

UC Client Startup

Chapter 3

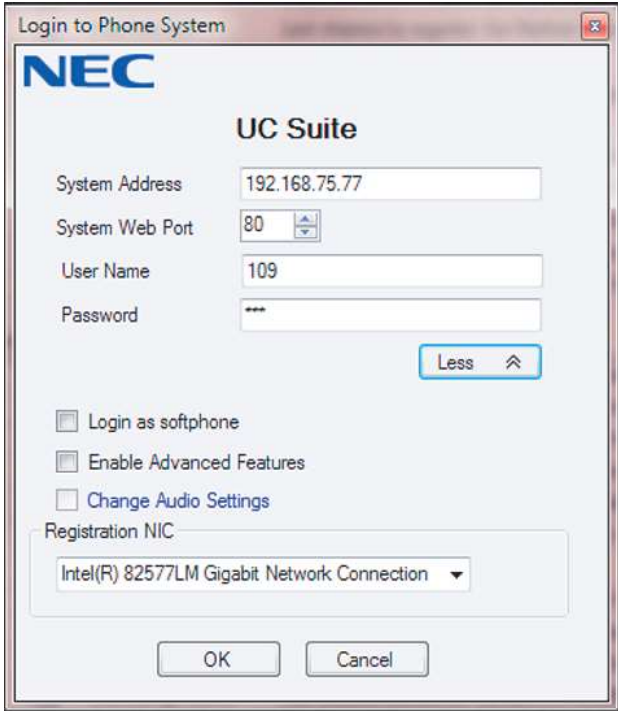
The UC Client can be started in any of the following ways:

- Double-click the NEC UC Suite icon within the Windows desktop area.
- Select Start/All Programs/NEC/NEC UC Suite.

When the UC Client is started, the Login to the Phone System window appears (refer to [Figure 3-1 Login to Phone System Screen on page 3-2](#)):

- Enter the SV9100 IP Address in System Address.
- If the WebPro port has been changed from the default port 80, change the System Web Port to the value set in Program 90-54-01.
- Enter the User Name and Password from Programs 20-59-01 and 20-59-02.
- If the client will be a soft phone, check the Login as Softphone check box.
- If the client is a standard user requiring advanced features similar to, but not all Premium user features, check the Enable Advanced Features check box. This will request a 5326 license when logging in.
- If the client will be a soft phone and the audio settings need to be changed, check the Change Audio Settings check box.
- The More button displays additional settings fields.
- If the PC has multiple network interfaces, select the NIC to be used during soft phone registration in the Registration NIC field.

