

Introducing Alcatel PIMphony



Thank you for choosing the **PIMphony** application.

This Online Help will be offered to assist you in becoming familiar with the product. The organization and structure is summarized below.

The Online Help is divided into five (5) sections:

1. Introduction of the product, its functions and practical features.
2. Getting started with the application, which guides you through the early stages.
3. PIMphony Configuration for general information concerning viewing, pop-up and telephony settings.
4. Detailed user's guide for the six (6) main modules in the application:
 - Telephone, which is the main user interface.
 - Dialer, which appears as an icon in the tool bar.
 - Popup, which concerns the PIM.
 - The Mailbox, management of voice messages
 - The Assistant, call routing
 - The Supervision window.
5. Miscellaneous, which includes a glossary, instructions in the event of technical problems, etc.

Introduction

The **PIMphony** application is a personal productivity tool installed on an office PC, configurable using the Wizard (Configuration).

If your telephone configuration is as follows:

- A PCX (PBX system) from the **Alcatel OmniPCX Office** line, and
- The Personal Information Manager (**PIM**) software is installed on your PC,

the **PIMphony** application will provide the interface between your telephone system and your PIM.

The voice message may be carried in two different ways:

- Over a telephone line, to which a phone set is connected.
- Over a data network (LAN). In this case, a multimedia PC equipped with a sound card, microphone and speakers, is used, . This is IP mode.

NOTE: the term "telephone set" is used in the same way for a standard telephone installation and for an IP mode configuration.

IP mode

Audio

After installation of the application, it is important to use the following settings in order to optimize the audio quality:

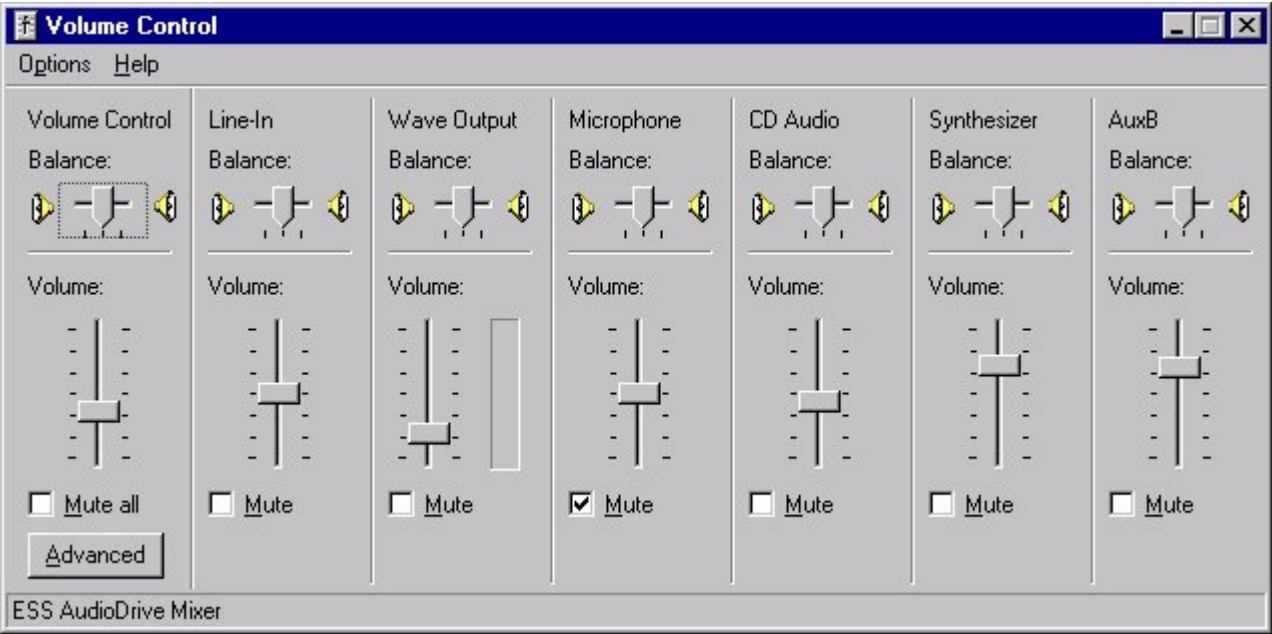
- **Choice of codec G711 or G723 (see the installation manual):**

The choice of codec algorithm is determined by how **PIMphony** is connected: if connecting to a LAN, G711 must be used; when connecting remotely it is more effective to select G723.

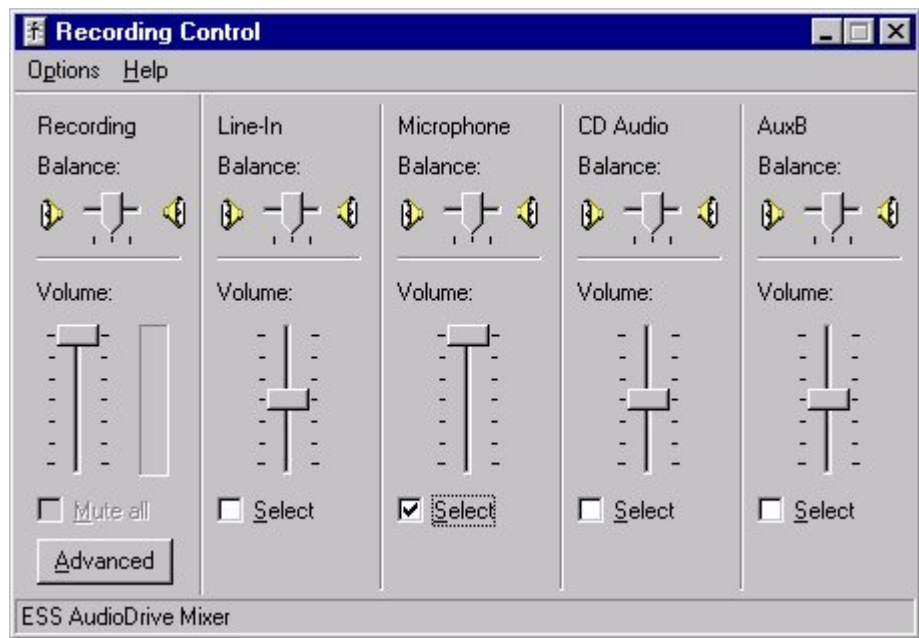
- **Volume setting:**

You have access to the volume setting window using the **Configuration/Volume control** menu in PIMphony. Audio volume control is set by configuring the Listen or Record parameters, which are accessible via the **Options/Properties** menu in the **Volume Control** window. Below are recommendations for proper PIMphony operation.

Listen: It is preferable to de-activate everything except the "Volume Control" and "Wave output." Setting of these two parameters enables you to increase or decrease the speaker volume output, and in turn, to adjust the volume of your caller's voice.



Recording: It is preferable to de-activate everything except the "Microphone" and the "Recording Control." Setting these two parameters enables you to increase or decrease your microphone sensitivity; setting them low reduces background noise generated by your environment.



- For remote-worker configurations, the number of simultaneous calls depends upon the available bandwidth; guidelines are presented in the table below:

Number of simultaneous calls	Bandwidth dedicated to voice and connection (Kbps)
2	64
4	128
6	256
8	512

Profiles

This application is offered with three different profiles: **PIMphony Basic**, **PIMphony Pro**, and **PIMphony Team**.

The table below summarizes the feature set for each profile:

	Basic	Pro	Team
Telephone mode	•	•	•
Interface with PIM (Popup)		•	•
Voice mailbox		•	•
Superviser mode			•
Assistant mode			•

The benefits of Alcatel PIMphony include:

- Enhanced and userfriendly management of your telephone calls (on the screen)
- Use of the PIM's:
 - MS Outlook 97/98 or more recent
 - Goldmine 4.0 or more recent
 - ACT! 4.0 or more recent
 - MS Access 97/98 or more recent
- An individual directory supplied standard with the application which can operate even without the PIM
- A voice mail system
- Supervision and call distribution functions.

The Main functions are:

- Call management (holding, transfer, conference, etc.),
- Search using a telephone number in the PIM database to identify the corresponding name, and vice-versa,
- Management by copy-paste and drag-and-drop capability (name or number) for use in applications such as Notepad, Word, Excel, etc,
- An automatic PIM window Popup facility, as a function of predefined criteria or on request,
- Customized Popup configuration, using a wizard,
- Synchronization with the PIM contacts database,
- Storage of calls and management of the Calls log,
- Message recording, management and re-directing
- **PIMphony** Central Services.

 [Introducing Alcatel PIMphony](#)

Getting started with Alcatel PIMphony

If you are just starting to use the **PIMphony** application, then this section is for you:

- In it you will find descriptions of the operations that are required the first time the application is run.
- In the form of a short tutorial, there are examples on how to implement the main functions. This serves to guide you through the early phases of learning and also provides a check that the installation is correct.

The range of functions accessible through the Start menu enables you to consult the "Read Me" file, the on-line help or the manual, and to configure and launch the application.



Introducing Alcatel PIMphony

Running Alcatel PIMphony for the first time

To run the **Alcatel PIMphony** application for the first time, proceed as described below:

1 - Running Alcatel PIMphony

- From the PIMphony icon, on the office PC (if you answered yes to this parameter, during installation).
- From the Windows taskbar: click on **Start** and then select **PIMphony** in the **Programs/Alcatel PIMphony** menu.
- When PIMphony is first started, the **PIMphony Configuration Wizard** screen is displayed. Follow the instructions and select the configuration mode required.
- In "**I want to use a physical set**" mode, you are asked to enter your phone set number.
- In "**I want to use a Multimedia Pc based Set**" mode, you are configured in IP mode.

2 - Synchronization of PIMphony with the PIM

- The first time the Telephone module is run, the application is synchronized with the PIM contacts base (if used with Outlook 97/98/2000). This operation can take several minutes.

3 - Configuring Popup using the Wizard

- The Popup Wizard helps you configure automatic Popup operation and can configure the Popup as a function of predefined profiles.
- Follow the instructions on the screen and select the configuration which corresponds to your requirements (from the predefined profiles).

4 - Display of Telephone and Dialler

- The [Telephone module main window](#) is displayed.
- The Dialer icon is displayed in the tool bar, indicating that the PC-Telephone connection is active.

5 - Tutorial

- We recommend that you practice the simple operations described in the [Tutorial](#), to get to know the application and check that the main functions are available.



[Getting started with Alcatel PIMphony](#)

Tutorial

The tutorial guides you through your initial contact with the **PIMphony** application. It also provides a check that the application was correctly installed and that the main functions are available.

