

OW5000 Dialer

User Guide

NEC NEC Infrontia Corporation

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1

Introduction

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

- Chapter Topics*
- [What is OW5000 Dialer?](#)
 - [How This Guide is Organized](#)
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What is OW5000 Dialer?

Dialer is an OW5000 application that enables NEC Dterm users to access a corporate-wide directory on their telephone display. With OW5000 Dialer, you can search for an employee in the entire corporate directory or within a specific division or department. You can also search for External Organizations created by using the OW5000 Administrator application.

Once Dialer locates the name or location that you are looking for, it displays the information on your NEC Dterm telephone. You can then place or transfer a call to the telephone number corresponding to that entry.

Database entries are stored in the same database used by other OW5000 applications such as the OW5000 Admin. Queries to the database are dynamic. Any changes made to directory items through the OW5000 Admin or other OW5000 applications will immediately be available in Dialer.

How This Guide is Organized

- | | |
|--|---|
| Chapter 1
Introduction | This chapter outlines how to use the manual, including the actual manual organization, chapter layout, conventions, and function keys for the Dialer application. |
| Chapter 2
Using Dialer | This chapter explains how to locate, view, and call a telephone number using the Dialer application. |


Using This Guide





This guide is designed to make the OW5000 Dialer application easy to understand and simple to use. There are examples of the information you will see displayed on the Dterm used to access the Dialer application, with step-by-step instructions for the procedures you need to perform.

Document Conventions

The conventions used in this document are shown in [Table 1-1](#).

Table 1-1 Document Conventions

When you see:	It means:	Example
Boldfaced	<ul style="list-style-type: none"> Field names Button names Drop-down list names Commands, keywords, or other user input 	Enter the ID in the Name field. Click Save . Select the names from the Employees drop-down list. Enter login admin at the command prompt.
Capitalized	<ul style="list-style-type: none"> <i>Menu names</i> <i>Window names</i> <i>Dialog box names</i> 	From the File menu, choose Save . From the Directory window, select Edit > Modify . Click OK to save and close the Account Properties dialog box.
Menu > Submenu (boldfaced font)	<ul style="list-style-type: none"> <i>Menu paths</i> 	Select Edit > Modify .
CTRL+S (boldfaced font) CTRL+Shift+S	<ul style="list-style-type: none"> <i>Shortcut keys</i> 	Press CTRL+S to save your changes.
F1 (boldfaced font)	<ul style="list-style-type: none"> <i>Function keys</i> 	Press F1 to access the online help.
Click	<ul style="list-style-type: none"> <i>Click the left mouse button</i> 	Click OK to save your changes.
Right-click	<ul style="list-style-type: none"> <i>Click the right mouse button</i> 	Right-click and select Delete from the shortcut menu.
	Warning	Used to warn against possible human injury or risk of death from an action or event.

When you see:	It means:	Example
	Caution	Used when equipment or data could be damaged by an action or event.
	Important	Emphasizes a MUST read statement.
	Note	Used to point out special details that you must know or actions that you must take relevant to your current actions.
	Tip	Describes time-saving ideas and other useful information for completing procedures.
	Reference	Indicates a reference to another related document.

Procedures

Step-by-step instructions are numbered. Simply follow the numbered steps to perform the desired function.

Sometimes in step-by-step instructions, you will have more than one option to complete the task. The following shows options to the example step in a procedure:

- Step 1** Do one of the following to add a field to the Employee directory.
- Select the desired field from the **Employee** field and click **Add**.
 - Double-click the desired field from the **Employee** field.
- Step 2** To select all of the available fields, click **Add all**.

Dialer Keys and Prompts

The Dterm components are shown in [Figure 1-1](#).

Figure 1-1 Dterm Components



Keypad Conventions

When Dialer is activated by pressing the assigned OAI key on your Dterm phone, the prompts are displayed on your Dterm LCD screen. Use the keys shown in [Figure 1-2](#) and described in [Table 1-2](#) to scroll through and select the desired information.