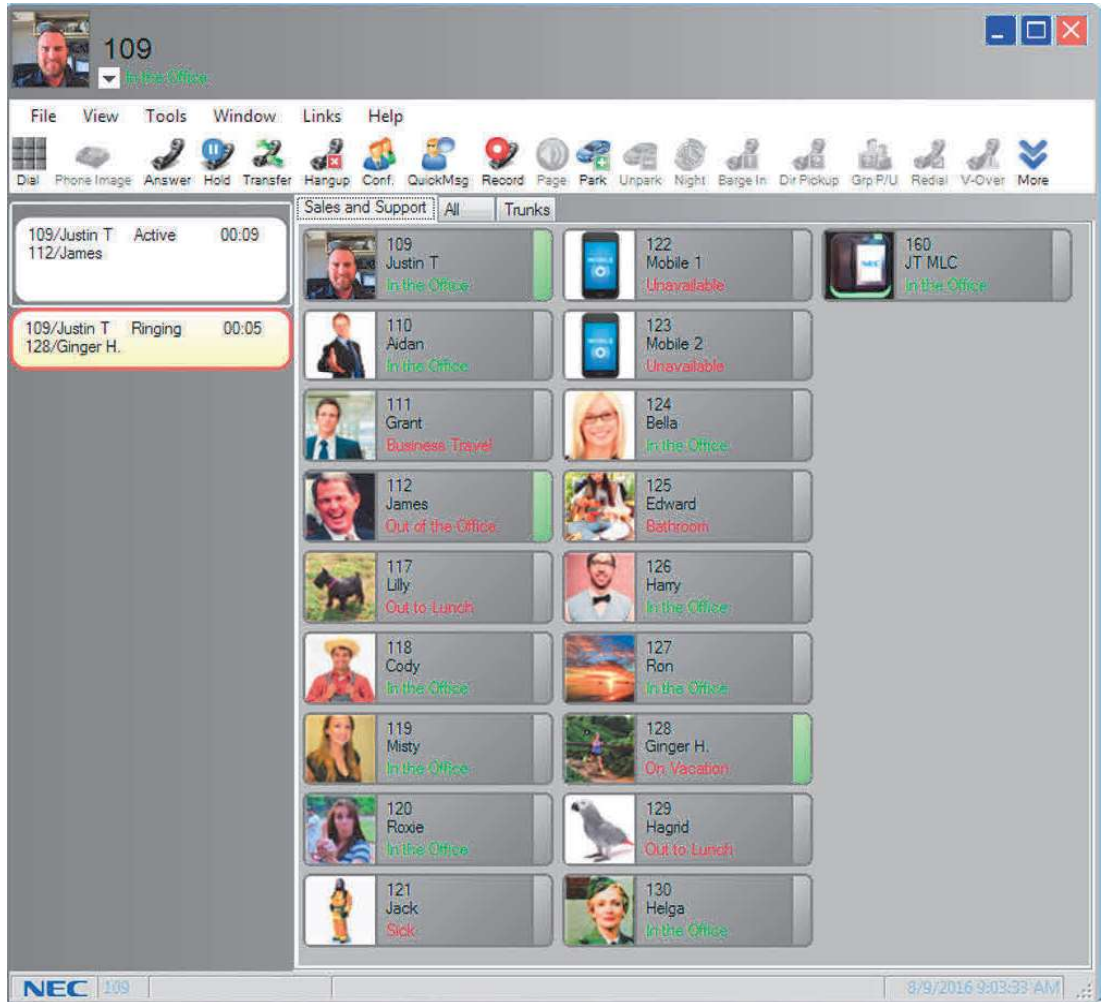
Figure 3-1 Login to Phone System Screen



SECTION 1 FULL WINDOW MODE

The Full Window Mode is primarily targeted for users with an attendant-type role. This User Interface mode presents valuable information about the current call activity and provides easy access to the basic operations required by the attendant. Using either the mouse or keyboard, the user can quickly move between the different areas of the screen to dispatch callers, search the company directory, and view the status of the individual lines. An example of the Full Window Mode is shown in [Figure 3-2 Full Window Mode Screen on page 3-3](#).

Figure 3-2 Full Window Mode Screen



The main screen consists of the following areas:

- Title Bar and Main Menu** Provides the standard windows controls and access to standard operations and utilities through the pull down menus. The Title Bar includes the presence area, extension associated with the UC Client, and Contact Center area if enabled.
- Function Toolbar** Provides quick access to the most commonly used call processing and attendant functions.

Active Call List	Displays information about the current call, a list of all calls currently active on the console, and active Quick Messages.
BLF/DSS Area	Provides the Busy Lamp field and Direct Station Select functionality, comparable to a DSS module. Also includes a special tab for Speed Dial numbers.

1.1 Title Bar and Main Menu

The **Title Bar** and **Main Menu** provide the standard windows controls and access to basic operations and utilities through pull down menus.

The standard Windows controls on the Title Bar are as follows:

Minimize	Hide the application's main window and include an entry to restore the application in the Windows task bar.
Maximize/Restore	Change the size of the application main window. Maximize increases the size of the window to fill the entire display. The Restore function reduces the size of the main window to the previous dimensions.
Close	Exit the desktop application.

The **Main Menu** provides a drop down menu, which lists all of the functions available within a selected category. The functions available from the **Main Menu** are as follows:

File

Exit	Close the UC Client.
-------------	----------------------

View

Standard Window	Change UI mode to Standard Window view.
Toolbar	Change UI mode to Toolbar mode.
Sort BLF By	Change the sort order of the BLF buttons. Sort options are Extension, First Name, and Last Name.

