UC for Enterprise (UCE) Attendant
(UNIVERGE UA5200)

A UA5200 Solution

Operations Guide

Liability Disclaimer

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Introduction

The *UC for Enterprise (UCE) Attendant (UNIVERGE UA5200) Operations Guide* provides the information you need to install and configure the UA5200 application.

Chapter Topics
- *UA5200 Overview*
- *How This Guide is Organized*

UA5200 Overview

UA5200 is a client/server application that communicates to the UA5200—Server service on the OW5000 Server, bringing the basic functionality of the UA5200 console to the desktop of a Windows-based workstation.

Supported databases include Microsoft SQL Server 2005 and 2008.

UA5200 uses the NEC Open Applications Interface (OAI) to communicate with the NEAX 2400 or the NEAX 2000. When connected to the NEC PBX, OAI shows call processing information on the attendant screen and allows the attendants to issue call processing requests with their keyboard or mouse. The UA5200 extends the attendant's capabilities with software and database-driven loops and console features that provide powerful call handling and directory assistance services. UA5200 also provides interface enhancements for converged solutions and more information to attended call environments such as Health Care and Higher Education vertical markets.

The UA5200 system now offers ACD functionality. This involves interfacing with the CallCenterWorX ACD for call processing. When this feature is enabled, the UA5200 system uses the CallCenterWorX ACD for call processing.

About the CallCenterWorX ACD

When the UA5200 Server is configured for ACD mode, the UA5200 Server service communicates to the CallCenterWorX ACD using the Infolink protocol for call processing operations. The InfoLink protocol allows an application to perform tasks such as agent logon, agent logoff, query split counts, and to monitor events from the ACD.

All communication to the ACD is made through the UA5200 server process. The UA5200 client will not connect directly to the ACD because of the limit to the number of simultaneous Infolink connections that the ACD supports.

Notifications of events needed by the UA5200 client are forwarded from the UA5200 server as they are received from the ACD.

The UA5200 server uses OAI to communicate directly with the PBX for UA5200 features that are not supported by the ACD; such as managing call forward and do not disturb settings.

Both the CallCenterWorX Business (server based) and Enterprise (internal) ACD is supported.

The UA5200 consists of the following components:

- The UA5200 Client application allows the attendants to process calls with a graphical user interface.
- The UA5200 Server provides connectivity between the UA5200 and the PBX.

How This Guide is Organized

Chapter 1
Introduction

This chapter provides an overview of the UA5200 application and the chapter layout of the UA5200 Operations Guide.

Chapter 2
Installing the UA5200 Server

This chapter details the procedures required to install the UA5200 Server application.

Chapter 3
Installing the UA5200 Client

This chapter details the procedures required to install the UA5200 Client application.

Chapter 4
Configuring the UA5200

This chapter describes the functions and associated screen displays for configuring the UA5200 in OW5000 Administrator.

Chapter 5
NEAX Command Assignments

This chapter specifies the procedures to configure the PBX settings required by the UA5200 application.

Appendix
Keyboard Mapping Shortcuts

This chapter provides keyboard mapping shortcuts.

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Installing the UA5200 Server

This chapter provides step-by-step procedures to install and configure the UA5200 Server software. Descriptions and procedures are found in the following sections of this chapter.

Chapter Topics
- *Before Starting the Installation Procedure*
- *Installing SQL Server Reporting Service*
- *Configuring the Reporting Services for SQL Server 2005*
- *Configuring the Reporting Services for SQL Server 2008*
- *Configuring the Reporting Services for SQL Server 2008 R2*
- *Installing the UA5200 Server*

Before Starting the Installation Procedure

This section describes the required components that must be in place before installing the UA5200 Server software.

NOTE

Each PBX must be configured for use with OAI before installing the application software.

Before installing the UA5200 software, please refer to the *Requirements* section in the *UNIVERGE OW5000 Configuration Guide* to verify that your system meets the Application Environment requirements for the OW5000 Platform and the specific application software you purchased.

SQL Server Reporting Service

The SQL Server Reporting Service must be installed in order to run reports in UA5200 applications. For more information, refer to "Installing SQL Server Reporting Service" on page 2-2.

UNIVERGE OW5000 Platform

The OW5000 Platform must be installed before you install the UA5200 software. For instructions on how to install the OW5000 Platform, refer to the *UNIVERGE OW5000 Configuration Guide*.

The CallCenterWorX ACD must be installed when the ACD integration is enabled. If the server based ACD is being used, it can be installed on the same machine as the UA5200 server to support up to 12 attendants. If more than 12 attendants are needed or if the ACD is being used for other call center activities, the ACD should be installed on a separate server.

The UA5200 Client software must be installed on all workstations that use the UA5200 for call processing. Refer to Chapter 3, "Installing the UA5200 Client" on page 3-3 for more information. Refer to the ACD Release Notes for ACD Server Configuration.

NOTE

Refer to the UNIVERGE OW5000 Installation Guide for information on installing the Microsoft SQL Services.

Installing SQL Server Reporting Service

IMPORTANT

If you already have the Full version of SQL installed, you do not need to run the SQL Server Advanced Services SP2 upgrade. The Full SQL already comes with the upgrade.

If you have SQL Server Express Edition installed, you must upgrade to SQL Server Express Edition with Advanced Services to get SQL Server Reporting Service.

Refer to the *OW5000 Installation Guide* for information on installing SQL Server Express Edition with Advanced Services.

Configuring the Reporting Services for SQL Server 2005

NOTE

In order to run Reports, SQL Server Reporting Services must be installed and upgraded to SQL Advanced services to get the Reporting Services.

Step 1 Open the Reporting Services Configuration Tool by following the path, **Start > All Programs > Microsoft SQL Server 2005 > Configuration Tools > Reporting Services Configuration Manager** (Figure 2-1).

Figure 2-1 Reporting Services Configuration
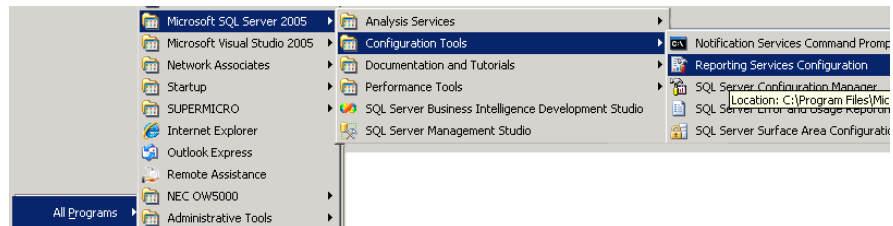
An Instance Selection dialog box displays (Figure 2-2).

Figure 2-2 Instance Selection dialog box
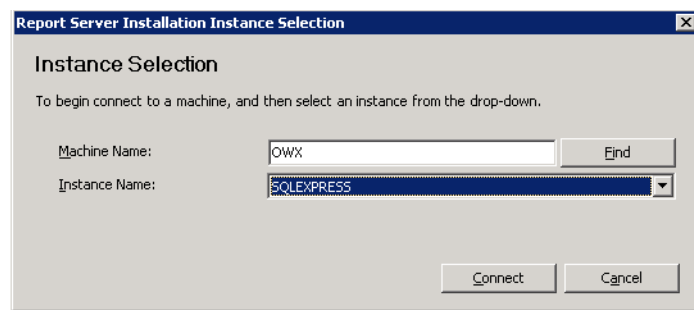
Step 2 Click **Connect**. If this is an upgrade, a Report Server Status dialog box displays (Figure 2-3).

Figure 2-3 *Report Server Status dialog box*
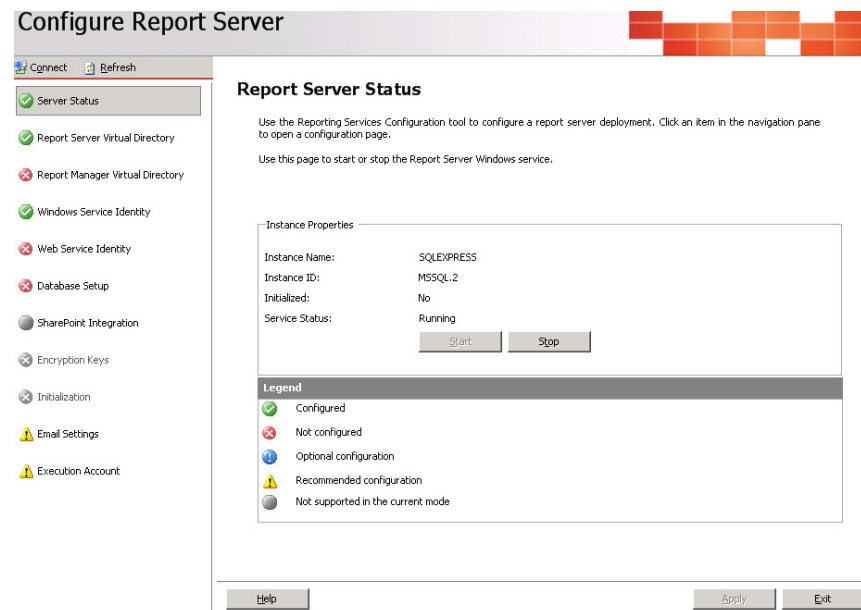
Step 3 Click **Report Server Virtual Directory**. A Report Server Virtual Directory Settings dialog box displays (Figure 2-4).

Figure 2-4 *Report Server Virtual Directory Settings dialog box*
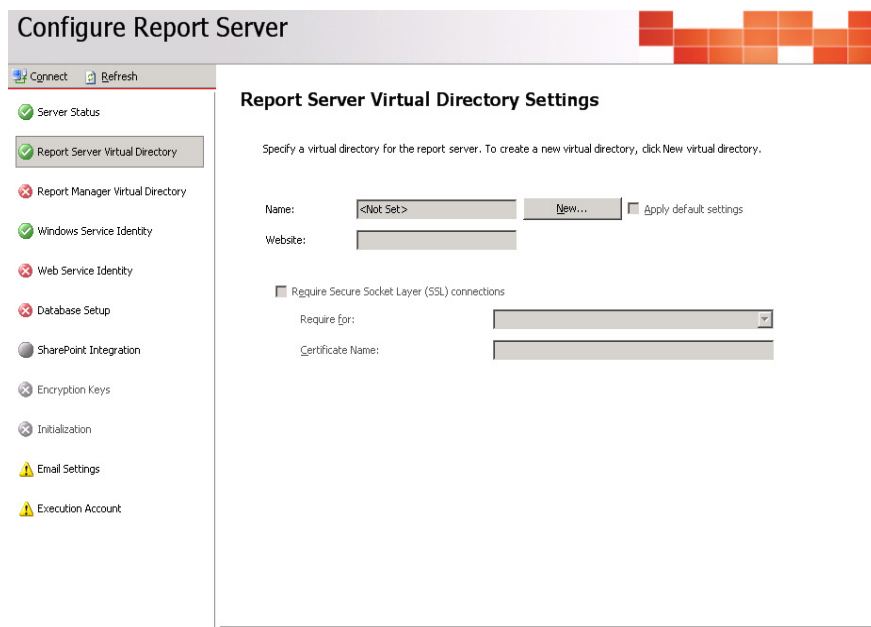
Step 4 Click **New**. Accept the default values and then click **OK**.

Step 5 Click **Report Manager Virtual Directory**. A Report Manager Virtual Directory dialog box displays (Figure 2-5).

Figure 2-5 *Report Manager Virtual Directory dialog box*

Step 6   Click **New**. Accept the default values and then click **OK**. A Task Status dialog box displays (Figure 2-6) confirming the directory was successfully created.

Figure 2-6 *Task Status dialog box*

Step 7   If **Windows Service Identity** is marked with a green check mark, no changes are needed. If it is not marked with a green check mark, click Windows Service Identity and click **Apply** to accept the default values.

Step 8   Click **Web Service Identity**, click **New**, accept the default values and then click **Apply**.

Step 9   Select **Database Setup** to display a Database Connection dialog box (Figure 2-7).

Figure 2-7 *Database Connection dialog box*
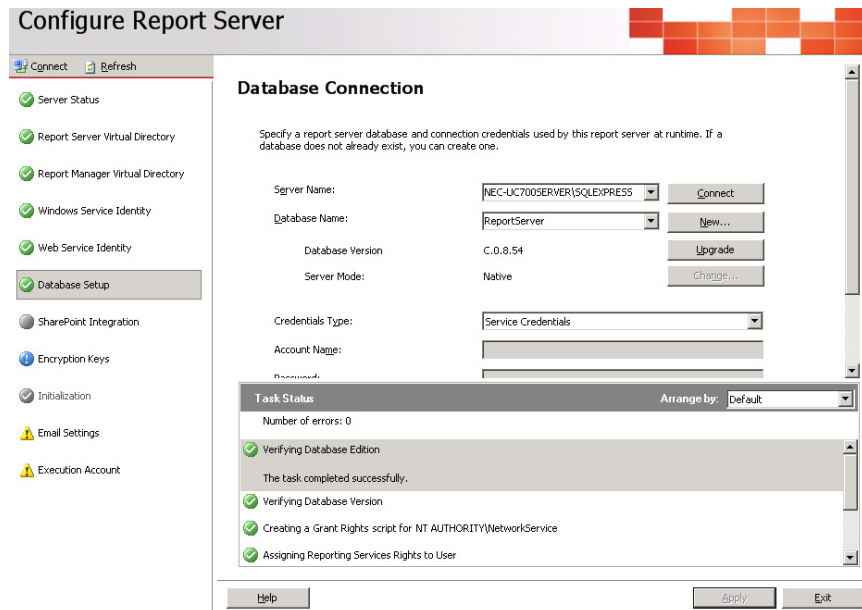
Step 10 Edit the **Server Name** field to read "<MACHINE NAME>\SQLEXPRESS" instead of "LOCALHOST\SQLEXPRESS".

> **NOTE**
>
> *If the full version for SQL is being used, then* ***\SQLEXPRESS*** *will not be a part of the name unless some other named instance for the database was used.*

Step 11 Create a new Database Name by clicking **New**. A New SQL Server Connection dialog box displays (Figure 2-8).

Figure 2-8 *New SQL Server Connection dialog box*
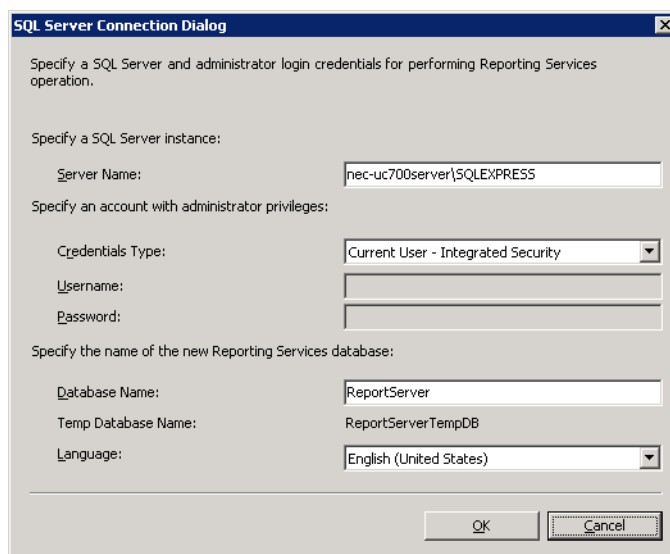
Step 12 Rename the new Reporting Service **ReportServer**. Use the defaults from the new database dialog box.

Step 13 Press the **Connect** button (Figure 2-7) to verify the database connectivity. If connectivity fails, verify that the SQL Server OW5000 is installed and is accessible. Also, verify that the **Server Name** field is correct.

Step 14 Click **Apply**. A Database Connection Confirmation dialog box displays (Figure 2-9).

Figure 2-9 *Database Connection Confirmation dialog box*

Step 15 Click **Exit**.

Configuring the Reporting Services for SQL Server 2008

> ***Step 1***   Open the Reporting Services Configuration Tool by following the path, **Start > All Programs > Microsoft SQL Server 2008 > Configuration Tools > Reporting Services Configuration Manager** (Figure 2-10).

Figure 2-10 *Reporting Services Configuration*
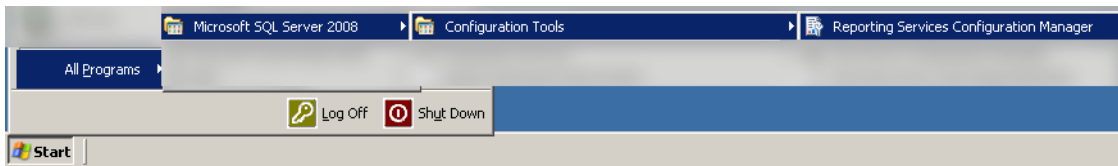
An Instance Selection dialog box displays (Figure 2-11).

Figure 2-11 *Instance Selection dialog box*
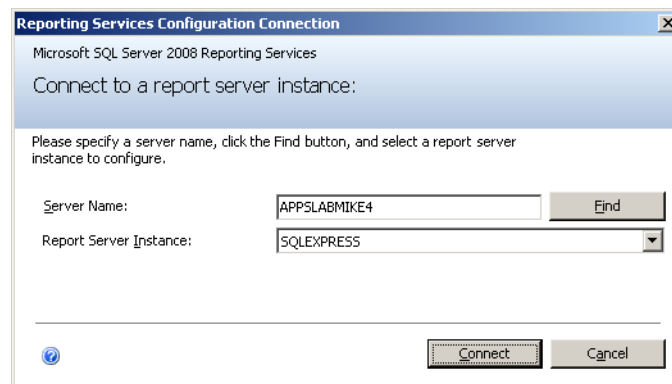
> ***Step 2***   Specify a **Server Name**, select a **Report Server Instance** and then click **Connect**. A Report Server Status dialog box displays (Figure 2-12).

> *If **Report Server Instance** is grayed out, re-run the SQL Installer and ensure that the Report Server component is installed.*

NOTE

Figure 2-12 *2008 Report Server Status dialog box*
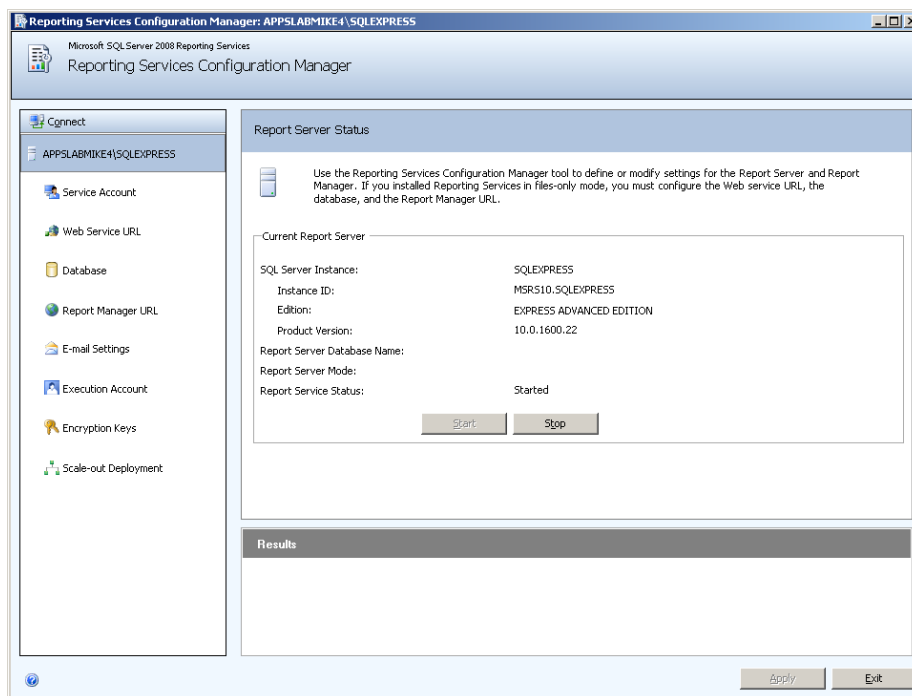
NOTE

*If the **Stop** button is grayed out, the Report Server is not connected. Click the **Start** button.*

The following topics are included for Configuring Reporting Services for SQL 2008:

- *Service Account*
- *Web Service URL*
- *Database*
- *Report Manager URL*

Service Account

Service Account identifies which account will run the report server service. The server account is selected during SQL installation.

Step 1 To verify the account, select **Service Account** from the Reporting Services Configuration Manager dialog box. Figure 2-13 displays.

Figure 2-13 *2008 Service Account dialog box*

The default value for **Use built-in account** is **Network Service**.

NOTE

*The **Service Account** window is for verification purposes only. It is recommended that the **Use built-in account** value not be changed from the default.*

Once verified, no further action is required.

In order to change the built-in account type, you must have an encryption key. It is recommended that you create a backup of the Report Server Database before selecting any account other than the default.

If the Use built-in account field is changed, the following error message may appear.

"The report server cannot decrypt the symmetric key used to access sensitive or encrypted data in a report server database. You must either restore a backup key or delete all encrypted content. Check the documentation for more information. (rsReportServerDisabled)"

If you receive this error, the Service login account has changed and a new encryption key file is needed to validate the new account. You should restore a symmetric key only if it is the same key that is currently used to encrypt and decrypt data in the report server database. If you restore a symmetric key that is not valid, you will no longer be able to access sensitive data. In this case, you must delete and re-create the key. Refer to documentation from Microsoft SQL Server on restoring encryption Key files. If the key file is not available, then go to the Encryption section and delete the current key file and re-do all steps.

NOTE

Web Service URL

Follow the steps below to configure a URL to access the Report Server.

Step 1 From the Report Server Status dialog box (Figure 2-10), select **Web Service URL**. Figure 2-14 displays.