Four simple operations are covered:

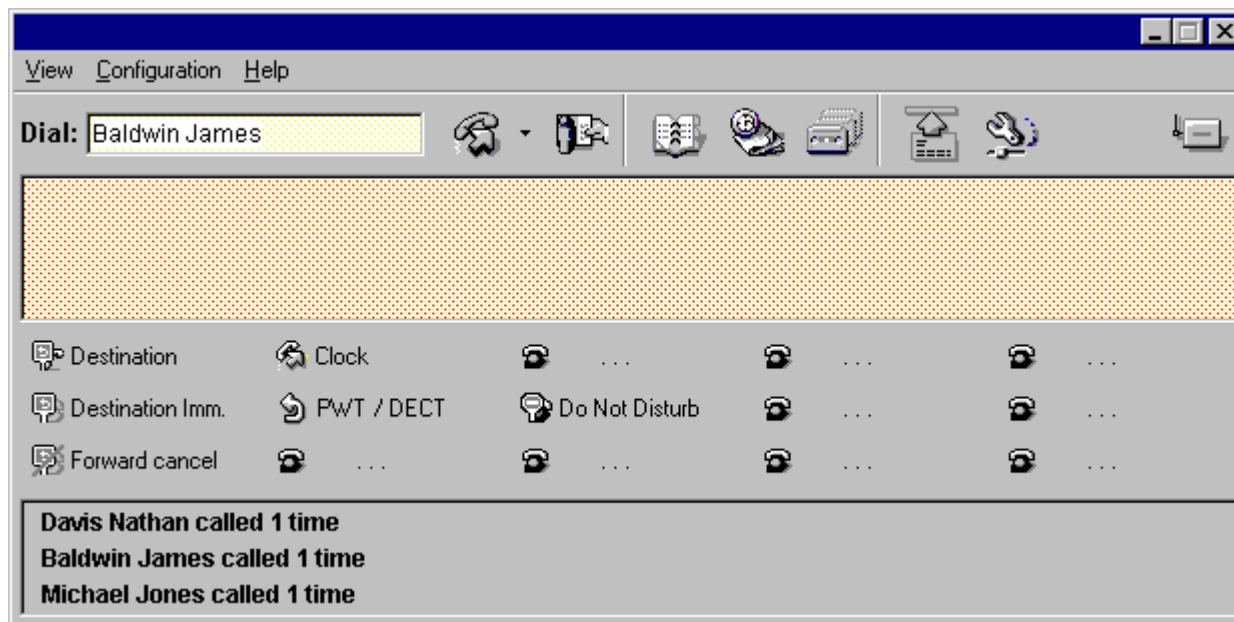
1. [Making a call using the Telephone](#)
2. [Making a call using the Dialer](#)
3. [Automatic Popup of the PIM entry corresponding to an incoming call](#)
4. [PIMphony Team in Assistant mode](#)



[Getting started with Alcatel PIMphony](#)

Making a call using the Telephone module

In the example below, you are going to make a call using the Telephone module.



1. On the keyboard, enter the name or number of the person you wish to call in the entry window (for example **77895**).
2. When the first few letters have been entered, the name is completed from the PIM contact list or - if the contact manager is not installed - from the one in the personal directory.



3. Click on , to dial the number.

4. The call status and management window is as shown below.



-  indicates that the call is "ringing" (unanswered).

- Control icon  indicates that the only action available is "terminate call".

5. When the call is answered and during the conversation, the call status and management window is as shown below.



6.  indicates that the call is connected.

- Possible actions are indicated by the control icons: "terminate call" , "put on hold" , "transfer"  and "conference" .

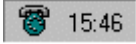
7. You can lift your receiver and speak to the person called.

 [Alcatel PIMphony tutorial](#)

Making a call using the Dialer module

In the example below, you are going to make a call using the Dialer module.



1. First, check that the CTI link is in "connected" mode. The icon should look like this .
2. Right-click on the Dialer icon.
3. In the context menu, click on the "Dial" command. The **New Call** window opens.
4. Now either:
 - Enter the number, or
 - Perform one of the [Windows actions](#).
5. Modify the number if necessary.
6. Click on  and the number is dialed.
7. The Telephone window appears, if it was previously closed.
8. The call status and management window shows the call status, the name of the person called and possible actions.

9. When your call is answered, you are in contact with the person called.

 [Alcatel PIMphony tutorial](#)

Showing a Popup entry

This action enables you to check the operation of the Popup that you configured during the installation.

In the example below, we shall consider that the Popup is configured to show an entry for the first incoming call.

1. Ask a colleague for whom you have an entry in your PIM, or in your Personal directory, to call you.
2. Check that the call entry appears on the screen, in the way that you defined.

 [Alcatel PIMphony tutorial](#)

PIMphony Team in "Assistant" mode

The following incoming call scenario will show you the advantages of PIMphony Team in "Assistant" mode.

This configuration enables handling of a large number of incoming calls while optimizing and improving caller reception because of the user-friendly interface.

The scenario described shows the operation with "Unsupervised transfer" configured under the **Assistant** configuration tab.

When a call reaches your phone set, caller identification (if supplied by the network), the name (if the caller is entered in your PIM) or the caller number is displayed in the **Calls** window.

After replying, you may transfer this call using the following methods:

- Using the "Favorites" tab in the **Information** window to direct the caller to the same person the caller already asked for on a previous call;
- Using the "Colleagues" tab in the **Information** window to transfer the caller to the colleague of a favorite;
- Using the Supervision views to transfer the caller to a person in the telephone system;
- Using the "Dialing" window to select a person and transfer the caller to one of the numbers for this person.

In the "Calls window," you may also consult all the calls directed to your telephone and define the alarm thresholds for queuing calls.

"Favorites" Tab

ConfigurationView



Calls

 Davis, Nathan00:37

Information

 Favorites Colleagues Speed Dial

Name	Last Call Date
Carey, Maria	3/22/01
 Miller, Charlie	3/22/01 
Richie, Lionel	3/22/01

Dialing

Dial: 

 BusinessAssistant

Status: Forwarded

Immediate Forward to Sinatra Frank

Department:Email Address:

Phone SetsPersonsMarketingAdministration

Eley Carla

Carey Maria

 Miller Charlie

Richie Lionel

file:///C:/tmp/~hhC7E1.htm

15/03/04

If the caller has already called at least once, the **Favorites** tab shows the last persons to whom he was re-directed. These calls may be sorted by date or by number of transfers.

For example, if Mr Davis asks for Charlie Miller, you may:

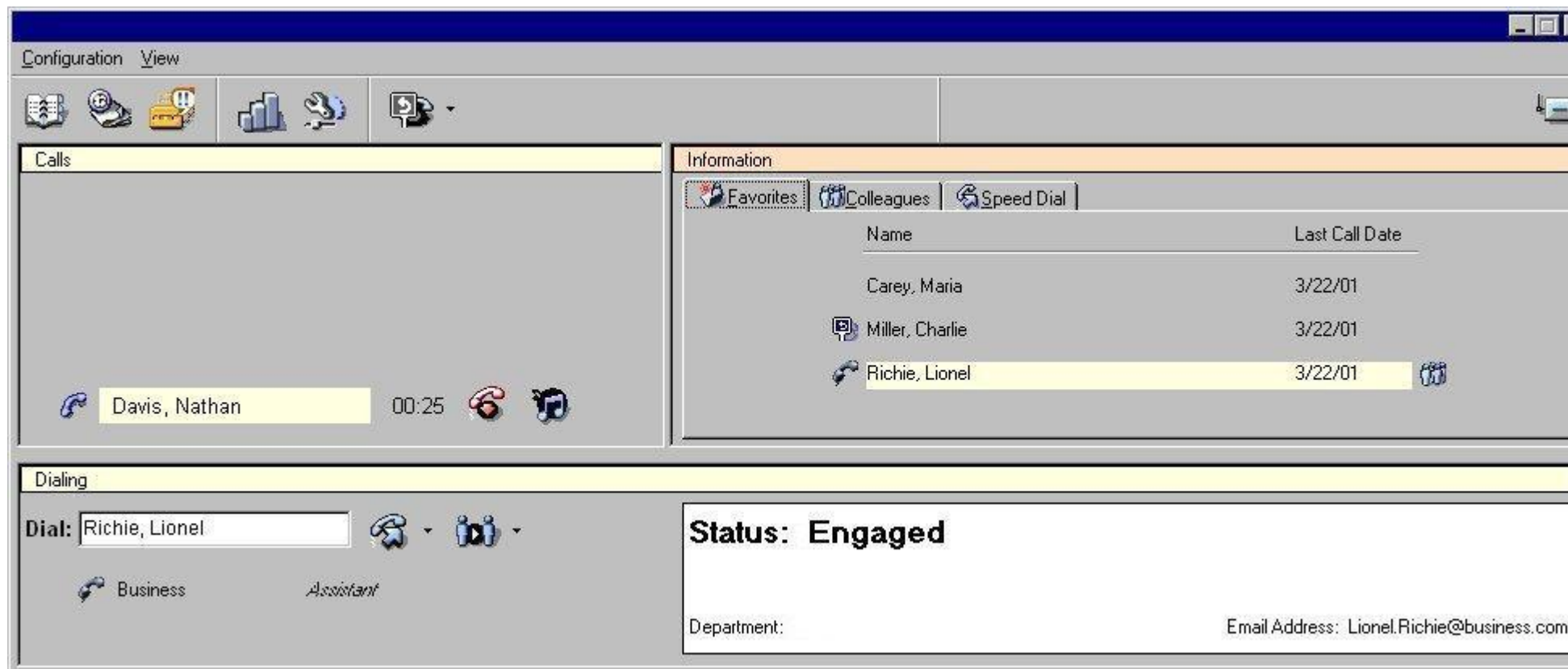
- Transfer the caller by double-clicking on the name of the person requested
- Check his station status in the supervision window
- Check his station status in the **Dialing** window by clicking once on his name under the **Favorites** tab
- Check his status under the **Favorites** tab.

The information given in the **Dialing** window shows the complete status of Mr Davis' phone.

- His telephone status: forwarded;
- The status of the main set ("Business") with the message "Immediate Forward to SINATRA Frank";
- The telephone engaged status of his assistant ^{*};
- His mobile number ^{*};
- As well as other numbers (PWT/DECT, Pager, etc.), department, his e-mail ^{*}.

^{*} This information is only displayed if it was previously entered in the person file.

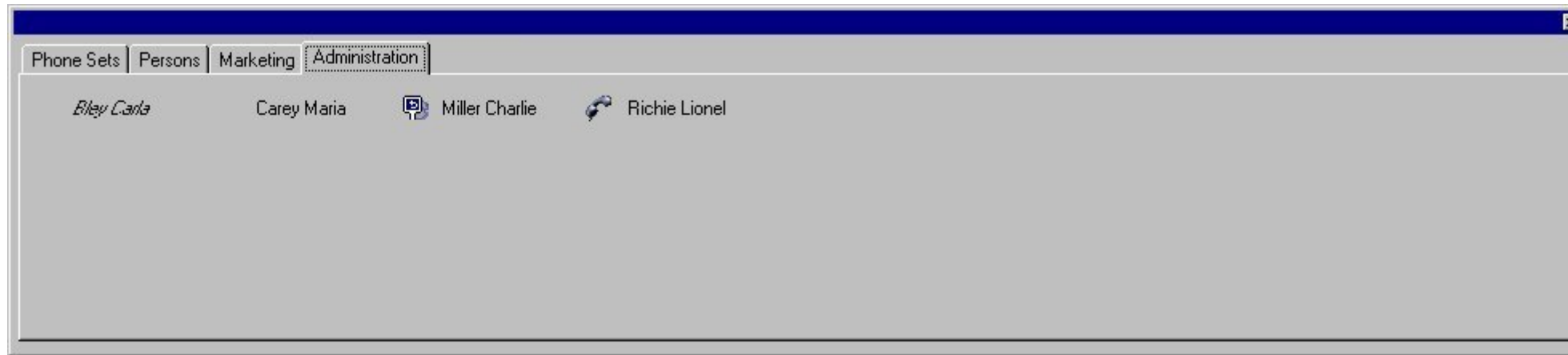
"Colleagues" Tab



The **Colleagues** tab enables you to see up to 4 persons belonging to the same supervision view as the current favorite. In the same way as above, you may, with a single click, consult the status of a colleague's station.