Tools

- Preferences** Customize operational settings for the UC Client.
- Volume Control** Changes the volume level of a Softphone.
- Profiles** Save and select user profiles.
- Color Selection** Change the color scheme of the UC Client main window and IM window. Below is an example of the custom color window that opens when choosing color selection.



- Start Color** Choose the color to start with on the left side of the screen.
- End Color** Choose the color to end with on the right side of the screen.
- Gradient Pattern Preview** Preview how the selected colors will look.
- Restore Default** Set the color scheme back to default.
- Save** Save the new color settings.
- Cancel** Cancel the new color settings and abort changes.

Window

- Call Log** Open a separate window to view the call history.
- Directory** Open a separate window to view the Directory/Contact List.
- Phone Image** Display emulation phone image/control when the Desktop Application is run in IP Softphone mode.
- Abandoned Calls** Open a separate window to view the abandoned call list.
- Agent Monitor** Opens an Agent Monitor window used to view the current status of other Contact Center Agents.
- Queue Monitor** Opens a Queue Monitor window to view real-time statistics associated with a set of selected queues.

Dialpad Opens a dialpad for dialing digits during a call.

Links

SV9100 PCPro Opens a PCPro Window if PCPro is installed on the machine.

CallTo: Setup Opens a window Yes and No options for Enabling or Disabling the CallTo tag feature. When Enabled, the CallTo tag feature provides the ability to dial from a CallTo tag/hyperlink within a web page or MS Office document using the Desktop Application.

Highlight Dial Starts the Highlight Dial process in the system tray. The Highlight Dial process can be turned on or off. When turned on, highlighting a number in any program will automatically dial the number from the UC Suite.

Help

Contents and Index Access the on-line help system by topic.

About View the copyright notice and current revision of the desktop application.

1.2 Function Toolbar

The **Function Toolbar** provides quick access to the most commonly used call processing functions. A function on the toolbar can be selected by using the mouse to click on the desired function button or by pressing the associated hotkey sequence on the keyboard. If additional information is required to complete the operation, then a supporting menu is displayed requesting additional input from the user.

Individual buttons on the **Function Toolbar** become disabled if the function is not allowed for the current state of the telephone. For example, the **Answer** button is only enabled when a call is ringing on the telephone.

Available functions are:

- | | |
|---------------------------|--------------------|
| Add/Edit Note | Hold |
| Answer | Last Number Redial |
| Auto Callback | Night Mode |
| Auto Handset/Auto Headset | Page |
| Background Music | Park |
| Barge In | Phone Image |

Callback Request	Phone Message
Call Redirect	Pickup Other Group
Conference	Quick Message
Custom Message	Record
Dial	Switch Login Mode
Directed Call Pickup	Transfer
Do Not Disturb	Unpark
Forward Calls	Video
FTP	Voice Mail
Group Call Pickup	Voice Over
Hang Up	

The operation of each of these functions is further described in [Section 1 Toolbar Functions on page 4-1](#).

1.3 Active Call List

The Active Call List displays all of the calls that are currently being handled by the application. The list includes calls that are in the following states:

- Ringing
- Connected
- Held

1.3.1 Active Call List Format

The active call entry that is displayed on the top of the list is always the connected (active) call.

Each entry in the active call list includes the following information, based upon the current state of the call:

- Line/Trunk Identifier
- Connection Status
- Timer displaying time in current state
- Calling Party/Called Party Identification
- User-defined notes
- DNIS information when provided.

The color of the frame for each entry in the active call list also indicates the state of the call. The following table shows the colors that represent each call state.

Table 3-1 Call State Colors

State	Frame Color
Active/Connected	Gray
Ringing	Red
Held	Yellow
Call Forward All	Blue

Calls are automatically removed from the active call list when they are disconnected.

1.3.2 Active Call List Operations

The following operations are valid within the Active Call List:

- Clicking on a ringing call automatically answers that call.
- A right mouse click on an entry displays a pop-up menu with the function, Add/Edit Note.
- Selecting Add/Edit Note displays a dialog that allows the user to append a note to the active call. This note is included in the call log entry for this call.