Figure 2-14 *2008 Web Service URL dialog box*
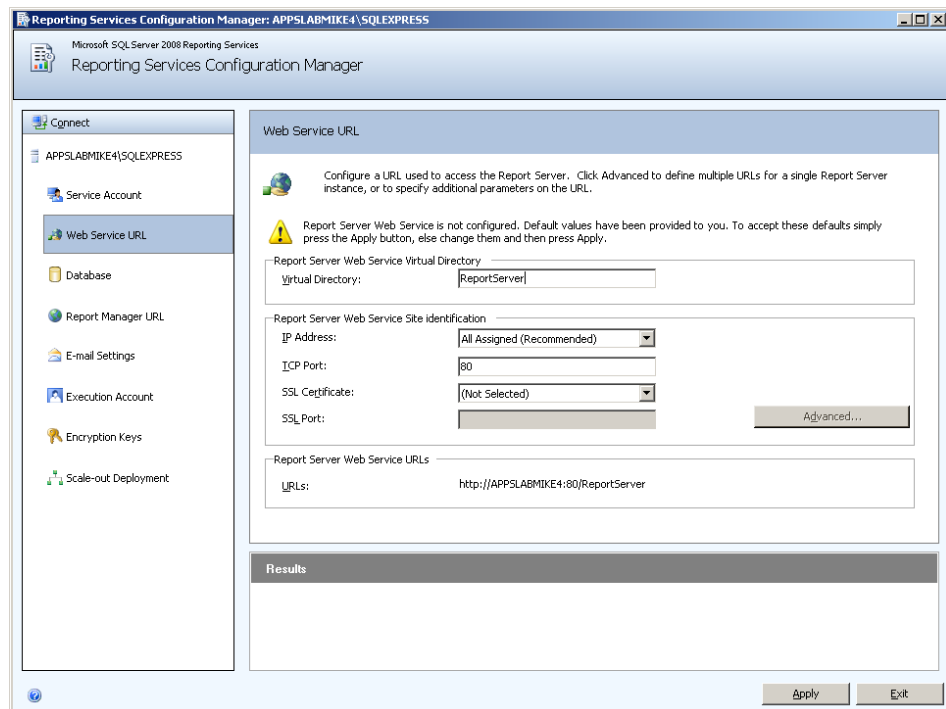
The Web Service URL dialog box is populated with data identified during the SQL installation. If no changes are needed, it is recommended that you accept the default settings. If you accept the default settings, no further action is needed.

If you need to make changes, notify your System Administrator and proceed with the steps below.

NOTE

Step 2   Enter a name for the Virtual Directory. This allows you to specify the virtual directory name for the Report Server Web service. You can only have one virtual name for each Report Server Web service instance on the same computer.

NOTE   *If the default value for **Virtual Directory** is **ReportServer_SQLEXPRESS**, it is recommended that you change it to **ReportServer** by removing the **_SQLEXPRESS** portion (to match the last qualifier of the default Report Server URL seen in OW5000 Settings).*

Step 3   Select an **IP Address** from the drop-down list. It is normally OK to accept the default value, **All Assigned**.

Step 4   Enter the **TCP Port number**. The default is 80.

Step 5   Click **Apply**. A confirmation dialog box displays (Figure 2-15).

Figure 2-15 *Confirmation dialog box*

For information on Advanced settings, refer to *Microsoft's SQL Server 2008 SQL Server Setup Help, Web Service URL (Reporting Services Configuration) Online Help*.

Database

The **Report Server Database** stores all report content and application data and is accessed under **Database** on the **Reporting Services Configuration Manager** dialog box (Figure 2-16). Use the **Report Server Database** dialog box to verify report server database settings.

Figure 2-16 *2008 Report Server Database dialog box*

NOTE

*The fields in the **Report Server Database** dialog box are populated during SQL installation. If SQL Installation was performed correctly, no changes to this page are necessary.*

Step 1   If the fields in Figure 2-16 are blank, click **Change Database**. A Change Database—Action dialog box displays (Figure 2-17).

Figure 2-17 *Change Database—Action dialog box*

Step 2   Click **Next**. A Change Database—Database Server dialog box displays (Figure 2-18).

Figure 2-18 *Change Database—Database Server dialog box*
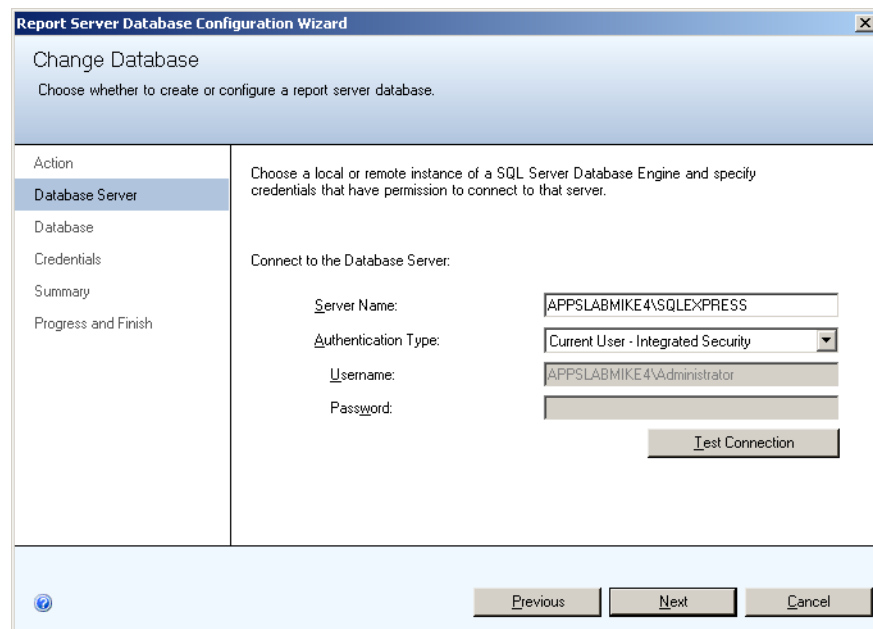
Step 3   Click **Test Connection**. Figure 2-19 displays.

Figure 2-19 *Test Connection Confirmation dialog box*
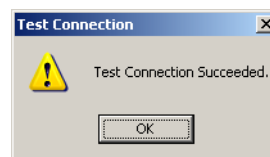
Step 4   If the test is not successful, edit the Server Name to match the instance name and try again.

> **NOTE**
>
> *Depending on the SQL edition you are using and how it was installed, one of the following should allow a successful connection:*
>
> *<hostname>*
> *<hostname>\<instance name>*
> *.\<instance name>*
>
> *If you are in doubt as to whether or not a successful Test Connection is connecting to the correct SQL instance, try using Microsoft SQL Server Management Studio to connect to the value you have specified here. You should not only be able to connect, but also examine the Databases to find the OW5000 database residing there. (It's technically OK, however, to install the Report Server Database within a different instance of SQL than that where the OW5000 database resides.)*

Step 5   Click **Next**. A Change Database—Database dialog box displays (Figure 2-20).

Figure 2-20 *Change Database—Database dialog box*

Step 6   Accept the defaults and click **Next**. A Change Database—Credentials dialog box displays (Figure 2-21).

Figure 2-21 *Change Database—Credentials dialog box*

Step 7   Accept the default values and click **Next**. A Change Database—Summary dialog box displays (Figure 2-22).

Figure 2-22 *Change Database—Summary dialog box*

Step 8 Review the settings and click **Next**. A Change Database—Progress and Finish dialog box displays (Figure 2-23). This may take a few seconds to complete.

Figure 2-23 *Change Database—Progress and Finish dialog box*

Step 9 Confirm that a status of **Success** is shown for each step, and then click **Finish**.

Figure 2-24 *Report Server Database—Database option*
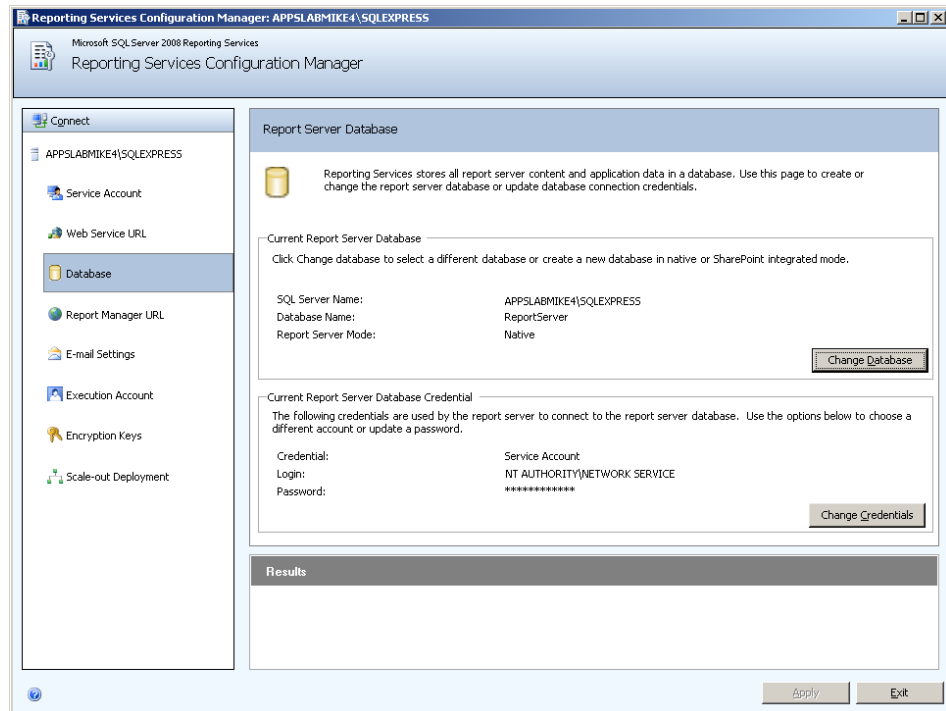
Report Manager URL

To access the Report Manager, you must configure a URL. Follow the
steps below.

Step 1 Select **Report Manager URL** from the 2008 Report Server Status dialog
box (Figure 2-12). Figure 2-25 displays.

Figure 2-25 *Report Manager URL dialog box*
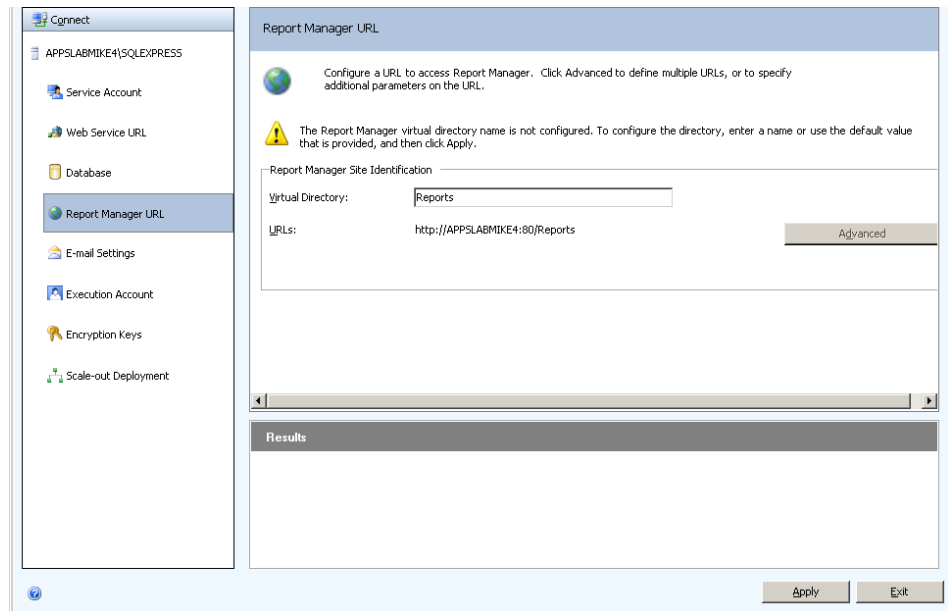
Step 2 Enter a value of **Reports** for the **Virtual Directory** name for **Report
Manager Site Identification**.

Step 3 Click **Apply**.

Step 4 Test the URL by clicking the link in the **URLs** section of the **Report
Manager URL** window. If the URL is correct, Figure 2-26 displays. (It can
take 60 seconds or longer for this page to open in your browser.)

> **NOTE**
> *If prompted, enter the User Name and Password of the person that has machine
> administrator privileges on that machine.*

Figure 2-26 *2008 SQL Server Reporting Services Home*
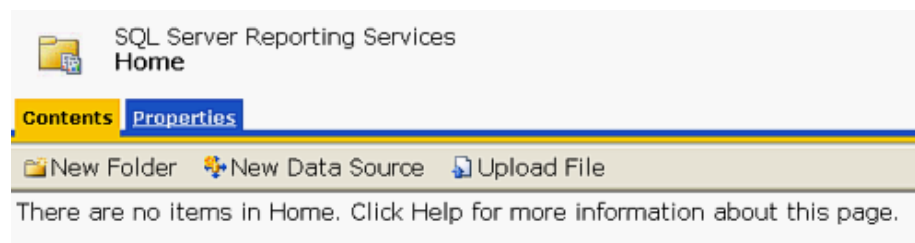
Loading the SQL Server Reporting Service

Step 1 If the page fails to load, a configuration file must be manually edited by following the procedure below:

—Browse to **C:\Program Files\Microsoft SQL Server\MSSQL.X\Reporting Services\ReportManager**. Find the file named **RSWebApplication.config**.

Multiple MSSQL folders may appear, such as MSSQL.1, MSSQL.2, and MSSQL.3. Browse through all of them until you find one that has a **Reporting Services** sub folder.

—Open the config file with NotePad and find the line containing **<ReportServerVirtualDirectory></ReportServerVirtualDirectory>**.

Modify the line by inserting the Virtual Directory Name **ReportServer** in the field. The line will now appear as follows:

—**<ReportServerVirtualDirectory>ReportServer</ReportServerVirtualDirectory>**

Step 2 Save and close the configuration file.

Step 3 Retry opening the URL **//<Server Name>/Reports**. A web page opens displaying the **Home** level.

> **NOTE**
>
> *If the web page does not open, verify that IIS is running on your server.*
>
> *If the web page opens, the following error might be displayed: **This page might not function correctly because either your browser does not support scripts or active scripting is disabled**. If so, using Internet Explorer, go to **Tools** > **Internet Options** > **Security tab** > **Local Intranet**, click the **Sites** button, and add your Report Manager URL to the list of sites.*

Step 4 Click the **Properties** tab. A Properties page displays (Figure 2-27).

Figure 2-27 *2008 SSRS Properties Page*
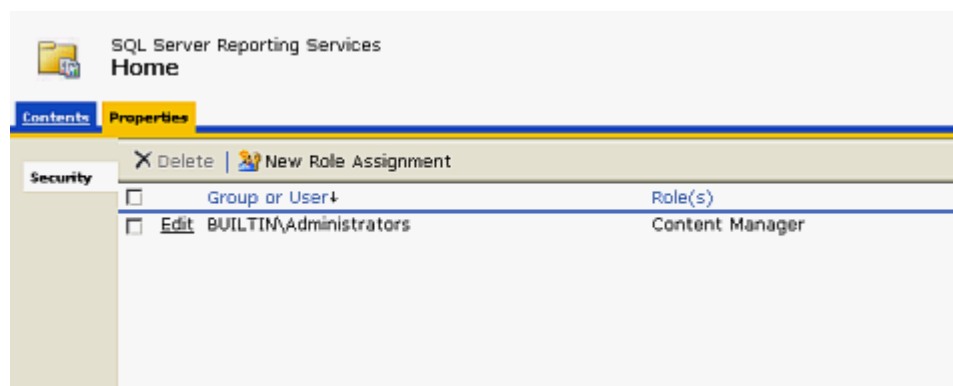
Step 5 Click **New Role Assignment**. A New Role Assignment dialog box displays (Figure 2-28).

Figure 2-28 *2008 New Role Assignment dialog box*
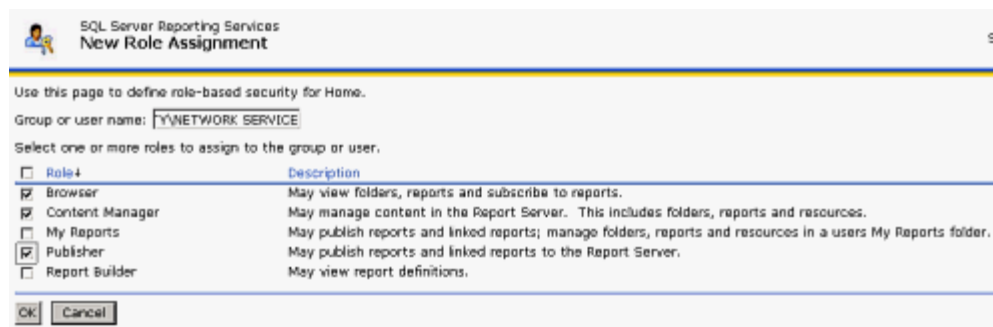
Step 6 Enter **NT AUTHORITY\NETWORK SERVICE** in the **Group or user name** field. This field is case sensitive.

Step 7 Check the following check boxes:

—Browser

—Content Manager

—Publisher

Step 8 Click **OK**.

Uploading OW5000 Reports

You must log on to the OW5000 Administrator in order to upload reports. Refer to the *UNIVERGE OW5000 Configuration Guide* for information on how to log on to the OW5000 Administrator. When you have finished, you can either log out or just close your browser.

Step 1 Once you are logged on to OW5000 Administrator, follow this path to open the Report Setting configuration options: **OW5000 > Settings > General Settings**. A Settings dialog box displays (Figure 2-29).

Figure 2-29 *2008 Settings dialog box*

Step 2 Verify that the reporting services URL reads as follows: **http://<Machine Name>/ReportServer**.

Step 3 Click **Upload Reports**. A Reports Confirmation dialog box displays (Figure 2-30).

Figure 2-30 *2008 Reports Confirmation dialog box*

Step 4 If a confirmation dialog box does not display, verify that the **NT AUTHORITY\NETWORK SERVICE** account was correctly added to the Home level in the Report Manager web page by doing the following.

—Go to the Report Manager web page **//<Server Name>/Reports**. Figure 2-31 displays.

Figure 2-31 *Reports Home page*
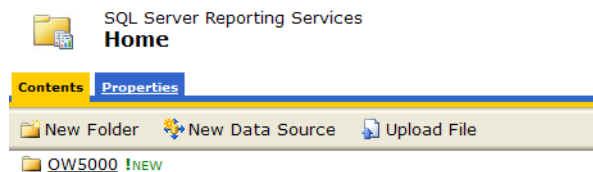
—Verify the sub directory **OW5000** was created under the **Contents** tab.

—Click **OW5000**, and then click **Admin**. All reports that OW5000 currently deploys and supports will display. All future reports will be uploaded to this location anytime the Upload Reports button is pressed in Admin, assuming that the report to upload is residing in the reports deployment folder. The default deployment folder is **C:\Program Files\NEC\OW5000\Administrator\ReportFiles**.

Reports can now be generated for applications using SSRS reports.

Configuring the Reporting Services for SQL Services 2008 R2

Step 1   Open the Reporting Services Configuration Tool: **Start > All Programs > Microsoft SQL Server 2008 R2 > Configuration Tools > Reporting Services Configuration Manager** (Figure 2-32).

Figure 2-32 *2008 R2 Reporting Services Configuration*
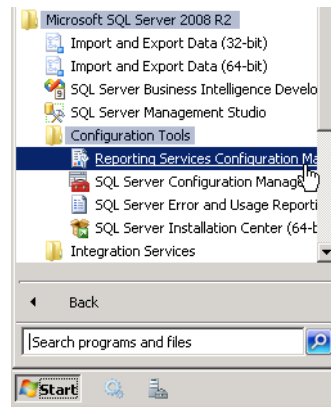
An Instance Selection dialog box displays (Figure 2-33).

Figure 2-33 *2008 R2 Instance Selection dialog box*
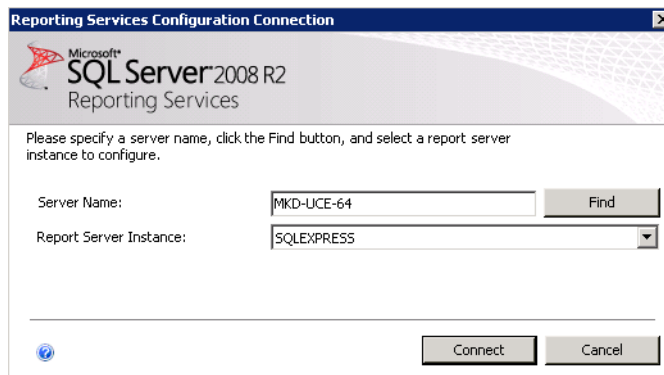
Step 2   Specify a **Server Name**, select a **Report Server Instance,** and click **Connect**. A Report Server Status dialog box displays (Figure 2-34).

> **NOTE**   *If Report Server Instance is grayed out, re-run the SQL installation and ensure that the Report Server component is installed.*

Figure 2-34 *2008 R2 Report Server Status dialog box*
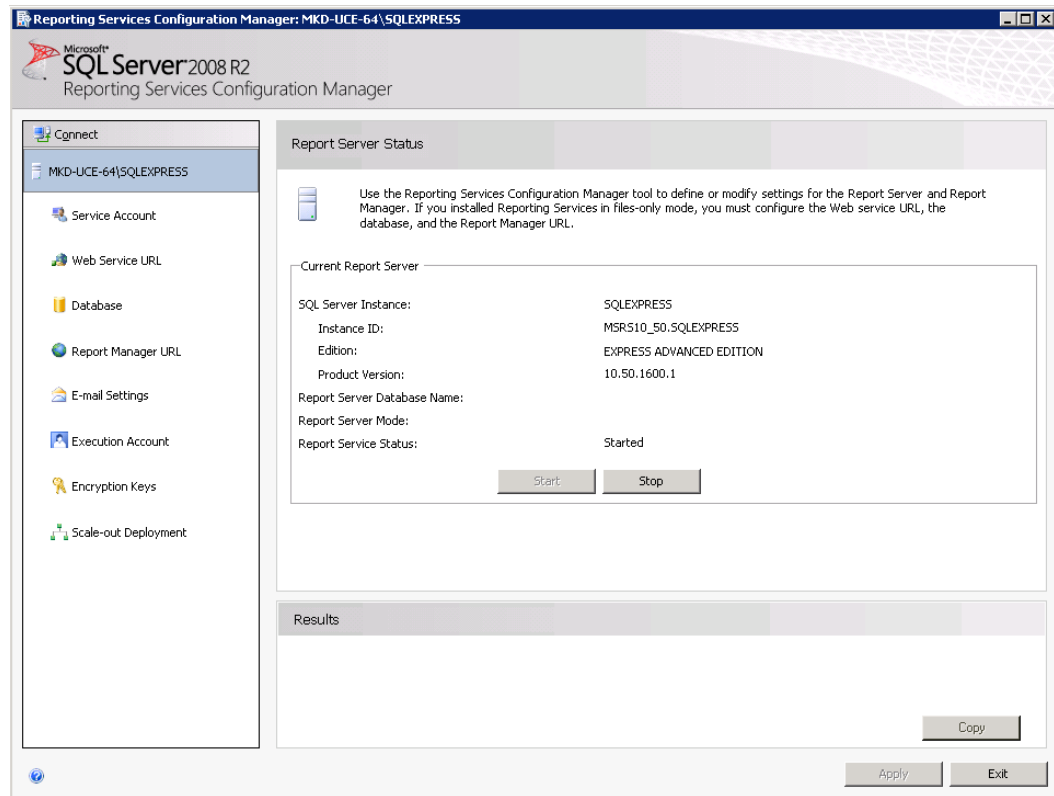
—If the **Stop** button is grayed out, the Report Server is not connected. Click the **Start** button.

