

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

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**On-Call Administrator**

**Operations Guide**

**NEC** NEC Corporation

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September 2010  
NDA-30905, Revision 4

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## 1

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# Introduction

Welcome to the *UA5200 On-Call Administrator Operations Guide*. This guide provides the information you need to install and configure On-Call Administrator.

*Chapter Topics*

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

---

## Overview

On-Call Administrator is an UA5200 application allowing an administrator to create groups of employees and to configure schedules, shifts, and contact information using a web interface.

Some of the functions provided by the On-Call Administrator application include:

- Create shifts
- Create, edit, and maintain schedule names
- Manage employee schedules and specify their contact methods and the order in which they will be used
- Create and maintain On-Call Schedules based on shifts, employees, and schedule names
- Use the On-Call Calendar to view schedules

On-Call Administrator relies on the OW5000 Runtime Platform, the OW5000 database, and directly affects the application through shared data in the database. It also relies on OW5000 Administrator for the maintenance of user login accounts and permissions.

---

## How This Guide is Organized

- |  |   |
|--|---|
| <i>Chapter 1</i><br><i>Introduction</i>                      | This chapter outlines how to use the guide, including the organization and chapter layout for the On-Call Administrator application.                            |
| <i>Chapter 2</i><br><i>Installing On-Call Administrator</i>  | This chapter describes the initial requirements for installing On-Call Administrator, along with the step-by-step procedures needed to install the application. |
| <i>Chapter 3</i><br><i>Configuring On-Call Administrator</i> | This chapter provides the steps and information needed to start and configure the On-Call Administrator application.  |

## 2

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# Installing On-Call Administrator

This chapter provides step-by-step procedures to install the On-Call Administrator application.

*Chapter Topics*

- [Before Starting the Installation Procedure](#)
- [Installing On-Call Administrator](#)
- [Removing the On-Call Administrator Software](#)

---

## Before Starting the Installation Procedure

This section describes the required components that must be in place before installing the On-Call Administrator software.



NOTE

The OW5000 Runtime Platform and UA5200 Server must be installed prior to installing UA5200 On-Call Administrator so that the database is created and ready for storing and retrieving data.

---

## Hardware and Software Requirements

Prior to installing any software, refer to the *Requirements* section in the *UNIVERGE OW5000 System Manual* to verify that your system meets the Application Environment requirements for the OW5000 Runtime Platform and the specific application software you purchased.

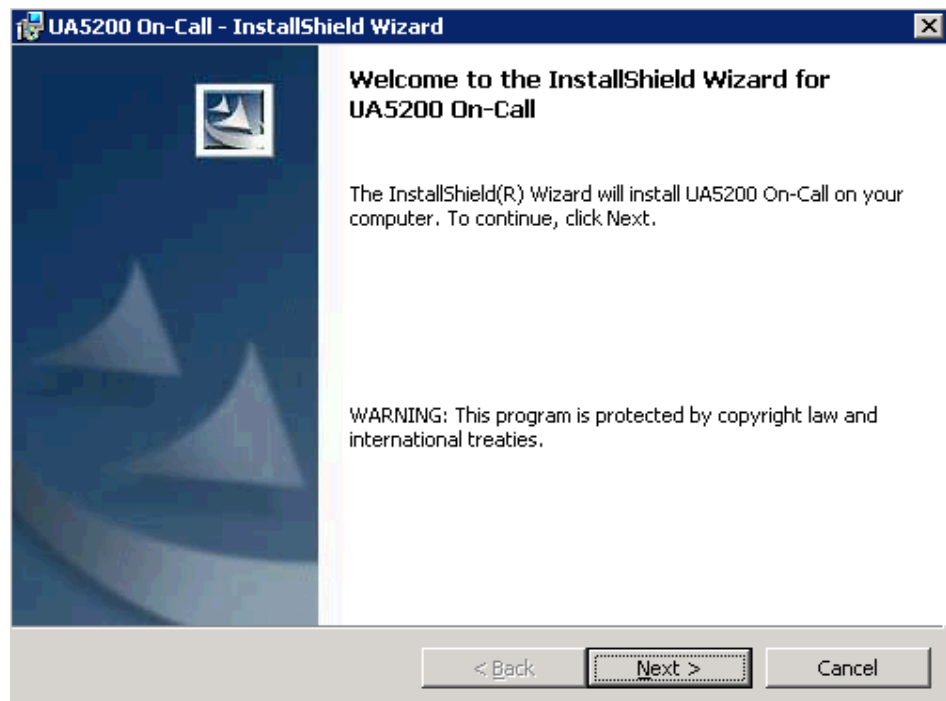
## Installing On-Call Administrator

This section details the step-by-step instructions for installing the On-Call Administrator software.

Use the following steps to install the On-Call Administrator software.

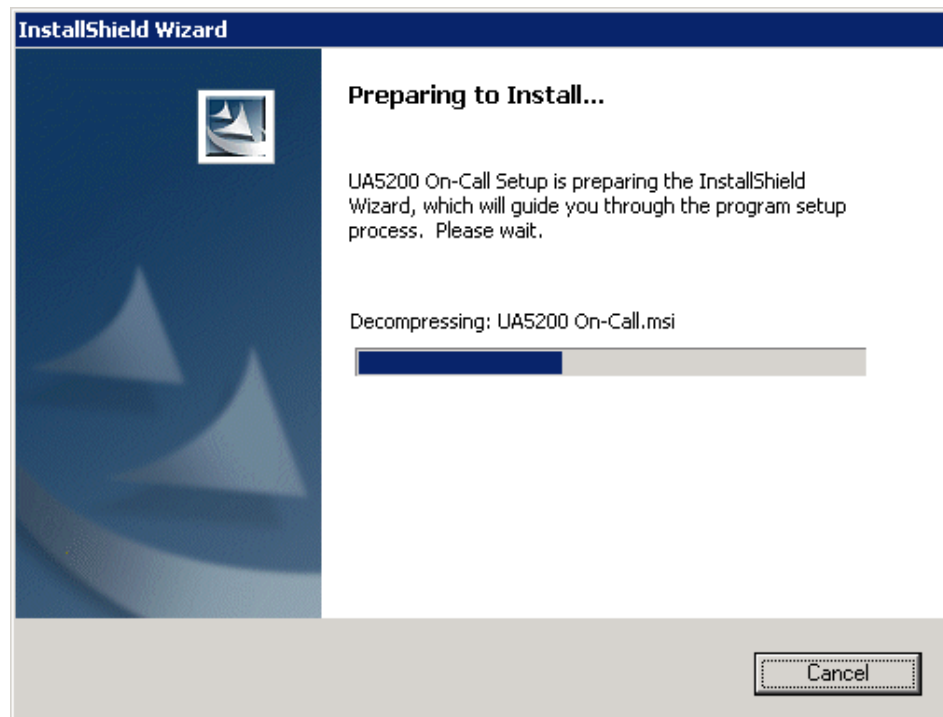
- Step 1** Place the UCE DVD into the computer's DVD-ROM drive. On most computers, setup will automatically start when the DVD is loaded. If Autorun is not enabled on the computer, then do the following:
- After placing the UCE DVD into the computer's DVD-ROM drive, open Windows Explorer and double-click the **DVD-ROM drive** icon.
  - In the DVD-ROM file list, double-click the **Setup.exe** file in the **On-Call Administrator** folder. A Master Installation Menu displays.
- Step 2** Select **Installation > On-Call Administrator** to start the On-Call Administrator installation program. A Preparing to Install screen briefly appears and then [Figure 2-1](#) displays.

**Figure 2-1** On-Call Administrator - InstallShield Wizard - Welcome



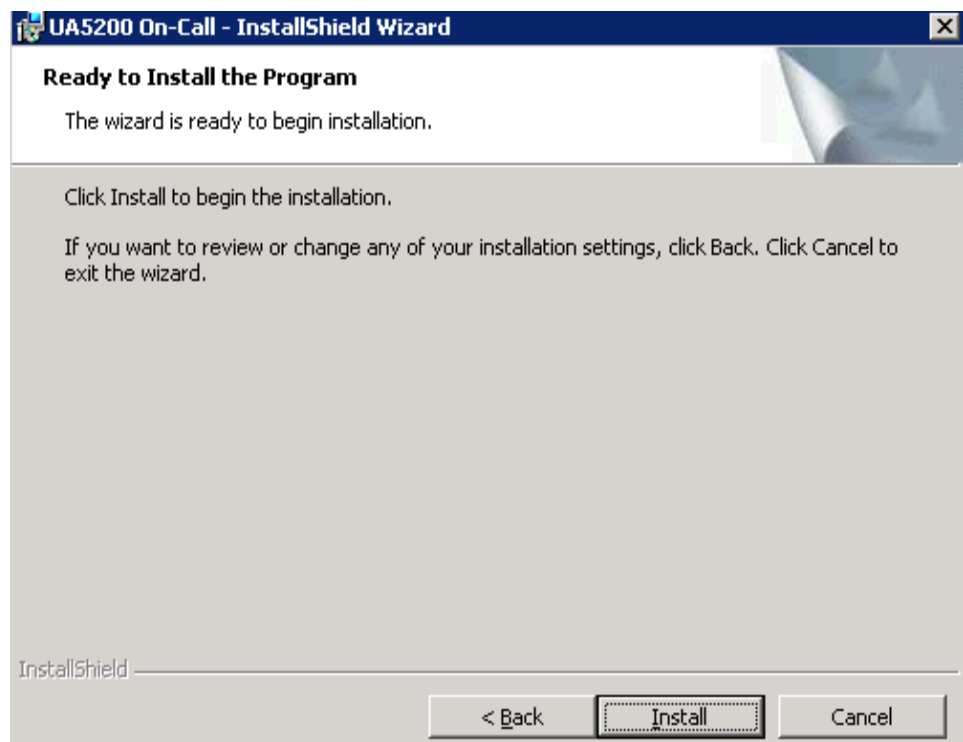
- Step 3** Click **Next**. [Figure 2-2](#) displays.