1.4 BLF/DSS Area

The Busy Lamp Field (**BLF**)/Direct Station Select (**DSS**) **Area** provides for monitoring and quickly accessing different phone system resources. By selecting different tabs in this area the user can select between viewing BLF/DSS buttons, monitoring trunks, and accessing a personal speed dial list.

1.4.1 BLF/DSS Tabs

Each key on the **BLF/DSS Tab** is used to monitor another station on the telephone system and provides one-touch access to that station. The **BLF/DSS Tab** also provides the Presence Status for the user associated with the station selected. In addition to the basic add-on module functionality, the **BLF/DSS Tab** also provides access to other telephony functions.

1.4.1.1 BLF/DSS Programming

- By default the BLF/DSS view includes an entry for the user local extension.

- Additional BLF buttons are created for each extension that is programmed as a one-touch key on the user's phone for stations without a UC Server connection. UC Server will provide BLF buttons for each station in the system. (MB 15-07-01 and 30-03-01).
- One-Touch keys must be programmed on buttons that physically appear on the phone for DSS/BLF status without UC Server. BLF information will not be provided to the UC Client for any one-touch keys that are programmed on buttons higher than the phone has physically.
- The UC Client acquires the list of programmed one-touch keys at startup.
- Any changes to the phone programming that occur while the application is running are reflected in the application only after the application is restarted.
- Alternately, the Tools → Preferences → BLF/DSS tab includes a Synchronize function that reads the current phone programming.

1.4.1.2 BLF Button Design

- Each BLF button includes an LED image, followed by an identifier.
- The LED image changes color to indicate the current state of the extension.
- The supported colors/states are as follows: Gray (Idle), Green (Busy), Red (Call Forward Immediate/DND All).
- The label can show the extension number, directory name associated with this extension, or both, as determined by the user settings.

1.4.1.3 BLF/DSS Layout

The Preferences → BLF/DSS tab specifies the layout of the BLF/DSS area. Through this dialog the user can set the following:

- Define BLF Groups (tabs).
- Set Visible BLF Groups (tabs).
- Specify members of each BLF Group.
- Define label format for the BLF buttons.
- Specify the name order used on the BLF and Directory views.

The Preferences dialog is further defined in the Preferences section of this document.

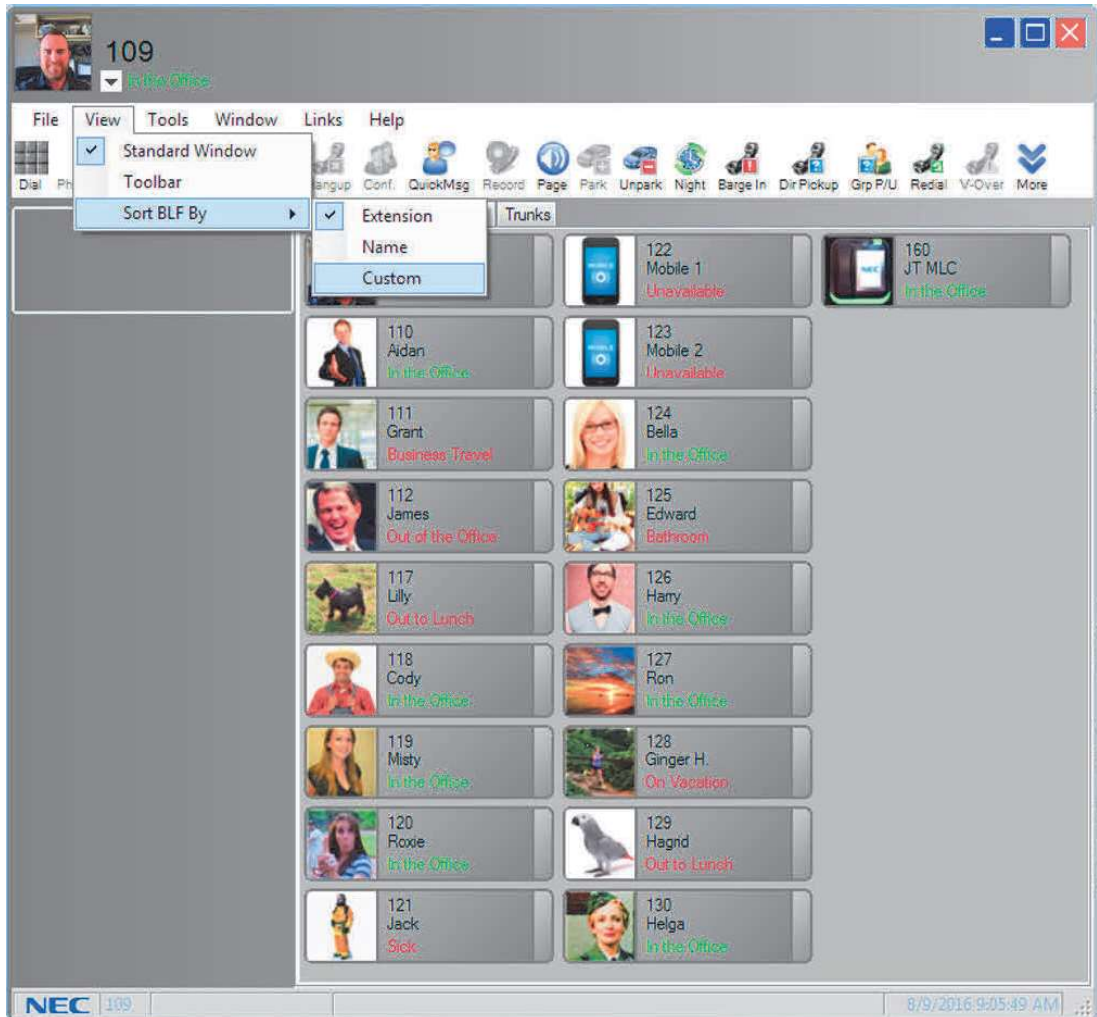
The user can also change the sort order of the BLF buttons using the View → Sort BLF By options on the Main Menu. The available sort options are by Extension, by First Name, or by Last Name.

