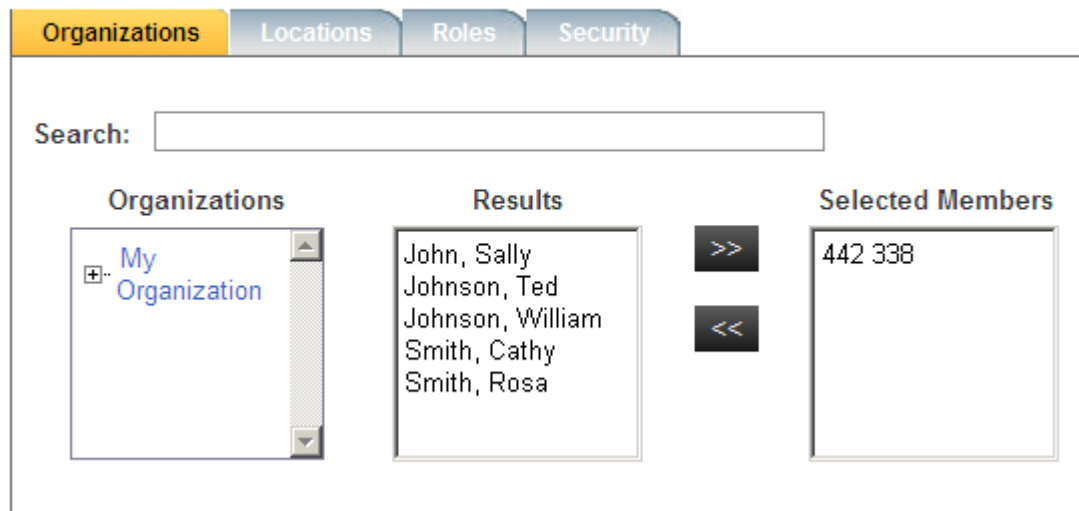
**Table 3-4** New Procedure Step Field Descriptions

On-screen elements	Descriptions
Organization Tab	Displays a tree view list of organizations.
Location Tab	Displays a list organization units.
Roles Tab	Displays a tree view list of locations.
Access Roles	A check box list of roles that can be assigned to a user. (Required).
Users List box	A list of filtered users from the selected organization, location, or roles.
Attendants	A list box of users selected from the Users list box.
Left Arrow	Moves selected items from Attendants to Users.
Right Arrow	Moves selected items from Users to Attendants.

The next section of the Group Alert dialog box contains the Directory section.

**Figure 3-10** New Procedure Step—Group Alert—Directory

### Directory



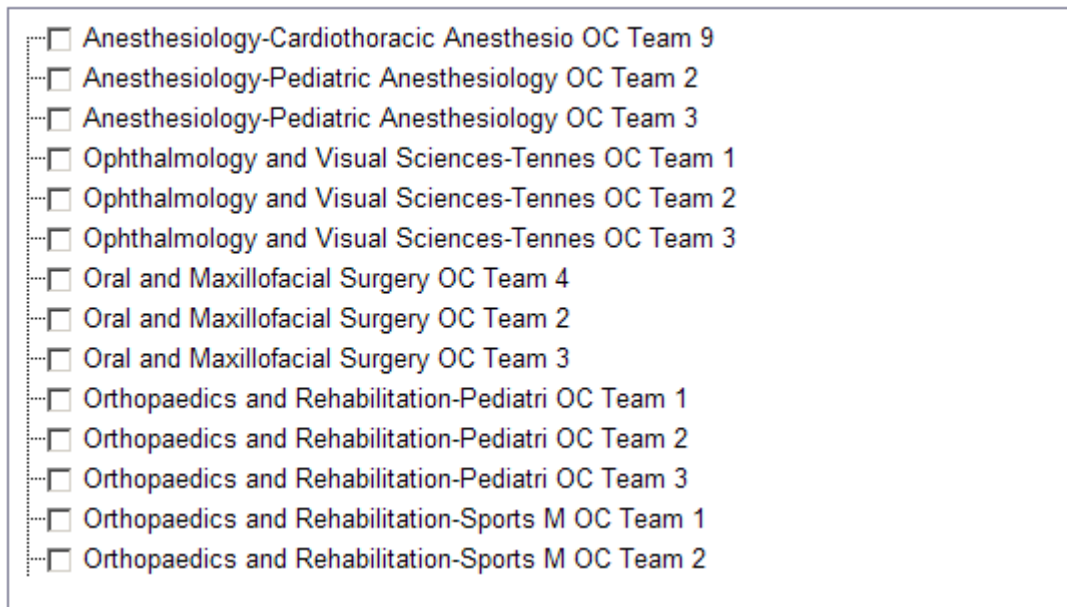
- Step 7** Under **Directory**, click the **Organizations**, **Locations**, **Roles**, and **Security** tabs to specify the criteria to use to locate participants' contact methods by doing the following:
- Click an entry in the **Organizations**, **Locations**, **Roles**, or **Security** pane to select it. A list of results displays.
  - Click the entry in the results list box to add to the group alert. Use the scroll bar to view the entire list if necessary.
  - (Optional) Type a full or partial name in the **Search** field to filter the **Results** list.