Double-clicking on a colleague also enables you to transfer the caller to the colleague.

Supervision view



This window shows you, at a glance, the supervision views that you have defined. A view may represent, for example, a division, a department or a group of persons.

The supervision view selected enables you to consult the telephone status of the persons in it. You can transfer the caller to any of the persons in the view with a single click.

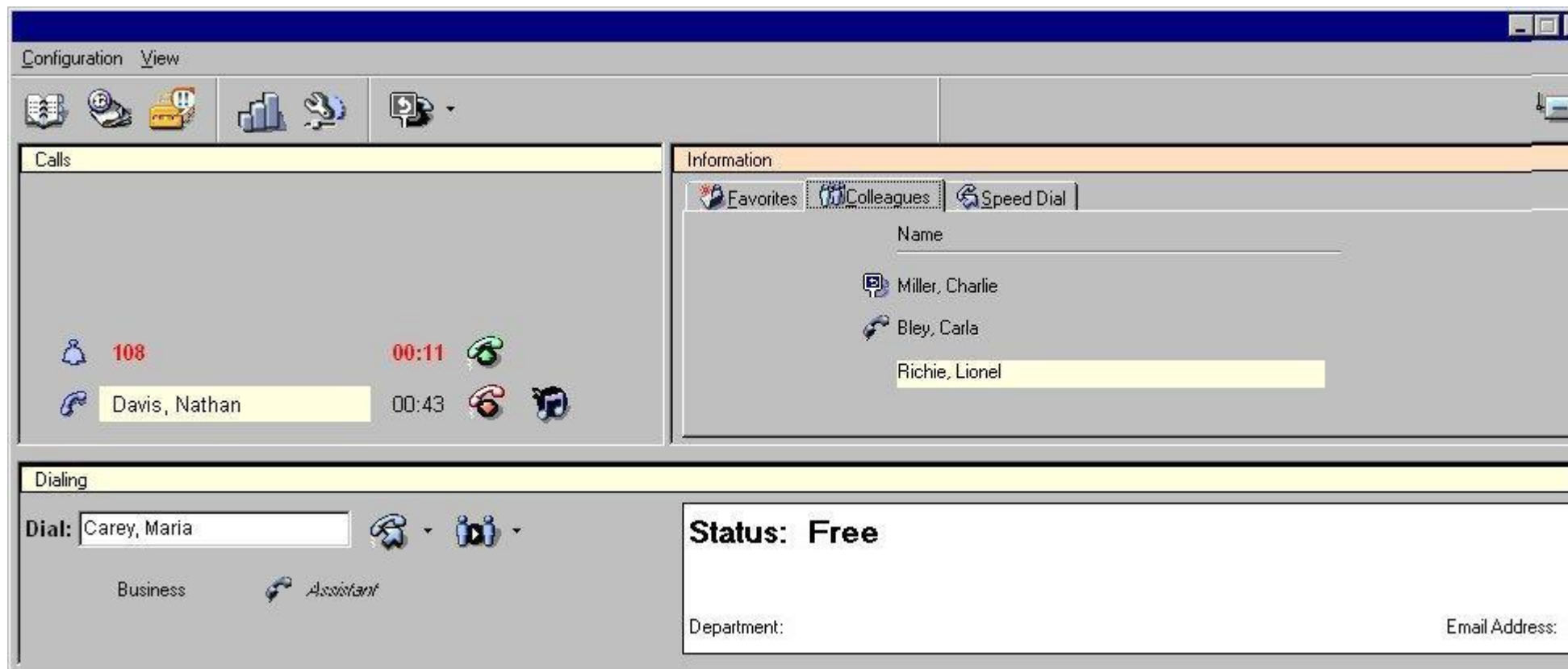
"Dialing" window



You may also use the **Dialing** window to dial by name directly. The name entered is searched for in your PIM. It may be that of:

- A person in the system: in this case, you can consult his telephone status as described above and make the transfer;
- An outside person, defined in the PIM: this enables you to transfer the incoming caller to a person who does not belong to your telephone system.

Waiting calls window



The **Calls** window shows you all waiting calls. You may define the alarms (waiting time in seconds) as you require; In our example, the second call has reached the alarm threshold.

Remark: you may answer a waiting call at any time.

 [Getting started with Alcatel PIMphony](#)

Functions accessible from the Start menu

The following information is available with **Alcatel PIMphony**:

- Consult the manual by clicking the **Start** button on the Windows taskbar and selecting **Alcatel PIMphony Help (pdf)** from the menu **Programs/Alcatel PIMphony**.
- Consult the on-line help by clicking the **Start** button on the Windows taskbar and selecting **Alcatel PIMphony Help** from the menu **Programs/Alcatel PIMphony**.
- Use the **PIMphony** Configuration Wizard by clicking on the **Start** button in the Windows taskbar, and then selecting option **PIMphony Configuration Wizard** from the **Alcatel PIMphony Programs** menu.
- Consult the "Read Me" file by clicking the **Start** button on the Windows taskbar and selecting **Read Me** from the menu **Programs/Alcatel PIMphony**.
- Configure **PIMphony** by clicking the **Start** button on the Windows taskbar and selecting **PIMphony Configuration** from the **Programs/Alcatel PIMphony** menu.
- Launch the application by clicking the **Start** button on the Windows taskbar and selecting **PIMphony** from the menu **Programs/Alcatel PIMphony**.
The application can also be launched by clicking the corresponding desktop icon, if installed.
- Uninstall **PIMphony** by clicking the **Start** button on the Windows taskbar and selecting **unInstall Alcatel PIMphony** from the menu **Programs/Alcatel PIMphony**.

 [Getting started with Alcatel PIMphony](#)

Configuring PIMphony

The **PIMphony** Configuration window can be accessed:

- By clicking the **Start** button on the Windows taskbar and selecting **PIMphony Configuration** from the menu **Programs/Alcatel PIMphony**
- Via the Configuration menu in the **Alcatel PIMphony** window
- Via the control button .

Each of the above methods opens the [PIMphony main Configuration window](#). The tab corresponding to the call source used is the one activated.

 [Introducing Alcatel PIMphony](#)

Main PIMphony Configuration window

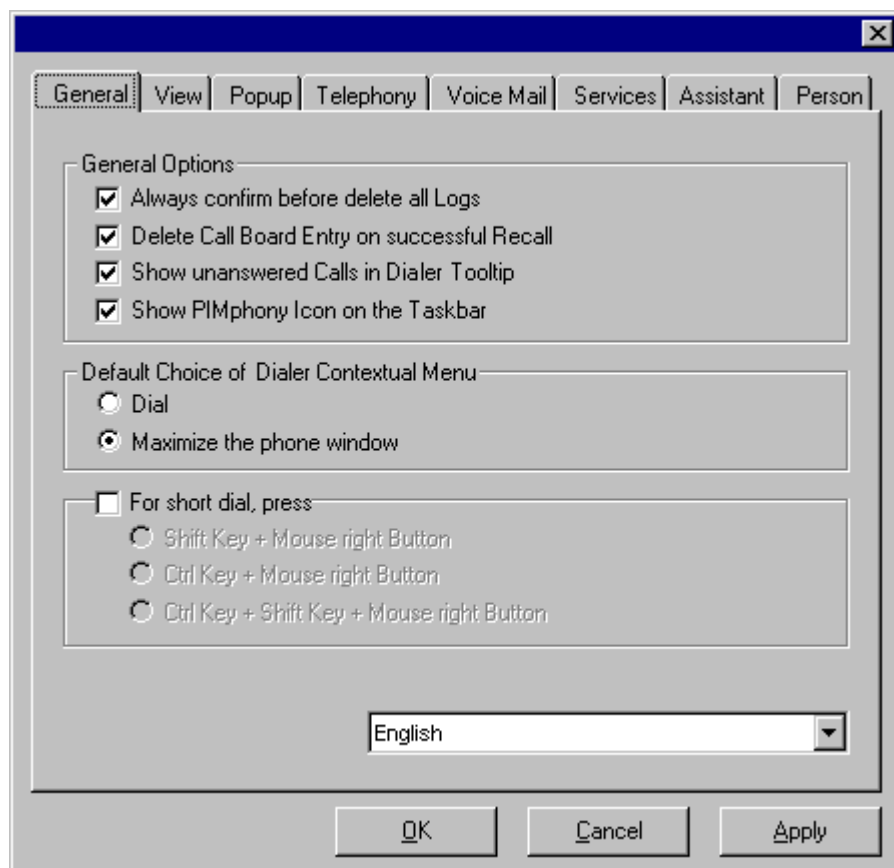
The main **PIMphony Configuration** window is used for setting:

- The general options, the function of the mouse right-hand button, the short dial and the choice of language via the [General](#) tab
- The telephone module, the Telephone bar and the visual parameters via the [View](#) tab
- The PIM driver and the Popup configuration via the [Popup](#) tab
- The service provider, associated line, localization details, dialing options via the [Telephony](#) tab
- Access and voice mail options via the [Voice mail](#) tab
- The PIMphony Central Services and the call log via the [Services](#) tab
- Access to and the function options for statistics, call activation, transfer and favorites via the [Assistant](#) tab
- Customization of the telephone number label, and contacts synchronization in the PIM via the [Person](#) tab



"General" tab

Below is the "General" tab from the **PIMphony Configuration** main window.



The tab consists of three areas and a pull-down list as described below.

"General Options" window

This window is composed of checkboxes used to activate the following functions:

- **Always confirm before delete all logs (default: active)**

In the call journal, a confirmation message will be shown each time the base total delete icon is pressed.

- **Delete call board entry on successful recall**

Each caller who was unsuccessful in trying to call you is displayed in the unanswered calls window. Calling these numbers erases them from this window.

- **Show unanswered calls in dialer ToolTip (default: active)**

When you move the cursor over the dialer, a ToolTip pops up to display the number of unanswered calls received. The details relating to these calls are shown in the unanswered calls window. However, if no calls are entered, the ToolTip gives the extension number concerned. The Dialer icon changes state (no message, message, etc.).

- **Show PIMphony icon on the Taskbar**

The **PIMphony** icon will be shown on the Taskbar.

"Default choice of dialer contextual menu"

This area contains the radio buttons used to select one mode or another:

- **Dial**

Clicking the mouse left button on the **PIMphony** status icon activates the Dialler module.

- **Maximize the phone window (default: active)**

Clicking the mouse left button on the **PIMphony** status icon activates the **PIMphony** window.

"For short dial, press"

To activate this area, check the box. The area contains radio buttons used to select from the different modes.

- **Shift key + mouse right button**

After Copying or Pasting a telephone number, pressing the Shift key + mouse right button activates the Dialer incorporating the previously selected number.

- **Ctrl key + mouse right button**

After Cutting or Pasting a telephone number, pressing the Ctrl key + mouse right button activates the Dialer incorporating the previously selected number.

- **Ctrl key + Shift key + mouse right button**

After Cutting or Pasting a telephone number, pressing the Ctrl + Shift + mouse right button activates the Dialer to incorporate the previously selected number.