1.4.1.4 BLF Custom Layout

The UC Client allows the user to order the buttons within the BLF tab based upon the Extension number or Name, or the user can customize the order of the buttons within the BLF tab.

In Window mode the View → Sort BLF By menu includes the options to sort by Extension and Name and the Custom menu option allows users to Drag and Drop BLFs into the order the user prefers.

Figure 3-3 BLF Custom Screen



When the Custom option is selected, the user can re-order the buttons within a BLF tab by dragging a button into a new location. This operation is accomplished by placing the mouse / cursor over a button and holding down the left mouse button while moving the cursor to a new button position. During the Drag and Drop, the mouse/cursor changes to a re-order cursor to indicate that the operation is in progress.

When the mouse button is released, the dragged BLF button is inserted into that position and the remaining BLF buttons are shifted down.

1.4.1.5 BLF/DSS Operations

The BLF/DSS buttons provide one-touch access as follows:

- When the local phone is idle, selecting an idle BLF button initiates a call to that extension.
- When the local phone has an active call, selecting an idle BLF button initiates a transfer to that extension.
- A configuration option set in Tools → Preferences → Shortcuts defines the action when the user double-clicks on a busy BLF with an active call. The options are:
 - Send active call to voice mail for the selected extension.
 - Put caller on hold and initiate voice over.
 - Camp caller on second line of selected extension.
- Performing a right mouse click on a BLF button provides access to the following functions:
 - Dial
 - Voice Mail
 - Quick Message
 - Phone Message
 - Instant Message
 - Transfer
 - Conference
 - Voice Over
 - Camp
 - Call Redirect
 - E-Mail
 - Add/Edit Note
 - Clear Note

Each of these functions is further described in the Functions section of this document.

1.4.1.6 Trunks Tab

- ❑ The Trunks tab allows the user to monitor the status of the trunk appearances that are programmed on the local phone.
- ❑ The LED image shows the trunk status using the following color scheme: Gray (Idle), Red (Ringing), Green (Busy).
- ❑ The Trunks tab can be hidden by clearing the corresponding Visible tabs setting within the Tools → Preferences → BLF DSS tab.