The following topics are included in this section:

- *Service Account*
- *Web Service URL*
- *Database*
- *Report Manager URL*

Service Account

Service Account identifies which account will run the report server service. The server account is selected during SQL installation.

To verify the account, select **Service Account** from the **Reporting Services Configuration Manager** dialog window. Figure 2-35 displays.

Figure 2-35 *2008 R2 Service Account dialog*
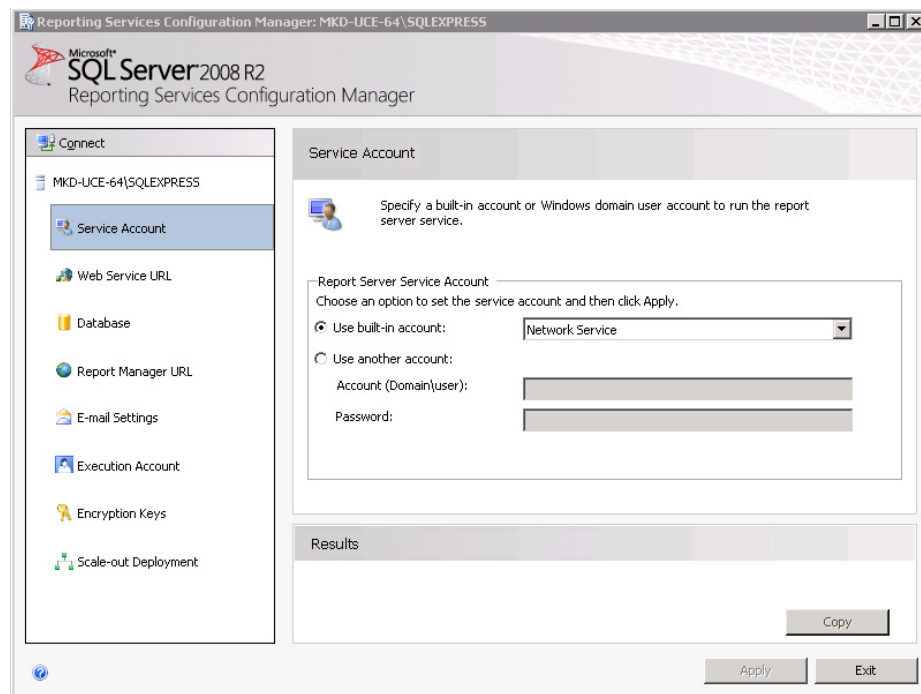
The default value for **Use built-in account** is **Network Service**.

NOTE

*The **Service Account** window is for verification purposes only. It is recommended that the **Use built-in account** value not be changed from the default.*

Once verified, no further action is required.

In order to change the buIlt-in account type, you must have an encryption key. It is recommended that you create a backup of the Report Server Database before selecting any account other than the default. See .

IMPORTANT

*If the **Use built-in account** field is changed, the following error message may appear.*

"The report server cannot decrypt the symmetric key used to access sensitive or encrypted data in a report server database. You must either restore a backup key or delete all encrypted content. Check the documentation for more information. (rsReportServerDisabled)"

If you receive this error, the Service login account has changed and a new encryption key file is needed to validate the new account. You should restore a symmetric key only if it is the same key that is currently used to encrypt and decrypt data in the report server database. If you restore a symmetric key that is not valid, you will no longer be able to access sensitive data. In this case, you must delete and re-create the key. Refer to documentation from Microsoft SQL Server on restoring encryption Key files. If the key file is not available, then go to the Encryption section and delete the current key file and re-do all steps.

Web Service URL

In order to access the Report Server, the Web Service URL must be configured. Use the Web Service URL page to configure or modify the URL used to access the report server. A URL reservation will be created based on the URL you specify.

Follow the steps below to configure a URL in order to access the Report Server.

Step 1   From the left panel of the **Reporting Services Configuration Manager** dialog window, select **Web Service URL**. Figure 2-36 displays.

NOTE   *The Web Service URL dialog box is populated with data identified during the SQL installation. If no changes are needed, it is recommended that you accept the default settings. If you accept the default settings, no further action is needed for this procedure.*

If you need to make changes, notify your System Administrator and proceed with the steps below.

Figure 2-36 *2008 R2 Web Service URL dialog box*
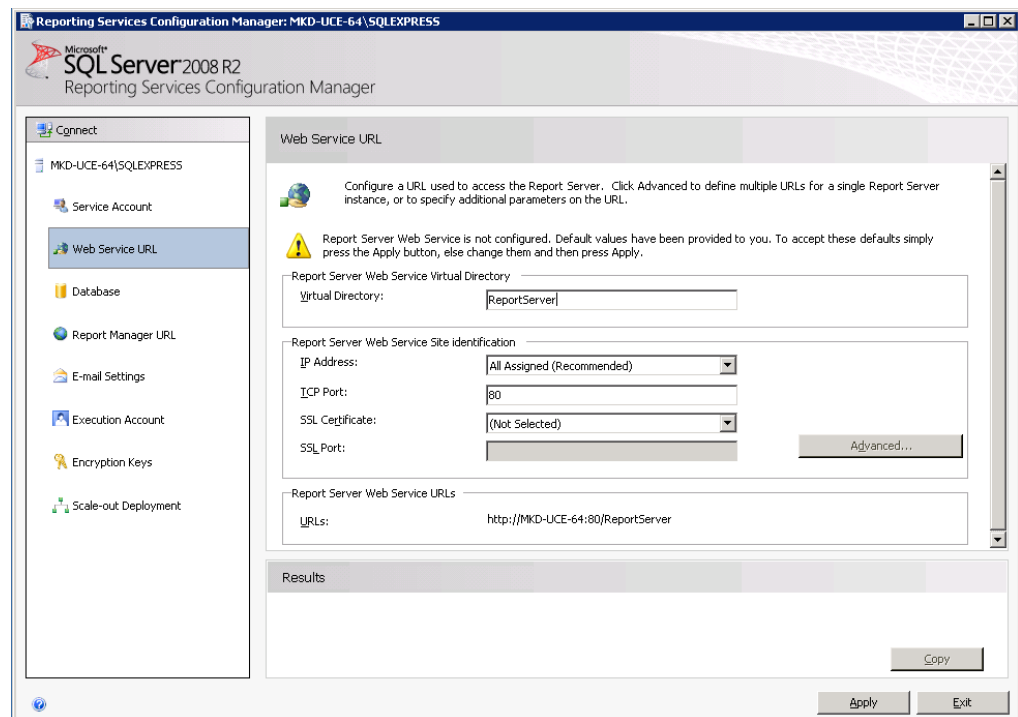
Step 2   Enter a name for the **Virtual Directory**. This allows you to specify the virtual directory name for the Report Server Web service. You can only have one virtual name for each Report Server Web service instance on the same computer.

Step 3   Select an **IP Address** from the drop-down list. It is normally OK to accept the default value, **All Assigned**.

Step 4   Enter the **TCP Port Number**. The default is 80.

Step 5   Click **Apply**. Figure 2-37 displays.

Figure 2-37 *2008 R2 Web Service URL—Confirmation dialog box*

For information on **Advanced** settings, refer to *Microsoft's SQL Server 2008 R2 Reporting Services Configuration Manager Online Help*.

Database

The **Report Service Database** stores all report content and application data and is accessed under **Database** on the **Reporting Services Configuration Manager** dialog box. Use the **Report Service Database** dialog box to verify report server database settings.

Figure 2-38 *Report Service Database*
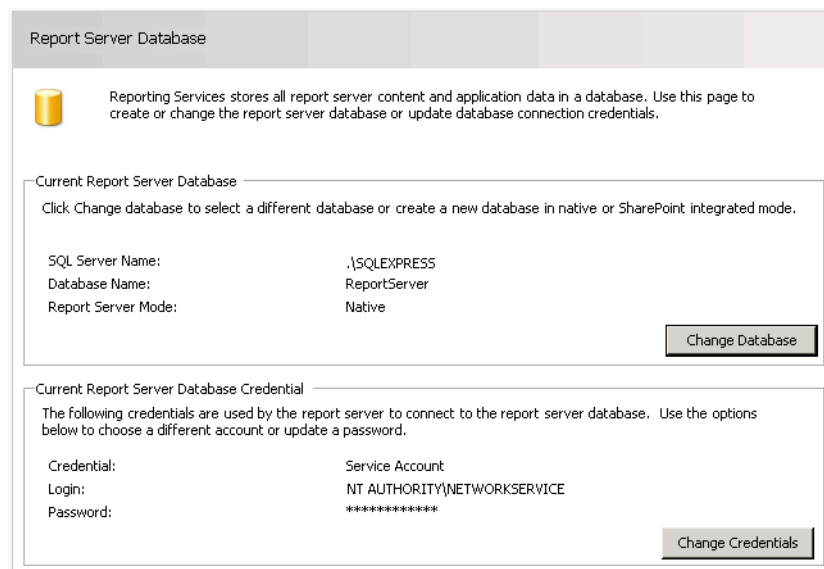
> **NOTE**
>
> *The fields in the **Report Server Database** dialog box are populated during SQL installation. If SQL Installation was performed correctly, no changes to this page are necessary. If the fields are blank on the Report Server Database dialog, follow the steps below.*

Change Database

If the SQL Installation was not performed correctly, click **Change Database**. Figure 2-39 displays.

Figure 2-39 *Change Database dialog*

Step 1   Click **Next** to display Figure 2-40.

Figure 2-40 *Change Report Server Database dialog*

Step 2   Click **Test Connection**. Figure 2-41 displays.

Figure 2-41 *Test Connection Confirmation*
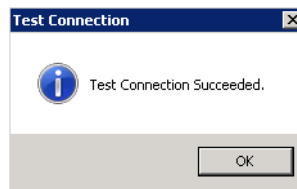
> ***Step 3*** If the test is not successful, edit the **Server Name** to match the instance name and try again.

> **NOTE**
>
> *Depending on the SQL edition you are using and how it was installed, one of the following should allow a successful connection:*
>
> *<hostname>*
> *<hostname>\<instance name>*
> *.\<instance name>*
>
> *If you are in doubt as to whether or not a successful Test Connection is connecting to the correct SQL instance, try using Microsoft SQL Server Management Studio to connect to the value you have specified here. You should not only be able to connect, but also examine the Databases to find the OW5000 database residing there. (It is technically OK, however, to install the Report Server Database within a different instance of SQL than that where the OW5000 database resides.)*

> ***Step 4*** Click **Next**. Figure 2-42 displays.

Figure 2-42 *Change Database—Database dialog*

> ***Step 5*** Accept the defaults and click **Next**. Figure 2-43 displays.

Figure 2-43 *Change Database—Credentials dialog*

Step 6   Accept the default values and click **Next**. Figure 2-44 displays.

Figure 2-44 *Change Database—Summary dialog*

Step 7   Review the settings and click **Next**. It may take a few seconds before a Change Database—Progress and Finish dialog (Figure 2-45) displays.

Figure 2-45 *Change Database—Progress and Finish dialog*
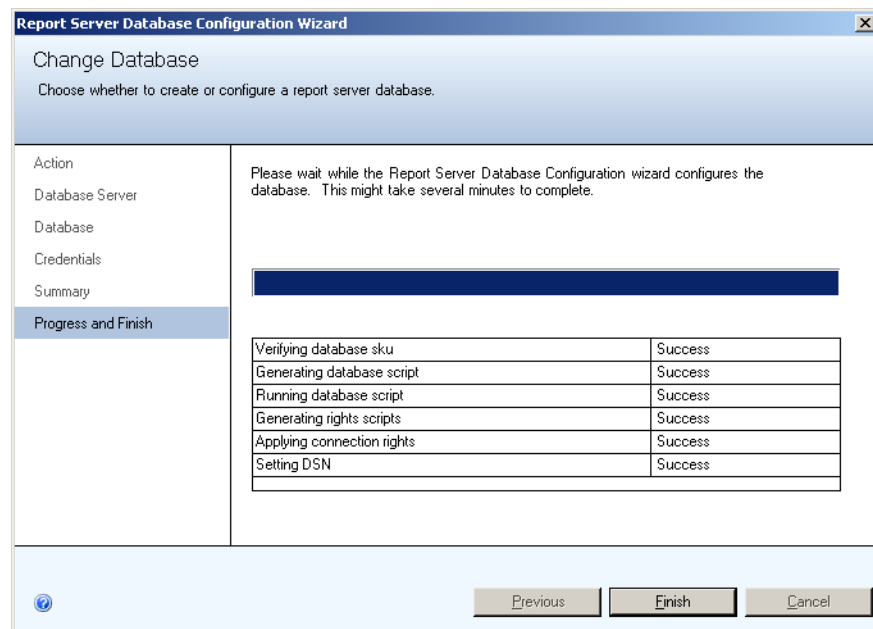
Step 8 Confirm that a status of **Success** displays for each step and then click **Finish**. Figure 2-46 displays.

Figure 2-46 *Report Server Database*
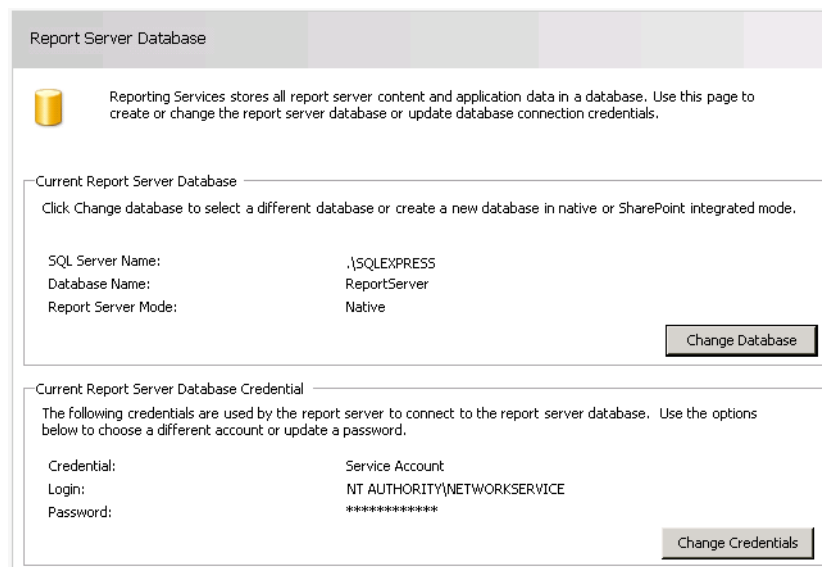
Report Manager URL

Use the Report Manager URL page to configure or modify the URL used to access Report Manager. Report Manager listens on the same IP address and port as the Report Server Web service. By default, the Report Manager URL inherits the prefix, IP address, and port of the Report Server **Web Service URL**. If you configured Report Manager to point to a different Report Server Web service, you must modify the Report Manager URL settings. Follow the steps below.

Step 1   Select **Report Manager URL** from the **Reporting Services Configuration Manager** dialog box. Figure 2-47 displays.

Figure 2-47 *2008 R2 Report Manager URL dialog box*
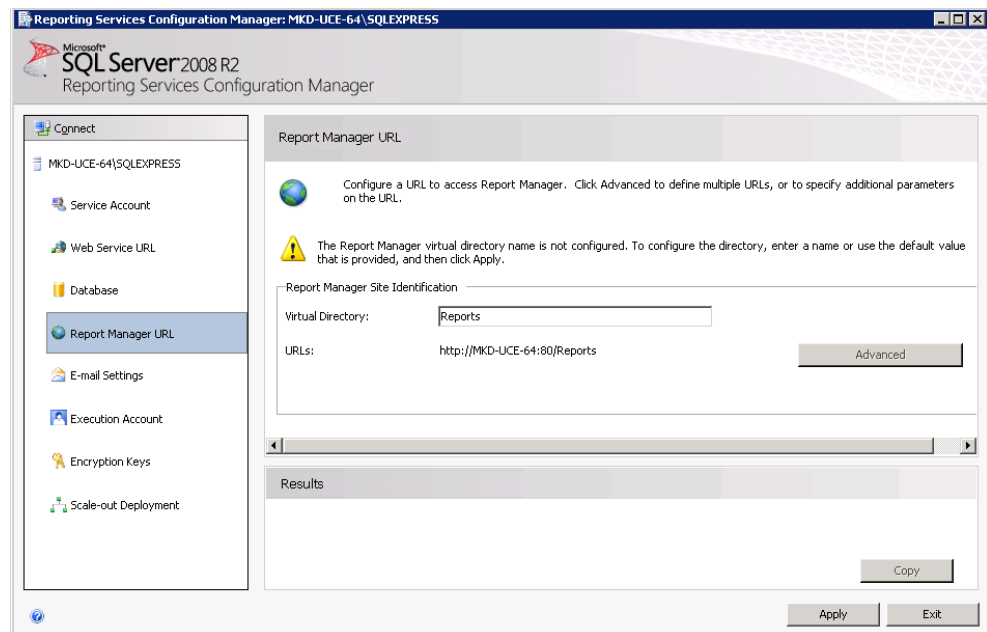
Step 2   Enter a value of **Reports** for the **Virtual Directory** name for the Report Manager Site Identification.

Step 3   Click **Apply**.

Step 4   Test the URL by clicking the link in the **URLs** section of the **Report Manager URL** window. If the URL is correct, Figure 2-48 displays. (It can take 60 seconds or longer for this page to open in your browser.)

NOTE   *If prompted, enter the User Name and Password of the person that has machine administrator privileges on that machine.*

Figure 2-48 *2008 R2 SQL Server Reporting Services Home*
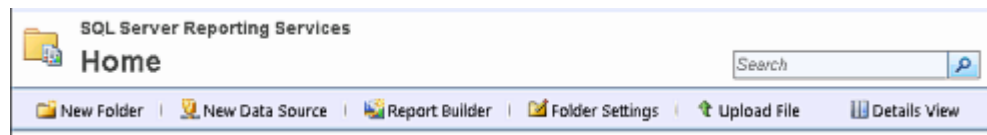
> **NOTE**
>
> *If the web page does not open, verify that IIS is running on your server. If the web page opens, the following error might be displayed: **This page might not function correctly because either your browser does not support scripts or active scripting is disabled.** If so, using Internet Explorer, go to **Tools** > **Internet Options** > **Security tab** > **Local Intranet**, click the **Sites** button, and add your Report Manager URL to the list of sites.*

Loading the SQL Service Report Service

Step 1   Click **Folder Settings** (Figure 2-48) to display a Role Assignment dialog box (Figure 2-49).

Figure 2-49 *2008 R2 Role Assignment dialog box*
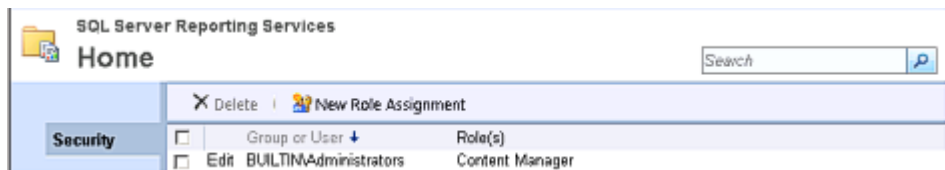
Step 2   Click **New Role Assignment**. A New Role Assignment dialog box displays (Figure 2-50).

Figure 2-50 *2008 R2 New Role Assignment dialog box*
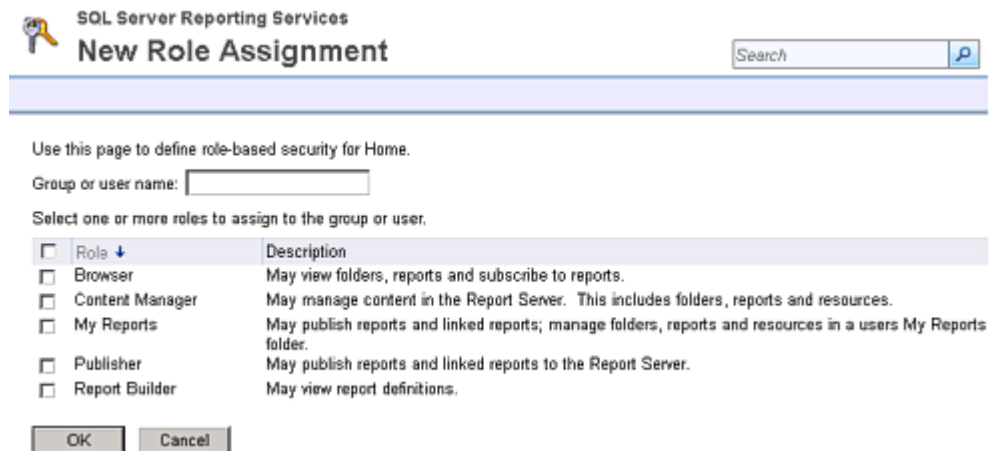
Step 3   Enter **NT AUTHORITY\NETWORK SERVICE** in the **Group or user name** field. This field is case sensitive.

> ***Step 4*** Check the following check boxes, as shown in Figure 2-51.
>
> > —Browser
> > —Content Manager
> > —Publisher

Figure 2-51 *2008 R2 New Role Assignment Datafill*

> ***Step 5*** Click **OK**.

Uploading OW5000 Reports

You must log on to the OW5000 Administrator in order to upload reports. Refer to the *UNIVERGE OW5000 Configuration Guide* for information on how to log on to the OW5000 Administrator. When you have finished, you can either log out or just close your browser.

> ***Step 1*** Once you are logged on to OW5000 Administrator, follow this path to open the Report Setting configuration options: **OW5000 > Settings > General Settings**. A Settings dialog box displays (Figure 2-52).

Figure 2-52 *2008 R2 Settings dialog box*

> ***Step 2*** Verify that the reporting services URL matches the Virtual Directory value in the Reporting Services Configuration Manager. The default is **http://<Machine Name>/ReportServer**.
>
> ***Step 3*** Click **Upload Reports**. A Reports Confirmation dialog box displays (Figure 2-53).

Figure 2-53 *2008 R2 Reports Confirmation dialog box*

Step 4   If a confirmation dialog box does not display, verify that the **NT AUTHORITY\NETWORK SERVICE** account was correctly added to the Home level in the Report Manager web page by doing the following.

—Go to the Report Manager web page **//<Server Name>/Reports**. Figure 2-54 displays.