PIMphony language configuration

The pull-down list presents the languages which can be used for **PIMphony**.

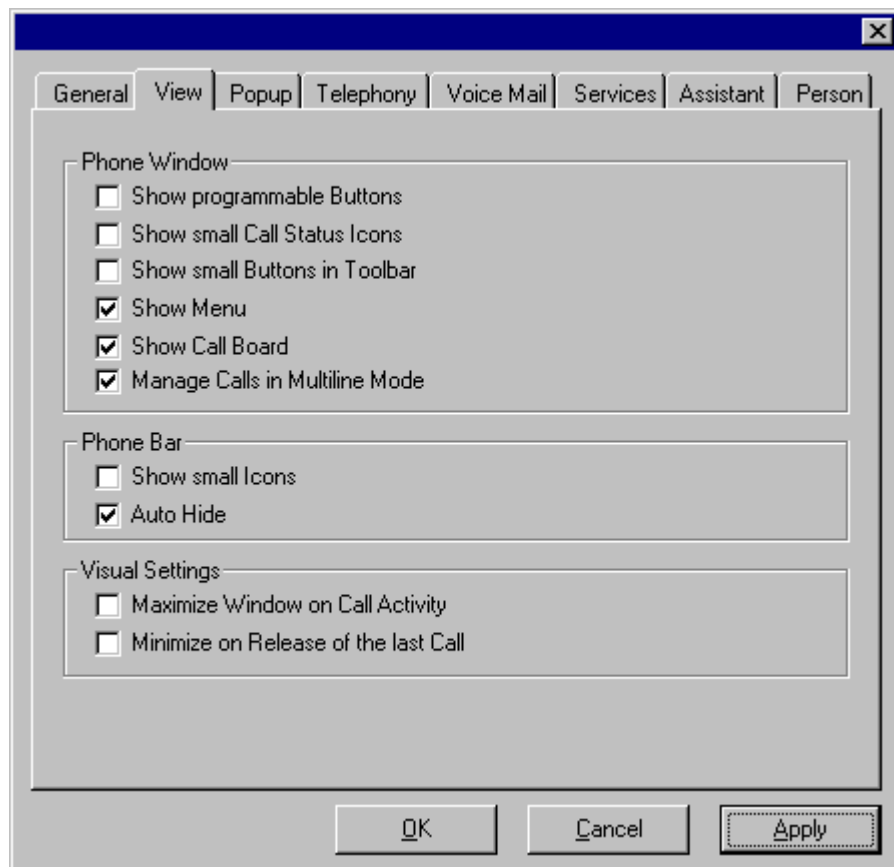
NOTE: After changing the language, you have to close and reboot **Alcatel PIMphony** to obtain the desired version.



Main PIMphony Configuration window

"View" tab

Below is the "View" tab (default presentation) from the main **PIMphony Configuration** window.



The tab consists of the following three areas.

"Phone window"

This area contains the checkboxes used to validate the corresponding functions:

- **Show programmable buttons**

In the main telephone module window, it is possible to display 15 programmable buttons. Pressing one of these buttons will automatically start the preprogrammed function (direct call, transfer, etc.)

- **Show small call status icons**

In the main telephone module window, the control or call status icons may be displayed in two formats: the default "large," and "small" when this function is checked.

- **Show small buttons in toolbar**

In the main telephone module window, the control bar icons may be displayed in two formats: the default "large," and "small" when this function is checked.

- **Show menu (default: active)**

In the main telephone module window, the "View," "Configuration" and "Help" menus may be displayed. These menus gives access to the on-line Help function, configuration parameters, directory, log, etc.

- **Show call board**

The identification of each caller who has tried to contact you unsuccessfully is displayed in the show call board window.

- **Manage calls in multiline mode (default: active)**

Multiline mode is used to validate such functions as call transfer or conference for already established calls.

Example:

You are speaking to two different callers and you click on the call transfer icon.

- If multiline mode is checked, the two callers are connected to one another by call transfer.
- If multiline mode is not checked, **PIMphony** asks you to dial a third number in order to transfer the current caller.

"Phone bar"

This area contains the checkboxes used to validate the corresponding functions:

- **Show small icons**

In the phone bar, the icons may be displayed in two formats: the default "large," and "small" when this function is checked.

- **Auto Hide (default: active)**

When this function is checked, the phone bar is masked when **PIMphony** is no longer in use. To show the bar again, position the cursor at the top of the screen.

"Visual Settings"

This area contains the checkboxes used to validate the corresponding functions:

- **Maximize window on call activity**

You can de-activate the telephone module main window by clicking on  or the phone bar by clicking on . In this case, this operation activates **PIMphony** when there is an incoming call. This also applies if the window is simply masked by another application.

- **Minimize on release of the last call**

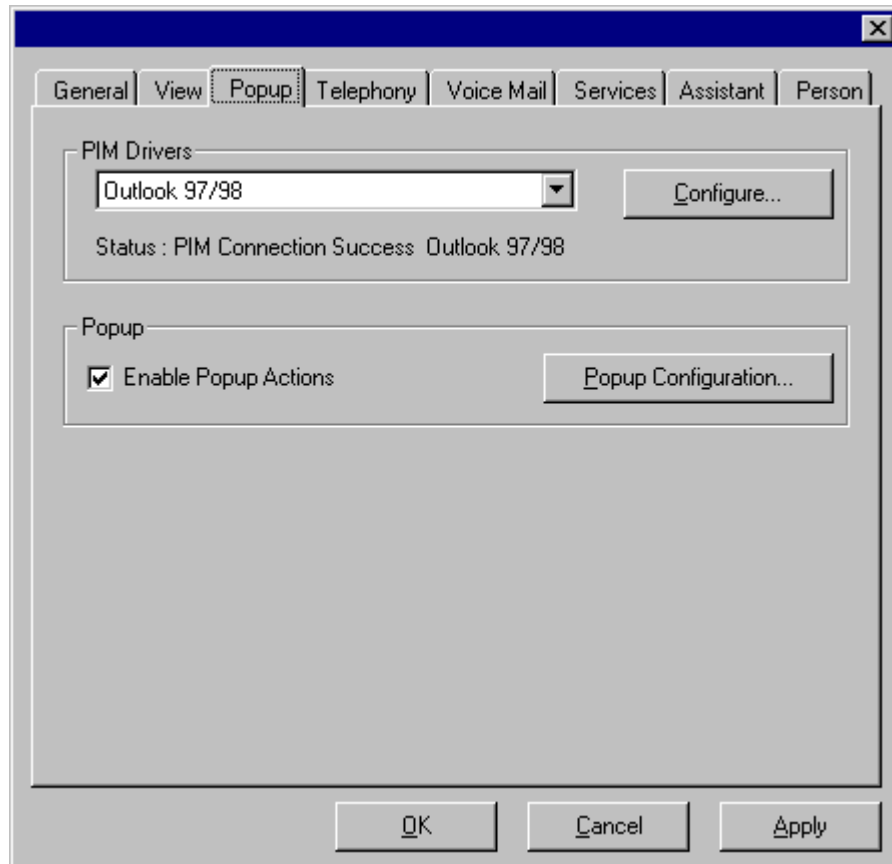
This function, closes the **PIMphony** main window at the end of the call, which is then displayed as an icon.



PIMphony main Configuration window

"Popup" tab

Below is an example of the "Popup" tab located in the main **PIMphony Configuration** window.



The tab consists of two areas as described below.

"PIM drivers"

This area contains:

- **A pull-down list**

Used to select the PIM used by PIMphony from among:

- Outlook 2000

- Outlook 97/98
- ACT!
- GoldMine
- Access 2000
- Access 97
- Personal List: if you wish to use the PIMphony address book
- None: if no Personal Information Manager is used

- **The "Configure" control button**

When active, this button calls the configuration window of the PIM selected in the pull-down list.

This offers the following actions:

- For Outlook 2000: Selection of a maximum of 16 contact files.
- For Outlook 97/98: Selection of a maximum of 16 contact files, reinitialization of the PIM, synchronization of the application and the PIM.
- For ACT! A login and password must be entered to identify the user.
- For GoldMine: A login and password must be entered to start the PIM automatically.
- For Access 97/2000: Selection of a database. Last name, First name, Key, Phone numbers fields must be entered.

NOTE: If the user wishes to use the data provided by Access 2000, it must be installed.

On the other hand, installation of MS Access 97 is not necessary in order to use the databases provided by it.

- **A status field**

Which shows the status of the link with the PIM selected (connected, connection impossible).

"Popup"

This area is composed of:

- **A checkbox to activate the Popup function**

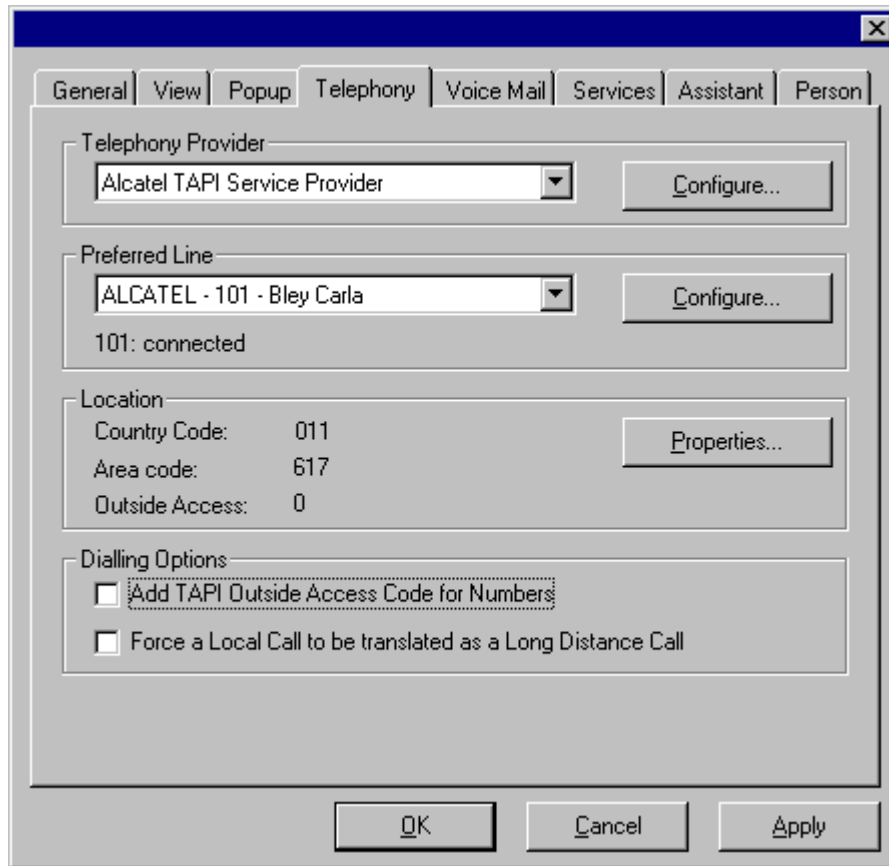
- **The "Popup configuration" control button**

For configuring the Popup actions using the [Popup Configuration](#) window.

 PIMphony main Configuration window

"Telephony" tab

Below is the "Telephony" tab from the main **PIMphony Configuration** window.