- Click the **Right Arrow** between the Results and Selected Members list boxes to add the selected contact to the conference.
- (Optional) Click the **Left Arrow** between the Results and Selected Members list boxes to remove the selected contact from the conference.

The next section of the Group Alert dialog box contains the On-Call section.

**Figure 3-11** New Procedure Step—Group Alert—On-Call

**On Call**



**Adding/Editing an Instruction Step**

An Instruction step defines specific information, hints, or information which should be presented to an attendant during a procedure.



Identical procedures are used for editing procedure steps except that the Pencil icon in the Steps summary list dialog box (Figure 3-6) is clicked to open the Edit Procedure Step dialog box. The user can modify the same fields in the Edit Procedure Step dialog box that are in the New Procedure Step dialog box.



Refer to the following for more information:

- “To Open Steps Dialog Boxes” on page 3-10 for instructions to open the Steps tab.
- “To Add/Edit New Steps” on page 3-11 for descriptions of on-screen dialog box elements and general information about adding new procedure steps.

## To Add an Instruction Step to an Existing Procedure

- Step 1** Select **Instructions** from the **Step Type** drop-down menu. A New Procedure Step—Instructions displays (Figure 3-12).

Figure 3-12 New Procedure Step—Instructions





The screenshot shows a dialog box titled "EDIT PROCEDURE STEP" with two tabs: "Event Info Fields" and "Steps". The "Steps" tab is selected. The dialog contains the following fields and controls:

- Step Type:** A dropdown menu with "Instructions" selected.
- Name:** An empty text input field.
- Description:** An empty text input field.
- Must Complete:** Radio buttons for "Yes" (selected) and "No".
- Info Gathering Required:** Radio buttons for "Yes" (selected) and "No".
- Instructions:** A large empty text area with a vertical scrollbar.
- Buttons:** "Apply", "Delete", and "Cancel" buttons at the bottom.

- Step 2** Type a descriptive name for the step in the **Name** field.
- Step 3** Type descriptive text in the **Description** field.
- Step 4** Select **Yes** or **No** in the **Must Complete** field to specify whether the attendant must complete this step before executing the remaining steps.
- Step 5** Select **Yes** or **No** in the **Info Gathering Required** field to specify whether the attendant must complete the information gathering steps before executing the step procedures.
- Step 6** (Optional) Type descriptive text in the **Instructions** field.
- Step 7** Click **Apply** to save the step as part of the selected procedure.
- Step 8** Click **Delete** to remove the step, or click **Cancel** to exit the dialog box without saving the changes. The list of steps within the selected procedure displays again (Figure 3-9).