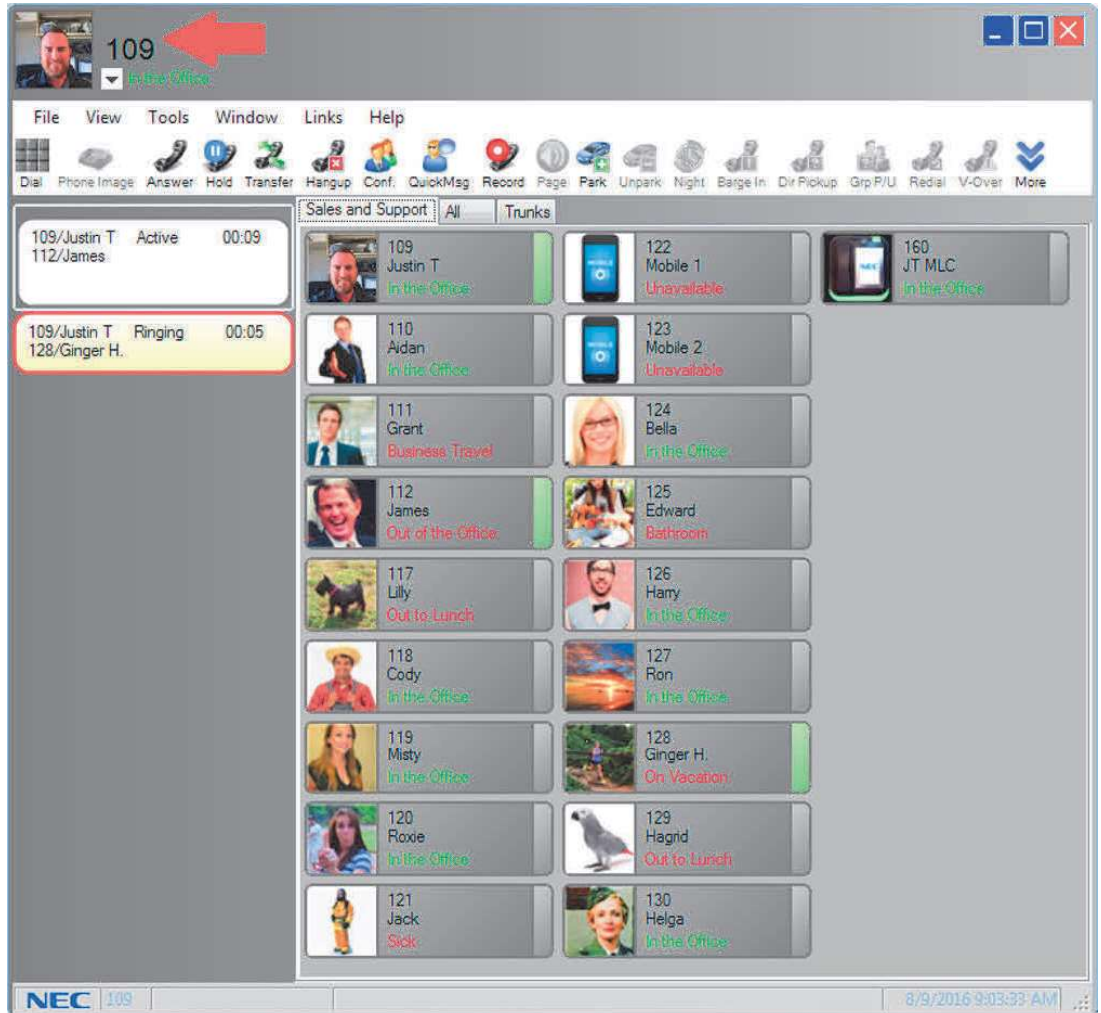
1.4.1.7 Speed Dial Tab

- ❑ A special tab labeled Speed Dial is included in the BLF/DSS area. When selected, this tab displays a set of buttons that the user has designated as speed dials.
- ❑ Clicking on an entry in the Speed Dial list immediately generates a call to the selected number.
- ❑ Entries are added to the Speed Dial list through the Directory/Contact List/Personal windows.
- ❑ A right-mouse click on a Speed Dial entry opens a menu that allows the user to Dial the selected entry or Delete the entry from the Speed Dial list.