Figure 2-54 *Report Manager—Home*
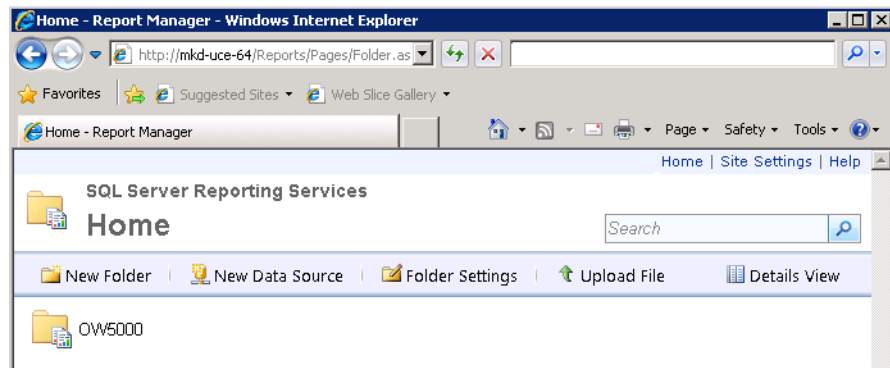
— Verify the sub directory **OW5000** was created under **Home**.

—Click **OW5000**, and then click **Admin**. All reports that OW5000 currently deploys and supports will display. All future reports will be uploaded to this location anytime the Upload button is pressed in Admin, assuming that the report to upload is residing in the reports deployment folder. The default deployment folder is **C:\Program Files\NEC\OW5000\Administrator\ReportFiles**.

Reports can now be generated for applications using SSRS reports.

Installing the UA5200 Server

This section details step-by-step instructions for installing the UA5200 Server software.

NOTE

If OW5000 and UA5200 are upgraded to a newer version from an older version, you must run OW5000 Administrator and browse to OW5000->Settings and select the Upload Reports button. This will upload the latest reports to SSRS.

Use the following steps to install the UA5200 Server software.

Step 1 Place the UCE 2010 DVD into the **DVD-ROM drive**. On most computers Autorun automatically starts the installation when you load the DVD. If Autorun is not enabled on the computer, you must do the following:

—After placing the 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 **Autorun.exe** file.

Step 2 From the UCE UA5200 menu, select a link to launch the installer for UA5200. A Preparing to Install screen displays briefly and then an InstallShield Wizard for UA5200 Server dialog box displays (Figure 2-55).

Figure 2-55 *InstallShield Wizard for UA5200 Server dialog box*
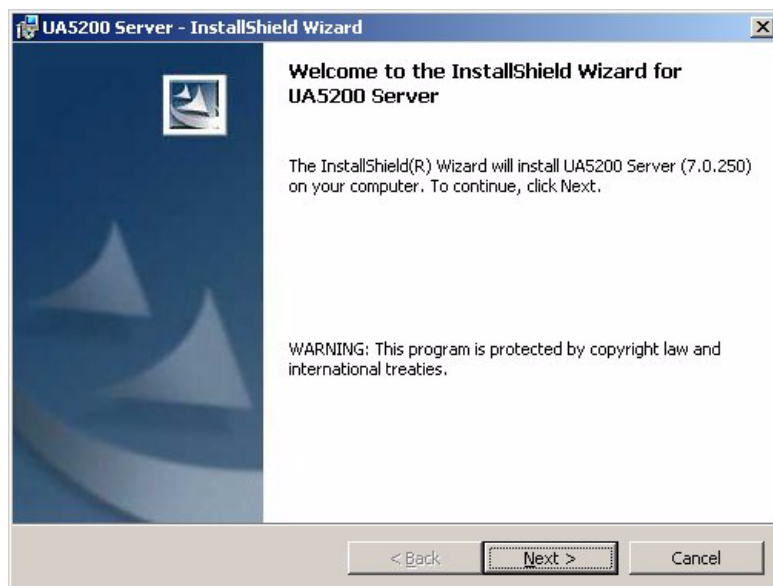
Step 3 Click **Next**. A License Agreement dialog box displays (Figure 2-56).

Figure 2-56 License Agreement dialog box

Step 4   Read the license agreement in the list box and select **I accept the terms in the license agreement** and then click **Next** to continue with the installation. A Choose Destination Location dialog box displays (Figure 2-57).

Figure 2-57 Choose Destination Location dialog box
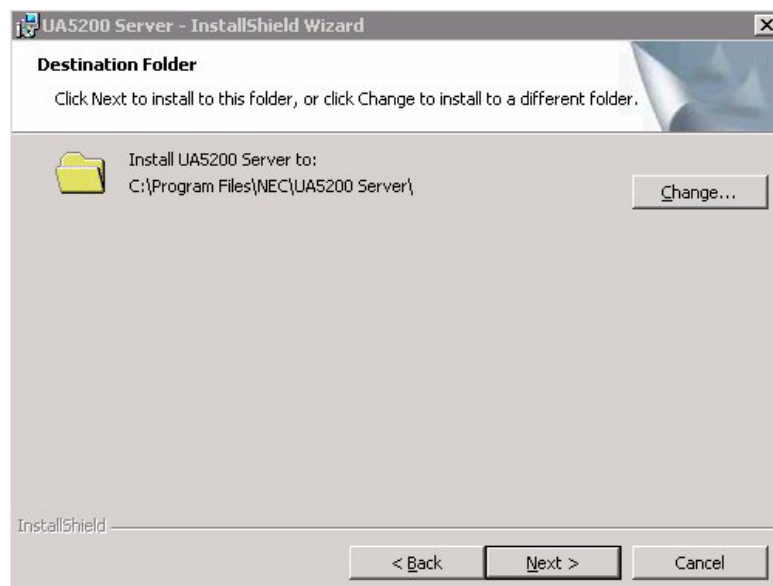
Step 5   Do one of the following:

—To install to the default folder, click **Next**.

—To select a different location, click **Change** and then select the desired folder from the drop-down list or create a new folder by clicking the new folder icon.

Step 6 Click **OK**. A Logon Information dialog box displays (Figure 2-58).

Figure 2-58 *Logon Information dialog box*

Step 7 Enter your **User name** or click **Browse** to select a domain/server and user name. Enter your **Password** and then click **Next**. A Configure TCP/IP Port dialog box displays (Figure 2-59).

Figure 2-59 *Configure TCP/IP Port dialog box*

Step 8 Enter the **TCP/IP port number** that the UA5200 Server uses to communicate with the UA5200 Clients. The default value is 5678.

Step 9 Click **Next**. A Ready to Install dialog box displays (Figure 2-59).

Figure 2-60 *Ready to Install dialog box*
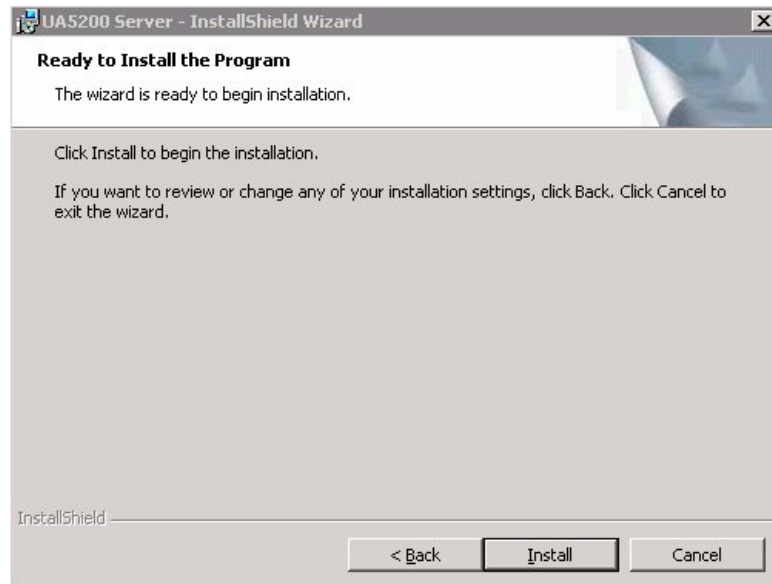
Step 10   Click **Install**.

Step 11   After the install is complete, click **Next**. Figure 2-61 displays.

Figure 2-61 *Installation Complete dialog box*
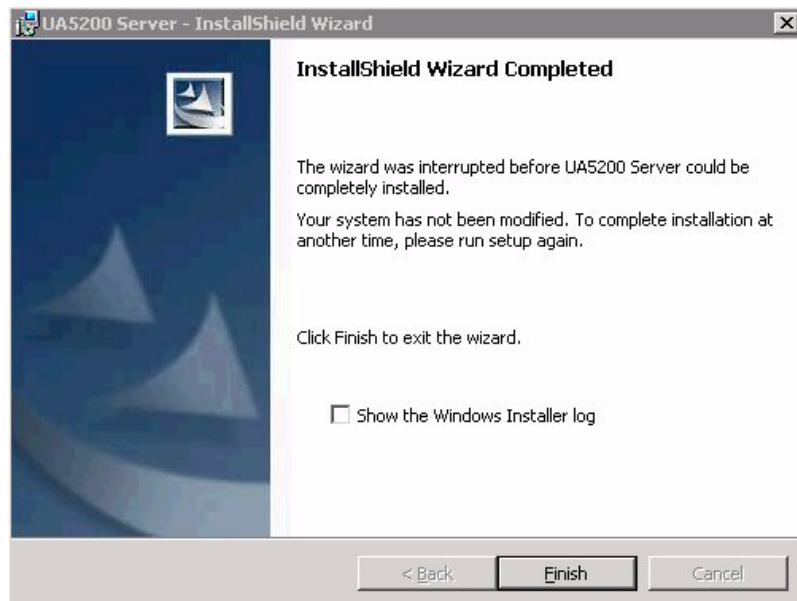
Step 12   Click **Finish** to complete the UA5200 Server installation. To **Show the Windows Installer log**, click the checkbox.

3

Installing the UA5200 Client

This chapter provides step-by-step procedures to install and configure the UA5200 Client software. Descriptions and procedures are found in the following sections of this chapter.

Chapter Topics
- *Before Starting the Installation Procedure*
- *Installing the UA5200 Client*

Before Starting the Installation Procedure

This section describes the required components that must be in place before installing the UA5200 Client software.

Client Workstation Requirements

The following requirements should be met when staging a UA5200 (UA) client or Desktop.

Table 3-1 Client Workstation Requirements

Minimum	Recommended
Operating System	
Windows XP Professional (latest Service Pack and Critical Windows Updates), or Vista SP1	
Processor	
Pentium 2 GHz	Pentium 3 GHz+
Memory	
1GB RAM 2 GB RAM (for Vista)	2GB or higher
Hard Drive Space (available before installation)	
20 MB or more	
Note: Not applicable to web applications.	

Minimum	Recommended
Additional Hardware and Software	
17" Color monitor with 1280x1024 or higher resolution	19" Color monitor with 1280x1024 or higher resolution
Ethernet network interface cards	
Visual C++ 2005 Redistributable package SP1	
.NET 3.5 Framework	
PMS Interface	
CCDesign ACD with sufficient agent licenses for Attendant Clients	
CD-ROM drive	52x or faster CD-ROM drive ***Note:*** *Not applicable to web applications.*
Microsoft Internet Explorer 7.0 (latest Critical Updates) for Windows (Macintosh systems not supported)	

UNIVERGE OW5000 Platform

Before installing the UA5200 Client software, please refer to the Requirements section in the *UNIVERGE OW5000 Configuration Guide* to verify that your system meets the Application Environment requirements for the OW5000 Platform and the specific application software you purchased. The OW5000 Platform must be installed before you install the UA5200 software. For instructions on how to install the OW5000 Platform, refer to the *UNIVERGE OW5000 Installation Guide*.

The UA5200 Client software must be installed on all workstations that will use the UA5200 for call processing.

Installing the UA5200 Client

This section details the step-by-step instructions for installing the UA5200 Client software.

Use the following steps to install the UA5200 Client software.

NOTE

Make sure that a workstation was added for the UA5200 Client on the UA5200 Server machine. For more information, see Chapter 4, "Configuring the UA5200" on page 4-1.

Step 1   Place the UCE 2010 DVD into the **DVD-ROM drive**. On most computers Autorun automatically starts the installation when you load the DVD. If Autorun is not enabled on the computer, you must do the following:

—After placing the 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 **Autorun.exe** file.

Step 2   From the UCE UA5200 menu, select a link to launch the installer for **UA5200 Client** to start the UA5200 Client installation program. A Welcome—Client dialog box displays (Figure 3-1).

Figure 3-1 *Welcome—Client dialog box*
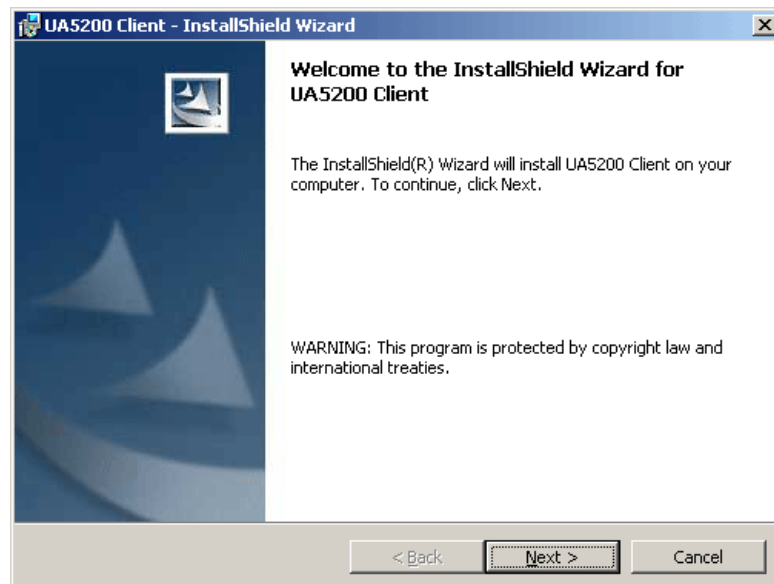
Step 3   After making sure that no other Windows programs are running, click **Next**. A License Agreement dialog box displays (Figure 3-2).

Figure 3-2 *License Agreement dialog box*
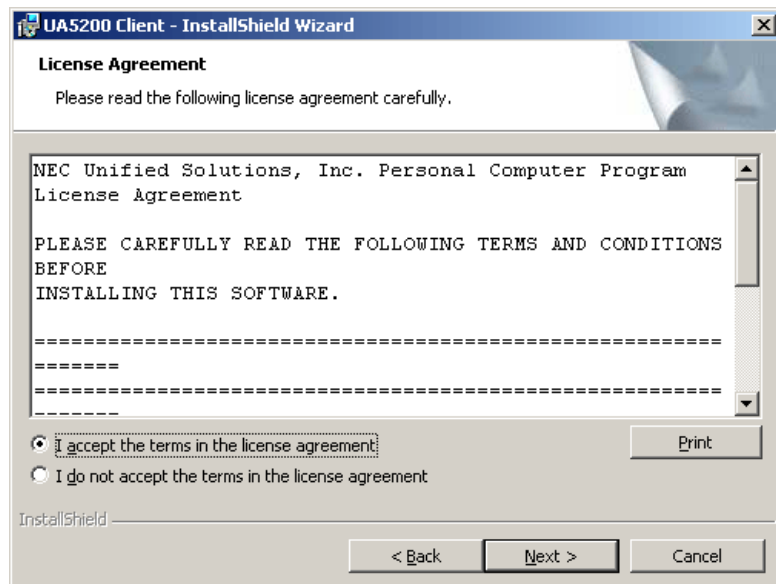
Step 4 Select **I accept the terms in the license agreement** and then click **Next**. A Select Destination Folder dialog box displays (Figure 3-3).

Figure 3-3 *Select Destination Folder dialog box*
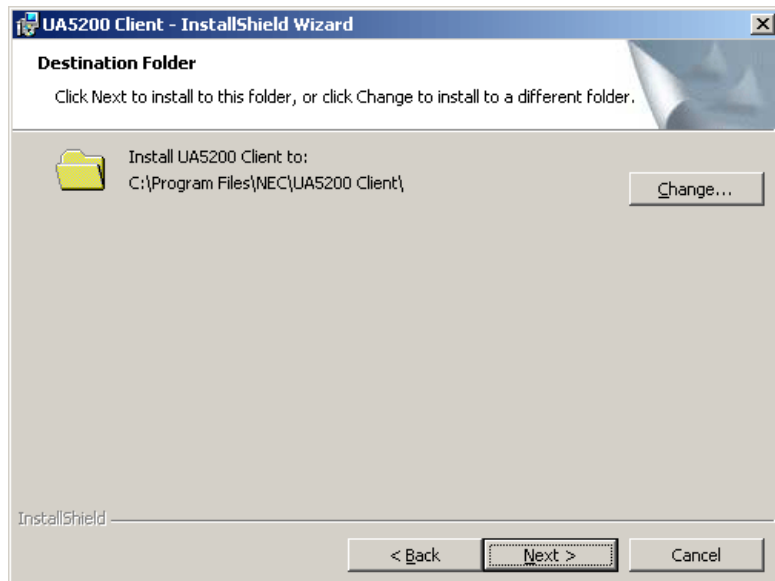
Step 5 Do one of the following:

—Click **Next** to install to the default folder.

—Click **Change** to install to a different location. Select the desired location from the dialog box and then click **Next**. A Server Information dialog box displays (Figure 3-4).

Figure 3-4 *Server Information dialog box*
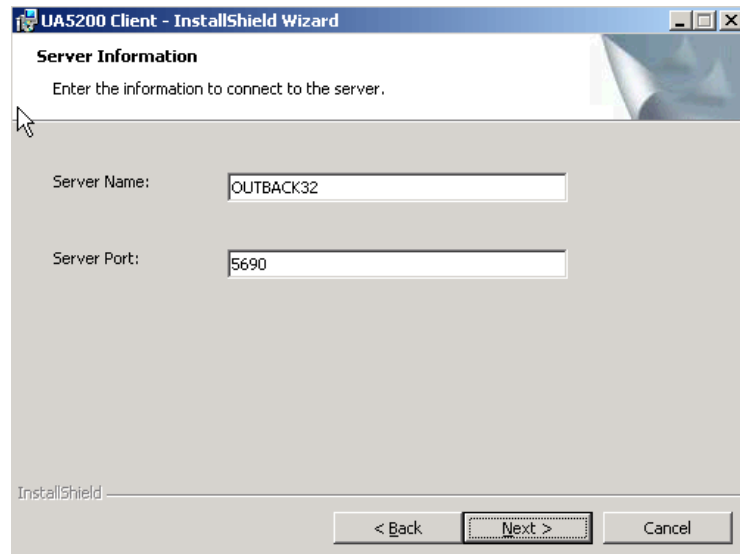
Step 6   Specify the **Server Name** and the **Server Port** of the computer that has been setup to maintain the application/PBX configuration information and the database.

Step 7   Click **Next**. The installation program verifies the location of the UA5200 Server. After successfully verifying the server location, a Ready to Install dialog box displays (Figure 3-5).

Figure 3-5 *Ready to Install dialog box*
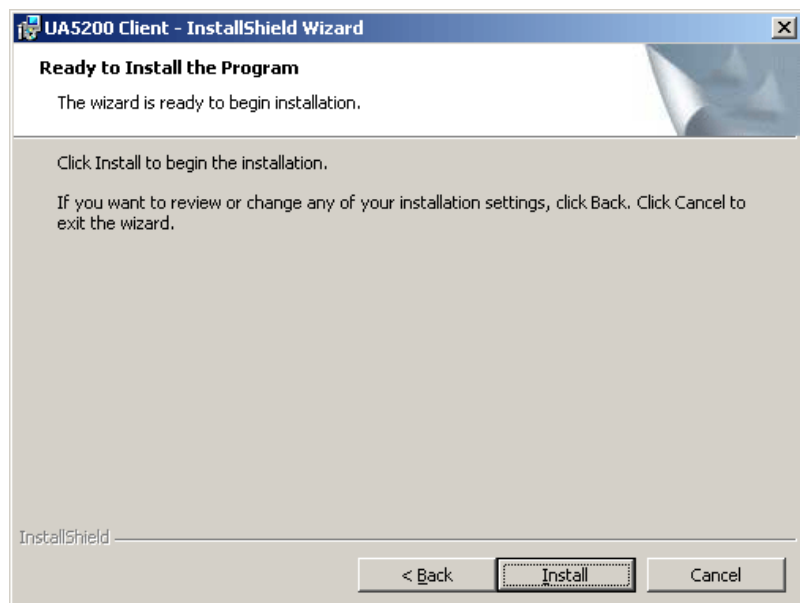
Step 8   Click **Install**. An Installation Status Screen displays (Figure 3-6).

Figure 3-6 *Installation Status Screen*
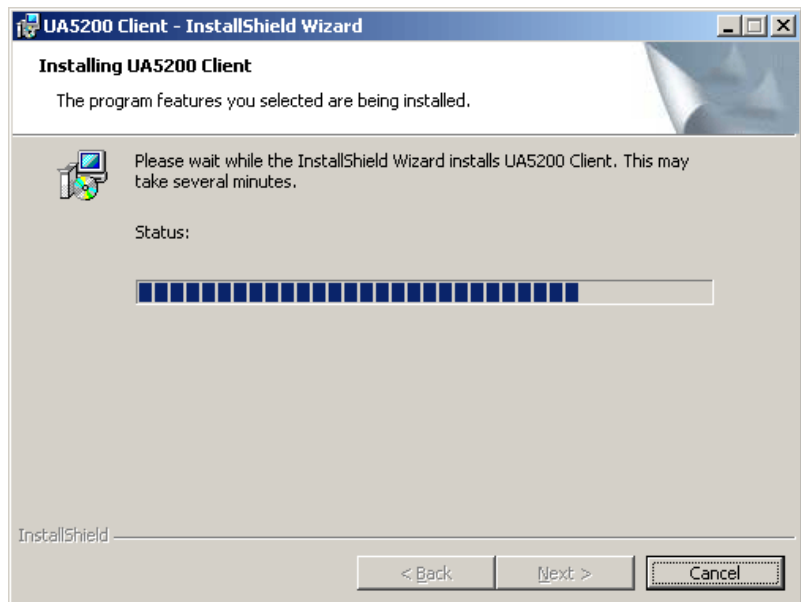
Step 9   Click **Next**. A Client Install Complete dialog box displays (Figure 3-7).