Figure 3-13 Steps Summary List

Event Info Fields		Steps	
<b>Add New</b>			
1 - 2 of 2 records		10	Results per page
		Page: 1	of 1
Name	Description	Must Complete	Reorder
  Alert the media	Leak the story	Yes	⤴ ⤵
  Cleanup in aisle 4	Mop detail	Yes	⤴ ⤵
1 - 2 of 2 records		10	Results per page
		Page: 1	of 1

### Adding/Editing a Notify/Contact Step

A Notify/Contact step defines one or more individuals that an attendant must contact at a specific point during a procedure.



IMPORTANT

Identical procedures are used for editing procedure steps except that the Pencil icon in the Steps summary list dialog box (Figure 3-6) is clicked to open the Edit Procedure Step dialog box. The user can modify the same fields in the Edit Procedure Step dialog box that are in the New Procedure Step dialog box.



NOTE

Refer to the following for more information:

- “To Open Steps Dialog Boxes” on page 3-10 for instructions to open the Steps tab.
- “To Add/Edit New Steps” on page 3-11 for descriptions of on-screen dialog box elements and general information about adding new procedure steps.

### To Add a Notify/Contact Step to an Existing Procedure

**Step 1** Select **Notify/Contact** from the Step Type drop-down menu. A New Procedure Step—Notify/Contact dialog box displays (Figure 3-14).

**Figure 3-14** New Procedure Step—Notify/Contact dialog box

**Event Info Fields** **Steps**

**EDIT PROCEDURE STEP**

Step Type:

Name:

Description:

Must Complete:  Yes  No

Info Gathering Required:  Yes  No

Instructions:

Directory  On-Call

Source:  Organization  Location

Custom Defined

**Directory**

**Organizations** **Locations** **Roles** **Security**

Search:

**Results**

**Selected Members**

Brown, Brenda

- Step 2** Type a descriptive name in the **Name** field.
- Step 3** Type descriptive text in the **Description** field.
- Step 4** Select **Yes** or **No** in the **Must Complete** field to specify whether the attendant must complete this step before executing the remaining steps.
- Step 5** Select **Yes** or **No** in the **Info Gathering Required** field to specify whether the attendant must complete the information gathering steps before executing the step procedures.
- Step 6** (Optional) Type descriptive text in the **Instructions** field.

- Step 7** Click a **Source** radio button to specify whether the participants derive from an OW5000/On-Call directory, an Organization or location list, a list of On-Call users, or a [Custom Defined](#) list.
- Step 8** Under Directory, click the **Organizations**, **Locations**, and **Roles** tabs to specify the criteria to use to locate participants' contact methods by doing the following:
- Click an entry in the **Organizations**, **Locations**, **Roles**, and/or **Security** pane to select it. A list of results displays.
  - Click the entry in the results list box to add to the step. Use the scroll bar to view the entire list if necessary.
  - (Optional) Type a full or partial name in the **Search** field to filter the **Results** list.
  - Click the **Right Arrow** between the Results and Selected Members list boxes to add the selected contact to the step.
  - (Optional) Click the **Left Arrow** between the Results and Selected Members list boxes to remove the selected contact from the Contact/Notify step.
- Step 9** Click **Apply** to save the step as part of the selected procedure.
- Step 10** Click **Delete** to remove the step, or click **Cancel** to exit the dialog box without saving the changes. The list of steps within the selected procedure displays again ([Figure 3-15](#)).

### Custom Defined

- Step 1** To define a custom list in the On-Call list, a step must first be saved. Click the **Apply** button to save the step and then click the **Edit** (pencil) icon in the Steps list dialog box and proceed to the next step.
- Step 2** Do the following in the Custom Defined text box:
- Select a pre-existing list to edit or click **Add New** to create a new custom On-Call list.
  - Type a descriptive name in the **Description** field. This text label will appear on the attendant side next to the number. This is the phone number to call when executing this step in the **Number to Call** field.
  - (Optional) Select the **Dial-As-Is** check box to require the system to dial the number exactly as entered.
- Step 3** Click **Apply** to save the step as part of the selected procedure or click **Cancel** to exit the dialog box without saving the changes. The list of steps within the selected procedure displays ([Figure 3-7 on page 3-10](#)).