**Figure 2-2** On-Call Administrator - InstallShield Wizard - Preparing to Install



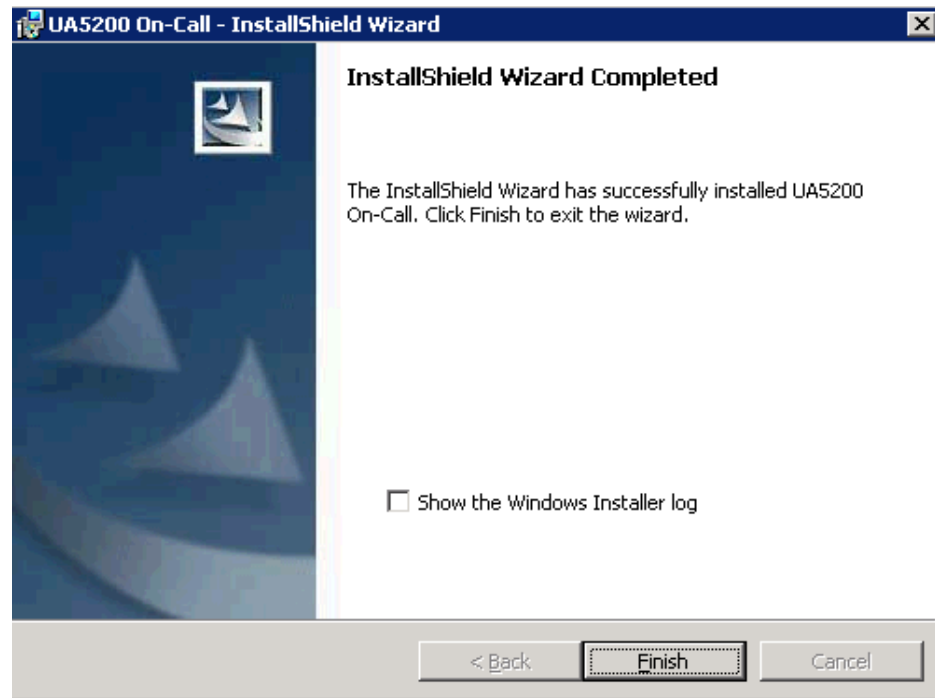
—After InstallShield has completed the setup procedure, [Figure 2-3](#) displays.

**Figure 2-3** On-Call Administrator - InstallShield Wizard - Ready to Install the Program



**Step 4** Click **Install**. Figure 2-4 displays after the install is complete.

**Figure 2-4** On-Call Administrator - InstallShield Wizard - Complete



## Removing the On-Call Administrator Software

The On-Call Administrator software can be removed using the Windows operating system Add/Remove software function in the Windows Control Panel.

**Step** In the Add/Remove dialog, select **UA5200 On-Call** then click **Remove**. Follow the displayed instructions, and remove all components when prompted.



REFERENCE

Refer to the Windows documentation for the specific version of Windows installed.

## 3

# Configuring On-Call Administrator

- Chapter Topics*
- [Using Calendar](#)
  - [Creating Schedule Names](#)
  - [Adding Schedules](#)
  - [Cloning Schedules](#)
  - [Editing Schedules](#)
  - [Deleting Schedules](#)
  - [Substituting Shifts](#)
  - [Using On-Call Reports](#)

The functions and associated screen displays for configuring the On-Call Administrator are described in this chapter.

OW5000 Administrator is the OW5000 Runtime Platform utility used to configure applications and tools. It also provides a graphical user interface to modify user account information.

OW5000 Administrator provides a view of database information, login settings, installed applications, and application settings. You may browse and request modifications to the system repository by clicking on the desired application in the navigation pane.

A On-Call Administrator can manage On-Call users and configure schedules, shifts, and contact information. Plus, the On-Call Administrator can create shifts, create, edit, and maintain schedule names, manage employee schedules and specify their contact methods and the order in which they will be used, create and maintain On-Call Schedules based on shifts, employees, and schedule names, and use the On-Call Calendar to view schedules.

A reporting feature provides the user a way to create an audit log or log of On-Call schedules. You can group the log results based on a particular report type. Depending on the report type, you can group reports by Attendant Name, Contact Name, Schedule Name, Unit, and Schedule Name with Details.

The On-Call Administrator must be given access privileges prior to using the web interface and administration portion of the application.

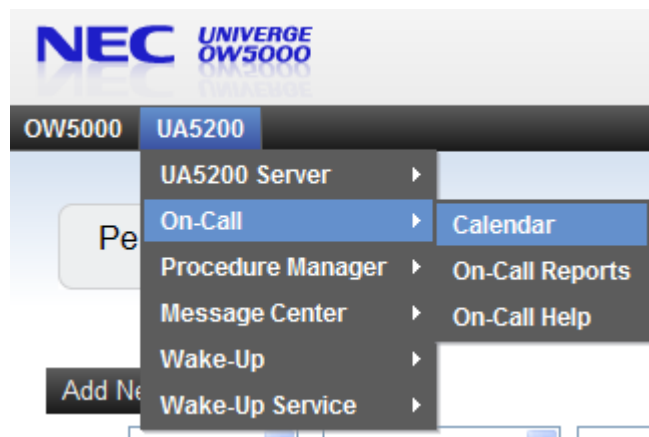
## Access Rights

The System Administrator can assign a user role and specific security authorizations to all person using the On-Call Administrator application. Based on the security authorization, the user will be able to perform certain tasks within the application module. The UA5200 menu is visible only if an individual has access rights based on their security authorization. In some cases, certain options under the **UA5200 > On-Call** menu will also be visible only under these conditions.

## Using Calendar

The **Calendar** option helps identify groups of employees or organizations within your company that can be assigned to a common schedule. After establishing a schedule, it can be modified, as well as specify when it becomes active or inactive. To add new Schedule Names do the following:

**Figure 3-1** UA5200 On-Call Calendar Option



- Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**. [Figure 3-2](#) displays. Refer to [Table 3-1](#) for a description of the sections, fields, and hyperlinks populating the On-Call Calendar screen.



Figure 3-2 On-Call Calendar - Main Menu

NEC UNIVERGE OW5000 Log Out

OW5000 UA5200

On-Call Calendar

Schedule Name: Accounting + -

Shift Filter: All

CALENDAR VIEW  
Perspective: Shift Assignment  
Time Frame: Monthly

ATTENDANT SETTINGS  
Status Management: Manual  
Show Persons for Shifts: All Shifts

Schedule: [Add Schedule](#), [Clone Schedule](#), [Edit Schedule](#), [Delete Schedule](#)

Shift: [Shift Substitutions](#)

September October, 2008 November

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	Oct 1	2	3	4
Afternoon-Shift: EryWeekend	Afternoon-Shift: EryWeekend	Afternoon-Shift: EryWeekend				

Table 3-1 On-Call Calendar - Main Menu Overview

Item	Description
<b>Schedule Name</b>	Use to select, create, edit or delete a Schedule Name.
<b>Calendar View</b>	<p><b>Perspective:</b> Use to change the calendar display to four possible views for a selected Schedule Name. The view options are Shift Assignment, Shift Schedule, Person Schedule, or Individual.</p> <p><b>Time Frame:</b> Use to change the calendar display to either a weekly or a monthly view.</p>
<b>Attendant Settings</b>	<p><b>Status Management:</b> Use to automatically or manually clear attendant overrides for inactive shifts.</p> <p><b>Show Persons for Shifts:</b> Use to display all shifts, or only active shifts.</p>
<b>Shift Filter</b>	Use to display all shifts in the calendar view, or only selected shifts. The displayed shifts are dependent on the selected Schedule name.
<b>Add Schedule</b>	Use to add a new schedule to the selected Schedule Name.
<b>Clone Schedule</b>	Use to choose an existing shift schedule to copy and add to Schedule Name
<b>Edit Schedule</b>	Use to choose an existing schedule to edit.
<b>Delete Schedule</b>	Use to choose an existing schedule to delete from the selected Schedule Name.

Item	Description
<b>Shift Substitutions</b>	Use to allow one team member to be substituted for another team member within a schedule.

## Creating Schedule Names

The **Schedule Name** field (Figure 3-3) allows the user to group schedules under a common heading (for example, department name or team name).