Figure 1-2 Scroll List Function Keys



Table 1-2 Scroll List Function Key descriptions

Key	Function	Description
1	Top	Displays the first entry in scroll list
2	Scroll Up	Displays the previous entry in scroll list
3	Prev Letter	Displays the first entry with the previous letter
4	Scroll Left	Displays additional entry information
5	Add Letters	Adds more letters to the search string
6	Scroll Right	Displays additional entry information
7	Bottom	Displays the last entry
8	Scroll Down	Displays the next entry
9	Next Letter	Displays the first entry with the next letter
0	Search Again	Returns to the "Name" prompt if your query did not find the desired name
*	Backspace	Clears the entry if pressed before pressing # to enter the data.
#	Enter	Selects displayed entry



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Using Dialer

OW5000 Dialer can be configured to display search prompts after the installation by using the OW5000 Administrator.

See the *OW5000 Dialer Installation Guide* for more information about the installation process.

Basic Operating Procedure

If the Global List option is checked on the Dialer > Server Settings page in the OW5000 Administrator, Dialer displays the **[Name?]** prompt. Enter the name using the keypad and press # when finished.

For example, if the caller is looking for "Joe Smith" and the display name is shown in First, Last name order, enter 563. Dialer will look up all matching names in the database and display the first matching name found. The user can then scroll through the list to find "Joe Smith" using the navigation keys, as described in [Directory Search Example](#).

If the Global List option is not checked, Dialer will display prompts in the following order.

- Dialer checks the database for a list of companies. If one, or more than one, company is found, Dialer checks to determine if the calling extension has selected names during a previous session, then displays the last company searched.
- If the extension has not accessed Dialer previously, the first company in the list displays, and the **Global** and **External** options display at the end of the list. Do the following:
 - Select **[Global]** to search all local names for matches.
 - Select **[External]** to search all names in the external number database for matches.
 - Select a company to search all names under that company.
- If a company has been selected by pressing the # key, Dialer will do the following:
 - If more than one Division is found in the database, the **[All Divisions]** prompt displays. Use the navigation keys shown in the [Directory Search Example](#) to scroll through the list and select the desired Division.

- If there are no divisions in the db, or when the desired division is selected by the user, the Dialer will do the following.
 - If more than one department was found, the **[All Departments]** prompt displays. Use the navigation keys shown in the [Directory Search Example](#) to scroll through the list and select the desired department. When the desired department is selected, the **[Name?]** prompt displays. Enter the name using the keypad and press **#** when finished.
 - If one or no departments were found for that division, the **[Name?]** prompt displays.
- The search results are listed alphabetically on the LCD. Use any of the Dterm key functions to scroll through the list and display additional data. If your search returns too many names to scroll through, press **5** to display your original search criteria. Then, use the keypad to add additional letters to narrow your search and press **#** to search again.
- Dialer can be configured to display extension data in the name scroll list. If the Name/Extension option is checked on the Dialer > Server Settings page in the OW5000 Administrator, then extension numbers are displayed with internal directory entries. The name is truncated down to a minimum of 9 characters long so the entire extension will fit. This means the name and extension will display on the same line if the extension is at most 6 characters long. Otherwise, the name is written out up to 13 characters and >> is appended to indicate the full number is on the next line.

If no name matches your search criteria, the **[No Such Name]** prompt is displayed, and you can press **0** to return to the **[Name]** prompt and search for another name or exit and start a new session to select a new company, division, or department.