**Figure 3-15** Steps Summary—Notify/Contact

Event Info Fields
Steps

Add New

1 - 2 of 2 records  Results per page
Page:  of 1

	Name	Description	Must Complete	Reorder
	Alert the media	Leak the story	Yes	⬆️ ⬇️
	Cleanup in aisle 4	Mop detail	Yes	⬆️ ⬇️

1 - 2 of 2 records  Results per page
Page:  of 1

### Adding/Editing an Overhead Page Step

An Overhead Page step specifies the number your system uses to conduct an overhead page announcement and any text which the announcer must read.



Identical procedures are used for editing procedure steps except that the Pencil icon in the Steps summary list dialog box (Figure 3-6) is clicked to open the Edit Procedure Step dialog box. The user can modify the same fields in the Edit Procedure Step dialog box that are in the New Procedure Step dialog box.



Refer to the following for more information:

- “To Open Steps Dialog Boxes” on page 3-10 for instructions to open the Steps tab.
- “To Add/Edit New Steps” on page 3-11 for descriptions of on-screen dialog box elements and general information about adding new procedure steps.

### To Add/Edit an Overhead Page Step

**Step 1** Select **Overhead Page** from the **Step Type** drop-down menu. A New Procedure Step—Overhead Page (Figure 3-9).

**Figure 3-16** New Procedure Step—Overhead Page

The screenshot shows a dialog box titled "EDIT PROCEDURE STEP" with two tabs: "Event Info Fields" and "Steps". The "Steps" tab is selected. The form contains the following fields and controls:









- Step Type:** A dropdown menu set to "Overhead Page".
- Name:** A text input field.
- Description:** A text input field.
- Must Complete:** Radio buttons for "Yes" (selected) and "No".
- Info Gathering Required:** Radio buttons for "Yes" (selected) and "No".
- Number To Page:** A text input field.
- Page Announcement:** A large text area with a vertical scrollbar.
- Buttons:** "Apply", "Delete", and "Cancel" buttons at the bottom.

- Step 2** Type a descriptive name in the **Name** field.
- Step 3** Type descriptive text in the **Description** field.
- Step 4** Select **Yes** or **No** in the **Must Complete** field to specify whether the attendant must complete this step before executing the remaining steps.
- Step 5** Select **Yes** or **No** in the **Info Gathering Required** field to specify whether the attendant must complete the information gathering steps before executing the step procedures.
- Step 6** Type the system's paging number in the **Number To Page** field.
- Step 7** Type the text you wish the announcer to read during the page in the **Page Announcement** field.
- Step 8** Click **Apply** to save the step as part of the selected procedure.
- Step 9** Click **Delete** to remove the step, or click **Cancel** to exit this dialog box without saving the changes. The list of steps within the selected procedure displays (Figure 3-7 on page 3-10).



Some overhead paging systems require the touch tone from a Dterm. The phone may need to be used to access the overhead paging system.

**Figure 3-17** Steps Summary List—Overhead Page

Event Info Fields		Steps			
+ Add					
	Name	Description	Must Complete	Reorder	
 	Group Alert	Signals terminated on Bus	No	⤴	⤵
 	Instructions	Install Board in PCI slot	Yes	⤴	⤵
 	Notify/Contact Step	Contact Admin	Yes	⤴	⤵
 	Overhead Page	Overhead Page	Yes	⤴	⤵

### Deleting a Procedure Step

Use the following steps to delete a step from a procedure.

- Step 1** Open the **OW5000 Administrator** in your browser.
- Step 2** Click **UA5200 > Procedure Manager > Manage Procedures**. A Procedure Manager window displays containing a list of existing procedures.
- Step 3** Select the **Right Arrow** icon on the row of the procedure containing the step you wish to delete. The procedure is highlighted and the Info Gathering Fields/Steps dialog box displays.
- Step 4** Click the **Steps** tab to select it. A list of any existing steps displays.
- Step 5** Select the step to delete and click the **Trash can** icon. A confirmation dialog box displays.
- Step 6** Click **OK** to delete the step.