Figure 3-7 *Client Install Complete dialog box*
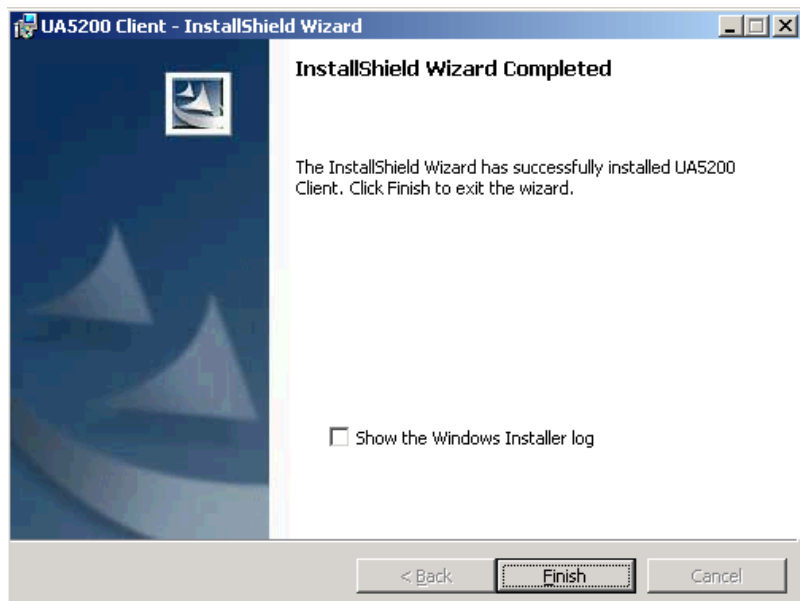
Step 10   Click **Finish** to complete the installation. To **Show the Windows Installer log**, click the check box. A UA5200ClientInstall.log - Notepad displays with the install details. To close, click the **X** at the top of the screen.

4

Configuring the UA5200

OW5000 Administrator is an OW5000 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.

When ACD is enabled, the UA5200 system uses the CallCenterWorX ACD for call processing instead of the existing attendant console based call processing model. The addition of ACD support to the UA5200 system enables you to take advantage of the extra call processing functionality in the ACD. Reporting through the existing MIS packages that are available for ACD is also supported. Both call processing models are available. However, if you have ACD mode enabled, the dialog boxes and procedures will be different than those shown below.

Figure 4-1 *UA5200 Options*
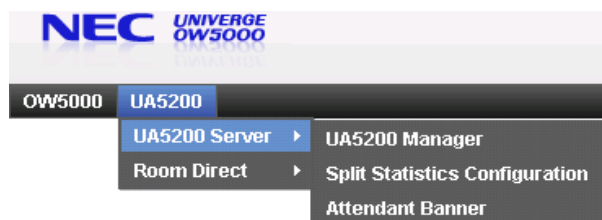
Refer to "Configuring the UA5200 for ACD Mode" on page 4-19 for detailed procedures when ACD is enabled.

The functions and associated screen displays for *Configuring UA5200 Manager* and *Configuring Dialing Properties* in OW5000 Administrator are described in this chapter.

Chapter Topics
- *Configuring UA5200 Manager*
- *Configuring the UA5200 for ACD Mode*
- *ACD Break Modes Configuration*
- *ACD Work Modes Configuration*
- *Split Statistics Configuration*
- *Attendant Banner*
- *Configuring Dialing Properties*
- *Configuring Paging*

You must log in to the OW5000 Administrator in order to configure the UA5200 application. Refer to the *UNIVERGE OW5000 Configuration Guide* for information on how to log on to the OW5000 Administrator. When you have finished configuring the application, you can either log out or just close your browser.

Configuring UA5200 Manager

Some of the following options are originally configured during either the OW5000 Platform installation or during the UA5200 installation process. They may be reconfigured through OW5000 Administrator.

The following configuration options and steps are described in this section:

- *Configuring Accounts*
- *Configuring Settings*
- *Home PBX Configuration*
- *Configuring the Miscellaneous Option*
- *Configuring Night Mode*
- *Configuring the PBX*
- *Timers Configuration*
- *Workstations Configuration*
- *PBX Settings*

NOTE

*The **ACD Config** tab is discussed later in this chapter. Refer to "ACD Configuration" on page 4-20 for more information.*

Configuring Accounts

Step 1   Log on to the OW5000 Administrator program. Once you are logged into OW5000 Administrator, follow this path to open the UA5200 configuration options: **UA5200 > UA5200 Server > UA5200 Manager**. A UA5200 Configuration dialog box displays (Figure 4-2).

Figure 4-2 *UA5200 Configuration dialog box*

Adding an Account

Before an attendant can log on to the UA5200, an account must be created for the user. To create an account, an Administrator must add a UA5200 Role to the attendant's person entry. Refer to 'Person Management' in the UNIVERGE OW5000 Configuration Guide for more information.

Use the following steps to add an account,

Step 1   From the UA5200 Configuration dialog box (Figure 4-2), click **Add New Account**. An Add New Account dialog box displays (Figure 4-3).

Figure 4-3 *Add New Account dialog box*

IMPORTANT

Before adding a new account, you must first configure a Home PBX. Refer to "Home PBX Configuration" on page 4-7.

Step 2 Select the **Login Name** from the drop-down list.

Step 3 Select a monitored number from the **Monitored Numbe**r drop-down list (if desired).

Step 4 Select the **User Type** for the **UA5200 Server** from the following drop-down options:

—**UA5200 Administrator** - this user type can configure custom color settings within the UA5200 Client and push the color settings out to other operators. You can also add, modify, and delete directory entries from the UA5200 client.

—**UA5200 Operator** - this user type is for call processing only.

—**UA5200 DB Operator** - this user type is for call processing and can add, modify, and delete people in the directory.

Step 5 Click **Apply**.
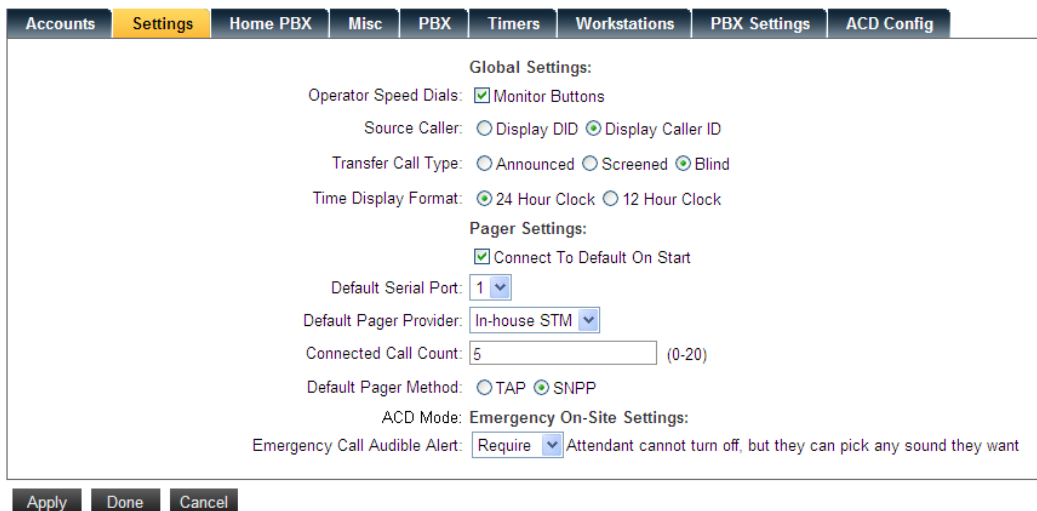
Edit or Deleting an Account

Step 1 Select the **Pencil** 🖉 icon next to the desired account to edit.

Step 2 Select the **Trashcan** 🗑 icon to delete an account.

Configuring Settings

Selecting **Settings** from the **UA5200 Manager** options displays a Settings Configuration dialog box (Figure 4-4).

Figure 4-4 *Settings Configuration dialog box*

The **Settings** option allows you to configure Global Settings, Pager Settings and Emergency On-Site Settings.

About the Global Settings Option

Global Settings allow you to enable Operator Speed Dials monitoring, configure the information displayed in the Source Caller area of the main window of the UA5200 Client when the attendants answer calls in a shared tenant environment, and set up the default Transfer Call Type for a client.

Operator Speed Dials allows the UA5200 to monitor internal speed dial numbers.

NOTE

If OAI traffic is approaching maximum capacity, you should not enable this option.

Step 1   For the **Operator Speed Dials** option, do one of the following:

—Select the **Monitor Buttons** check box to enable speed dial button monitoring and to allow the attendant to monitor internal speed dial numbers. When active, the speed dial buttons will flash when that number is dialed and turn red when connected, allowing the attendant to check the status of numbers at a glance.

—Clear the **Monitor Buttons** check box to turn off speed dial button monitoring.

Step 2   For the **Source Caller** option, do one of the following to configure the information displayed for callers in a shared tenant environment.

—Select **Display DID** to display the information assigned to the DID number in the Source Caller area of the UA5200 Client window. This allows the attendant to identify the number the caller dialed and answer callers accordingly. For example, attendants can greet callers differently, depending on which number was called. This feature is often used in a multi-tenant environment where the operator answers calls for multiple businesses. You can configure the information displayed for individual DID numbers through the Database Setup options.

NOTE

When DID is enabled, both caller ID and DID information is displayed.

—Select **Display Caller ID** to display the caller's Automatic Number Identification (ANI) information in the Source Caller area when the attendant answers. Generally, the ANI number lists the telephone number from which the call is placed and the associated name, if available.

NOTE

When Display Caller ID is selected, the attendant sees the caller ID information for the number from which the call is being placed in the UA5200 Client window. However, if the call is transferred from a DID number, the information for that DID number displays in the Status Line of the UA5200 Client window.

Step 3   For the **Transfer Call Type**, do one of the following:

—Select **Announced** to allow the attendant to place the caller on hold while announcing the transfer to the destination party without the destination party answering the phone.

—Select **Screened** to allow the attendant to place the caller on hold and call the destination party, announce the transfer when the destination party answers, and then complete the transfer and release.

—Select **Blind** to allow the attendant to transfer the caller directly to the destination party and release from the call.

Step 4 For the **Time Display Format**, select 24 Hour Clock or 12 Hour Clock.

—The clock settings affect how time is displayed in the UA5200 Client.

Step 5 Enter the **Connected Call Count** from 0-20.

NOTE

*Connected Call Count is a global setting that specifies the connected call history that will be retained and can be reviewed while a UA5200 Client is running. The UA5200 Client preference **retain connected call information** will turn this feature on per UA5200 client.*

About the Pager Settings Option

The **Pager Settings** option allows a page to be sent to a pager.

NOTE

The TAP protocol is used for the TAP through a modem connected to the server and STM methods.

SNPP is sent to the configured host's IP Address and is executed from the UA5200 Client workstation. This does not go through the UA5200 Server's machine.

Step 1 Select **Connect to Default On Start** to connect to the default provider on start up.

Selecting the **Default Serial Port** and the **Default Pager Provider** from the drop-down list provides a quick way to connect to a provider.

Step 2 Select the **Default Pager Method**, TAP or SNPP.

For more information, refer to "Configuring Dialing Properties" on page 4-39.

About the Emergency On-Site Settings Option

The **Emergency On-Site Settings** options are available only when the Emergency On-Site feature is installed. They will be used by the UA5200 Client for audio notifications in case of emergency calls.

Step 1 Select **Emergency Call Audible Alert** from the three possible choices:

—**Require** - Attendant cannot turn off, but they can pick any sound they want

—**Optional** - Attendant can turn off or on the alert tone and pick any tone they want

—**Disable** - Cannot turn on, and no sound will be played

Step 2 Do one of the following:

—Click **Apply** to save the information.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit without saving the changes.

Home PBX Configuration

Selecting **Home PBX** from the **UA5200 Manager** options displays a Home PBX Configuration Options dialog box (Figure 4-5).

The Home PBX settings contains information about all monitored numbers and orbit numbers configured for use by the UA5200. Through the Home PBX, you can select the PBX Server in which the monitored numbers will exist and the UA5200 Client extensions reside, assign queues to monitored numbers to enable attendants to receive incoming calls, and configure the orbit numbers used when paged parties retrieve their calls.

> **TIP**
>
> *If the ACD mode of the UA5200 server is active, refer to "Home PBX Configuration for ACD" on page 4-26.*

Figure 4-5 *Home PBX Configuration dialog box*

> **Step 1** From the **Home PBX** drop-down list, select the PBX in which the monitored numbers will exist.

> **NOTE**
>
> *If there are no free monitor numbers, an error message displays on the screen. More reserved lines can be entered for this PBX through the OW5000—PBX Configuration option or another PBX can be selected, if available.*

About Monitored Numbers

The UA5200 uses the OAI-monitored numbers assigned on the PBX for routing and queuing incoming calls. When an incoming call arrives at a monitored number, the UA5200 detects it and updates the queue that corresponds with the monitored number. Calls then wait in the queue to be answered by the attendants. This is how the UA5200 connects calls coming in to the PBX to the attendant stations. The Monitored Numbers associate the UA5200 queues with the numbers assigned on the PBX MAT for UA5200 monitoring. (See Chapter 5, "NEAX Command Assignments" on page 5-1 for more information on MAT commands.) If the UA5200 Server fails to monitor any monitored number or orbit number at start-up, the UA5200 Server will not initialize.

About Orbit Numbers

Orbit numbers comprise the pool of meet-me paging numbers used for joining paged people with their parked parties. Paged parties can dial these numbers to retrieve their calls without attendant assistance.

Assigning Monitored Numbers

Use the following steps to configure the monitored numbers and orbit numbers used by the UA5200.

NOTE
These numbers must be reserved for the PBX before being assigned to the UA5200. See the OW5000 System Manuel for more information about reserving monitored numbers on PBXs.

Step 1   Select the number used to dial the UA5200 attendant internally in the left list box, and then click the left arrow to the right of the **Incoming Monitored Number** box.

Step 2   Select the number used for holding calls in the left list box, and then click the left arrow to the right of the **Hold Monitored Number** box.

Step 3   Select the number that VIPs and emergency listings call to be routed to the Priority queue in the left list box, and then click the left arrow to the right of the **Priority Monitored Number** box.

Step 4   Select the number used to route external calls that were placed to nonexistent stations to the specified queue in the left list box, and click the left arrow to the right of the **Vacant Monitored Number** box.

Step 5   If you are using meet-me paging, select the first orbit number in the left list box, and click the left arrow to the right of the **First Orbit Number** field, and then enter the total number of orbit numbers in the **Number of Orbit Numbers** box.

NOTE
The orbit numbers are numbered sequentially from the first orbit number through the total number of orbit numbers. The valid range is determined by the total number for contiguous free monitored numbers.

Step 6   Enter a number in the **Night Mode PIN** field. This PIN is required for authorization to put the PBX into night mode. the Night mode pin is the same for all attendants. All user roles can access this feature, however they must know the pin number. The pin is not encrypted but a user must have an UA5200 Administrator role to view this page.

In either mode, the defined Home PBX (PBX where the attendant's Dterm resides) can be placed in PBX Night mode. Depending on the PBX programming, calling stations may be redirected or blocked while it is in night mode.

Step 7   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Configuring the Miscellaneous Option

Selecting **Misc** from the **UA5200 Manager** option displays a Miscellaneous Configuration Options dialog box (Figure 4-6). Through the Miscellaneous Settings, you can configure the Settings for the TCP/IP port, the network interface card, the UA5200 statistics, and message retention.

Figure 4-6 *Miscellaneous Configuration dialog box*

Assigning Miscellaneous Values

Use the following steps to configure the Miscellaneous settings used by the UA5200.

Step 1   Enter the number of the port the UA5200 Client uses to communicate with the UA5200 Server in the **Server listen port** box.

Step 2   Enter the IP address of the active Network Interface card in the **Link Source Address** box.

Step 3   Select the **Activate** check box to gather statistics for the UA5200 Statistics application.

Step 4   Enter the number of days that opened employee messages will be stored in the system in the **Days Saved** text box.

Step 5   Select the **Clean-up Time** from the drop-down list.

Step 6   Click **Manage Message Subjects** to create the default subjects that appear in the Guest/Hotel Message subject field.

> **NOTE**
>
> *This field is only displayed for the Hospitality release that contains Guest data.*

Step 7   Click **Apply** to save the values without exiting the dialog box or **Done** to save the values and close the dialog box.

Configuring Night Mode

Selecting Night Mode from the UA5200 Manager options displays a Night Mode Configuration dialog box (Figure 4-7). Through the Night Mode settings, you can configure how the UA5200 handles calls if no attendants are logged in to process calls. The UA5200 can handle incoming calls in Night Mode by either transferring the call to another extension, or playing an announcement to the incoming caller.

Figure 4-7 *Night Mode Configuration dialog box*

If the **Disable Night Mode** check box is selected, special handling of incoming calls during Night Mode is not in use. If Night Mode is not enabled, callers during Night Mode will hear a ring-back tone until they hang up or an attendant logs in.

Transferring Night Mode Callers to an Extension

Use the following steps to configure the UA5200 to transfer incoming calls to another extension when no attendants are logged in during Night Mode.

Step 1   If the **Disable Night Mode** check box is selected, clear the check box to enable Night Mode call processing.

Step 2   Select the **Transfer** option. The **Tenant** and **Number** boxes become available in the Transfer area.

Step 3   Select the tenant number in the **Tenant** field.

> **NOTE**
>
> *Valid range for the Tenant field is 0-63.*

Step 4   Enter the desired extension in the **Number** field.

Greeting Night Mode Callers with an Announcement

Use the following steps to configure the UA5200 to play an announcement to incoming calls when no attendants are logged in during Night Mode.

Step 1   If the **Disable Night Mode** check box is selected, clear the check box to enable Night Mode call processing.

Step 2   Select the **Announcement** option. The Tenant and Package fields become available in the Announcement area.

Step 3   Select the tenant number in the **Tenant** field. Valid range is 0-63.

Step 4   Select the package number in the **Package** field. Valid range is 1-58.

> **NOTE**   *The Package number corresponds to the announcement package number configured by the Assignment of Announcement Dictation Trunks (AADT) MAT command on the PBX. (Refer to* Chapter 5, "NEAX Command Assignments" on page 5-1 *for more information.)*

Step 5   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Configuring the PBX

Selecting **PBX** from the **UA5200 Manager** options displays a PBX Configuration dialog box (Figure 4-8). Through the PBX Configuration dialog box, you can configure how the UA5200 communicates with the PBX, including the voice mail transfer parameters, and the acknowledgement response time.

Figure 4-8 *PBX Configuration dialog box*

Assigning PBX Values

Use the following steps to configure the PBX setup options used by the UA5200.

Step 1   Enter the amount of time the server will wait for a response from the **Ack Response Time** field.

Guard Delay Time

Enter the amount of time the system will wait before automatically disconnecting a **CCIS** call or an **External** call.

NOTE

The purpose of these timers is to avoid a transfer recall back to the attendants Dterm. If the attendant releases too fast to a CCIS or external phone before the PBX has a chance to establish a connection, the caller is recalled. When executing a blind transfer across CCIS or external, the system forces the transfer to be a supervised transfer. When these timers expire, the transferred call will be auto released. Optionally, the attendant can release manually as soon as the attendant hears the destination phone ring. The ring confirms the connection has been established. If desired, an IT Admin can slowly walk the Guard Delay timers down from the default value of 5 seconds to meet the speeds of their network.

IMPORTANT

The UA5200 Client executing the transfer must be restarted before the changes will take affect.

Configuring the Voice Mail Transfer Option

Use the following steps to configure the Voice Mail transfer options used by the UA5200.

NOTE

If a transfer to voice mail script is not entered, the UA5200 will default to an "auto transfer to voice mail" method in which the transfer process is automated.

Step 1 Enter the Voice Mail Pilot number in the **Pilot Number** field.

Step 2 Select the **Pilot Number's PBX** from the drop-down list.

Step 3 Enter a script in the **Transfer Script** field. The transfer script can contain any combination of dialable digits, commas, and **V** or **v**. Dialable digits are 0, 1, 2, 3, 4, 5, 6, 7, 8, 9 and #. A comma inserts a pause, and V dials the voice mail pilot number.

Step 4 Select the length of the pause in the **Pause Length** field.

Step 5 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Timers Configuration

Selecting **Timers** from the **UA5200 Manager** options displays a Timers Configuration dialog box (Figure 4-9). **Using** the Timers settings, you can assign the time-out values for the internal timers that the UA5200 requires to process calls.

NOTE

If you modify the timer configuration while the UA5200 Server is running, you must restart the UA5200 Server before the changes will take effect.

Figure 4-9 *Timers Configuration dialog box*

TIP

If the ACD mode of the UA5200 server is active, refer to "Timers Configuration for ACD" on page 4-29.

Assigning Timer Values

Use the following steps to configure the timer values used by the UA5200.

Step 1   Enter the number of seconds that a caller waits for the destination party to answer before returning to an attendant during a direct transfer in the **Direct Transfer Recall** field.

NOTE

The amount of time entered for the Direct Transfer Recall timer must be shorter than the amount of time configured in the PBX for recall, but longer than the amount of time in the Call Forward No Answer setting used by the UA5200 to determine when to recall direct (blind) transfers to internal stations.

Step 2   Enter the number of seconds that the UA5200 waits before clearing old abandoned parked calls records from the database in the **Park Abandon Cleanup** field.

NOTE

The amount of time entered for the Park Abandon Cleanup timer should be long enough to allow attendants to view the previously parked calls if a paged party finally calls the orbit number after the parked party abandons.

Step 3   In the Park Recall field, enter the number of seconds a call will be parked before it is returned to a queue.

NOTE   *Even after recall, the paged party can still call the orbit number and be joined to the parked party. If an attendant has already answered the re-called parked caller, the attendant will be notified and given the option to join the two parties.*

Step 4   Enter the number of seconds that elapses between checks to make sure that the connection between the UA5200 Server and a UA5200 Client workstation is still active in the **Health Check Interval** field.

Step 5   Enter the number of seconds the UA5200 Server waits for a UA5200 Client workstation to respond to a health check before determining that the client is inactive in the **Health Check Timeout** field.

NOTE   *The amount of time entered for the Health Check Timeout field should be long enough to account for LAN traffic and client workstation response time.*

Step 6   Enter the number of seconds that the UA5200 waits before reusing a meet-me page number in the **Orbit Reuse** field.

NOTE   *The amount of time entered for the Orbit Reuse timer should be short enough to avoid running out of meet-me page numbers, but long enough to avoid the meet-me page numbers overlapping. If no orbit numbers are available when a caller is parked, the paged party must call the operator to be joined to the waiting party.*

Step 7   In the **Wait Delay Announcement** field, specify the number of seconds a call will ring in queue before it is moved to an announcement trunk to hear a message. The default is 10 seconds.