**Figure 3-3** Schedule Name List

Schedule Name:     

To create or add a new Schedule Name, do the following:

**Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar > Schedule Name**. See Figure 3-2.

**Step 2** Click the **Plus**  icon. Figure 3-4 displays.

**Figure 3-4** Adding Schedule Name

Schedule Name

Schedule Name:

Contact Persons in a Specified Order? ☒

Apply

Done

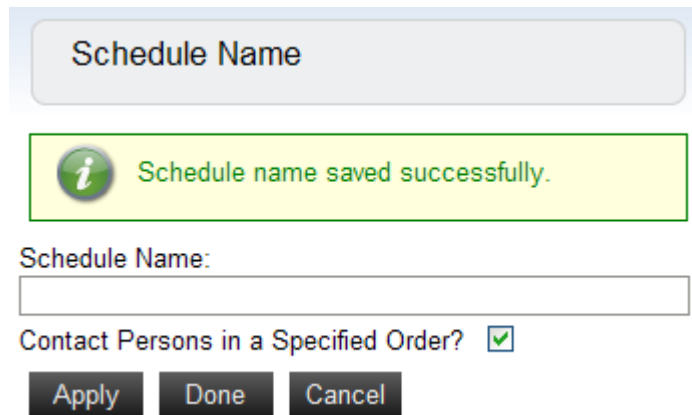
Cancel

**Step 3** Enter the schedule's name (between 1 and 50 characters), then click **Apply**. Figure 3-5 displays.




Select the **Contact Persons in a Specified Order** check box if team members of a particular shift are to be contacted in a prioritized order.


**Figure 3-5** Schedule Name - Successfully Saved



The screenshot shows a dialog box titled "Schedule Name". At the top, there is a text input field containing the text "Schedule Name". Below this field is a green-bordered box with a green information icon and the text "Schedule name saved successfully.". Underneath the success message is another text input field, also labeled "Schedule Name:". Below the input field is a checkbox labeled "Contact Persons in a Specified Order?" which is checked. At the bottom of the dialog are three buttons: "Apply", "Done", and "Cancel".

**Step 4** To add more schedule names, continue entering new names and clicking **Apply**. When all the desired Schedule Names are entered, click **Done**. [Figure 3-3](#) displays once more with the new Schedule Names in the drop-down list.

—To change an existing Schedule Name, click the **Pencil**  icon assigned to the Schedule Name to be edited.

—To remove an existing Schedule Name, click the **Trash**  icon assigned to the Schedule Name to be deleted.

## Adding Schedules

An On-Call schedule defines a common time period created and assigned to a Schedule Name. You can specify the start and end times for the shift, as well as how often it recurs, and the days of the week or the months during which it is in effect. Once you define the recurrence pattern, you can further define a range of dates during which the shift is available for use in an On-Call schedule.

### **Examples:**

- Admin - Day Shift: 9am - 5pm every weekday
- ER - Summer Day Shift: 9am - 5pm every weekday in the month of June
- Student Rotation Day Shift: 9am - 5pm every 21 days
- Fall Schedule - Day Shift: 9am - 5pm, seven days a week, between October and December
- Semi-annual Day Shift: 9am - 5pm, seven days a week, from January until June
- Revised Standard Day Shift: 9am - 5pm, seven days a week, beginning next August and continuing indefinitely

The Create Schedule screen allows the user to add a new schedule to the selected Schedule Name. To create new schedules, do the following:

- Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**, then click the **Add Schedule** hyperlink. [Figure 3-6](#) displays with the selected Schedule Name listed.

**Figure 3-6** On-Call Calendar - Create Schedule

**On-Call Calendar**

**CREATE SCHEDULE**

Schedule Name: House Keeping

Start Date: July 16 2008

End Date: July 16 2008

Description:

Notes:

**SHIFTS**

Add New Shift

There are no shifts defined.

Apply Done Cancel

- Step 2** Enter the schedule duration dates in the **Start Date** and **End Date** fields by entering the dates directly, or by clicking the calendar icons located next to each date field and selecting the desired date from the displayed calendar.

- Step 3** Provide a brief schedule title in the **Description** field.



**IMPORTANT**

The **Description** field is a mandatory entry.

- Step 4** Enter any additional information, if needed, in the **Notes** field.

- Step 5** Click **Apply** to add the new schedule to the selected Schedule Name. [Figure 3-7](#) displays.

**Figure 3-7** Schedule Name Saved Successfully

The screenshot shows the 'On-Call Calendar' interface. At the top, there is a header bar labeled 'On-Call Calendar'. Below it, a green message box with an information icon states 'The schedule was saved successfully.' The main section is titled 'EDIT SCHEDULE' in blue. It contains the following fields: 'Schedule Name: Test', 'Start Date: July 21 2008' (with a calendar icon), 'End Date: July 25 2008' (with a calendar icon), 'Description: Greensburg Fire' (in a text box), and 'Notes:' (in a large text area with a vertical scrollbar). Below the 'EDIT SCHEDULE' section, there is a 'SHIFTS' section with a button labeled 'Add New Shift' and a message 'There are no shifts defined.' At the bottom of the form, there are three buttons: 'Apply', 'Done', and 'Cancel'.

- Step 6** To add shifts to this newly created schedule, click **Add New Shift**. [Figure 3-8](#) displays.

**Figure 3-8** On-Call Calendar - Add Shift

**On-Call Calendar**

**CREATE SCHEDULE**

Schedule Name: AdminSchedule

Start Date: February 16 2010

End Date: February 16 2010

\* Description: Test

Notes:

**ADD SHIFT**

\* Shift Name:

Start Time: 12:00 AM

Shift Lasts: Hours 0 Minutes 0

Frequency: Once

Save Cancel

Apply Done Cancel


## Adding a New Shift

- Step 1** In the **Add Shift** section, enter a name for the new shift in the **Shift Name** field.
- Step 2** Enter the **Start Time**.
- Step 3** Use the **Shift Lasts** to specify shift duration.
- Step 4** Use the **Frequency** option to specify how often the new shift is available. Select from one of the following options:

—**Once** - Makes the shift available for only one occurrence, starting and lasting as indicated.

Frequency: Once

—**Daily** - Makes the shift available every day, including weekends. (You can also select the Every Weekday option to specify that the shift will be available every Mon.-Fri., and the Every Weekend Day option to specify that the shift will be available every Sat.-Sun.).


Frequency: Daily 

☒ Every  Day(s)

☐ Every Weekday

☐ Every Weekend Day

—**Weekly** - Makes the shift recur on one or more weeks. Enter a number in the **Every \_\_ Week(s) on** text field to specify the number of weeks before the shift recurs.


Frequency: Weekly 

Every  Week(s) on:

☐ Sunday ☒ Monday ☐ Tuesday ☒ Wednesday ☐



Enter **1** if you wish the shift to be available every week. Use the check boxes to specify which days during the specified week the shift will be available.

—**Monthly** - Makes the shift recur on one or more months. Click the **Day \_\_ of the Month** option and enter the day (1-31) during the month when the shift recurs. Then, enter the number of months before the shift recurs on that specified day.

Frequency: Monthly 

Every  Month(s) on:

☐ Day  of the Month

☐ The First  Sunday  of the Month

Enter 1 if you wish the shift to be available every month on the specified day.) You can also use the drop-down increment menus to specify which days and weeks during the specified month the shift will be available.

Click **The \_\_ of the Month** option to specify a specific day for the month. For example, the third Wednesday of the month.


**Step 5** To add more shifts, continue entering new shifts and clicking **Apply**. When all the desired shifts are entered, click **Done**. [Figure 3-9](#) displays once more with the new shifts listed.


**Figure 3-9** On-Call Calendar - Shift Listing

On-Call Calendar

**EDIT SCHEDULE**

Schedule Name: Test

Start Date:  







End Date:  

Description:




Notes:

**SHIFTS**

Add New Shift

	<u>Name</u> ▲	<u>Start</u>	<u>End</u>	<u>Frequency</u>
  	Team A	12:01 AM	8:01 AM	weekly
  	Team B	12:00 AM	8:00 AM	weekly

Apply
Done
Cancel

- To change an existing shift, click the **Pencil**  icon assigned to the shift to be edited.
- To remove an existing shift, click the **Trash**  icon assigned to the shift to be deleted.
- To configure shift team members, click the **Team Member**  icon assigned to the shift where team members are to be added. [Figure 3-10](#) displays.



**Figure 3-10** On-Call Calendar - Adding New Team Member

On-Call Calendar

EDIT SCHEDULE

Schedule Name: Test

Start Date: July 21 2008

End Date: July 25 2008

Description: Greensburg Fire

Notes:

TEAM MEMBER LIST FOR SHIFT: TEAM A

Add New Team Member

There are no team members defined for this shift.