- When a name has been selected, Dialer attempts to make the call. If the calling terminal is off-hook and connected, Dialer will transfer the connected party to a new number. (See [Transferring or Conferencing a Call](#) for more information.) When transferring a call, Dialer exits and the display is then handled by the PBX. The PBX displays **[XFR]** on the Dterm's LCD, followed by the number. If the call is not successful, Dialer will display the following:
 - **[Line Busy]** if the called party is busy.
 - **[Invalid Number]** if the number cannot be found.
 - Otherwise, **[Unable To Call]** will be displayed.
- If one or no keys were pressed for the name search, Dialer will display **[Need Two Letters]**, which is the minimum number of digits required to make a database search. If no matches are found, Dialer will display **[No Such Name]** and will allow the user to enter a new string of digits.



NOTE

The names can be entered and selected as described only if the Global List option is selected after the installation, using the OW5000 Administrator. (See the OW5000 Dialer Installation Guide for more information.)

Transferring or Conferencing a Call

You can use Dialer to transfer a call or to conference a third party into a conversation by using the following steps:

- Step 1** While in a conversation, press the **Dialer function key** and follow the steps above to search for a name in the directory.
- Step 2** Accept the displayed name by pressing the **#** key.
- Step 3** Do one of the following to transfer or conference the call:
- To transfer the call, hang up. The phone of the selected individual rings, and the party that you were talking to hears a ring-back tone.
 - To conference the third party, press the conference key (**CNF**) on your Dterm. All three parties are connected.

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

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



NOTE

If you are dialing a number on a different PBX and that number is busy, Dialer will quit without displaying an error message and will sound a busy tone.

Directory Search Example

The following example shows how to find an employee (Peter King) who works in the Payroll department of a multi-division company.

To find Peter King who works for the XYZ Company's Payroll Department in the Network Division, use the following steps:

When you activate Dialer, the first company in the company list displays, as illustrated in [Step 1](#):

Figure 2-1 Company Display



- Step 1** Do one of the following:
- Press **8** to scroll through the companies configured in the database, until the desired company name displays. For this example, the XYZ Company ([Figure 2-2](#)).

OR

—Press **9** to advance through the first letters of the companies until reaching the “X’s”.

Figure 2-2 Selecting a Company



Step 2 Press **#** to select the **XYZ Company**. The **[All Divisions]** prompt displays (Figure 2-3).

Figure 2-3 Division Selection (Global)



—Press **8** to scroll through the divisions configured in the database, until the **Network Div** displays.

OR

—Press **9** to advance through the first letters of the divisions until reaching the “N’s”.

Figure 2-4 Division Selection (Specific)



Step 3 Press **#** to select the **Network Division** directory. The **[All Departments]** prompt displays (Figure 2-5).

Figure 2-5 Department Selection (Global)



- Step 4** Do one of the following to select the Payroll department:
- Press **8** to scroll through the departments until the Payroll department displays (Figure 2-6).
 - Press **9** to advance through the first letters of the departments until reaching the “P’s”.

Figure 2-6 Department Selection (Specific)



- Step 5** Since Peter King works in the Payroll department, press **#** while the Payroll prompt is displayed to select this option. The **[Name]** prompt appears (Figure 2-7).

Figure 2-7 Name Prompt



- Step 6** Press **546#**. These numbers correspond to the first 3 letters of Peter King’s last name, and the # key indicates that you have completed your entry. The first name matching your search criteria displays (Figure 2-8).

Figure 2-8 Name Display



Step 7 Press 9 to display names starting with the next letter of the alphabet. The first name with a different first letter displays (Figure 2-9).

Figure 2-9 Scrolling Through Displayed Names



Step 8 Press 8 to show the next name in the list until the correct entry is displayed, as illustrated in Figure 2-10.

Figure 2-10 Selecting a Name



Step 9 Press 6 to scroll right. Press 4 to scroll left.



Press 6 repeatedly to scroll right to view the employee's extension, division, and departmental information.

Step 10 Press # at any time to dial Peter King. The call is placed in speaker mode to the selected entry (Peter King).

Exiting OW5000 Dialer

To exit Dialer, press the function key on the Dterm associated with Dialer. If you do not press the function key within a configured amount of time, the application will exit automatically.



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