1.5 Presence Area

The Presence Area is located on the far left side of the title bar in the Window View.

Figure 3-4 Presence Area Screen



1.5.1 Current Presence Status

The Presence area shows the current presence status of the user. Mousing over the Presence Area will pop a status box that shows the Details of the current presence status like Location, Expected Return Date and Time, Forward Settings and Special Instructions.

1.5.2 Right Click to Set Presence

Clicking the drop down arrow in the Presence area pops a menu of the possible Presence statuses that can be set with Details and the Presence Scheduler option.

SECTION 2 TOOLBAR MODE

The Toolbar Mode presents valuable information about the current call activity and provides easy access to the basic operations required by the normal phone user. The Toolbar User Interface (UI) layout takes up a minimum amount of space on the desktop, so as to not interfere with the operation or viewing of other applications. An example of the Toolbar Mode is shown below.

Figure 3-5 Toolbar



The toolbar consists of the following areas:

Dial String Field	Specifies the number to be dialed and maintains a list of the most recently dialed numbers.
Call Status Area	Color-coded icons represent the status of active calls.
Dial/Hangup Button	Controls the hookswitch state of the phone.
Speed Dial List	Displays a user-maintained list of frequently dialed numbers.
File Button	Provides access to additional menu items, such as configuration settings and additional application views.
Hold Button	Places the active call on Hold.
Presence Area	Displays the current presence state of the user with a drop down arrow to change presence states.
Contact Center Area	Displays the Contact Center Agent's current Contact Center state with a drop down arrow to change Contact Center state.
Function Toolbar	Provides quick access to the most commonly used call processing and application functions.

Each of these screen regions is further described in the sections to follow.

2.1 Dial String Field

- The Dial String Field is a combo box in which the user specifies the phone number to be dialed.
- The drop down list for this field contains the most recently dialed numbers.
- The drop down list displays up to 20 numbers.
- The numbers are listed with the most recent at the top.
- Selecting a number from the list places the number as the current number to be dialed.

- The user can enter a number in this field by manually typing in a number or using cut/paste.
- With a phone number highlighted in another Windows application, pressing <Ctrl+C> copies the selected number into the dial string field.

2.2 Call Status Area

- The Call Status Area is shown below the Recent Call List.
- Round icons are used to represent the calls that are active on the phone.
- The color of each icon indicates the call status as follows:
 - Ringing (Red)
 - Active (Green)
 - Held (Yellow)
- When a call first enters the ringing state, a tooltip balloon is displayed over the call status icon.
- Hovering the mouse over an icon displays the tooltip balloon for the selected call.
- The following information is included in the tooltip balloon, based upon the type of call:
 - Line/Trunk Number
 - Connection Status
 - Calling Party/Called Party Identification
 - Time in current state
 - User-Defined Notes

2.3 Dial/Hangup Button

- The Dial/Hangup button is used to control the hookswitch function.
- When the phone is idle, the button shows the Dial icon.
- When the phone is busy, the button shows the Hangup icon.
- Pressing the Dial button initiates a call to the number entered in the Dial String field.
- Pressing the Hangup button disconnects the active call.

2.4 Speed Dial List

- The combo box next to the Dial button provides access to the Speed Dial list.
- Clicking on an entry in the Speed Dial list immediately generates a call to the selected number.

- Entries are added to the Speed Dial list through the Directory/Contact List/Personal windows.
- A right-mouse click on a Speed Dial entry opens a menu that provides access to the following functions:
 - Edit – Open the associated database entry for editing.
 - Dial – Place a call to the selected number.
 - Transfer Immediate – perform a blind transfer of the active call to the selected destination.
 - Transfer Supervised – initiate a supervised transfer of the active call to the selected destination.
 - Conference – initiate a conference call with the selected destination.
 - E-Mail – create a new e-mail message with the selected name as the intended recipient.
 - Delete – remove the selected entry from the Speed Dial list.

2.5 File Button

The File button provides access to functions for configuring the application and changing the view/UI mode. The functions available from the File button are as follows:

Preferences

Customize application-level configuration settings.

Call Log

Open a separate window to view the call history.

Directory

Open a separate window to view the Directory/Contact List/Personal Directory.