Set the order for the contact methods

Done

Apply

Done

Cancel

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## Adding New Team Members


**Step 1** Click **Add New Team Member**. [Figure 3-11](#) displays.


**Figure 3-11** On-Call Calendar - Edit Schedule - Add Team Members To Shift Tabs

On-Call Calendar

**EDIT SCHEDULE**

Schedule Name: Test

Start Date:  

End Date:  

Description:

Notes:

**ADD TEAM MEMBERS TO SHIFT: TEAM A**



Organizations

Locations

Roles

Security

Filter:

Organizations	Results		Selected Members
          		<div style="background-color: #333; color: white; padding: 5px; margin: 5px 0;">&gt;&gt;</div> <div style="background-color: #333; color: white; padding: 5px; margin: 5px 0;">&lt;&lt;</div>	

Add

Cancel









Apply

Done

Cancel

**Step 2** Use one of the methods listed in [Table 3-2](#) to assign team members to a shift:


**Table 3-2** Adding New Team Members Methods

Tab	Description	Actions
<b>Organizations</b>	A tree list of the organization.	<ul style="list-style-type: none"> <li>In the <b>Organizations</b> tab's <b>Organization</b> section, double-click the organization of the team members to be assigned to the shift. All team members of that particular organization will display in the <b>Results</b> section.</li> <li>Use the <b>Right Double Arrow</b>  icon to move team members to the <b>Selected Members</b> section, and use the <b>Left Double Arrow</b>  icon to remove team members from the section.</li> </ul>
<b>Locations</b>	A tree list of locations.	<ul style="list-style-type: none"> <li>In the <b>Locations</b> tab's <b>Locations</b> section, double-click the location of the team members to be assigned to the shift. All team members of that particular organization will display in the <b>Results</b> section.</li> <li>Use the <b>Right Double Arrow</b>  icon to move team members to the <b>Selected Members</b> section, and use the <b>Left Double Arrow</b>  icon to remove team members from the section.</li> </ul>
<b>Roles</b>	A list of defined roles.	<ul style="list-style-type: none"> <li>In the <b>Roles</b> tab's <b>Roles</b> section, double-click the role of the team members to be assigned to the shift. All team members of that particular role will display in the <b>Results</b> section.</li> <li>Use the <b>Right Double Arrow</b>  icon to move team members to the <b>Selected Members</b> section, and use the <b>Left Double Arrow</b>  icon to remove team members from the section.</li> </ul>
<b>Security</b>	A list of applications with access rights.	<ul style="list-style-type: none"> <li>In the <b>Security</b> tab's <b>Secured Applications</b> section, double-click the application of the team members to be assigned to the shift. All team members of that particular application will display in the <b>Results</b> section.</li> <li>Use the <b>Right Double Arrow</b>  icon to move team members to the <b>Selected Members</b> section, and use the <b>Left Double Arrow</b>  icon to remove team members from the section.</li> </ul>

**Step 3** Click **Apply**. [Figure 3-12](#) displays indicating team members have been successfully added.


**Figure 3-12** On-Call Calendar - Team Members Added Successfully


On-Call Calendar

 Team members added successfully.

EDIT SCHEDULE

Schedule Name: Test

Start Date: July 21 2008 

End Date: July 25 2008 


Description: Greensburg Fire

Notes:

TEAM MEMBER LIST FOR SHIFT: TEAM A

Add New Team Member

Name

> ⬆ ⬇  Flintstone, Fred

CONTACT PRIORITIES FOR FLINTSTONE, FRED

Set the order for the contact methods

Contact Method

⬆ ⬇ Primary Extension

Done

Apply Done Cancel

**Step 4** For each team member listed, select the order that team members will be contacted for the shift.

—To change a team member's shift contact order, use the **Up Double Arrows** ⬆ and **Down Double Arrows** ⬇ icons to place the contact order in the desired priority sequence.

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- Step 5** For each team member listed, select that person's preferred contact method priority. The contact priority is listed from highest to lowest for each selected team member.



Refer to the *UNIVERGE OW5000 System Manual* for additional information concerning adding, editing, or deleting a team member's contact method.

—To change a team member's contact method priority, select the team member using the **Select** ➤ icon, then in the **Contact Method** section, use the **Up Double Arrows** ⬆ and **Down Double Arrows** ⬇ icons to place the contact method in the desired priority sequence.

- Step 6** Use the **Trash** 🗑 icon to delete a member from a shift.
- Step 7** Click **Done** when finished with changes to the team member list.

## Cloning Schedules

Use the **Clone Schedule** option to select an existing schedule that can be copied and added to a Schedule Name. Cloning a schedule is a convenient way to create a new schedule containing pre-populated information from an existing schedule. To clone an existing schedule, do the following:

- Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**, then click the **Clone Schedule** hyperlink. [Figure 3-13](#) displays.

**Figure 3-13** On-Call Calendar - Select The Schedule To Clone

### On-Call Calendar

**SELECT THE SCHEDULE TO CLONE**


Schedule Name: House Keeping

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

<a href="#">Start Date</a> ▼	<a href="#">End Date</a>	<a href="#">Description</a>
7/7/2008 12:00:00 AM	7/31/2008 12:00:00 AM	House Keeping Description

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

Done


- Step 2** Click the **Pencil**  icon located next to an existing schedule that is to be duplicated. [Figure 3-14](#) displays.


**Figure 3-14** On-Call Calendar - Clone Schedule

### On-Call Calendar

#### CLONE SCHEDULE

Schedule Name: House Keeping

Start Date:  

End Date:  







Description:

Notes: 

House Keeping Schedule Notes

#### SHIFTS

Add New Shift

	<u>Name</u> ▲	<u>Start</u>	<u>End</u>	<u>Frequency</u>
  	Day	8:00 AM	5:00 PM	weekly
  	Midwatch	12:00 AM	4:00 AM	once

Apply
Done
Cancel

- Step 3** Replace the existing **Description** schedule name with a **Description** title. You may enter a new title, or use the same title.
- Step 4** Modify each field, as needed, to reflect the changes required for the new schedule being created.



#### REFERENCE

See [“Adding Schedules” on page 5](#) for the steps to change each field.

- Step 5** After all changes to the cloned schedule are made, click **Apply** to save the new schedule to the selected Schedule Name. The following will display:



The schedule was saved successfully.

- Step 6** Click **Done** to return to the On-Call Calendar main screen.

## Editing Schedules

Use the **Edit Schedule** option to select an existing schedule in order to make changes to the selected schedule. To edit an existing schedule, do the following:

- Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**, then click the **Edit Schedule** hyperlink. [Figure 3-15](#) displays.

**Figure 3-15** On-Call Calendar - Select The Schedule To Edit

On-Call Calendar

**SELECT THE SCHEDULE TO EDIT**

Schedule Name: House Keeping

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

	<a href="#">Start Date</a> ▼	<a href="#">End Date</a>	<a href="#">Description</a>
	7/7/2008 12:00:00 AM	7/31/2008 12:00:00 AM	House Keeping Description

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

**Done**

- Step 2** Click the **Pencil** icon located next to an existing schedule that is to be edited. [Figure 3-16](#) displays.

**Figure 3-16** On-Call Calendar - Edit Schedule

## On-Call Calendar

### EDIT SCHEDULE

Schedule Name: House Keeping

Start Date: July 7 2008

End Date: July 31 2008

Description: House Keeping Description

Notes: 

House Keeping Schedule Notes

### SHIFTS

Add New Shift

	Name ▲	Start	End	Frequency
	Day	8:00 AM	5:00 PM	weekly
	Midwatch	12:00 AM	4:00 AM	once

Apply

Done

Cancel

**Step 3** Modify each field, as needed, to reflect the changes required for the schedule being edited.



#### REFERENCE

See [“Adding Schedules” on page 5](#) for the steps to change each field.

**Step 4** After all changes to the edited schedule are made, click **Apply** to save the edited schedule to the selected Schedule Name. The following will display:



The schedule was saved successfully.

**Step 5** Click **Done** to return to the On-Call Calendar main screen.



## Deleting Schedules

Use the **Delete Schedule** option to select an existing schedule to remove it from the selected Schedule Name. To delete an existing schedule, do the following:

- Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**, then click the **Delete Schedule** hyperlink. [Figure 3-17](#) displays.

**Figure 3-17** On-Call Calendar - Select The Schedule To Delete

On-Call Calendar

**SELECT THE SCHEDULE TO DELETE**

Schedule Name: House Keeping

1 - 1 of 1 records 20 Results per page Page: 1 of 1

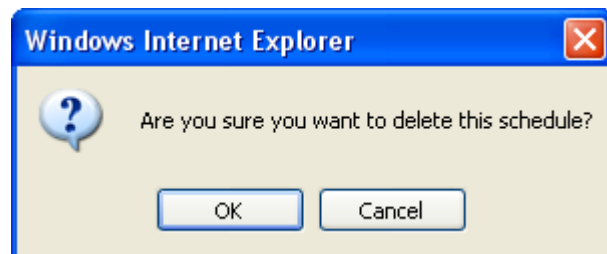
	Start Date ▼	End Date	Description
	7/7/2008 12:00:00 AM	7/31/2008 12:00:00 AM	House Keeping Description

1 - 1 of 1 records 20 Results per page Page: 1 of 1

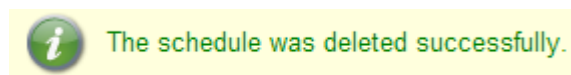
Done

- Step 2** Click the **Trash** icon located next to the existing schedule to be removed. [Figure 3-18](#) displays.

**Figure 3-18** Delete Schedule Confirmation



- Step 3** Click **OK** to delete the existing schedule. The following confirmation displays:



- Step 4** Click **Done** to return to the On-Call Calendar main screen.

## Substituting Shifts

Use the **Shift Substitutions** option (Figure 3-19) to replace a team member working one shift with another team member. Do the following:

**Figure 3-19** UA5200 On-Call Shift Substitutions Option

The screenshot shows the 'On-Call Calendar' interface. At the top, there is a header 'On-Call Calendar'. Below it, there are two dropdown menus: 'Schedule Name:' set to 'Accounting' and 'Shift Filter:' set to 'All'. To the right of these are three icons: a green plus sign, a yellow pencil, and a grey trash can. Below the dropdowns, there are two columns. The left column is titled 'Schedule' and contains four links: 'Add Schedule', 'Clone Schedule', 'Edit Schedule', and 'Delete Schedule'. The right column is titled 'Shift' and contains one link: 'Shift Substitutions'.