NOTE   *The Announcement trunk must be configured.*

Step 8   In the **On Hold Warning Time** field, enter the number of seconds a call can be on hold before visible notification will occur in the UA5200 Client, alerting the attendant that a call is still on hold. The default is 25.

Step 9   **Blind Transfer Delay Time** is defaulted to **"0"**. It should only be changed in case of a problem with blind transfers where the release fails after successfully ringing the destination.

Step 10   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Workstations Configuration

Selecting **Workstations** from the **UA5200 Manager** options displays a Workstations Configuration dialog box (Figure 4-10), which displays information for all workstations configured to use the UA5200. From the Workstations list, you can add, modify, and delete any workstation profile.

Figure 4-10 *Workstations Configuration dialog box*

If the ACD mode of the UA5200 server is active, refer to "Workstation Configuration for ACD" on page 4-31.

TIP

Adding a Workstation

Before an attendant can use a workstation to access the UA5200, you must create an account for that workstation. Use the following steps to add a new workstation profile.

Step 1   From the Workstations list (Figure 4-10), click **Add New**. An Add Workstation dialog box displays (Figure 4-11).

Figure 4-11 *Add Workstation dialog box*

Step 2   Enter the name for this workstation in the **Machine Name** field.

Step 3   For the **Keyboard** option, select **Default** or **Medical/General** from the drop-down list.

Unless you have an NEC customized keyboard, select Default.

NOTE

Step 4   Select the **Prime Line** from the drop-down list. The extensions available are based on the selected Home PBX.

> **Step 5**   Select the line set in off-hook suppressed mode for the physical station from the **Sub Line** drop-down list.

> **Step 6**   Click **OK**. After a confirmation dialog box displays, click **OK** again.

Modifying a Workstation

Use the following steps to change the information for an existing workstation profile.

> **Step 1**   From the Workstations list (Figure 4-10), select the workstation profile that you want to modify and click **Edit**. An Edit Workstation dialog box displays (Figure 4-12).

Figure 4-12 *Edit Workstation dialog box*

> **Step 2**   To change the **Keyboard** option, select **Default** or **Medical/General** from the drop-down list.

NOTE   *Unless you have an NEC customized keyboard, select Default.*

> **Step 3**   To change the prime line assigned to the workstation, select the **Prime Line** from the drop-down list.

> **Step 4**   To change the sub line assigned to the workstation, select the **Sub Line** from the drop-down list.

> **Step 5**   Do one of the following:

>   —Click **Apply** to save the information without exiting the dialog box.
>   —Click **Done** to save the information and exit the dialog box.
>   —Click **Cancel** to exit the dialog box without saving the changes.

Deleting a Workstation

Use the following steps to delete a workstation profile.

> **Step 1**   From the Workstations list (Figure 4-10), click the **Trashcan** 🗑 icon next to the desired workstation to delete. A Delete Workstation Confirmation dialog box displays (Figure 4-13).

Figure 4-13 *Delete Workstation Confirmation dialog box*
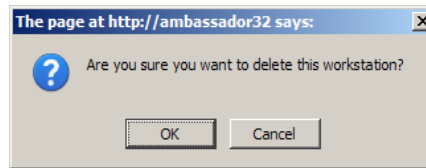
Step 2   Click **OK** to delete the workstation or **Cancel** to keep the workstation.

PBX Settings

Selecting **PBX Settings** from the **UA5200 Manager** options displays a PBX Settings dialog box (Figure 4-14). The PBX Settings option is used to assign the PBXs to which UA5200 will connect.

Figure 4-14 *PBX Settings dialog box*

Values in gray are read-only values assigned at the time the PBX was configured for use with the OW5000 Platform. Changes to these values can only be made by modifying the global PBX configuration from the OW5000 Platform in the navigation pane. Such changes will effect every application using that PBX. To specifically modify the PBX settings used only by UA5200, use the following steps:

Step 1   Select the desired PBX to modify from the **PBX** drop-down list.

Step 2   Verify the desired value for **Port**.

This field specifies the TCP/IP port number that the application uses when connecting to the PBX. Use the following port values for the PBX in use:

—NEAX 2400 IMS External IP PBX ports range from 1024 to 1039. Each application that connects to the PBX must use a different port number.

—NEAX 2000 IPS PBX, NEAX 2400 IMS Internal IP PBX, and UNIVERGE SV7000 ports are always 60030.

Step 3 Verify the value for **Force Port**.

This field has the following settings:

—**Yes** specifies that the application uses the same port each time it runs. This should be selected to avoid problems with clearing Dterm displays and monitoring equipment.

—**No** specifies that the application will retry one of the other port numbers when the application fails to connect to the PBX because the port may be in use by another application. This setting has no effect when the PBX Type is NEAX 2400 IMS Internal IP, UNIVERGE SV7000, SV8500, NEAX 2000 IPS and SV8300.

You should normally select **Yes** for the Force Port field.

Step 4 Verify the setting for **Heartbeat**.

This field has the following settings:

—**Yes** specifies that the application checks approximately every 20 seconds to make sure the PBX connection is still alive and operational.

—**No** specifies that the application will not check the PBX connection.

You should normally select **Yes** for the Heartbeat field.

Step 5 Check the **Selected** checkbox if you would like UA5200 to attempt to connect to this PBX the next time it is restarted.

Step 6 Select the amount of time from the **Incremental Retry Delay** drop-down list to specify how long the application waits before attempting to reconnect to the PBX after the connection is lost.

Step 7 Select the amount of time from the **Max Retry Delay** drop-down list to specify the maximum amount of time the application waits between attempts to reconnect to the PBX after the connection is lost.

Step 8 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

NOTE

In order for the changes to become active, you must stop the UA5200 application via the WatchDog Helper and allow WatchDog to restart the application. (See the UNIVERGE OW5000 System Manual for more information.) Because the application will not be accessible during this process, it is best to wait until off hours to stop the application.

Configuring the UA5200 for ACD Mode

If the ACD license key is installed on the server, an ACD Config tab appears in the UA5200 manager.

The **ACD Config** tab allows the administrator to configure information needed for the UA5200 server while in ACD mode. This tab allows the administrator to enable or disable ACD mode and to enter the ACD configuration information.

When ACD mode is turned on, the UA5200 monitored number configuration is cleared in the database and a warning displays to confirm the change.

IMPORTANT

System Limitations:

If ACD Mode is enabled and the originally dialed number is forwarded to an attendant, it is not possible to capture the DID and forwarding information.

Clearing the monitored number configuration allows the numbers to be reclaimed because most of the configured numbers for incoming queue, held call queue, and others are not used in ACD mode.

After searching for all UA5200 assigned monitored numbers and unassigning them from UA5200, you are ready to configure and setup the accounts, workstations, and Home PBX monitored numbers for the new configuration.

The following topics are covered in this section:

- *ACD Configuration*
- *Configuring Accounts for ACD*
- *Settings Configuration for ACD*
- *Home PBX Configuration for ACD*
- *Miscellaneous Configuration for ACD*
- *PBX Configuration for ACD*
- *Timers Configuration for ACD*
- *Workstation Configuration for ACD*
- *PBX Settings for ACD*

ACD Configuration

Step 1   Log on to the OW5000 Administrator program. Once you are logged in to OW5000 Administrator, follow this path to open the UA5200 configuration options: **UA5200 > UA5200 Server > UA5200 Manager > ACD Config**. Figure 4-15 displays.

Figure 4-15 *Enable ACD Mode Configuration dialog box*
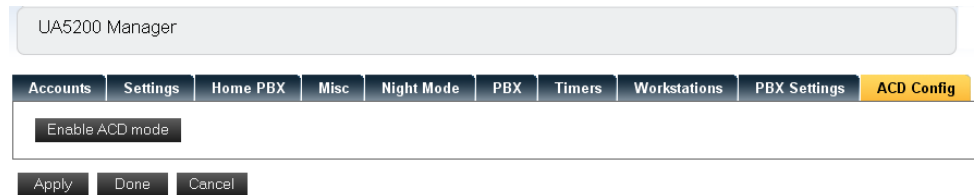
Step 2   Click **Enable ACD mode**. When changing from loop mode to ACD Mode, a confirmation dialog box displays to confirm your action. This may change configuration settings already set up. An Enable ACD Mode confirmation dialog box displays (Figure 4-16).

An administrator must specify the network location of the ACD and the tenant number used to subscribe to the ACD using Infolink.

Figure 4-16 *Enable ACD Mode Confirmation dialog box*
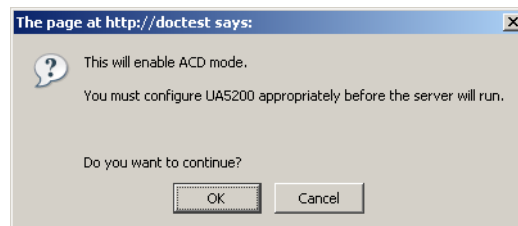
Step 3   Click **OK** to continue. An ACD Enabled dialog box displays (Figure 4-17).

Figure 4-17 *ACD Enabled dialog box*

Fields which must be completed are designated with an asterisk (*).

NOTE

Step 4 Enter the **ACD IP Address** of the server. If this is for internal ACD, enter the IP address of the PBX.

Step 5 Enter the TCP port used to connect to the ACD in the **ACD Port Number** box. This must be an integer between 1 and 65534 inclusive. The default value is 60030.

Step 6 Select the **Tenant Number** from the drop-down list. This number is used during the subscribe process to the ACD using Infolink. The accepted range is 0 - 63. The default value is 1.

Step 7 Enter the **Blind Transfer Recall Pilot** number. This number is used when a blind transfer is not answered.

*The **Blind Transfer Recall Pilot** can point back to the main split.*

NOTE

Step 8 Enter the **Park Pilot** number. This is the number that parked calls are sent to by the UA5200.

*The **Park Pilot** must point to a split other than the main split, which allows the user to define how long the parked call will recall to operator.*

NOTE

Step 9 Enter the **Page Pilot** number. This is the number that calls are sent to when there are no parked calls waiting.

*The **Page Pilot** can point back to the main split.*

NOTE

Step 10 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Step 11 Click **Disable ACD mode** to turn off the ACD mode and clear UA5200 monitored number configurations in the database.

Configuring Accounts for ACD

Each UA5200 account must have an ACD login ID association. This is used by the UA5200 server to register the attendant to the ACD over Infolink when the attendant logs in.

Selecting the **Accounts** tab displays a list of all configured ACD accounts. From the accounts list, you can add a new ACD account, delete an account, or modify an existing account.

Adding an ACD Account

Use the following steps to add an ACD account:

Figure 4-18 Main ACD dialog box

Step 1 From the Main ACD dialog box (Figure 4-18), click **Add New**. An Add ACD Account dialog box displays (Figure 4-19).

Figure 4-19 Add ACD Account dialog box

Step 2 Select a name from the **Login Name** drop-down list.

Step 3 Enter a number in the **ACD Login** box. Valid entry is a one to nine digit number.

NOTE

The value of one (1) is not allowed.

Step 4 Select the **User Type** for the **UA5200 Server** from the following drop-down options:

—**UA5200 Administrator** - can configure custom color settings within the UA5200 Client and push the color settings out to other operators; can also add, modify, and delete directory entries from the UA5200 client.

—**UA5200 Operator** - for call processing only.

—**UA5200 DB Operator** - for call processing and can also add, modify, and delete people in the directory.

Step 5 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Editing an ACD Account

Select the desired account to edit and then click the **Pencil** ⁄ icon to make the necessary changes.

Deleting an ACD Account

Step 1 Select the desired account and then click the **Trashcan** 🗑 icon to delete the account.

Step 2 Click **OK** to delete the account.

Settings Configuration for ACD

Selecting **Settings** from the **UA5200 Manager** options displays a Settings Configuration for ACD dialog box (Figure 4-20).

Figure 4-20 *Settings Configuration for ACD dialog box*

The **Settings** option allows you to configure Global Settings, Pager Settings and Emergency On-Site Settings.

About the Global Settings Option

Global Settings allow you to enable Operator Speed Dials monitoring, configure the information displayed in the Source Caller area of the main window of the UA5200 Client when the attendants answer calls in a shared tenant environment, and set up the default Transfer Call Type for a client.

Operator Speed Dials allows the UA5200 to monitor internal speed dial numbers.

> *If OAI traffic is approaching maximum capacity, you should not enable this option.*

NOTE

Step 1   For the **Operator Speed Dials** option, do one of the following:

—Select the **Monitor Buttons** check box to enable speed dial button monitoring and to allow the attendant to monitor internal speed dial numbers. When active, the speed dial buttons will flash when that number is dialed and turn red when connected, allowing the attendant to check the status of numbers at a glance.

—Clear the **Monitor Buttons** check box to turn off speed dial button monitoring.

Step 2   For the **Source Caller** option, do one of the following to configure the information displayed for callers in a shared tenant environment.

—Select **Display DID** to display the information assigned to the DID number in the Source Caller area of the UA5200 Client window. This allows the attendant to identify the number the caller dialed and answer callers accordingly. For example, attendants can greet callers differently, depending on which number was called. This feature is often used in a multi-tenant environment where the operator answers calls for multiple businesses. You can configure the information displayed for individual DID numbers through the Database Setup options.

NOTE

When Display DID is selected, the attendant never see the caller ID information in the UA5200 Client window.

—Select **Display Caller ID** to display the caller's Automatic Number Identification (ANI) information in the Source Caller area when the attendant answers. Generally, the ANI number lists the telephone number from which the call is placed and the associated name, if available.

NOTE

When Display Caller ID is selected, the attendant sees the caller ID information for the number from which the call is being placed in the UA5200 Client window. However, if the call is transferred from a DID number, the information for that DID number displays in the Status Line of the UA5200 Client window.

Step 3 For the **Transfer Call Type**, do one of the following:

—Select **Announced** to allow the attendant to place the caller on hold while announcing the transfer to the destination party without the destination party answering the phone.

—Select **Screened** to allow the attendant to place the caller on hold and call the destination party, announce the transfer when the destination party answers, and then complete the transfer and release.

—Select **Blind** to allow the attendant to transfer the caller directly to the destination party and release from the call.

Step 4 For the **Time Display Format**, select 24 Hour Clock or 12 Hour Clock.

—The clock settings affect how time is displayed in the UA5200 Client.

Step 5 Enter the **Connected Call Count** from 0-20.

NOTE

Connected Call Count is a global setting that specifies the connected call history that will be retained and can be reviewed while a UA5200 Client is running. The UA5200 Client preference retain connected call information will turn this feature on per UA5200 client.

About the Pager Settings Option

The **Pager Settings** option allows a page to be sent to a pager.

NOTE

The TAP protocol is used for the TAP through a modem connected to the server and STM methods.

SNPP is sent to the configured host's IP Address and is executed from the UA5200 Client workstation. This does not go through the UA5200 Server's machine.

Step 1 Select **Connect to Default On Start** to connect to the default provider on start up.

Selecting the **Default Serial Port** and the **Default Pager Provider** from the drop-down list provides a quick way to connect to a provider.

Step 2   Select the **Default Pager Method**, TAP or SNPP.

For more information, refer to "Configuring Dialing Properties" on page 4-39.

About the Emergency On-Site Settings Option

The **Emergency On-Site Settings** options are available only when the Emergency On-Site feature is installed. They will be used by the UA5200 Client for audio notifications in case of emergency calls.

Step 1   For the **ACD Mode** option, do one of the following:

—Select the **Automatically switch to ACD Work Mode** check box to automatically switch to the E-OSN Call Processing Work Mode when the Emergency On-Site application's module becomes the active one in the UA5200 Client. When leaving the Emergency On-Site application's module, the ACD mode is restored to the previous state.

—Clear the **Automatically switch to ACD Work Mode** check box to preserve the ACD mode when the Emergency On-Site application's module becomes the active one in the UA5200 Client.

Step 2   Select **Emergency Call Audible Alert** from the three possible choices:

—**Require** - Attendant cannot turn off, but they can pick any sound they want

—**Optional** - Attendant can turn off or on the alert tone and pick any tone they want

—**Disable** - Cannot turn on, and no sound will be played

Step 3   Do one of the following:

—Click **Apply** to save the information.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit without saving the changes.

Home PBX Configuration for ACD

Selecting **Home PBX** from the **UA5200 Manager** options displays a Home PBX Configuration for ACD Options dialog box (Figure 4-21). The Home PBX settings contain information about all monitored numbers and orbit numbers configured for use by the UA5200. Through the Home PBX settings, you can select the PBX Server in which the monitored numbers will exist and the UA5200 Client extensions reside and configure the orbit numbers used when paged parties retrieve their calls.

Figure 4-21 *Home PBX Configuration for ACD dialog box*

Step 1   From the **Home PBX** drop-down list, select the PBX in which the monitored numbers will exist.

NOTE

If there are no free monitor numbers, an error message displays on the screen. You can enter more reserved lines for this PBX by returning to PBX Configuration or select another PBX, if available.

About Monitored Numbers

The UA5200 uses the OAI-monitored numbers assigned on the PBX for routing and queuing incoming calls. When an incoming call arrives at a monitored number, the UA5200 detects it and updates the queue that corresponds with the monitored number. Calls then wait in the queue to be answered by the attendants. This is how the UA5200 connects calls coming in to the PBX to the attendant stations. The Monitored Numbers associate the UA5200 queues with the numbers assigned on the PBX MAT for UA5200 monitoring. (See Chapter 5, "NEAX Command Assignments" on page 5-1 for more information on MAT commands.) If the UA5200 Server fails to monitor any monitored number or orbit number at start-up, the UA5200 Server will not initialize.

About Orbit Numbers

Orbit numbers comprise the pool of meet-me paging numbers used for joining paged people with their parked parties. Paged parties can dial these numbers to retrieve their calls without attendant assistance.

Assigning Monitored Numbers

Use the steps below to configure monitored numbers and orbit numbers used by the UA5200.

NOTE

These numbers must be reserved for the PBX before being assigned to the UA5200. See the OW5000 System Manuel for more information about reserving monitored numbers on PBXs.

Step 1   Select the **ACD Park Join** number from the list box.

Step 2 If you are using meet-me paging, select the first orbit number from the list box, and click the left arrow to the right of the **First Orbit Number** field, and then enter the total number of orbit numbers in the **Number of Orbit Numbers** box.

NOTE

The orbit numbers are numbered sequentially from the first orbit number through the total number of orbit numbers. The valid range is determined by the total number for contiguous free monitored numbers

Step 3 Enter the number for the **Night Mode PIN**. This PIN is required for authorization to be able to put the PBX into night mode. the Night mode pin is the same for all attendants. All user roles can access this feature; however they must know the PIN number. The pin is not encrypted but a user must have an UA5200 Administrator role to view this page.

Step 4 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Miscellaneous Configuration for ACD

Selecting **Misc** from the **UA5200 Manager** option displays a Miscellaneous Configuration Options dialog box (Figure 4-22).

Figure 4-22 Miscellaneous Configuration Options with ACD dialog box

Assigning Miscellaneous Values

Use the following steps to configure the Miscellaneous settings used by the UA5200.

Step 1 Enter the number of the port the UA5200 Client uses to communicate with the UA5200 Server in the **Server listen port** box.

Step 2 Enter the IP address of the active Network Interface card in the **Link Source Address** box.

Step 3 Enter the number of days that opened employee messages will be stored in the system in the **Days Saved** text box.

Step 4   Select the **Clean-up Time** from the drop-down list.

Step 5   Click **Manage Message Subjects** to create the default subjects that appear in the Guest/Hotel Message subject field.

> **NOTE**   *This field is only displayed for the Hospitality release that contains Guest data.*

Step 6   Click **Apply** to save the values without exiting the dialog box or **Done** to save the values and close the dialog box.

PBX Configuration for ACD

Selecting **PBX** from the **UA5200 Manager** options displays a PBX Configuration dialog box (Figure 4-8).

There is no difference in the configuration of this option for ACD. Please refer to "Configuring the PBX" on page 4-11 for more information.

Timers Configuration for ACD

Selecting **Timers** from the **UA5200 Manager** options displays a Timers for ACD settings (Figure 4-23). Through the Timers settings, you can assign the time-out values for the internal timers that the UA5200 requires to process calls.

> **NOTE**   *If you modify the timer configuration while the UA5200 Server is running, you must restart the UA5200 Server before the changes will take effect.*

Figure 4-23 *Timers for ACD Configuration dialog box*

Accounts	Settings	Home PBX	Misc	PBX	Timers	Workstations	PBX Settings	ACD Config

Timers:
The UA5200 Server must be restarted for any changes made to the Timer settings to take effect.

Direct Transfer Recall:	20	(10-300 sec)
Park Abandon Cleanup:	300	(10-600 sec)
Health Check Interval:	30	(30-600 sec)
Health Check Timeout:	10	(5-30 sec)
Orbit Reuse:	20	(10-600 sec)
Blind Transfer Delay Time:	0	(millisec)

Apply   Done   Cancel

Assigning Timer Values

Use the following steps to configure the timer values used by the UA5200.

Step 1   Enter the number of seconds that a caller waits for the destination party to answer before returning to an attendant during a direct transfer in the **Direct Transfer Recall** field.

NOTE   *The amount of time entered for the Direct Transfer Recall timer must be shorter than the amount of time configured in the PBX for recall, but longer than the amount of time in the Call Forward No Answer setting used by the UA5200 to determine when to recall direct (blind) transfers to internal stations.*

Step 2   Enter the number of seconds that the UA5200 waits before clearing old abandoned parked calls records from the database in the **Park Abandon Cleanup** field.

NOTE   *The amount of time entered for the Park Abandon Cleanup timer should be long enough to allow attendants to view the previously parked calls if a paged party finally calls the orbit number after the parked party abandons.*

Step 3   Enter the number of seconds that elapses between checks to make sure that the connection between the UA5200 Server and a UA5200 Client workstation is still active in the **Health Check Interval** field.

Step 4   Enter the number of seconds the UA5200 Server waits for a UA5200 Client workstation to respond to a health check before determining that the client is inactive in the **Health Check Timeout** field.

NOTE   *The amount of time entered for the Health Check Timeout field should be long enough to account for LAN traffic and client workstation response time.*

Step 5   Enter the number of seconds that the UA5200 waits before reusing a meet-me page number in the **Orbit Reuse** field.

NOTE   *The amount of time entered for the Orbit Reuse timer should be short enough to avoid running out of meet-me page numbers, but long enough to avoid the meet-me page numbers overlapping. If no orbit numbers are available when a caller is parked, the paged party must call the operator to be joined to the waiting party.*

Step 6   **Blind Transfer Delay Time** is defaulted to "0". It should only be changed in case of a problem with blind transfers where the release fails after successfully ringing the destination.