## Generating Reports

Reports can be generated for all procedures that are run. The following information is included:

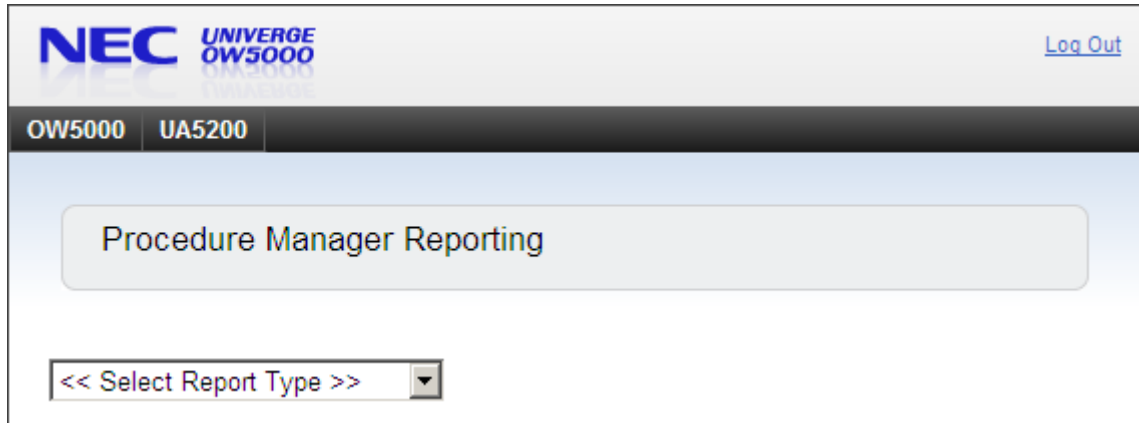
- Instance ID (the number generated when a procedure is run)
- Procedure Name
- Star
- Start Date
- End Date
- Event Date
- Attendant Name
- Notes

To create a report, a search must be completed to identify the procedures to be included.

## To Create a Report

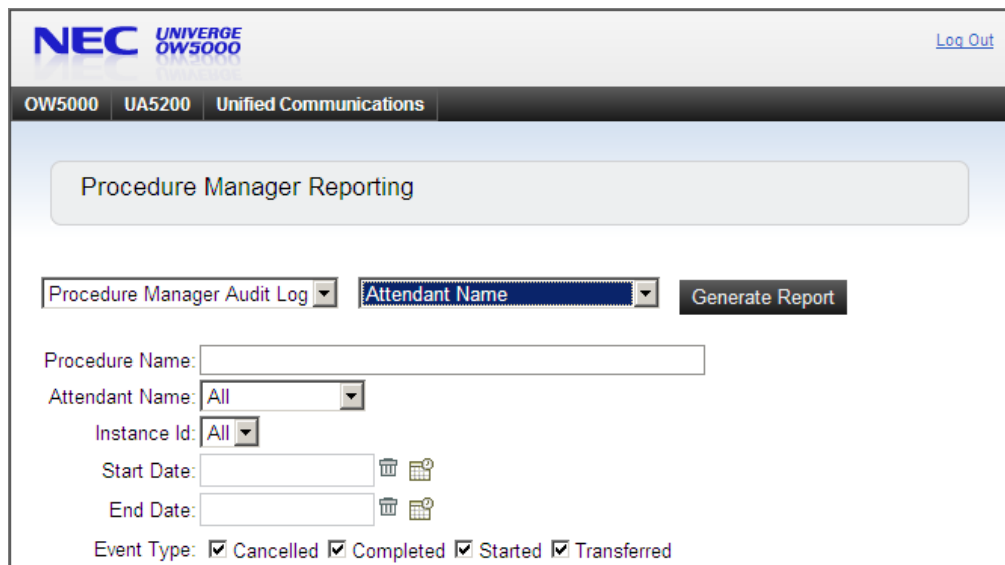
**Step 1** Login to the OW5000 Administrator program. Once you are logged in to OW5000 Administrator, follow this path to open the Procedure Manager report options: **UA5200 > Procedure Manager > Procedure Reports**. A Procedure Manager Reports dialog box displays (Figure 3-18).