**Step** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**, then click the **Shift Substitutions** hyperlink. Figure 3-20 displays.

**Figure 3-20** On-Call Calendar - Shift Substitutions

The screenshot shows the 'On-Call Calendar - Shift Substitutions' interface. At the top, there is a header 'On-Call Calendar'. Below it, there is a section titled 'SHIFT SUBSTITUTIONS' with a button 'Add New Substitution'. Below this, there is a table with the following columns: 'Replacement Person', 'Original Person', 'Schedulename Name', 'Shift Name', 'Substitution Start', and 'Substitution End'. The table contains two rows of data. Below the table, there is a pagination bar showing '1 - 2 of 2 records', '10 Results per page', and 'Page: 1 of 1'.

Replacement Person	Original Person	Schedulename Name	Shift Name	Substitution Start	Substitution End
Moham, Riz	Schmid, Jery T.	House Keeping	Day	7/22/2008 8:00:00 AM	7/22/2008 5:00:00 PM
Moham, Riz	Schmid, Jery T.	House Keeping	Day	7/24/2008 8:00:00 AM	7/24/2008 5:00:00 PM



**NOTE**

If records have previously been added, the display is sorted alphabetically by **Replacement Person**. Each record has a **Trashcan** icon for deleting the record.

## Adding Shift Substitutions

**Step 1** Click **Add New Substitution**. [Figure 3-21](#) displays.

**Figure 3-21** On-Call Calendar - Select Outgoing

On-Call Calendar

Select Outgoing Person

Organizations Locations Roles Security

Filter:

Roles	Results		Selected Members
Employee	Flint, Fred	>>	
User		<<	
None			

Previous Next Cancel

**Step 2** Select the team member that is going to be replaced, then click **Next**. [Figure 3-22](#) displays.

—Click >> to move the person's name to the **Selected Members** list.

—Click << to remove any entries from the list.



TIP

The team member to be replaced can be selected using either the person's organization, location, role, or security.

**Figure 3-22** On-Call Calendar - Select Schedule and Date Range to See Inclusive Shifts

### On-Call Calendar

#### Select schedule and date range to see inclusive shifts

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

Select One	Name	Schedule Description	Schedule Start Date	Schedule End Date	Date Subrange (Start)	Date Subrange (End)
<input type="radio"/>	House Keeping	House Keeping Description	7/7/2008	7/31/2008	<input type="text" value="7/7/2008"/>	<input type="text" value="7/31/2008"/>

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

Previous
Next
Cancel

- Step 3** Choose the applicable schedule by selecting a specific schedule's assigned **Select One** option, then click **Next**. [Figure 3-23](#) displays.
- (Optional) Enter a new date in **Date Subrange (Start)** to specify that the shift substitution will begin on a specific day after the schedule starts. Default value: First day of the selected schedule.
  - (Optional) Enter a new date in **Date Subrange (End)** to specify that the shift substitution will finish on a specific day before the schedule ends. Default value: Last day of the selected schedule.

**Figure 3-23** On-Call Calendar - Select Shifts and Exact Times for Substitution

On-Call Calendar

**Select shifts and exact times for substitution**

1 - 10 of 19 records  Results per page Page:  of 2 > >>

Pick Shift Times	Shift Name	Start Date	Start Time	End Date	End Time	Date Subrange (Start)	Time Subrange (Start)	Date Subrange (End)	Time Subrange (End)
<input type="checkbox"/>	Day	7/23/2008	8:00 AM	7/23/2008	5:00 PM	7/23/2008	8:00 AM	7/23/2008	5:00 PM
<input type="checkbox"/>	Day	7/24/2008	8:00 AM	7/24/2008	5:00 PM	7/24/2008	8:00 AM	7/24/2008	5:00 PM
<input type="checkbox"/>	Day	7/21/2008	8:00 AM	7/21/2008	5:00 PM	7/21/2008	8:00 AM	7/21/2008	5:00 PM
<input type="checkbox"/>	Day	7/22/2008	8:00 AM	7/22/2008	5:00 PM	7/22/2008	8:00 AM	7/22/2008	5:00 PM
<input type="checkbox"/>	Day	7/25/2008	8:00 AM	7/25/2008	5:00 PM	7/25/2008	8:00 AM	7/25/2008	5:00 PM
<input type="checkbox"/>	Day	7/30/2008	8:00 AM	7/30/2008	5:00 PM	7/30/2008	8:00 AM	7/30/2008	5:00 PM
<input type="checkbox"/>	Day	7/31/2008	8:00 AM	7/31/2008	5:00 PM	7/31/2008	8:00 AM	7/31/2008	5:00 PM
<input type="checkbox"/>	Day	7/28/2008	8:00 AM	7/28/2008	5:00 PM	7/28/2008	8:00 AM	7/28/2008	5:00 PM
<input type="checkbox"/>	Day	7/29/2008	8:00 AM	7/29/2008	5:00 PM	7/29/2008	8:00 AM	7/29/2008	5:00 PM
<input type="checkbox"/>	Day	7/18/2008	8:00 AM	7/18/2008	5:00 PM	7/18/2008	8:00 AM	7/18/2008	5:00 PM

1 - 10 of 19 records  Results per page Page:  of 2 > >>

**Step 4** Select the applicable schedule using the schedule's assigned **Pick Shift Times** option, then click **Next**. [Figure 3-24](#) displays.

- (Optional) Enter a new date in the **Date Subrange (Start)** field to specify the day the substitution will begin. Default value: First day of the selected shift.
- (Optional) Enter a new date in the **Time Subrange (Start)** field to specify the time of day the substitution will begin. Default value: First hour of the selected shift.
- (Optional) Enter a new date in the **Date Subrange (End)** field to specify the day the substitution will end. Default value: Last day of the selected shift.
- (Optional) Enter a new date in the **Time Subrange (End)** field to specify the time of day the substitution will end. Default value: End time of the selected shift.

Figure 3-24 On-Call Calendar - Select Incoming Person

- Step 5** Select the team member who will be replacing the team member designated in [Step 2](#), then click **Next**. [Figure 3-25](#) displays.
- Click >> to move the person's name to the **Selected Members** list.
  - Click << to remove any entries from the list.



The team member who will be replacing another team member can be selected using either the person's organization, location, role, or security.

**Figure 3-25** On-Call Calendar - Set the Order for Contact Methods

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On-Call Calendar

FLINT, FRED

Set the order for the contact methods

Contact Method

⤴ ⤵ Work Email Address

⤴ ⤵ Primary Extension

Previous Finish Cancel

- Step 6** Click the ⤴ or ⤵ icon to set the contact method order for the substitute employee, then click **Finish**. [Figure 3-26](#) displays once more listing the new schedule substitution.

**Figure 3-26** On-Call Calendar - Shift Substitutions

On-Call Calendar

SHIFT SUBSTITUTIONS

Add New Substitution

1 - 2 of 2 records 10 Results per page Page: 1 of 1

	<a href="#">Replacement Person</a>	<a href="#">Original Person</a>	<a href="#">Schedules Name</a>	<a href="#">Shift Name</a>	<a href="#">Substitution Start</a>	<a href="#">Substitution End</a>
🗑	Moham, Riz	Schmid, Jerry T.	House Keeping	Day	7/22/2008 8:00:00 AM	7/22/2008 5:00:00 PM
🗑	Moham, Riz	Schmid, Jerry T.	House Keeping	Day	7/24/2008 8:00:00 AM	7/24/2008 5:00:00 PM

1 - 2 of 2 records 10 Results per page Page: 1 of 1

- Step 7** Navigate to **UA5200 > On-Call > Calendar** to return to the main On-Call Calendar screen.

## Deleting Shift Substitutions

To delete an existing shift substitution, do the following:

- Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > Calendar**, then click the **Shift Substitutions** hyperlink. [Figure 3-27](#) displays.

**Figure 3-27** On-Call Calendar - Shift Substitutions

On-Call Calendar

SHIFT SUBSTITUTIONS

Add New Substitution

1 - 2 of 2 records 10 Results per page Page: 1 of 1

Replacement Person	Original Person	Schedules Name	Shift Name	Substitution Start	Substitution End
Moham, Riz	Schmid, Jerry T.	House Keeping	Day	7/22/2008 8:00:00 AM	7/22/2008 5:00:00 PM
Moham, Riz	Schmid, Jerry T.	House Keeping	Day	7/24/2008 8:00:00 AM	7/24/2008 5:00:00 PM

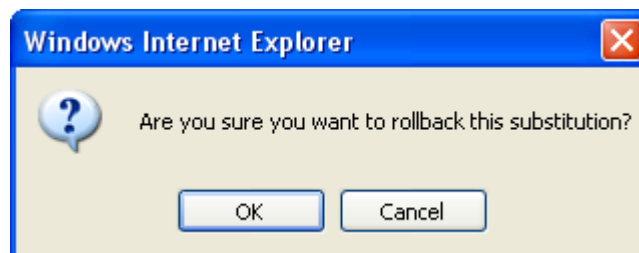
1 - 2 of 2 records 10 Results per page Page: 1 of 1

- Step 2** Locate the shift you wish to delete from the list.