Step 7   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Workstation Configuration for ACD

In ACD mode, the UA5200 server needs to know the ACD position number for the workstation. This is used in the Infolink protocol to log on the attendant and control the phone for the attendant.

Selecting the **Workstation** tab displays a list of all configured workstations, if any, and allows you to add, edit, or delete a workstation (Figure 4-24).

Figure 4-24 *Workstations for ACD dialog box*

Adding a Workstation

Before an attendant can use a workstation to access the UA5200, an account must be created for that workstation. Use the following steps to add a new workstation profile.

Step 1 From the Workstations for ACD dialog box (Figure 4-24), click **Add New**. An Add ACD Workstation dialog box displays (Figure 4-25).

Figure 4-25 *Add ACD Workstation dialog box*

Step 2 Enter the name for this workstation in the **Machine Name** text box.

Step 3 Select the **Keyboard** option from the drop-down list.

> **NOTE** *The keyboard drop list shows the possible short cut mapping files that can be used per workstation. The default layout uses the general business mappings. If the installed system license is for Hospitality, Medical or Higher Education, the matching keyboard options will be displayed.*
> *(See "Keyboard Mapping Shortcuts" on page A-1.)*

Step 4   Enter the **ACD Position** number. Valid characters are 0-9.

NOTE   *The ACD Position number is coming from the Position Data on the ACD program.*

Step 5   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.
—Click **Done** to save the information and exit the dialog box.
—Click **Cancel** to exit the dialog box without saving the changes.

Modifying an ACD Workstation

Use the following steps to change the information for an existing workstation profile.

Step 1   From the Workstations for ACD dialog box (Figure 4-24), click the **Pencil** icon next to the workstation profile that you want to modify. An Edit Workstation dialog box displays (Figure 4-12).

Figure 4-26 *Edit Workstation dialog box*

Step 2   To change the **Keyboard** option, select **Default** or **Medical/General** from the drop-down list.

NOTE   *Unless you have an NEC customized keyboard, select Default.*

Step 3   Change the **ACD Position** number as desired.

Step 4   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.
—Click **Done** to save the information and exit the dialog box.
—Click **Cancel** to exit the dialog box without saving the changes.

Deleting an ACD Workstation

Use the following steps to delete a workstation profile:

Step 1   From the Workstations for ACD dialog box (Figure 4-24), click the **Trashcan** icon next to the desired workstation to delete. A delete confirmation dialog box displays.

Step 2   Click **OK**.

PBX Settings for ACD

Selecting **PBX Settings** from the **UA5200 Manager** options displays a PBX Settings dialog box (Figure 4-27).

Figure 4-27 *PBX Settings dialog box*

| Accounts | Settings | Home PBX | Misc | PBX | Timers | Workstations | **PBX Settings** | ACD Config |

PBX: *EADD SV7000

IP Address: 172.24.133.40

PBX ID: 40

RMI Bind Name: OAIServer.EADD SV7000

Client Server Port: 44000

PBX Type: UNIVERGE SV7000

Split Call Forward: No

Port: 60030

Force Port: ⦿ yes ○ no

Heartbeat: ⦿ yes ○ no

Selected: ☑

Incremental Retry Delay: 30 seconds

Max Retry Delay: 10 minutes

Use OAI Server: No

Apply   Done   Cancel

There is no difference in the configuration of this option for ACD. Please refer to "PBX Settings" on page 4-17 for more information.

ACD Break Modes Configuration

ACD supports nine break modes, numbered one through nine. A descriptive name can be assigned to each break mode so an attendant doesn't need to know the meaning of each break mode number. The names are stored in the database allowing the UA5200 client program to read them for display. The name assigned to each mode can be up to 32 characters in length.

One break mode can be designated as the default break mode. Break Mode 1 is the default if a break mode is not designated. Only one break mode can be marked as default.

Some of the following options are originally configured during either the OW5000 Platform installation or during the UA5200 installation process. They may be reconfigured through OW5000 Administrator by completing the following steps.

Step 1   Log on to the OW5000 Administrator program. Once you are logged in to OW5000 Administrator, follow this path to open the UA5200 configuration options: **OW5000 > Directory > ACD Break Modes**. An ACD Break Modes dialog box displays (Figure 4-28).

Figure 4-28 *ACD Break Modes dialog box*

Step 2   To change a default break mode, click **Set Default** next to the break mode number to change.

Step 3   To edit an ACD Break Mode, click the **Pencil** ✎ icon next to the desired Break Mode number. A Break Mode Description dialog box displays (Figure 4-29).

Figure 4-29 *Break Mode Description dialog box*

Step 4   Enter a description for the selected Break Mode in the text box.

Step 5   Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Done** to save the information and exit the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

ACD Work Modes Configuration

The ACD supports 99 work modes, numbers 1 through 99. A descriptive name can be assigned to each work mode so an attendant doesn't need to know the meaning of each work mode number. These names are stored in the database to allow the UA5200 client program to read them for display. The name assigned to each mode can be up to 32 characters in length.

One work mode can be designated as the default work mode. Work Mode 1 is the default if a work mode is not designated. Only one work mode can be marked as default.

One work mode can be designated as the **VIP Wake-Up Processing** work mode and will be used by the Wake Up feature when it is installed. Only one work mode can be marked as **VIP Wake-Up Processing** work mode.

One work mode can be designated as the **E-OSN Call Processing** work mode and will be used by the Emergency On-Site feature when it is installed. Only one work mode can be marked as **E-OSN Call Processing** work mode.

Some of the following options are originally configured during either the OW5000 Platform installation or during the UA5200 installation process. They may be reconfigured through OW5000 Administrator by completing the following steps.

Step 1   Login to the OW5000 Administrator program. Once you are logged in to OW5000 Administrator, follow this path to open the UA5200 configuration options: **OW5000 > Directory > ACD Work Modes**. An ACD Work Modes Configuration dialog box displays (Figure 4-30).

Figure 4-30 *ACD Work Modes Configuration dialog box*

Default work mode: 1 - Work Mode

	Work Mode	Description	VIP Wake-Up Processing	E-OSN Call Processing	
🖉	1	Work Mode	False	False	Set Default
🖉	2	Filing	False	False	Set Default
🖉	3	Scheduling	False	False	Set Default
🖉	4	Sorting	False	False	Set Default
🖉	5	Accounting	False	False	Set Default
🖉	6	VIP Wake-Up	True	False	Set Default
🖉	7	E-OSN	False	True	Set Default
🖉	8		False	False	Set Default
🖉	9		False	False	Set Default
🖉	10		False	False	Set Default

1 - 10 of 99 records 10 Results per page   Page: 1   of 10   >   >>

> **NOTE**
>
> The **VIP Wake-Up Processing** and **E-OSN Call Processing** columns are visible only if the associated features are installed.

Step 2   To change a default Work Mode, click **Set Default** next to the work mode number to change.
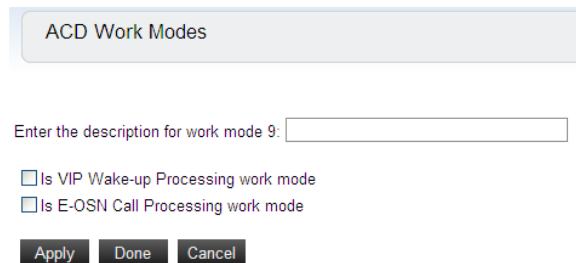
Step 3 To edit an ACD Work Mode, click the **Pencil** ✏ icon next to the desired Work Mode number. A Work Mode Description dialog box displays (Figure 4-31).

Figure 4-31 *Work Mode Description dialog box*

NOTE

*The **Is VIP Wake-Up Processing work mode** and **Is E-OSN Call Processing work mode** check boxes are visible only if the associated features are installed.*

Step 4 Enter a description for the selected Work Mode in the text box.

Step 5 Select the **Is VIP Wake-Up Processing work mode** check box to designate the selected work mode as the VIP Wake-Up Processing one.

Step 6 Select the **Is E-OSN Call Processing work mode** check box to designate the selected work mode as the E-OSN Call Processing one.

Step 7 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.
—Click **Done** to save the information and exit the dialog box.
—Click **Cancel** to exit the dialog box without saving the changes.

Split Statistics Configuration
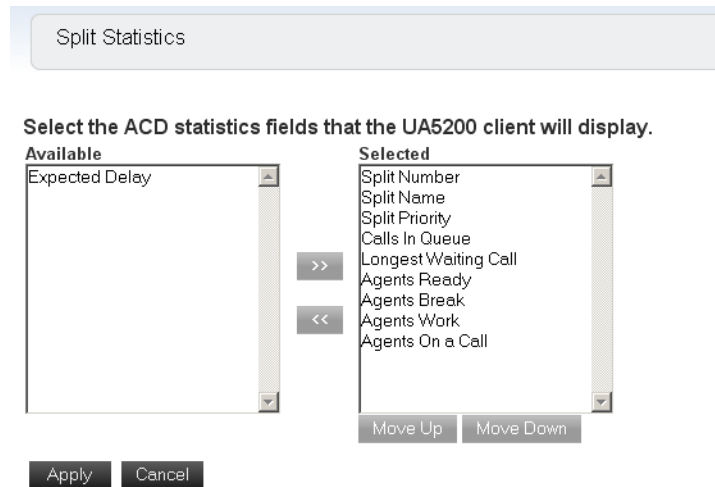
IMPORTANT

*In the ACD system data MAT command, set **Use infolink split information** so that Split data will be displayed in the UA5200 Client Splits window.*

The **Split Statistics Configuration** option allows you to specify which ACD statistic fields will display in the UA5200 client call queue window. You can also change the order of the columns.

Some of the following options are originally configured during either the OW5000 Platform installation or during the UA5200 installation process. They may be reconfigured through OW5000 Administrator by completing the following steps.

Step 1 Login to the OW5000 Administrator program. Once you are logged in to OW5000 Administrator, follow this path to open the UA5200 configuration options: **UA5200 Server > Split Statistics Configuration**. A Split Statistics Configuration dialog box displays (Figure 4-32).

Figure 4-32 *Split Statistics Configuration dialog box*

Step 2 Use the right and left arrows to move the statistic fields from the **Available** or **Selected** columns.

Step 3 To change the order of the fields, click the desired split statistic in the **Selected** column and then click the **Move Up** or **Move Down** button.

Step 4 Do one of the following:

—Click **Apply** to save the information without exiting the dialog box.

—Click **Cancel** to exit the dialog box without saving the changes.

Attendant Banner

The **Attendant Banner** option allows you to add new messages, and to delete, edit or view current messages.

Step 1   Login to the OW5000 Administrator program. Once you are logged in to OW5000 Administrator, follow this path to open the UA5200 configuration options: **UA5200 Server > Attendant Banner**. An Attendant Messages dialog box displays (Figure 4-33).

Figure 4-33   *Attendant Messages dialog box*

	Message	Expiration Date	Create Date
› ✎ 🗑	This is the message of the day	7/10/2008 4:40:00 PM	6/16/2008 5:31:03 PM
› ✎ 🗑	Test message 4	7/12/2008 11:59:00 PM	7/11/2008 2:47:06 PM
› ✎ 🗑	This is another banner message!!!	7/12/2008 11:59:00 PM	7/11/2008 2:47:56 PM

Add New

1 - 3 of 3 records 10 Results per page   Page: 1 of 1

Step 2   To view previously entered messages, click the › icon. An Attendant Messages—Expanded dialog box displays (Figure 4-34).

Figure 4-34   *Attendant Messages—Expanded dialog box*

Add New

1 - 3 of 3 records 10 Results per page   Page: 1

	Message	Expiration Date	Create Date
› ✎ 🗑	This is the message of the day	7/10/2008 4:40:00 PM	6/16/2008 5:31:03 PM
› ✎ 🗑	Test message 4	7/12/2008 11:59:00 PM	7/11/2008 2:47:06 PM
› ✎ 🗑	This is another banner message!!!	7/12/2008 11:59:00 PM	7/11/2008 2:47:56 PM

1 - 3 of 3 records 10 Results per page   Page: 1

BANNER TEXT

This is the message of the day

Web Link   Expiration Date

Phone Link   04 40 PM

Email Link   July 10 2008

Save   Cancel

Step 3   To edit a message, click the pencil ✎ icon.

Step 4   To delete a message, click the trashcan 🗑 icon. A confirmation dialog box displays to confirm the deletion.

Step 5   To add a message, click **Add New**. An Attendant Message—Add New dialog box displays (Figure 4-35).

Figure 4-35 *Attendant Message—Add New dialog box*

Step 6   Enter **Banner Text** in the text box field.

Step 7   To create a **Web Link**, **Phone Link**, or an **Email Link**, select the text and click one of the options:

—Web Link - places percentage signs (%) on either end of the text.

—Phone Link - places pound signs (#) on either end of the text.

—Email Link - places dollar signs ($) on either end of the text.

Step 8   To Set the Banner Expiration Date and Time, select the hour, minute, and AM or PM from the drop-down list. Enter an **Expiration Date** by clicking on the **Calendar** icon.

To clear the expiration date, click the trashcan 🗑 icon.

Step 9   To send the Banner Text, click **Send** and then click **OK** on the confirmation dialog box.

Configuring Dialing Properties

Before using the UA5200, you must specify the properties the server uses to dial calls. These settings can be configured in the OW5000 Administrator. Refer to the *UNIVERGE OW5000 Configuration Guide* for more information.

Configuring Paging

Follow the steps below to configure the server to allow paging. For more information on Pager Providers, please refer to the *UNIVERGE OW5000 Configuration Guide.*

Step 1   Configure the serial ports by following the path: **OW5000 > Platform > Serial Ports** (Figure 4-37).

Figure 4-36 *Serial Port Management*

	Serial Port ▲	Baud Rate	Data Bits	Parity	Stop Bits	Flow Control
✏ 🗑	1	300	7	Even	None	HardWare

Serial Port Management

Add New Serial Port

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

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

Step 2   Click the **Pencil** icon to configure an existing serial port or click **Add New Serial Port**.

Step 3   Add the pager provider by following the path: **OW5000 > Platform > Pager Provider** (Figure 4-37).

Figure 4-37 *Pager Provider Management*

Pager Provider Management

Add New Pager Provider

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

	Name ▲	TAP Dialup (1-Way)	TAP Dialup (2-Way)	SNPP Host Name	Port	Message Length
✏ 🗑	Verizon	2222222222			444	240

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

> **NOTE**   *Not all pager providers support SNPP and TAP. Consult with your pager provider or look online to determine the providers supported methods and their settings.*

Step 4   Add the alpha pager contact methods to desired employees by following the path: **OW5000 > Directory > People > Contact Methods** (Figure 4-38).

Figure 4-38 *Contact Methods*

Step 5   Select the **Pencil** icon or click **Add New Contact Method** to add alpha pager contact methods.

Step 6   If applicable, install a modem.

Step 7   Stop and then restart the UA5200 Server.

STM Integration for Wireless Devices

Step 1   Configure your STM by selecting **OW5000** > **Platform** > **Pager Provider**. Figure 4-39 displays.

Figure 4-39 *Pager Provider Management*

Step 2   Set the Pager Provider TAP Dialup (1-way) and SNPP Host Name fields to blank.

When set to blank, this tells the server to assume a direct serial connection to an STM server and immediately begins sending the TAP protocol, without an initial modem handshake. The connection cables to the same server or to a different server must be female to female serial cables with all pins active. The cable itself must be a loop back cable or have a null modem adapter.

System Configuration

Filter Settings

The filter settings represent the number of hierarchy levels that will be loaded in the drop list on the UA5200 Client filters page for categories, organizations and locations. Depending on the number of items to be loaded, based on the depth, a message may display in the Filter, instead of data that reads **Too many entries...**

This message may display if either loading the data took too long and timed out, or the number of entries exceeded a pre-defined limit. The number of hierarchy levels displayed can be configured and the number of items loaded limit can be adjusted through the Application Data page in OW5000 Administrator.

Use the steps below to adjust the limit:

Step 1   Log in to OW5000 Administrator with an account that has OW5000 Administrator privileges. Refer to the *UNIVERGE OW5000 Configuration Guide* for information on how to log on to the OW5000 Administrator.

Step 2   Browse to **OW5000 > Application Data**.

Step 3   Filter by application **UA5200 Client** (Figure 4-40).

Figure 4-40 Application Data—UA5200 Client

Step 4   Click **Search** to display Figure 4-41.

Figure 4-41 Search Results

Step 5   Modify the application preference value called **SecondaryFilterMaxItemsCount** by clicking the Pencil icon.

5

NEAX Command Assignments

This guide assumes that data settings that affect the operation of all OAI software on a system-wide basis have already been assigned on the NEAX 2400 and the NEAX 2000. Such settings include, for instance, system index values and assignment of Interface I/O Port Data in the Interface Processor (IP). For more information about the system data settings and about the UA5200 settings discussed in this section, refer to the following technical manuals for the specific NEAX system in use:

- OAI System Manual
- Command Manual
- Job Specification
- Feature Programming Manual
- System Manual

The following topics are included in this chapter.

Chapter Topics
- *NEAX 2400 Commands*
- *NEAX 2000 Commands*

IMPORTANT

System Limitations:

Reporting Off-Hook Alarms in the system operates the same as it does with the SN716 console.

NEAX 2400 Commands

Use the NEAX 2400 Maintenance Administration Terminal (MAT) to enter these commands.

AMNO Command: (Assignment of Monitored Number)

Use AMNO to configure the monitored numbers UA5200 will use. See "Assigning Monitored Numbers" on page 4-8 for additional configuration needed on the OW5000.

A/G A: Business use or Admin
    G: For guest room

    Always use A

TN (Tenant Number){1-255}

    Typically 1 or the same as your users.

MNO (Monitor Number){0-9, *, #} *Max. 6 digits

    This is the monitored number and should fit within the dialable number plan, but does not use a physical port.

NMI (Monitor Number Index){1-4095}

    This number must be unique between all monitored numbers in the system; usually start with "1" and increase for each **AMNO**. Do an LMNO to list up existing monitored numbers to verify what NMI's are already in use.

MFC (G-2 Signal Data for MFC) {0-3}Always use 0 for North America. For other countries, enter the G-2 Signal Data appropriate for that country.

Follow the UCD when Monitor

Check the box (preferred): this means that when the UA5200 server goes down, the system will downgrade to UCD group. Fill the station number for UCD group. Command ASHU (Assignment of Station Hunting Group-UCD) should be used for UCD group programming in this case.

Uncheck the box: this means that when the UA5200 server goes down, the system will not downgrade to the UCD group.

STN (Reprehensive UCD Station Number) {0~9,*,#}

    This parameter is valid only when UCD=1

ASYD Command: (Assignment of System Indices)

Use ASYD to assign certain bits in System Index data as indicated below.

Index 27	Bit 6 0	OAI message type - normal
Index 31	Bit 0~3 6	Common Memory Mounting Capacity of 06 is required for OAI/ACD.
Index 63	Bit 6 1	Enable SMFN Call Forward Detail
Index 79	Bit 6 0	Enable OAI/ACD
Index 207	Bit 0 1	ACD/Interface Processor is mounted
Index 241	Bit 2 1	LP sends SMFNs to IP
Index 241	Bit 7 1	OAI/SSFN Facility enabled
	Bit 3 1	Enable Detail Error Codes
Index 370	Bit 0 1	Send expanded SMFNs including CCIS Link reconnect SMFNs needed
Index 449	Bit 3 0	Send ANI in normal format, not ASCII
Index 451	Bit 0 1	OAI Call Origination to MFC Trunk by SCF FN=3 in-service
Index 451	Bit 1 1	OAI Call Origination to MFC Trunk by SCF FN=1 in-service

ASYDL Command: (Extended Assignment of System Indices)

This command is used to set system index bits as needed by most applications. This command is not available on earlier versions of the PBX, such as the HDS.

Index 533		Fusion Point Code for Variable Network Data Memory (VNDM)
Index 864	Bit 0	Internal/external OAI 0/1
	1	
	Bits 2&3	
Index 864	Bit 2	Agent Anywhere
	0=Out of Service	
	1=In Service	
	This bit is only valid when Index 864 Bit 3=1	
Index 864	Bit 3	Multiple ACDP
	0=Not Available	
	1=Available	
	Bit 4	
	1	Enable 8-port mode to allow more than two applications to monitor the same device
Index 865		FPC of Node providing IP
Index 867	Bit 0	
	1	Send OAI SMFNs for Call Forward No Answer
	Bit 3	
	1	Improvement of SCF6 request for Monitor Connection in ACD
	Bit 4	
	1	Enable 16 digit extensions

*Set bit-4 to **1** only if using 16 digit OAI numbers. Before enabling this feature, verify that all OAI/ACD applications being used support expanded 16-digit numbers. Applications that do not support this feature, will not work if this is enabled.*

NOTE

Index 867	Bit 3	
	1	Improvement of SCF6 request for Monitor Connection in ACD
*Index 868	Bit 3	
	1	Restriction of IP-PAD Link Block during ACD process is valid

Index 868	Bit 3	
	1	Restriction of IP-PAD Link Block during ACD process is valid
Index-868	Bit 4	
	1	Call ID Notification (SMFR) is valid
Index-868	Bit 5	
	1	Fix Direct Inward Dialing number to 12 Digit (SMFR) is valid.
*Index 869	Bit 6	Monitor Function for IP terminals
	1	in-service
*Index 869	Bit 7	Monitor Function for Dterm IP LAN is
	0 = Multip-path	
	1 = Single Path	
Index 869	Bit 6	Monitor Function for IP terminals
	1	in-service
Index 870	Bit 4	
	1	Improvement of SCF7 (Call Transfer) is in-service
Index 871	Bit 6	
	1	SCF04 to UCD MCI change in-service
Index 873	Bit 7	
	1	Execution of SCF7 from the Call Hold State is in-service.
*Index 874	Bit 0	Multi-Path connection
	0 = Disabled	
	1 = Enabled (used with 869 b7)	
Index 874	Bit 2	CCIS SMFN Indication in-service
	1	
*Index 874	Bit 3	ACDP Automatic Logoff
	1	
Index 874	Bit 4	
	1	CCIS Camp-on by SCF19 for OAI is in-service.
Index 874	Bit 7	OAI Break-in feature is in-service
	1	
Index 875	Bit 0	SMFN FN9 STS=01: Dial Number
	1	Notification (Call Forwarding) in-service
Index 875	Bit 1	SMFN FN9 STS=02: Dial Number
	1	Notification (Busy) in-service

Index 875	Bit 2	Notification of Terminal Status Change
	1	by Call Back in-service
Index 875	Bit 3	OAI Forced break-in feature (toward
	1	Stations setting Privacy feature)

* These bits are applicable when using IP devices.