The screenshot shows the "Telephony" tab of the PIMphony Configuration window. The window has a title bar with a close button (X). Below the title bar is a tabbed interface with the following tabs: General, View, Popup, Telephony (selected), Voice Mail, Services, Assistant, and Person. The "Telephony" tab contains several sections:

- Telephony Provider:** A dropdown menu showing "Alcatel TAPI Service Provider" and a "Configure..." button.
- Preferred Line:** A dropdown menu showing "ALCATEL - 101 - Bley Carla" and a "Configure..." button. Below the dropdown, it says "101: connected".
- Location:** A section with three labels and values: "Country Code: 011", "Area code: 617", and "Outside Access: 0". There is a "Properties..." button to the right.
- Dialling Options:** A section with two checkboxes:
 - ☐ Add TAPI Outside Access Code for Numbers
 - ☐ Force a Local Call to be translated as a Long Distance Call

At the bottom of the window are three buttons: "OK", "Cancel", and "Apply".

The tab consists of the five following windows.

"Telephony provider"

This area contains:

- **A pull-down list**

Used to select the access provider used by **PIMphony** from among the different options.

"Preferred line"

This area contains:

- **A pull-down list**

For selecting the telephony access used by **PIMphony** from among the different options. You may consult the Installation Manual for more in-depth explanations regarding the choice of line used.

- **The "Configure..." control button**

For configuring the line selected (configuration is carried out by **PIMphony** when it is installed).

- **A status field**

Which shows the status of **PIMphony** in relation to the line selected (disconnected, connected).

"Location"

This area contains:

- **Information fields**

Which show the country and area codes as well as the outside access prefix programmed into the dialing properties.

- **A "Properties" control button**

Used to access the dialing properties configuration.

"Dialing options"

This area contains:

- **An "Add TAPI outside access code for numbers" checkbox**

Which automatically adds the prefix used for outside calls (PCX outgoing call prefix) to all numbers higher than the figure programmed in the next field.

- **A "Force a local call to be translated as a long distance call" checkbox**

Used to force **PIMphony** into dialing in long distance call mode.

"External handset on port"

This windows is composed of:

- **A checkbox "External handset on port"**

Which automatically opens a pulldown list (this checkbox is only accessible in an IP configuration).

- **A pulldown list**

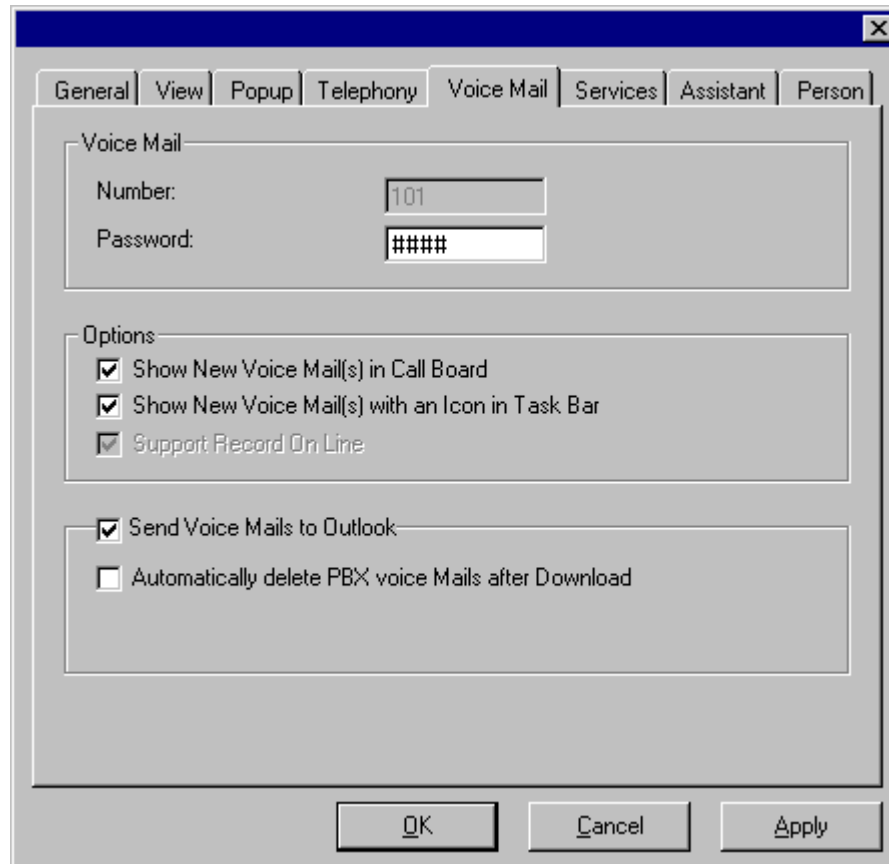
Used to select the communication port to which the telephone set is connected.



PIMphony main Configuration window

"Voice mail" tab

Below is the "Voice mail" tab from the main **PIMphony Configuration** window.



The tab is comprised of the following three windows.

"Voice mail"

This area is composed of two lines:

- **Number**

To be entered automatically (supplied by the system).

- **Password**

When entered here, avoids having to enter the password each time the user wants to access the Visual Mailbox.

"Options"

This window is composed of checkboxes to activate the corresponding functions:

- **Show new voice mail(s) in Call Board**

Used to inform the user that there are new messages in the unsuccessful calls window.

- **Show new voice mail(s) with an icon in Task Bar**

Used to show the new messages icon on the Dialer module.

- **Support record on line**

Used to activate the "Record conversation" mode.

"Send voice mails to Outlook"

The window is composed of checkboxes which activate the corresponding functions:

- **Send voice mail to Outlook**

Used to send the message to Outlook, as an attachment, if the **PIMphony** application is open.

NOTE:

Outlook must be the e-mail client on the PC.

In order to avoid saturating the PCX with messages, we recommend that PIMphony messages first be copied into Outlook, and then deleted from the PCX. It is also possible to activate the option: **Automatically delete PBX voice mails after download**.

It should also be noted that certain specific functions of Outlook are not operational; this is the case with the automatic re-routing function.

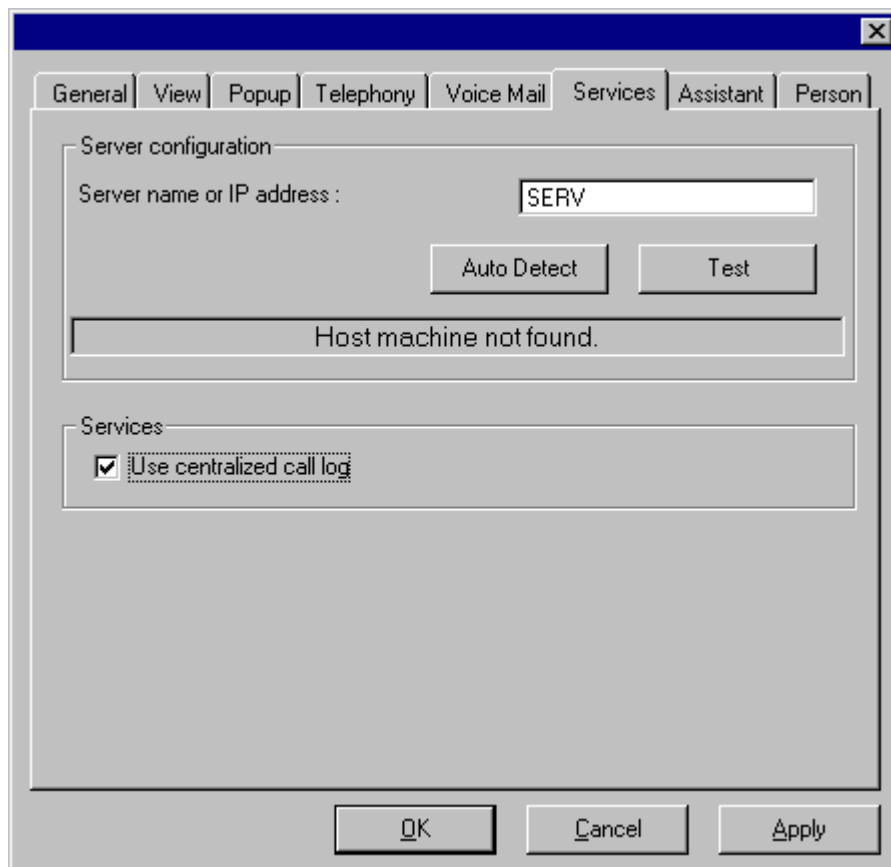
- **Automatically delete PCX voice mails after download**

Which is used to delete the PCX message after it has been sent to Outlook. This message will no longer appear in the messages window. This message may only be heard on the PC, and no longer on the telephone set.

 [PIMphony main Configuration window](#)

"Services" tab

This is the "Services" tab in the main **PIMphony Configuration** window.



The tab is composed of the following two areas.

"Server configuration"

This area has four boxes:

- **Server name or IP address**

The server name or IP address must be entered if use of **PIMphony** Central Services is required .

- **Auto Detect**

Automatic server search.

- **Test**

Used to test the connection with the server.

- **Test result**

Shows the result of the server connection test.

"Services"

This area is composed of a checkbox:

- **Use centralized call log**

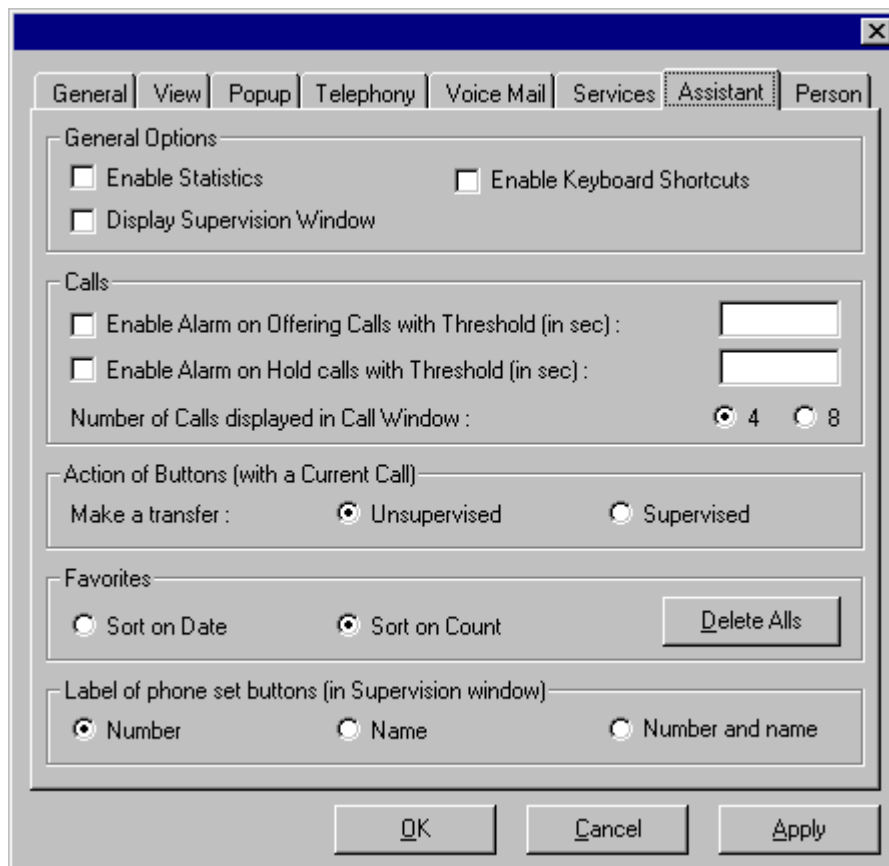
This function is used to activate the centralised call log proposed by **PIMphony**.