- (Optional) Enter a number in the **Results per page** field, then click to specify how many substitutions to display per page.
- (Optional) Enter a number in the **Page** field, then click to go directly to a specific page.
- (Optional) Click a column heading to sort the list.

- Step 3** Click . [Figure 3-28](#) displays.

**Figure 3-28** Delete Confirmation



- Step 4** Click **OK** to delete the substitution.

## Calendar Links

The administrator has the option to make some modifications using the Calendar view. Clicking on either the schedule name or person's name



allows the administrator to edit a schedule and set contact priorities for a person from the Calendar View as shown in [Figure 3-29](#).

**Figure 3-29** Calendar View Modifications

Admin	Sched Day	Shift	
Brown,	Brian	8:00A-5:00P	
Doe,	John T.	8:00A-5:00P	
Frank,	Barney 4.	8:00A-5:00P	

Set contact priorities for this person

Clicking on the schedule name from the calendar view, brings up the same On-Call Calendar Edit Schedule dialog box and allows the same edits as performing the [Editing Schedules](#) procedure.

Clicking on a person's name from the calendar view allows the administrator to change the contact priorities for that person. See [Figure 3-30](#).

**Figure 3-30** Calendar View Contact Priorities

On-Call Calendar

CONTACT PRIORITIES FOR BROWN, BRIAN

Set the order for the contact methods

Contact Method

- Primary Extension
- Home Email Address
- Alpha Pager

Apply Done Cancel

Clicking on the up or down arrows changes the priority order of the contact method.

## Using On-Call Reports

The On-Call Administration Reporting function provides the Administrator a way to create an audit log or log of On-Call schedules. The log result groups are based on the following report types:

- **On-Call Audit Log**

This report type groups reports by:

- Attendant Name
- Contact Name
- Schedule Name
- Unit

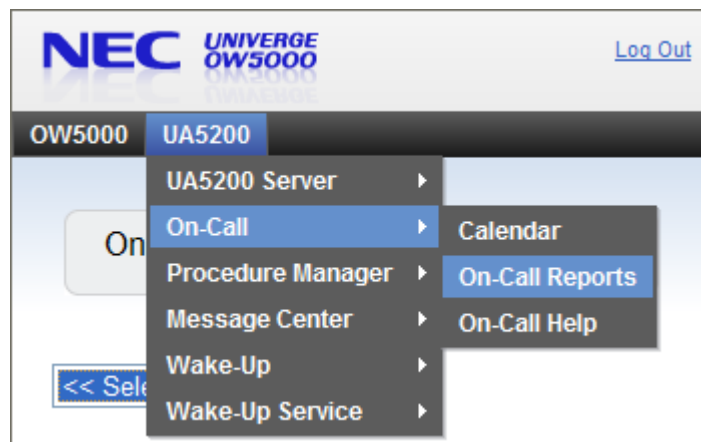
- **On-Call Schedules**

This report type groups reports by:

- Contact Name
- Schedule Name
- Schedule Name with Details

The Administrator can further refine the report by limiting the results to a schedule's specific start or stop date. Once the report parameters are specified, a report can be generated that displays on the screen. A report can be searched, exported to a computer using a common format, or printed. To generate a report:

**Figure 3-31** UA5200 On-Call Substitution Review Option



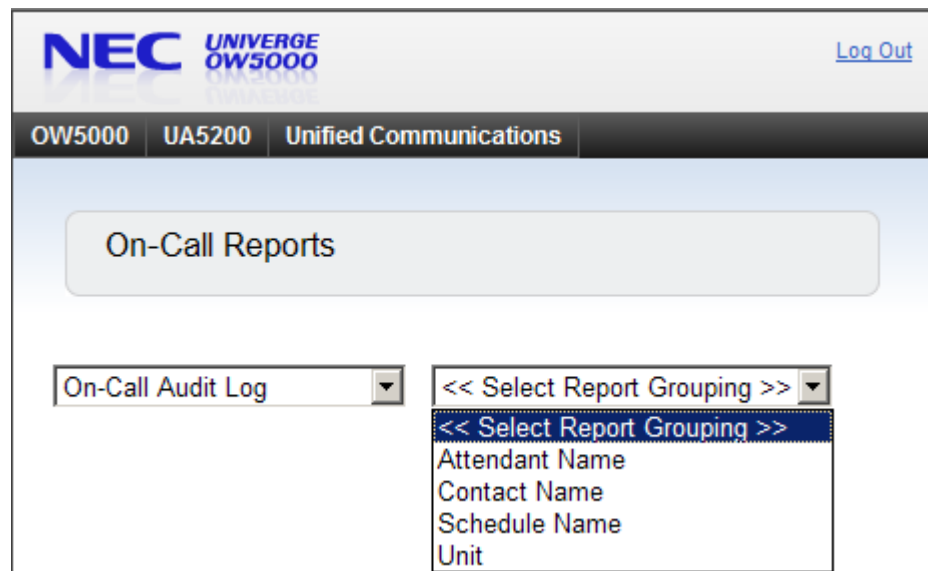
**Step 1** From NEC UNIVERGE OW5000, select **UA5200 > On-Call > On-Call Reports**. [Figure 3-32](#) displays.

**Figure 3-32** On-Call Report Types

**Step 2** Select the report type from the **Select Report Type** drop-down list.

- If the **On-Call Audit Log** report option is selected, proceed to [On-Call Audit Log](#).
- If the **On-Call Schedules** report option is selected, proceed to [On-Call Schedules](#).

## On-Call Audit Log

**Figure 3-33** On-Call Reports - On-Call Audit Log - Select Report Grouping

**Step 1** Select the report grouping from the **Select Report Grouping** drop-down list. [Figure 3-34](#) displays.

—The report grouping choices are **Attendant Name**, **Contact Name**, **Schedule Name**, and **Unit** (see [Figure 3-33](#)).

**Figure 3-34** On-Call Reports - On-Call Audit Log Fields



NOTE

The fields displayed in [Figure 3-34](#) remain the same whether the **Attendant Name**, **Contact Name**, **Schedule Name**, or **Unit** report grouping is selected.

—Continue using some, or all, of the following steps to create an audit report containing the information desired.

**Step 2** Enter an existing **Schedule Name** or leave blank to select all schedules.

**Step 3** Do one of the following to select an **Attendant Name**.

—Select a name from the drop-down list.


—Choose **All** to include all attendants in the audit report. The default value for this option is **All**.

**Step 4** Enter an existing **Contact Name** or leave blank to select all.

**Step 5** Do one of the following to select a **Unit**.

—Select a unit from the drop-down list.

—Choose **All** to include all units in the audit report. The default value for this option is **All**.

**Step 6** If desired, enter a **Start Date** or an **End Date** by clicking the **Calendar**  icon.

—To delete a **Start Date** or an **End Date**, click the **Trash Can**  icon.

**Step 7** Click **Generate Report**. See [Figure 3-35](#) for an audit report example.

Figure 3-35 On-Call Reports - On-Call Audit Log Report Example

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OW5000 UA5200 Unified Communications

### On-Call Reports

On-Call Audit Log

Schedule Name:  Attendant Name:   
 Contact Name:  Unit:   
 Start Date:   End Date:

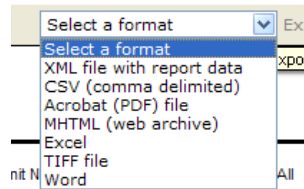
1 of 1 100% Find | Next Select a format Export


**"On-Call Audit Log Report - By Attendant Name"**

Attendant	Schedule Name	Unit	Contact	Contact Method	Call Date	Notes
<b>Wang, Julia</b>						
	SchName1		ABBES, JENNIFER	Primary Extension	10/31/2007 2:10:35 PM	
	SchName6	MHS   JSUMC   Test Department	ABBOTT, LEAH M.	Home Phone Number	2/2/2008 7:03:32 PM	
	SchName6	MHS   JSUMC   Test Department	ABBOTT, LEAH M.	Home Email Address	2/2/2008 7:03:34 PM	
	SchName6	MHS   JSUMC   Test Department	ABBOTT, LEAH M.	Other Work Phone Number	2/2/2008 7:03:50 PM	tititan

Page: 1/1 Schedule Name: All, Attendant Name: All, Contact Name: All, Unit Name: All, Start Date: All, End Date: All

- Step 8** Click the arrow buttons at the top of the audit report list to navigate backward or forward through the report, or enter a page number into the text box to go to a specific page.
- Step 9** To search the audit report list for a specific entry, type the search term in the text box at the top of the list and click **Find**. The list displays all entries matching the search text. To continue searching the list for additional matches, click **Next**.
- Step 10** Use the **Select a format** drop-down menu, then click **Export** to save a copy of the displayed report to your computer. See [Figure 3-36](#) for available options.