When using UA5200 in ACD Mode, it requires that Internal ACD is enabled. In addition to the above indexes, the following are also required:

ASYD

| Index 2 | Bit 0 | ACD in-service |
| | 1 | |

ASYDL

| Index 866 | | FPC of Node providing ACDP |

NEAX Command Assignments Required Settings for UA5200 Wake-Up

ASYD SYS1

Index 79	Bit 6	(Enable OAI/ACD)
	0	
Index 160	Bit 0	(Enable Hotel/Motel features)
	1	
Index 241	Bit 2	(Enable SMFN Notifications)
	1	
Index 241	Bit 7	(Enable SSFN Notifications)
	1	

AHSY

| Index 551 | Bit 7 | (Automatic SSFN for non-VIP Wake-Up |
| | 1 | message) |

NEAX Command Assignments Required Settings for UA5200 VIP Wake-Up

ASYD SYS1

Index 79	Bit 6	(Enable OAI/ACD)
	0	
Index 160	Bit 0	(Enable Hotel/Motel features)
	1	
Index 165	Bit 4	(Enable VIP Wake-Up features)
	1	
Index 241	Bit 2	(Enable SMFN Notifications)
	1	
Index 241	Bit 7	(Enable SSFN Notifications)
	1	

AHSY

Index 100	Bit 1 & 0	(Sets the number of wake-up retries. Required for VIP Wake-Up to have an automatic wake-up sent if the Wake-Up Operator does not handle a VIP Wake-Up notification)
	0 & 1	(Bit 1 = 0, Bit 0 = 1)
Index 551	Bit 6	(Automatic SSFN for VIP Wake-Up
	1	message)
Index 551	Bit 7	(Automatic SSFN for non-VIP Wake-Up
	1	message)

AHSY VIP Behavior Choices

Index 184	Bit 7 & 6	(VIP Wake-up for VIP guests only.
	0 & 0	VIP flag controlled by PMS)
Index 184	7 & 6	(VIP Wake-Up on for all guests)
	1 & 1	
Index 165	Bit 4	(Disable VIP Wake-Up feature. Normal
	0	wake-up behavior for all guests)

NEAX Command Assignments for Recommended PBX Wake-Up Settings

ASYD SYS1

Index 172	Bit 4	(Play an announcement if VIP Wake-Up
	1	becomes an automatic wake-up)

AHSY

Index 77	Bit 0	(Wake-up time indication on a quest
	1	Dterm display)
Index 77	Bit 1	(DND indication on a guest Dterm
	1	display)
Index 77	Bit 2	(RC indication on a guest Dterm
	0	display (No))
Index 77	Bit 3	(2nd wake-up indication on a guest
	0	Dterm display (No))
Index 163	Bit 7 & 6	(Number of PBX generated wake-up
	0 & 0	retry attempts when guest station is busy (three))
Index 188	Bit 3	(Ringing for suite room wake-up call
	0	(ring all phones))
Index 551	Bit 0	(Automatic SSFN for 1st, 2nd and
	0	GRP WU set by PMS (Yes))
Index 551	Bit 5	(Automatic SSFN for GRP formation
	0	set/cancel by PMS (Yes))

NEAX Command Assignments Required Settings for UA5200 Guest Link Basic

ASYD SYS1

Index 79	Bit 6	(Enable OAI/ACD)
	0	
Index 160	Bit 0	(Enable Hotel/Motel features)
	1	
Index 241	Bit 2	(Enable SMFN notifications)
	1	
Index 241	Bit 7	(Enable SSFN Notifications)
	1	

UA5200 is now installed and ready to be initialized on the NEAX 2400.

NEAX 2000 Commands

Use the NEAX 2000 Customer Administration Terminal (CAT) or the NEAX 2000 Maintenance Operations Console (MOC) to enter the following commands. (Refer to the NEAX 2000 System Manuals for more information.)

Phone in CAT mode: (Assignment of CAT Mode)

Use this command to place the phone in CAT mode:

Trans + Conf + * + Trans + Conf + #

Once you are in CAT mode, the Buttons on the Dterm perform the actions listed in Table 5-1.

Table 5-1 *Dterm Buttons—CAT Mode*

Button	Action
LNR/SPD or Redial	Sets the PBX to command mode
Conf	Writes the data to memory
Recall	Acts like the Enter key to accept a selection

Programming Monitored Numbers

Use the following commands to program monitored numbers.

CMD11 Command (Virtual Line Number)

CMD 17Y Command (ACD/UCD Group)

> CMD 171 > station number>3 (OAI Monitored Number)
>
> CMD 171 > station number>member group # (00 ~ 15)

CMD0B for IPS Command: (Assignment of IP Address)

Use this command to assign the IP Address of TCP/IP-Ethernet.

1st data	00	
2nd data	00	IP Address
	01	Subnet Mask

CM65 Command: (Camp Recall)

The following settings should be applied to IPS F2 5.0.0 and above to prevent camped calls from recalling to the operator's extension.

yy	27	
1st data	1:	Tenant number
2nd data	0:	ACD

NOTE   *For L1 (R11) or higher.*

CM08 Command: (System Data)

The following settings should be configured to ensure proper behavior of applications.

1st data	117	
2nd data	0:	When Station A is talking to Station B with external call on consultation hold screened transfer, and Station B hangs up, reconnect Station A to the held trunk call

1st data	177	
2nd data	0:	Send OAI SMFN-9 (Dialed Digits) for calls placed from an analog single line station

1st data	460	
2nd data	0:	Send OAI SMFN-1 (Incoming) STS=7 (Blind Transfer) after a blind transfer

1st data	461	
2nd data	0	Send OAI SMFN-2 (Answer) STS=2 (Held Call) when unholding a held call

1st data	462	
2nd data	0	Send ANI/Caller ID/CPN to OAI terminal

1st data	464	
2nd data	0:	Do not send SMFN Off hook notification after SCF

1st data	465	
2nd data	0:	Send SCF error detail

1st data	804	
2nd data	0	Send station type (0=single line, 1=PS terminal) in OAI SMFNs

1st data	805	
2nd data	0	Send OAI SMFN-3 (Release) STS=5 (Abandon Call Forward) and SMFN-1 (Incoming) STS=6 (Call Forward No Answer) when a monitored extension call forwards no answer

1st data	808	
2nd data	0	Send OAI SMFN-2 (Answer) STS=5,6,7 for answering Call Forward -All/Busy/No Answer

1st data	809	
2nd data	1	When answering a held call by SCF11, exchange the line information

1st data	811	
2nd data	0	Send OAI SMFN-1 (Incoming) STS=4,5 for incoming calls that are Call Forward All/Busy

1st data	815	
2nd data:	0	Send OAI SMFN-1 (Incoming), STS=2 (Recall) when held call recalls

1st data	817	New in R9
2nd data	0	Send OAI SMFN-1 (Incoming) and SMFN-2 (Answer), STS=4,5,6/5,6,7 (Call Forward All/Busy/No Answer) when CF-All Calls/Busy Line/No Answer call via CCIS is ringing/answered

1st data	818	New in R9
2nd data	0	Send OAI SMFN-6 (Hold). STS=2 (Exclusive Hold) when call is put on exclusive hold

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ACD Configuration

In order to have split statistics displayed in the UA5200 Client Splits tab, check the **Use Infolink split information** checkbox in the ACD system data MAT command.

To delay the distribution of ACD calls, add a CCV step called **Ring Delay**. The CCV step should be set before the **Queue** step.

This delay should be used in the case where ACD call distribution appears too fast and interferes with answering a call on the Dterm and UA5200, due to the previous call not having time to properly be removed.

How to Configure the UNIVERGE SV8500 (or SV7000 or IPX) for ACD when the UA5200 is set for ACD Mode

The following is only one example of how to configure Internal ACD when the UA5200 is set to ACD Mode. This example is using number values for clarification purposes only; the numbers used on site will differ. Also, this example uses four different splits (one for each Pilot Number) but Splits and CCV can be shared. Options differ from site to site.

Step 1   **AMNO/L/N**:
Program five Monitored Numbers. There are actually more Monitored Numbers required for features such as Park Join and for Orbit Number, but are not described in this section. The examples below are for numbers that pertain to the ACD only.

   —Main Attendant Pilot Number: 5000

   —Blind Transfer Recall Number: 5001

   —Park Number: 5002

   —Paging Pilot Number: 5003

   —Attendant's Personal Pilot Number: 5004

> **NOTE**
>
> *The UA5200 Client will not be able to connect to the UA5200 Server if a Personal Pilot Number is not assigned to the Operator's ACD LOGON ID.*

The Blind Transfer Recall Pilot, Park Pilot and Page Pilot numbers will be entered in the UA5200 Manager under the ACD Config tab.

Step 2   ACDSPL: Create four Splits

—Split-1: Main Attendant Split
—Split-2: Blind Transfer Recall Split
—Split-3: Park Split
—Split-4: Paging Split

Step 3   The Main Attendant's Split can be configured with many options; some to consider are:

—Do Not Disturb: Where do you want the calls to route when no Attendants are logged in?
—Stranded Call CCV: Where do you want the calls to route to when calls are in queue and all the Attendants have logged out?
—Conditional Threshold: Do you want a maximum queue depth, etc.

Step 4   ACDPLT: Assign the four Pilot Numbers (from Step 1) to their own CCV

—5000: CCV 1:1
—5002: CCV 2:1
—5003: CCV 3:1
—5004: CCV 4:1

Step 5   ACDPSN: Create the Attendant's ACD Position

—ACD = 6000, which is the ACD line in this example (TEC-18 assigned in ASDT/AAST and assigned as the Prime Line in AKYD).
—PBX = 7000, which is the My Line in this example. The station assigned to the hardware LEN (TEC-12 assigned in ASDT/AAST/AISTL and assigned as the My Line in AKYD).

NOTE   *This is the number that will be entered in UA5200 Manager under the Workstations tab.*

— SPLIT ASSIGNMENT: Split-1

Step 6   **ACDLOG**:
Create the Attendant's Logon ID

NOTE   *This Logon ID will be entered in UA5200 Manager under Accounts.*

When the UA5200 Operator logs into the UA5200 Client, the UA5200 will query the PBX using this LOGON ID to determine the Personal Pilot Number (and forward the PBX Line to the Personal Pilot Number). The UA5200 will also use the LOGON ID to automatically log the UA5200 Operator onto the ACD.

— LOGON ID: 1111 (does not need to conform to the PBX numbering plan)
—AGENTS NAME: Attendant 1
—SPLITS: Check SPLIT-1, SPLIT-2, SPLIT-3, and SPLIT-4
—MULTI-SPLIT: Yes, check this box
—PERSONAL PILOT NUMBER: 5004 (from Step 1)

Step 7 **ACDCCV**:

In this example, a CCV will be created for each Pilot Number (from StepStep 1). Again, this is only an example. Splits and CCV can be shared, and many different options can be configured. They are dependent on the customer's preferences. For example, the CCV (1:1) for the Main Attendant's Split can have an ACD Announcement step added, etc.

—CCV 1:1 Pause-2; Ring Delay-2; Queue-1; End

—(Main Attendant's Split; Pilot Number 5000)

—CCV 2:1 Pause-2; Queue-2; Pause-60; End

—(Blind Transfer Recall Split; Pilot Number 5001)

—CCV 3:1 Pause-2; Queue-3; Pause-60; Go To 1:1; End

—(Park Split; Pilot Number 5002)

—CCV 4:1 Pause-2; Queue-4; Pause-60; End

—(Paging Split; Pilot Number 5003)

NOTE

Pause steps for Blind Transfer Recall, Park and Paging are significant. For example, if the Park CCV (3:1) had a Pause step of 10 instead of 60, the call would recall back to the Attendant after it had been parked for 10 seconds. Pause steps should be longer than the UA5200 timer or the PBX timer, if you want the UA5200 or the PBX to control when calls will recall (instead of the ACD).

Appendix

Keyboard Mapping Shortcuts

This appendix provides the text for assigning keyboard mapping shortcuts for the following:

- *Re-programming the Custom Keyboard*
- *Health Keyboard Mapping*
- *Higher Education Mapping*
- *Hospitality Mapping*
- *Keyboard Mapping*

NOTE

When the custom keyboard is purchased with the system for the Health and Hospitality markets, most of the shortcuts from these files are mapped directly to keys for a single button solution.

Re-programming the Custom Keyboard

If a conflict occurs between the shortcuts programmed in the custom keyboard and 'already installed' products on the UA5200 Client workstation, it is possible to re-program the shortcut in the custom keyboard.

To re-program the shortcut, downloaded a utility called **Preh Winprogrammer** from **http://www.prehkeytec.com**.This is the manufactures utility that can read the current key programming and save to a file. The file can then be modified per key and then reloaded into the custom keyboard.

After making the keyboard shortcut change, the UA5200 Client must be made aware of this change. In the UA5200 Client install directory there is a configuration file for each vertical market. In each config file, locate the short cut changed and set to the new short cut value. Do this for each UA5200 Client workstation that had a custom keyboard that was changed. Restart the client and test the key.

Health Keyboard Mapping

#This is the keyboard map for UA5200 Client Prototype
#Lines starting with # are comments.
#A key definition starts at the beginning of a line and looks like this:
#Modifiers.Key;Command;View
#
#Modifiers can be Control, Alt, or Shift. But, should not start with just Alt key.
#Key is the key number ('A'-'Z', F1-F10, etc). Since semicolon is a separator
#write Semicolon to specify it as the space. Space for space, Tab for tab,
#
#The view name is the name of the active view to fire the command in. Specify
#Global to mean any view.
#

#F1;ShowContextHelp;Global
#Ctrl.Shift.Alt.F1;ConfigureContextHelp;Global

#Toggle Source/Destination

#Process Key is used on all views to executed default action like clicking on Ok or
Apply button.
#It could also be pressing the enter key.
F12;Application.ProcessCommand;Global

Ctrl.Shift.I;OnCall.PersonStatusIn;OnCallCurrentSchedulesView
Ctrl.Shift.O;OnCall.PersonStatusOut;OnCallCurrentSchedulesView
Ctrl.Shift.U;OnCall.PersonStatusUnavailable;OnCallCurrentSchedulesView
Ctrl.Shift.N;OnCall.PersonStatusEditNotes;OnCallCurrentSchedulesView
Ctrl.Shift.C;OnCall.CollapseAll;OnCallView
Ctrl.Shift.E;OnCall.ExpandAll;OnCallView
Ctrl.Shift.Z;DisplayAdditionalDetails;Global
Ctrl.Shift.X;DisplayFilter;DirectoryView

#Start Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.S;StartProcedure;ProcedureListView
#View Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.V;ViewProcedure;ProcedureListView
#Continue Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.C;ContinueProcedure;ProcedureListView
#Refresh Procedure (Not Global, only from Procedure pane)
Ctrl.R;ProcedureListView.Refresh;ProcedureListView

Ctrl.N;New.Instance;Global

F8;CreateMessageView.TakeMessageFromDirectorySource;Global
Ctrl.M;CreateMessageView.TakeMessageFromConnectedPartySource;Global
F9;OpenMessageView.RetrieveMessageFromDirectorySource;Global
Ctrl.L;OpenMessageView.RetrieveMessageFromConnectedPartySource;Global

#Shortcut for opening CreateGuestMessageView
Ctrl.Q;Messaging.OpenNewMessageDialog;Global

#Shortcut for opening OpenGuestMessageView
Ctrl.W;Messaging.OpenViewMessagesDialog;Global

#Shortcut for Process First VIP Wake-up Notification
Ctrl.Shift.W;VipWakeUpView.ProcessFirstVipWakeUp;Global

#ShowDiagnosticsNTests
Ctrl.Shift.Alt.F5;ShowDiagnosticsNTests;DiagnosticsNTestsView

Higher Education Mapping

#This is the keyboard map for UA5200 Client Prototype
#Lines starting with # are comments.
#A key definition starts at the beginning of a line and looks like this:
#Modifiers.Key;Command;View
#
#Modifiers can be Control, Alt, or Shift. But, should not start with just Alt key.
#Key is the key number ('A'-'Z', F1-F10, etc). Since semicolon is a separator
#write Semicolon to specify it as the space. Space for space, Tab for tab,
#
#The view name is the name of the active view to fire the command in. Specify
#Global to mean any view.
#

#F1;ShowContextHelp;Global
#Ctrl.Shift.Alt.F1;ConfigureContextHelp;Global

#Toggle Source/Destination

#Process Key is used on all views to executed default action like clicking on Ok or
Apply button.
#It could also be pressing the enter key.
F4;Application.ProcessCommand;Global

Ctrl.Shift.I;OnCall.PersonStatusIn;OnCallCurrentSchedulesView
Ctrl.Shift.O;OnCall.PersonStatusOut;OnCallCurrentSchedulesView
Ctrl.Shift.U;OnCall.PersonStatusUnavailable;OnCallCurrentSchedulesView
Ctrl.Shift.N;OnCall.PersonStatusEditNotes;OnCallCurrentSchedulesView
Ctrl.Shift.C;OnCall.CollapseAll;OnCallView
Ctrl.Shift.E;OnCall.ExpandAll;OnCallView
Ctrl.Shift.C;WakeUp.CollapseAll;WakeUpManagerView
Ctrl.Shift.E;WakeUp.ExpandAll;WakeUpManagerView

Ctrl.Shift.Z;DisplayAdditionalDetails;Global
Ctrl.Shift.X;DisplayFilter;DirectoryView
#Following short cut is defined in the app.cofing
#F11;ShowRoomOccupants;RoomOccupantsView

#Start Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.S;StartProcedure;ProcedureListView

#View Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.V;ViewProcedure;ProcedureListView
#Continue Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.C;ContinueProcedure;ProcedureListView
#Refresh Procedure (Not Global, only from Procedure pane)
Ctrl.R;ProcedureListView.Refresh;ProcedureListView

Home;WakeUp.SelectList;WakeUpManagerView
Home;WakeUp.SelectGrid;WakeUpMissedView
Ctrl.N;New.Instance;Global
F8;CreateMessageView.TakeMessageFromDirectorySource;Global
Ctrl.M;CreateMessageView.TakeMessageFromConnectedPartySource;Global
F9;OpenMessageView.RetrieveMessageFromDirectorySource;Global
Ctrl.L;OpenMessageView.RetrieveMessageFromConnectedPartySource;Global

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Ctrl.W;Messaging.OpenViewMessagesDialog;Global

#Shortcut for Process First VIP Wake-up Notification
Ctrl.Shift.W;VipWakeUpView.ProcessFirstVipWakeUp;Global

#ShowDiagnosticsNTests
Ctrl.Shift.Alt.F5;ShowDiagnosticsNTests;DiagnosticsNTestsView

Hospitality Mapping

#This is the keyboard map for UA5200 Client Prototype
#Lines starting with # are comments.
#A key definition starts at the beginning of a line and looks like this:
#Modifiers.Key;Command;View
#
#Modifiers can be Control, Alt, or Shift. But, should not start with just Alt key.
#Key is the key number ('A'-'Z', F1-F10, etc). Since semicolon is a separator
#write Semicolon to specify it as the space. Space for space, Tab for tab,
#
#The view name is the name of the active view to fire the command in. Specify
#Global to mean any view.
#

#F1;ShowContextHelp;Global
#Ctrl.Shift.Alt.F1;ConfigureContextHelp;Global

#Toggle Source/Destination

#Process Key is used on all views to executed default action like clicking on Ok or Apply button.
#It could also be pressing the enter key.
F12;Application.ProcessCommand;Global

Ctrl.Shift.I;OnCall.PersonStatusIn;OnCallCurrentSchedulesView
Ctrl.Shift.O;OnCall.PersonStatusOut;OnCallCurrentSchedulesView
Ctrl.Shift.U;OnCall.PersonStatusUnavailable;OnCallCurrentSchedulesView
Ctrl.Shift.N;OnCall.PersonStatusEditNotes;OnCallCurrentSchedulesView
Ctrl.Shift.C;OnCall.CollapseAll;OnCallView
Ctrl.Shift.E;OnCall.ExpandAll;OnCallView
Ctrl.Shift.C;WakeUp.CollapseAll;WakeUpManagerView
Ctrl.Shift.E;WakeUp.ExpandAll;WakeUpManagerView

Ctrl.Shift.Z;DisplayAdditionalDetails;Global
Ctrl.Shift.X;DisplayFilter;DirectoryView
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#
#The view name is the name of the active view to fire the command in. Specify
#Global to mean any view.
#

#F1;ShowContextHelp;Global
#Ctrl.Shift.Alt.F1;ConfigureContextHelp;Global

#Toggle Source/Destination

#Process Key is used on all views to executed default action like clicking on Ok or
Apply button.
#It could also be pressing the enter key.
F4;Application.ProcessCommand;Global

Ctrl.Shift.I;OnCall.PersonStatusIn;OnCallCurrentSchedulesView
Ctrl.Shift.O;OnCall.PersonStatusOut;OnCallCurrentSchedulesView
Ctrl.Shift.U;OnCall.PersonStatusUnavailable;OnCallCurrentSchedulesView
Ctrl.Shift.N;OnCall.PersonStatusEditNotes;OnCallCurrentSchedulesView
Ctrl.Shift.C;OnCall.CollapseAll;OnCallView
Ctrl.Shift.E;OnCall.ExpandAll;OnCallView
Ctrl.Shift.C;WakeUp.CollapseAll;WakeUpManagerView
Ctrl.Shift.E;WakeUp.ExpandAll;WakeUpManagerView

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#Continue Procedure (Not Global, only from Procedure pane)
Ctrl.Shift.C;ContinueProcedure;ProcedureListView
#Refresh Procedure (Not Global, only from Procedure pane)
Ctrl.R;ProcedureListView.Refresh;ProcedureListView

Ctrl.Up;WakeUp.SelectList;WakeUpManagerView
Ctrl.Up;WakeUp.SelectGrid;WakeUpMissedView
Ctrl.N;New.Instance;Global

F8;CreateMessageView.TakeMessageFromDirectorySource;Global
Ctrl.M;CreateMessageView.TakeMessageFromConnectedPartySource;Global
F9;OpenMessageView.RetrieveMessageFromDirectorySource;Global
Ctrl.L;OpenMessageView.RetrieveMessageFromConnectedPartySource;Global

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Ctrl.Shift.Alt.F5;ShowDiagnosticsNTests;DiagnosticsNTestsView

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

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UC for Enterprise (UCE) Attendant (UNIVERGE UA5200) Operations Guide

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