PIMphony main Configuration window

"Assistant" tab

Here is the "Assistant" tab from the **PIMphony Configuration** main window.



The tab is composed of the five windows described below.

"General options" window

This window has boxes which are selected in order to activate the corresponding functions:

- **Enable Statistics**

Used to compile statistics on calls received. These statistics are exported in .csv format (data files which can be used by other applications).

- **Display Supervision Window**

Used to display the supervision window.

- **Enable Keyboard Shortcuts**

See [Keyboard shortcuts](#).

"Calls" window

This window contains boxes which are selected in order to activate functions, and radio buttons to choose between one mode or another:

- **Enable Alarm on Offering Calls with Threshold (in sec)**

Activation of a visual alarm based on a threshold expressed in seconds.

- **Enable Alarm on Hold calls with Threshold (in sec)**

Activation of a visual alarm based on a threshold expressed in seconds.

- **Number of Calls displayed in Call Window**

Used to select the number of calls shown simultaneously (4 or 8) in the Calls window.

"Action of Buttons (with a Current Call)" window

This window is composed of buttons which enable choice of one mode or another:

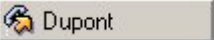
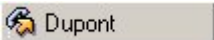
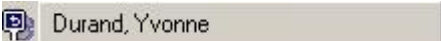
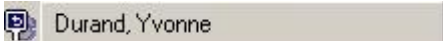
- **Make a Transfer: Unsupervised / Supervised**

Used to choose the transfer mode, either direct mode (Unsupervised), or with transfer follow-up (supervised mode).

- Unsupervised mode means a definite transfer. Unsupervised mode is the default mode.
- Supervised mode means a transfer with two separate steps: call to the target recipient, and then the transfer of the active call to the party (it is possible to cancel the forwarding).

Summary table of the possible ways to do a transfer in assistant mode (with an active call).

Supervised mode	Unsupervised mode
-----------------	-------------------

	Dialing and click on the "Transfer" button 
Dialing: click on the "Dial" button  then click on the "Transfer" button  (once the second call is in ringing state or in communication state)	
Click on a programmable button in the Speed Dial tab  Dupont then click on the "Transfer" button 	Click on a programmable button in the Speed Dial tab  Dupont
Click on a button in "Favorites," "Colleagues," or "Redial" tab  101 10/8/2003 then click on the "Transfer" button 	Double click on a button in "Favorites", "Colleagues" or "Redial" tab  101 10/8/2003
Click on a button in the supervision window  Durand, Yvonne then click on the "Transfer" button 	Click on a button in the supervision window  Durand, Yvonne

"Favorites" window

This window is composed of buttons used to set the **Favorites** window display:

- **Sort on Date**

For a calls, shows most recently contacted favorite persons.

- **Sort on Count**

For a calls, shows most frequently contacted favorite persons.

- **Delete All**

Re-set favorites.

"Label of phone set buttons (in Supervision window)"

This window contains buttons used to set the buttons display in the **Phone Sets** tab of the **Supervision** window:

- **Number**

Displays the phone sets connected to the PCX.

.

- **Name**

Displays the names of the PCX station users.

- **Number and name**

Displays the names and numbers of the .



PIMphony main Configuration window

"Person" tab

This is the "Person" tab of the **PIMphony Configuration** main window

General View Popup Telephony Voice Mail Services Assistant Person

Phone numbers label

BusinessPhone: Business

BusinessPhone2: Business2

MobilePhone: Mobile

HomePhone: Home

PagerPhone: Pager

OtherPhone: Other

AssistantPhone: Assistant

Update contacts in PIM

Contact Folder : Synchronize

OK Cancel Apply

The tab is composed of the following two windows.

"Phone numbers label" window

This window has seven lines used to change the syntax for each of the different telephone numbers. These labels are to be found in the [person files](#).

"Update contacts in PIM" window

The window is composed of:

- A "Contact Folder" line:

Used to define the folder of contacts in PIM in which the Phone Set and Person files of the supervision window are stored.

- **The "Synchronize" button**

Synchronizes the directory chosen and the PIM



[Main PIMphony Configuration window](#)

Alcatel PIMphony user's guide

The **Alcatel PIMphony** user's guide gives a detailed description of the application modules, with examples to show how to use the main functions available for each module.

This guide contains three sections, each corresponding to an application module, and a section on [Windows actions](#).

- [The Telephone module](#), which is the user's main interface.
- [The Popup module](#), which provides the interface with the external PIM.
- [The Dialer module](#), which appears as an icon in the tool bar.
- [The Visual Mailbox module](#) for voice message management
- [The Assistant module](#) which manages call distribution
- [The Supervision window](#).

There is also a [speed dialing](#) function.



[Introducing Alcatel PIMphony](#)

Windows Actions

The Windows actions are available:

- "Copy and paste", and
- "Drag and drop".

Use of the "Copy and paste" operation

You can use "Copy and paste" to recover phone numbers from Windows compatible applications such as Notepad, Microsoft Word or Microsoft Excel. Simply:

- Select the number to be copied from the relevant application, and
- Copy it (CTRL + C or "Copy" in the Windows context menu). The number is saved in the Windows Clipboard.

It can then be pasted into either:

- The "Dial" field in the main telephone module window, or
- The Telephone Bar field.

Note: In the **New Call** window opened by right-clicking on the Dialer, the number is pasted in automatically.

Use of the "Drag and drop" operation

Note: For the "drag and drop" function to work, the "source" and "target" windows must both be open.

You can use "drop and drag" to recover phone numbers from a contact manager record. To do so:

- Left-click on the record ("source" window), keeping the mouse button pressed down, and
- Position the mouse cursor over the relevant ("target") field in one of the following windows:
 - The main telephone module window,
 - The Telephone Bar,
 - The **New Call** window opened from the Dialer.

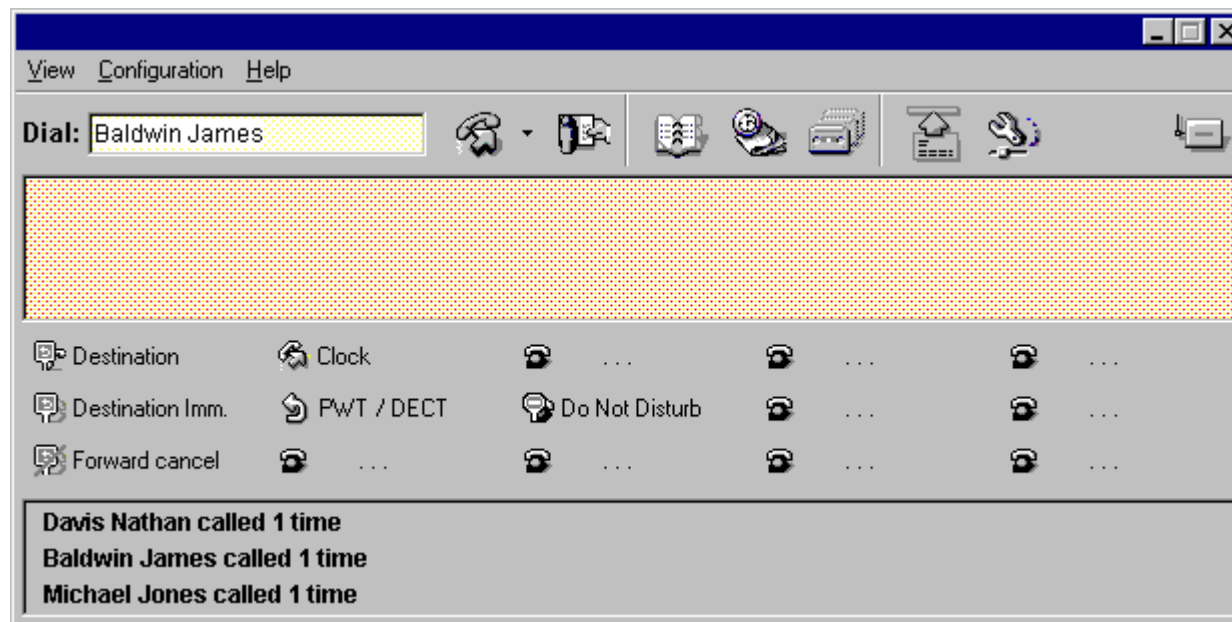


[Alcatel PIMphony User's Guide](#)

The Telephone module

The Telephone module is the core of the **PIMphony** application. It enables you to use the basic functions of your telephone without requiring use of the handset.

Following activation, the main Telephone module window is displayed.



The size of the window varies as a function of the number of calls and the supplementary options selected.

The window may not be displayed while calls are in progress (configuration).

When a "team" profile is used, the Telephone module may be completed by the [Supervision window](#).

 [Alcatel PIMphony User's Guide](#)

Running the Telephone module

The Telephone module can be run in three ways:

- From the Windows taskbar, click on **Start** and select the **PIMphony** application in the **Programs/Alcatel PIMphony** menu.
- From the workspace or the Windows tool bar, double-click on the **PIMphony** icon, if the icon is installed.
- Using the Dialer module (if running), right-click on the Dialer icon and select the **Maximize** menu option.

If the (PIM) contact manager base has been updated (entries added, deleted or modified), the application is synchronized with the contact manager.

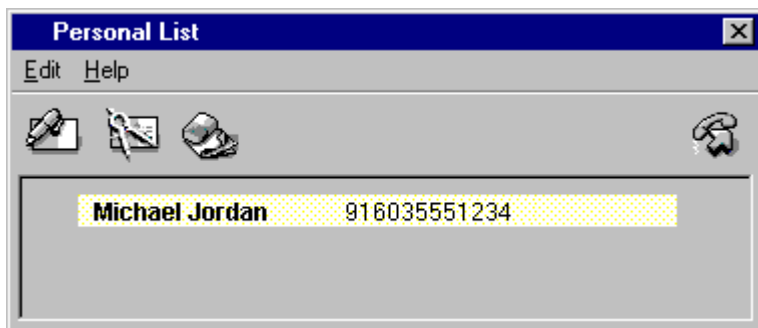


[The Telephone module](#)

Personal directory

The Personal directory provides a local telephone directory which can manage up to 400 entries.

The user interface is simply a directory display table containing 3 columns: name, first name and telephone number. Windows are presented in alphabetical order, by name.



The table is accompanied by a tool bar that offers the following buttons:

-  : to create a new entry.
-  : to modify an entry.
-  : to delete an entry.
-  : to dial the number.

Remark: The same features can be accessed from the **Edit** menu.

Direct calling is possible by double-clicking on the name or number.



[The Telephone module](#)

Telephone Bar

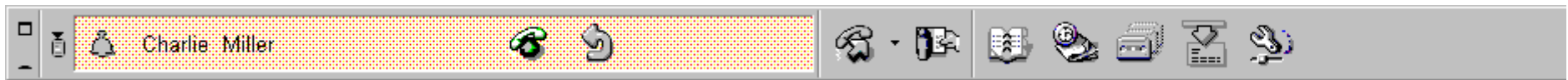
To save space on the screen, the Telephone window is replaced by a Telephone bar, which is activated from the Telephone window and is positioned at the top of the screen. Its appearance varies depending on the options selected in the corresponding [context menu](#).