Figure 3-18 Procedure Manager Reporting —Select Report Type



**Step 2** Enter the **Report Type** search criteria. Figure 3-19 displays.

Figure 3-19 Procedure Manager Reporting—Select Report Group



**Step 3** Enter the Report Group search criteria, then click **Generate Report** for procedures. Refer to Figure 3-20.

- Records can be searched by procedure names, attendant names, instance identification, start date, end date, or event type (cancelled, completed, started, or transferred).
- Table 3-5 describes onscreen items and field definitions for the Procedure Manager Reports dialog box (Figure 3-18).

**Table 3-5 Reporting Fields**

Fields	Descriptions
Procedure Name	Allows a search for all procedure records containing the exact procedure title. Max - 75 characters Min - 1 character
Start Date	Allows a criteria search based on the earliest date that the procedure should have occurred. Max - 20 characters Min - 1 character
End Date	Allows a criteria search based on the latest date that the procedure should have occurred. Max - 20 characters Min - 1 character

**Figure 3-20 Procedure Manager Audit Log Report**

The screenshot shows a web-based report interface. At the top, there are navigation controls including a page indicator (1 of 3), a zoom level (100%), a search box containing 'test1', and buttons for 'Find | Next', 'Select a format', and 'Export'. Below the navigation is the report title 'Procedure Manager Audit Log Report - By Attendant Name'. The main content is a table with the following columns: Attendant, Instance, Procedure, Step Name, Activity Type, Event Type, Event Date, Notes, and Final Summary. The data is filtered for the attendant 'Feng2, Hai2' and shows seven rows of procedure instances.

Attendant	Instance	Procedure	Step Name	Activity Type	Event Type	Event Date	Notes	Final Summary
Feng2, Hai2	4	ManyCharacters		Procedure	Started	12/06/2007 2:02:33 PM		11
	4	ManyCharacters		Procedure	Completed	12/06/2007 2:02:43 PM		11
	6	test1		Procedure	Started	12/06/2007 2:02:55 PM		1
	6	test1		Procedure	Completed	12/06/2007 2:03:07 PM		1
	12	ManyCharacters		Procedure	Started	12/06/2007 3:00:28 PM		axs
	12	ManyCharacters		Procedure	Completed	12/06/2007 3:00:36 PM		axs
	15	ManyCharacters		Procedure	Started	12/06/2007		7

The Procedure Manager Audit Log Report is used to generate the report document and perform the export features. Reports are available to view, print, and export.