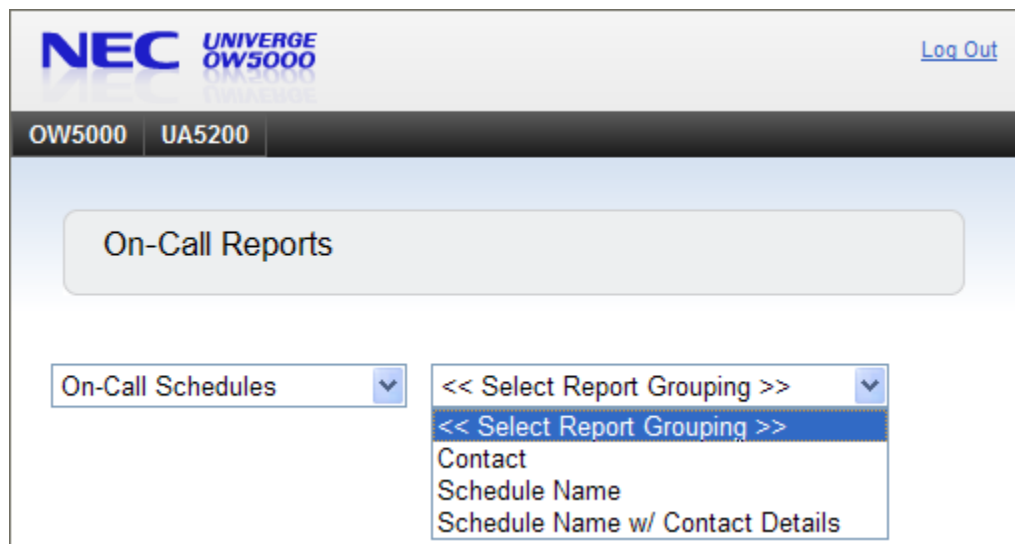
**Figure 3-36** Select a Format

**Step 11** To print reports to a locally installed printer on your computer, select the printer and accompanying parameters, then click the **Print**  icon.

**NOTE**

*If a locally installed printer is not available, a print driver must be downloaded to the system. To allow this download, the Internet Explorer settings must be modified on the system. See [Configuring the Print Control for Server Reports Using the ReportViewer Web Server Control](#).*

## On-Call Schedules

**Figure 3-37** On-Call Reports - On-Call Schedules - Select Report Grouping

**Step 1** Select the report grouping from the **Select Report Grouping** drop-down list. [Figure 3-38](#) displays.

—The report grouping choices are **Contact**, **Schedule Name**, and **Schedule Name with Contact Details** (see [Figure 3-37](#)).

**NOTE**

[Figure 3-38](#) displays an example using the **Contact** Reporting Grouping option selection. The **Schedule Name** and **Schedule Name w/ Contact Details** displays differs only in the naming of the first text field -- **Contact Name** or **Schedule Name**.

**Figure 3-38** On-Call Reports - On-Call Schedules Fields

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On-Call Reports

On-Call Schedules  Contact

Contact Name:

Schedule Name:

Shift Name:

Start Date:

End Date:

- Step 2** Select a **Contact Name** from the drop down list.
- Step 3** Select a **Schedule Name** from the drop down list.
- Step 4** Select a **Shift Name** from the drop down list.
- Step 5** If desired, enter a **Start Date** or an **End Date** by clicking the **Calendar** icon.
- Step 6** To delete a **Start Date** or an **End Date**, click the **Trash Can** icon.
- Step 7** Click **Generate Report**. [Figure 3-39](#), [Figure 3-40](#), and [Figure 3-41](#) are examples of the different schedule reports.

**Figure 3-39** On-Call Reports - On-Call Schedules - Contact Name Report Example

**NEC** UNIVERGE  
**OW5000**

[Log Out](#)

OW5000 UA5200 Unified Communications

On-Call Reports

On-Call Audit Log

Schedule Name:  Attendant Name:

Contact Name:  Unit:

Start Date:  End Date:

1 of 1 100% Find | Next Select a format Export

**On-Call Audit Log Report - By Contact Name**

Contact	Schedule Name	Unit	Attendant	Contact Method	Call Date	Notes
<b>ABBES, JENNIFER</b>						
	SchName1		Wang, Julia	Primary Extension	10/31/2007 2:10:35 PM	
<b>ABBOTT, LEAH M.</b>						
	SchName6	MHS   JSUMC   Test Department	Wang, Julia	Home Phone Number	2/2/2008 7:03:32 PM	
	SchName6	MHS   JSUMC   Test Department	Wang, Julia	Home Email Address	2/2/2008 7:03:34 PM	
	SchName6	MHS   JSUMC   Test Department	Wang, Julia	Other Work Phone Number	2/2/2008 7:03:50 PM	tititan

Page: 1/1 Schedule Name: All, Attendant Name: All, Contact Name: All, Unit Name: All, Start Date: All, End Date: All



Figure 3-40 On-Call Reports - On-Call Schedules - Schedule Name Report Example

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OW5000 UA5200 Unified Communications

### On-Call Reports

On-Call Audit Log Schedule Name **Generate Report**

Schedule Name:  Attendant Name:

Contact Name:  Unit:

Start Date:  End Date:

1 of 1 100% Find Next Select a format Export

**"On-Call Audit Log Report - By Schedule Name"**

Schedule Name	Unit	Attendant	Contact	Contact Method	Call Date	Notes
<b>SchName1</b>		Wang, Julia	ABBES, JENNIFER	Primary Extension	10/31/2007 2:10:35 PM	
<b>SchName6</b>	MHS   JSUMC   Test Department	Wang, Julia	ABBOTT, LEAH M.	Home Phone Number	2/2/2008 7:03:32 PM	
	MHS   JSUMC   Test Department	Wang, Julia	ABBOTT, LEAH M.	Home Email Address	2/2/2008 7:03:34 PM	
	MHS   JSUMC   Test Department	Wang, Julia	ABBOTT, LEAH M.	Other Work Phone Number	2/2/2008 7:03:50 PM	tititan

Page: 1/1 Schedule Name: All, Attendant Name: All, Contact Name: All, Unit Name: All, Start Date: All, End Date: All

**Figure 3-41** On-Call Reports - On-Call Schedules - Schedule Name w/Contact Details Report Example

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On-Call Reports

On-Call Schedules Schedule Name w/ Contact Details **Generate Report**

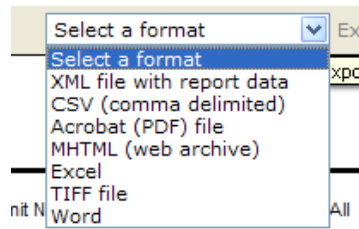
Schedule Name: Accounting  
 Shift Name: All  
 Start Date: September 1 2008  
 End Date: September 9 2008


1 of 1 100% Find | Next Select a format Export

**On-Call Scheduled Shifts - By Schedule Name with Contact Details**

<b>Accounting</b>	
Afternoon-Shift-EryWeekend	Start Date: 7/30/2008 Start Time: 16:00:00 End Date: 9/30/2008 End Time: 20:00:00
Morning-Shift	Start Date: 7/30/2008 Start Time: 08:00:00 End Date: 9/30/2008 End Time: 16:00:00
<b>Contact Priority</b>	<b>Contact Full Name</b> <b>Method Priority</b> <b>Method Type</b> <b>Method Value</b>

- Step 8** Click the arrow buttons at the top of the schedule report list to navigate backward or forward through the report, or enter a page number into the text box to go to a specific page.
- Step 9** To search the schedule report list for a specific entry, type the search term in the text box at the top of the list and click **Find**. The list displays all entries matching the search text. To continue searching the list for additional matches, click **Next**.
- Step 10** Use the **Select a format** drop-down menu, then click **Export** to save a copy of the displayed report to your computer. See [Figure 3-36](#) for available options.

**Figure 3-42** Select a Format

**Step 11** To print reports to a locally installed printer on your computer, select the printer and accompanying parameters, then click the **Print**  icon.

**NOTE**

*If a locally installed printer is not available, a print driver must be downloaded to the system. To allow this download, the Internet Explorer settings must be modified on the system. See [Configuring the Print Control for Server Reports Using the ReportViewer Web Server Control](#).*

## Configuring the Print Control for Server Reports Using the ReportViewer Web Server Control

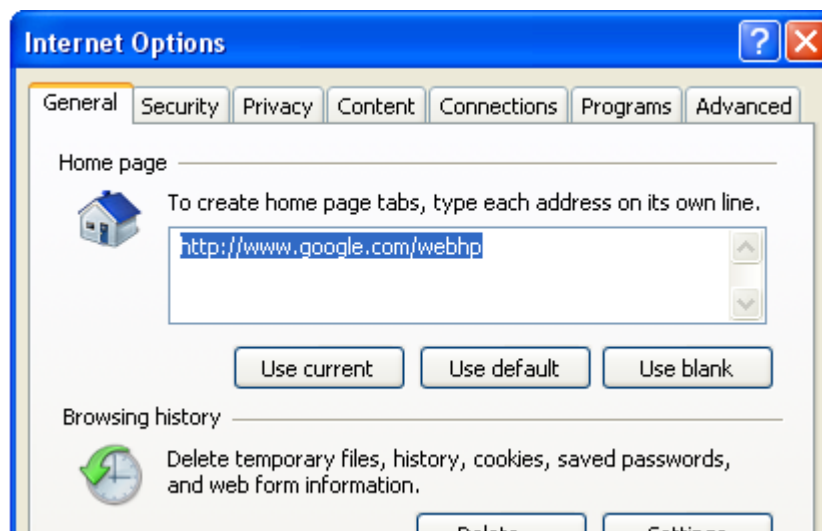
The ReportViewer Web server control provides an ActiveX print control for server reports that are processed on a remote SQL Server 2005 Reporting Services report server. This control downloads automatically the first time the Print command on the ReportViewer toolbar is clicked, and is installed on your computer. If you do install the control, or if support for the print control is disabled on the report server, the Print command cannot be used. After the control is installed, you can use the print control to print server reports configured to run in the ReportViewer server control