Its appearance differs depending on the phone set status:

- **Idle (at rest):**



- **Ringing:**



- **Engaged (here with Charlie MILLER)**



The bar contains:

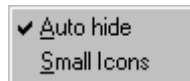
- A call status and management window similar to that of the [Telephone window](#) when the terminal is in operation,
- A group of [control buttons](#).

The Telephone Bar [function selection icons](#) provide access to supplementary functions.

 [The Telephone module](#)

Telephone bar context menu

The context menu below is called up by right-clicking inside the Telephone bar, away from the icons.



The context menu commands are:

- Auto hide: hides the Telephone bar when not in use. To display it again, move the cursor over to the top edge of the screen window: the Telephone bar will appear. To use it, keep the mouse cursor inside the Telephone bar.
- Small icons: the control buttons are reduced (from 16x16 pixels to 32x32).

When a command is checked, the corresponding action is validated.



Control buttons

The Telephone Bar comprises the following control buttons:

-  : a multifunction button:
 - Click  to make a call to the person or number specified in the entry field.
 - Click  to access a menu, from which you can:
 - Make a call to one of the numbers stored in the contact file corresponding to the name typed in the entry field.
 - Activate a telephone feature:
 - Redial one of the ten last dialed numbers using "Redial".
 - "Call direct" or "Featutes" give access to the functions or numbers pre-programmed into the programmable buttons
 - Activate the **New call** window from the **New call** menu (this function is only available on Telephone Bar).
-  : pop-up the PIM entry for the current call.
-  : call the application Personal directory.
-  : call up the Call log.
-  : call up the mail.

-  : voice with 2 possible states: there are new calls/no new calls.
-  : open the Telephone window and close the Telephone Bar.
-  : call the Popup configuration Wizard.

 [Telephone Bar](#)

Telephone Bar feature selection

Clicking  opens the Telephone window.

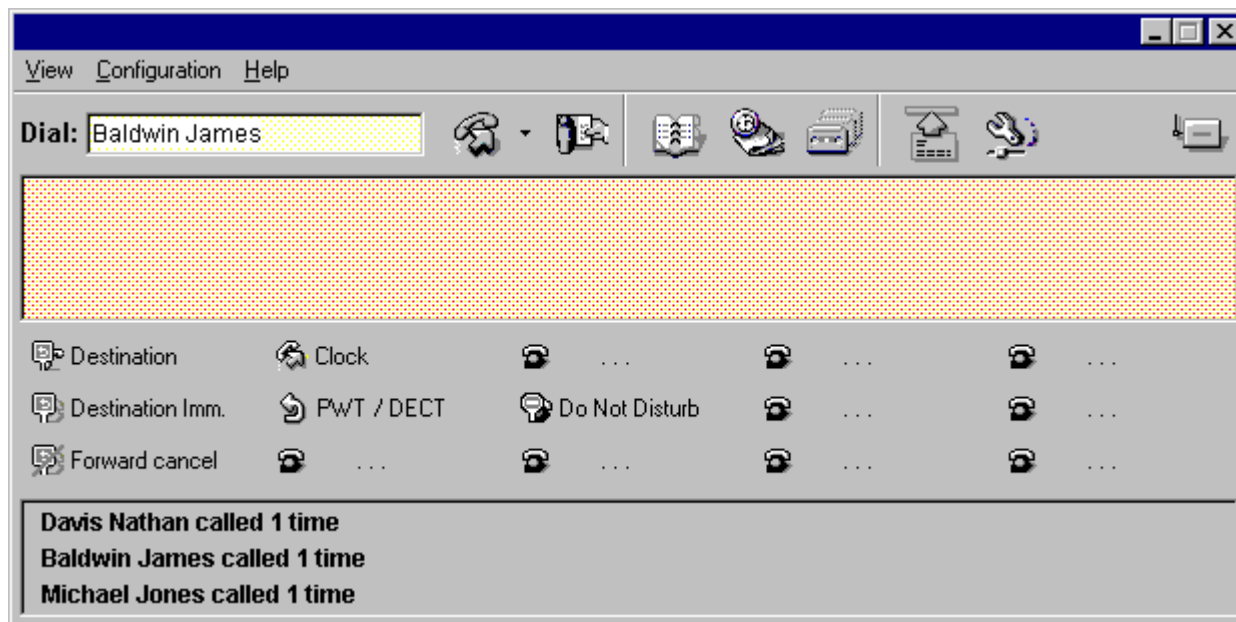
Clicking  reduces the Telephone bar.

Clicking  accesses other calls in progress; up to 8 calls can be handled.

 [Telephone bar](#)

Telephone module main window

The Telephone window shown below shows one call in progress, and more than 3 unanswered calls.



This window is designed to maximize the feature utilization while using a minimum of PC screen area.

The window consists of several control windows and bars of various sizes, some of which are optional:

1. Menu bar (optional) for accessing the personal directory, call log, application configuration and on-line help.
2. Main control bar for dialing, using the personal directory and call log. This bar is always displayed.
3. Call status and management window to answer a call, hang up, transfer, put on hold, conference, etc. The size of this window is a function of the number of calls (max. 8).
4. Programmable function key window for direct calls, forwarding, etc. This window is optional.
5. Unanswered calls window the size of this window is a function of the number of unanswered calls (max. 3).

The window's appearance will vary depending on the options chosen in the context menu of the main control bar.

 The Telephone module

Menu bar

The menu bar contains the following menus:

- View
- Configuration
- Help.

View menu

This menu contains the following commands:

- Personal List: to call up the personal directory for this application.
- Call Log: to call up the Call Log.
- Phone Bar: to call up the Phone Bar.
- Assistant mode: used to switch to Assistant mode.
- Supervision mode: to display the Supervision window.
- Contact: to pop up the record of a correspondent selected in the PIM status window.
- Minimize: to close the PIMphony window (it can then be reopened using the **Alcatel PIMphony** button on the taskbar).
- Exit: to quit PIMphony.

Configuration menu

This menu contains the following commands:

- Popup: to call up the PIMphony Configuration Wizard.
- Options: to call up the general PIMphony Configuration window.

Help menu

This menu contains the following commands:

- Contents: to call up the on-line help contents.
- About: to call up the window containing information about the application and the user.



Telephone module main window

Main control bar

The main control bar contains the main functions required to make a call. This is the "minimum" telephone representation when the terminal is idle, there are no unanswered calls, and the optional secondary control bar has not been programmed. The presentation can be modified to some extent using the context menu.



The window contains:

■ A control bar for dialing:

- Normal dialing,
- Dialing by using the name,

■ A control bar for window Popup and access to other modules such as the personal directory or the call log. etc.

The dialing control bar contains:

- : an entry field in which the name or number to be dialed is entered.
- : a multifunction button:
 - Click : to make a call to the person or number specified in the entry field.
 - Click : to access a menu, from which you can:
 - Make a call to one of the numbers stored in the contact file corresponding to the name typed in the entry field.
 - Activate a telephone function :
 - Redial one of the ten last dialed numbers using "Redial".
 - Activate the feature keys from the "Direct call" or "Feature/Function" menu.
 - Activate the **New call** window from the **New call** menu (this function is only available on Telephone Bar).

The control bar for window Popup and access to other modules contains:

- : a button to pop up the PIM file on a correspondent selected in the status window.
- : a button to call the application personal directory.
- : a button to call the call log.
-  /  / : a button to call the mailbox with one of the two possible states: new voice mail messages/no new messages.

- : a button to call the Telephone bar.
- : a button to call the Popup configuration Wizard.
- : a button to open/close the Programmable function keys window.

Appearance of buttons

Each button on the control bar indicates its status in the application. If the button is active, it appears in color when the mouse pointer is positioned over it. Otherwise it remains gray.

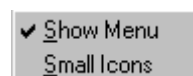
Dialling procedure

Calls can be made by using either a copy/paste or a drag-and-drop operation.

 [Telephone module main window](#)

Control bar context menu

The context menu below is called up by right-clicking inside the main control bar, away from the icons.



The context menu commands are:

- Show menu: displays the [menu bar](#).
- Small icons: the control buttons are reduced (from 24x24 pixels to 16x16).

When a command is checked, the corresponding action is validated.

 [Main control bar](#)

Call status and management window

The number of lines displayed in the call status and management window varies as a function of the number of calls. Up to 8 lines can be displayed.

Each call is represented by a line which gives the status of the call.

The window below shows an example of a call status line during the conversation phase.



This line contains the following:

- [Call status icon](#),
- Call identification window,
- Duration of call,
- [Control icons](#).

A [context menu](#) appears when you right-click in the call identification window.

The [special ergonomics](#) of the call status and management window facilitate your operations.

 [Telephone module main window](#)

Call status icon

This icon indicates the status of the current call:

-  : Ringing.
-  : Conversation/Call in progress.
-  : On hold.

When the mouse pointer is on the icon, the icon is displayed in color.

 [Call Status and Management window](#)

Control icons

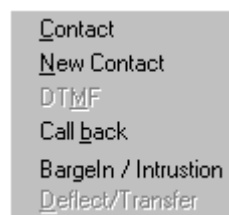
The status window control icons are used to assign the available commands, dynamically and directly, to each line. The control icons are:

-  : Answer call
-  : Deflect call
-  : Hang up
-  : Put on hold
-  : Transfer
-  : Conference
-  : Cancel (conference or transfer)

 [Call Status and Management window](#)

Context menu

The context menu below is called up by right-clicking inside the call identification pane in the [Call Status and Management window](#).



The context menu commands are:

- Contact: pops up the contact record during the call.

- New contact: creates a new record for the active contact.
- DTMF: for using the keyboard to over dial during a call (e.g. the "#" key).
- Call back: for automatic call-back.
- Barge In / Intrusion: for barging in (intruding) on calls.
- Deflect: for refusing an incoming call and diverting it to another person as desired.

 [Call Status and Management window](#)

Status window function selection

When the mouse pointer is positioned over an icon, the icon appears in color and, after one second, a ToolTip informs the user of the icon's exact function.

To activate a command, click on the corresponding icon.

A call can be picked up by double-clicking on a line if the  icon is present.

 [Call status and management window](#)

Programmable function keys

Display of the programmable function keys window can be activated or disabled from the Telephone main window (icon ). The programmable function keys window is shown below.



Fifteen keys are available for customised programming to your own requirements.

 [Telephone module main window](#)

Unanswered calls window

The window showing unanswered calls or the management of calls currently being performed shows all unanswered calls, incoming and outgoing. This window is completely independent of the Call log.



This window is not shown when there are no unanswered calls.