### To Generate Reports


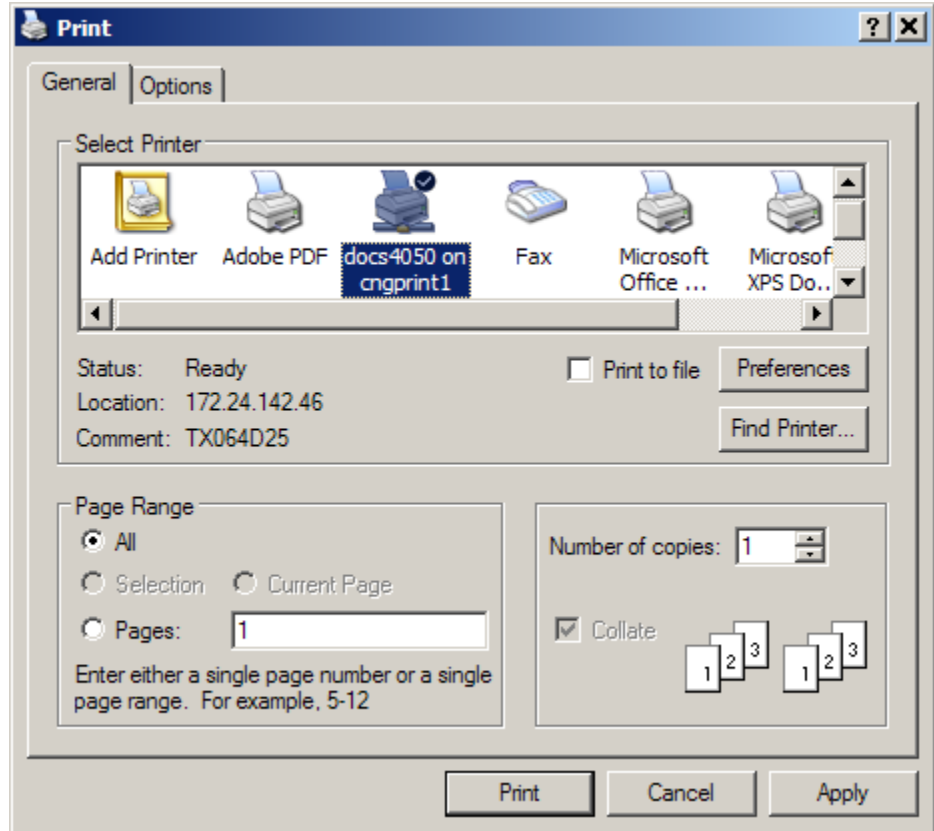
**Step 1** Click the printer icon  to print reports. The Print dialog box displays (Figure 3-21).

Figure 3-21 Printer dialog box



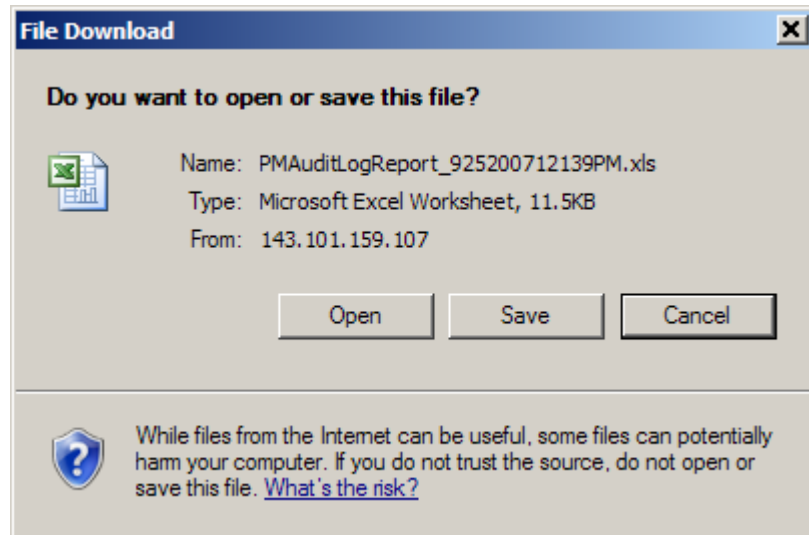
**Step 2** Select the desired printer and click **Print**.

### To Save Reports

**Step 1** Select the **Export Format** type from the **Export** drop-down list.

**Step 2** Click **Export**. A File Download dialog box displays (Figure 3-22).

---

**Figure 3-22** File Download dialog box

- Step 3** Do one of the following:
- Click **Open** to open the report in the associated application with the format chosen.
  - Click **Save** to save the file.
  - Click **Cancel** to exit without saving the report.

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## Procedure Manager Help

Select the Procedure Manager Help menu to display commands that display documentation or other information about the currently selected object or about the system.

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

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**UCE Attendant (UNIVERGE UA5200) Procedure Manager  
Administrator Operations Guide**

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