View

- Window** Change UI mode to Full Window mode.
- Phone Image** Display emulation phone image/control.

Links

SV8100 PCPro	Opens a PCPro Window if PCPro is installed on the machine.
CallTo: Setup	Opens a window Yes and No options for Enabling or Disabling the CallTo tag feature. When Enabled, the CallTo tag feature provides the ability to dial from a CallTo tag/hyperlink within a web page or MS Office document using the UC Desktop Application.
Highlight Dial	Starts the Highlight Dial process in the system tray. The Highlight Dial process can be turned on or off. When turned on, highlighting a number in any program will automatically dial the number from the UC Client.

Help

Contents and Index	Access the on-line help system by topic.
About	View the copyright notice and current revision of the UC Client.

Exit

Close the UC Client.

Phone Image

Open the emulation phone mode.

This same pop-up menu can be accessed by pressing the right mouse button while pointing at an open area within the toolbar.

2.6 Hold Button

- The Hold button places the active call on hold.
- The Hold button is only enabled when a call is active on the phone.

2.7 Function Toolbar

The **Function Toolbar** provides quick access to the most commonly used call processing functions. A function on the toolbar can be selected by using the mouse to click on the desired function button or pressing the associated hotkey sequence on the keyboard. If additional information is required to complete the operation, then a supporting menu is displayed requesting additional input from the user.

Individual buttons on the **Function Toolbar** become disabled if the function is not allowed for the current state of the telephone. For example, the **Answer** button is only enabled when a call is ringing on the telephone.

Available functions are:

- | | |
|---------------------------|--------------------|
| Add/Edit Note | Hold |
| Answer | Last Number Redial |
| Auto Callback | Night Mode |
| Auto Handset/Auto Headset | Page |
| Background Music | Park |
| Barge In | Phone Image |
| Callback Request | Phone Message |
| Call Redirect | Pickup Other Group |
| Conference | Quick Message |
| Custom Message | Record |
| Dial | Switch Login Mode |
| Directed Call Pickup | Transfer |
| Do Not Disturb | Unpark |
| Forward Calls | Voice Mail |
| Group Call Pickup | Voice Over |
| Hang Up | |

The operation of each of these functions is further described in [Section 1 Toolbar Functions on page 4-1](#).

SECTION 3 EMULATION PHONE MODE (PHONE IMAGE)

The Emulation Phone is an on-screen representation of a deskset that can be opened through the Window or Toolbar modes. This user interface option is provided to allow users access to telephony functions through individual key presses.

3.1 Emulation Phone Base Module

The base module for the emulation phone simulates a 24-button deskset, as shown in [Figure 3-6 Emulation Phone Base Module](#).

Figure 3-6 Emulation Phone Base Module



The emulation phone image operates in the same manner as a physical deskset, with the following exceptions:

- The LCD display does not support the double-height setting.
- The labels shown above the programmable keys are limited to six characters.

- The JogKey (Round, four-position control) does not provide the same functionality as the physical phone. The up and down sides of the control will open the volume adjustment bar, and the left side will bring up the redial number.

3.2 Emulation Phone Add-On Module

The Phone Image tab on the Preferences menu allows the user to specify an expansion module be included in the phone image. When this option is selected, an eight-button add-on module will be displayed, as shown in [Figure 3-7 Emulation Phone Add-On Module](#).

Figure 3-7 Emulation Phone Add-On Module



The add-on module operates in the same manner as the physical add-on module by providing eight programmable buttons to enhance the base module.

3.3 Emulation Phone DSS Module

The Phone Image tab on the Preferences menu allows the user to specify an attendant module be included in the phone image. When this option is selected, a 60-button DSS module will be displayed, as shown in [Figure 3-8 Emulation Phone DSS Module](#).

Figure 3-8 Emulation Phone DSS Module



- Each button on the DSS module includes two LEDs.
- The right LED is green and when lit indicates that a message is pending on the destination extension.
- The left LED is red and simulates a solid lit LED, as well as supporting all of the different flash rates that are available on the physical DSS module.
- The state of the red LED tracks the same conditions that affect the LED on the physical DSS module.