Depending on your browser settings, you may need to configure the browser to enable an ActiveX control download. To configure Internet Explorer to allow ActiveX control downloads, follow these steps:

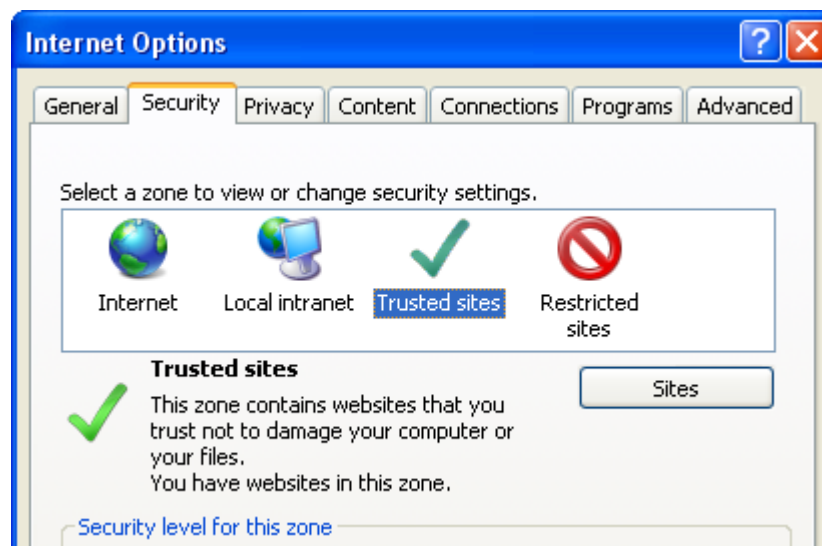
To configure your browser to allow downloading and installing the ActiveX printing control, do the following:

**Step 1** Open Internet Explorer.

**Step 2** Select **Tools > Internet Options**. [Figure 3-43](#) displays.

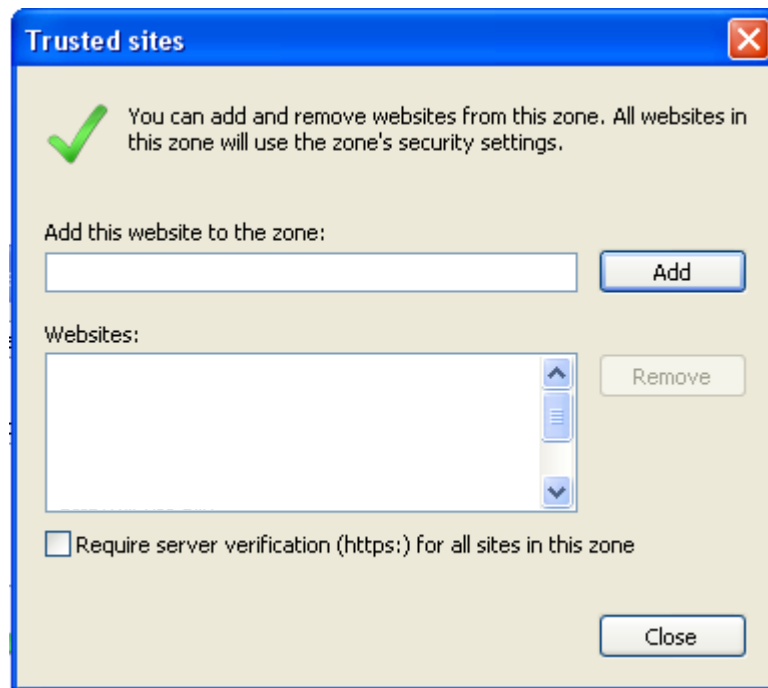
**Figure 3-43** *Internet Options*

**Step 3** Click the **Security** tab. [Figure 3-44](#) displays.

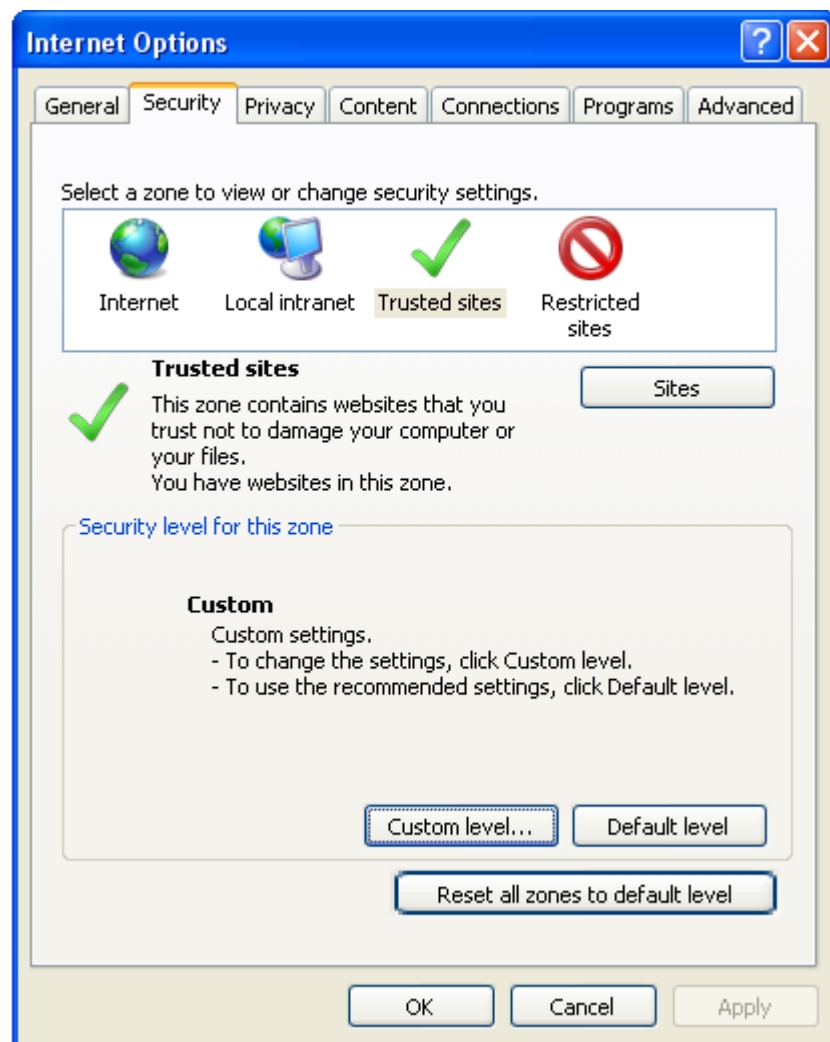
**Figure 3-44** *Internet Options - Security Tab*

**Step 4** Click the **Trusted sites** zone.

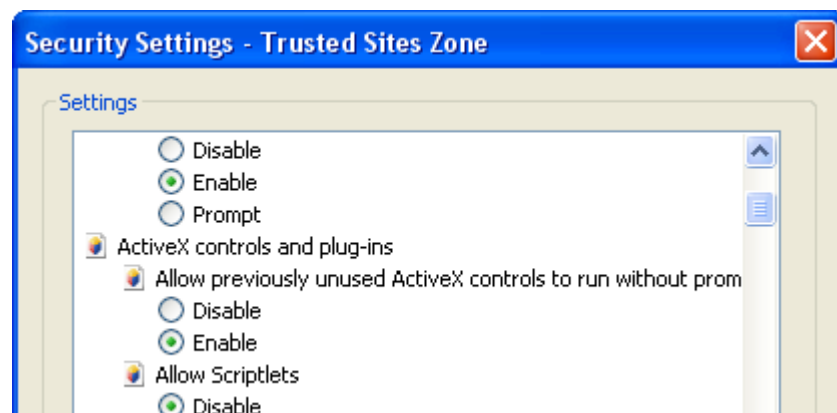
**Step 5** Click **Sites**. [Figure 3-45](#) displays.

**Figure 3-45** Trusted Sites

- Step 6** Enter your server's address in the displayed text field. The default address is: **https://YourServerName/reportserver**. Check with your network administrator if you are unsure of the correct address.
- Step 7** Click **Add**, then **Close**.

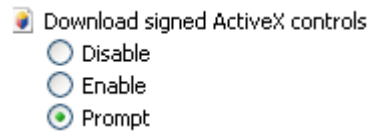
**Figure 3-46** Internet Options - Security Tab - Custom Level

**Step 8** In Figure 3-46, click **Custom level**. Figure 3-47 displays.

**Figure 3-47** Security Settings - Trusted Sites Zone - ActiveX

**Step 9** Scroll the list to locate the **ActiveX controls and plug-ins** node.

**Step 10** Click **Enable** for **Download signed ActiveX controls**.



**Step 11** Click **OK** to close the Security Settings dialog, then **OK** again to close the Internet Options dialog.

The ActiveX printing control will now download and install the first time you print a generated report.





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



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**UCE Attendant (Univerge UA5200) On-Call Administrator Operations Guide**

NDA-30905, Revision 4