The window can display up to three lines simultaneously. The lines contain the following information:

- Voice messages
- Unanswered incoming calls

 [Main Telephone module window](#)

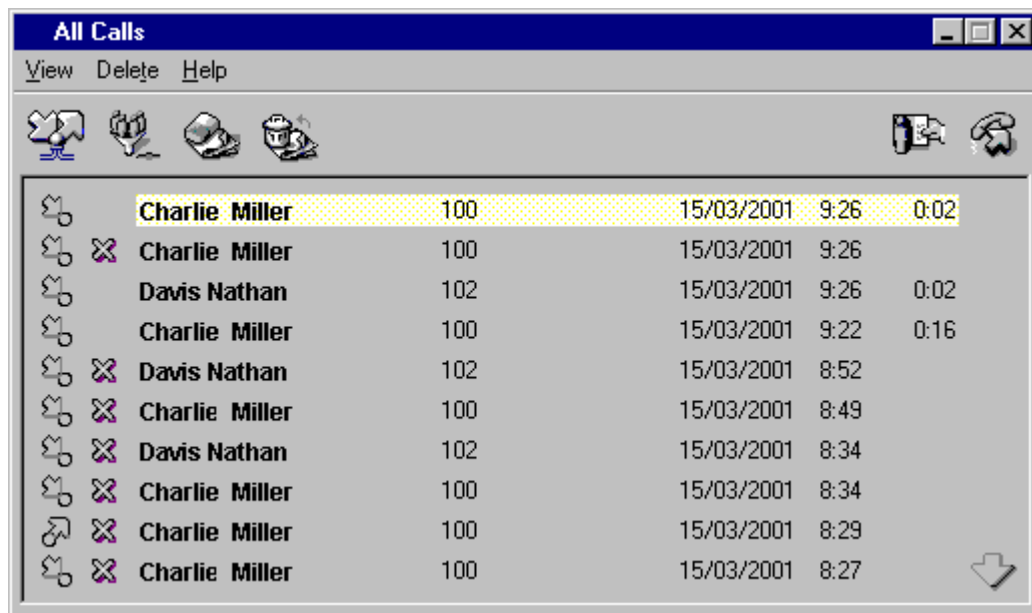
Call log window

The Call log records all calls (incoming and outgoing, answered or unanswered) over the last 30 days.

Call records are entered in the log continuously for as long as **PIMphony** is connected (see [Dialer](#)). If **PIMphony** Central Services are used, this log is updated automatically.

The [Call log can be exported](#).

Incoming and outgoing calls are shown in separate windows, but it is possible to show all the calls in the same window.



Status	Name	Number	Date	Time	Duration
	Charlie Miller	100	15/03/2001	9:26	0:02
X	Charlie Miller	100	15/03/2001	9:26	
	Davis Nathan	102	15/03/2001	9:26	0:02
	Charlie Miller	100	15/03/2001	9:22	0:16
X	Davis Nathan	102	15/03/2001	8:52	
X	Charlie Miller	100	15/03/2001	8:49	
X	Davis Nathan	102	15/03/2001	8:34	
X	Charlie Miller	100	15/03/2001	8:34	
X	Charlie Miller	100	15/03/2001	8:29	
X	Charlie Miller	100	15/03/2001	8:27	

The Call log window contains:

- [The list of calls](#)
- [The command bar](#)

This window shows the following information:

- Information concerning new messages in the voice mail,
- Incoming or outgoing call unanswered,
- Outgoing call to busy terminal,
- Outgoing call to unavailable terminal or wrong number,
- Call-back requested,
- Name or number of contact (if in system),
- Number of calls of contact.

Two pull-down menus provide the same functions as the command bar buttons.

 [The Telephone module](#)

Export Log

The Log is exported using the Log window called up by the  button or using the "Call log" command in the "View" menu.

1. Click on the "View" menu to open it.
2. Click on the "Export" Command.
3. In the Windows save window:
 - Enter the filename,
 - Check that the selected file is a "CVS file (*.cvs)",
 - Select its access path,
 - Validate.



Call list

The Call log window can display up to 10 lines simultaneously. Calls are shown in reverse chronological sequence, from the latest to the oldest.

	Davis Nathan	102	03/03/2004	9:32	0:13
---	---------------------	-----	------------	------	------

Each line corresponds to a call and contains the following information:

- General information icon ( : incoming call or  : outgoing call)
- Call status icon ( : unanswered call)
- Name of correspondent (if in system)
- Name of party
- Date
- Time
- Duration of call.

A selected line is highlighted in yellow.



Command bar

The call log command bar contains:

 A group of four buttons for **log management**:

-  : shows incoming and outgoing calls (by clicking on this button, it is possible to only display incoming calls: , or only outgoing calls: ).
-  : shows calls for a chosen correspondent.
-  : deletes entries from the log
-  : deletes all log entries.

 A group of 2 buttons to **manage the selected line**:

-  : Popup of Outlook entry for the party.
-  : calls back the number.

 [Call log](#)

Centralized call log

The "Use centralized call log" system enables calls to be stored when the PC is switched off.

- In this case, when the application is started up, calls are transferred to the log PIMphony as soon as the PC connects.
- The calls are displayed in the unanswered calls list.
- This service is activated using the [configuration window "Services"](#) tab.

 [Telephone module main window](#)

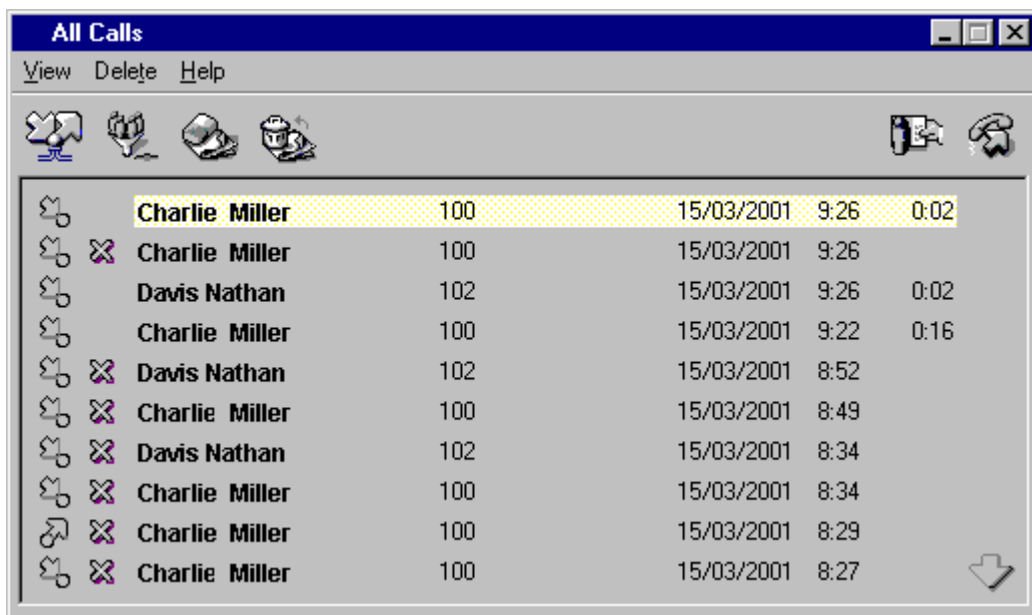
Using the Telephone module

From the main Telephone module window, you can access the following functions:

1. [Using the Call log](#)
2. [Using the Personal directory](#)
3. [Using a programmable function key](#)
4. [Call management](#)

 [The Telephone module](#)

Using the Call log



The screenshot shows a window titled "All Calls" with a menu bar (View, Delete, Help) and a toolbar with icons for call types and actions. The main area contains a table of call logs.

	Caller	Number	Date	Time	Duration
	Charlie Miller	100	15/03/2001	9:26	0:02
	Charlie Miller	100	15/03/2001	9:26	
	Davis Nathan	102	15/03/2001	9:26	0:02
	Charlie Miller	100	15/03/2001	9:22	0:16
	Davis Nathan	102	15/03/2001	8:52	
	Charlie Miller	100	15/03/2001	8:49	
	Davis Nathan	102	15/03/2001	8:34	
	Charlie Miller	100	15/03/2001	8:34	
	Charlie Miller	100	15/03/2001	8:29	
	Charlie Miller	100	15/03/2001	8:27	

Using the Call log you can:

- [Display a type of call \(incoming or outgoing\) or filter calls from a specified number.](#)
- [Delete any or all of the Log lines.](#)
- [Call a party back.](#)
- [Popup the PIM window for a correspondent.](#)

To display a type of call (incoming, outgoing or both):

1. Click on the corresponding icon.

To filter all calls to or from a specified number:

1. Select a line for the number concerned.

2. Click on .

To call a person back:

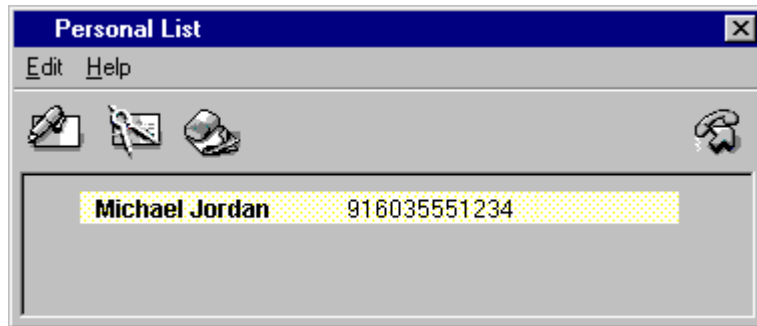
1. Select a line of the number concerned.
2. Click on .
3. You can also click RH on the line and select the **Dialing** option in the menu.

To Popup the PIM window for a specific party:

1. Select a line of the number concerned.
2. Click on .
3. You can also click RH on the line and select the **Popup** option in the menu.
4. The window corresponding to the selected PIM pops up.

 [Using the Telephone module](#)

Using the personal directory



From the Personal directory, you can:

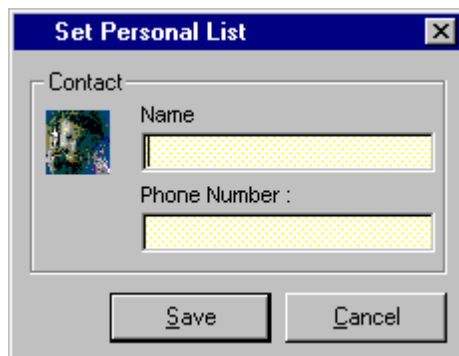
- [Access an existing entry](#)
- [Create a new entry](#)
- [Modify an existing entry](#)
- Delete an entry
- [Make a call from the directory](#)

Accessing an existing entry:

1. Click on the scrolling bar or use the arrow keys on the keyboard.
2. You can directly access the first entry in the directory with a name beginning with the letter I (for example) by entering I on the keyboard (**quick search**).

Creating a new entry:

1. Click on  and the following new entry screen will be displayed.



2. Enter the name and telephone number of the person and click on **Save**.
3. This creates a new entry in the Personal directory.

Modifying an existing entry:



1. Click on ; and the same edit screen will be displayed.
2. Modify the person's name and/or number, as required, and click on **Save**.
3. The entry is updated in the Personal directory.

Remark: The same functions can be obtained using the **Edit** menu.

Making a call from the Personal directory:

1. Select the entry for the person you wish to call.
2. Click on . The number is dialed and the Telephone window is displayed.
3. You can also double-click on the directory entry.

 Using the Telephone module

Using a programmable function key

You can use the Telephone module main window to assign a predefined function to a key.

To display the programmable function key window:

1. Click on  in the main control bar.

Example of a function key window:



2. You can program a function key on any unassigned key.

To use a programmed function key:

1. Move your cursor to hover over the key in question. Its appearance changes, as shown here:



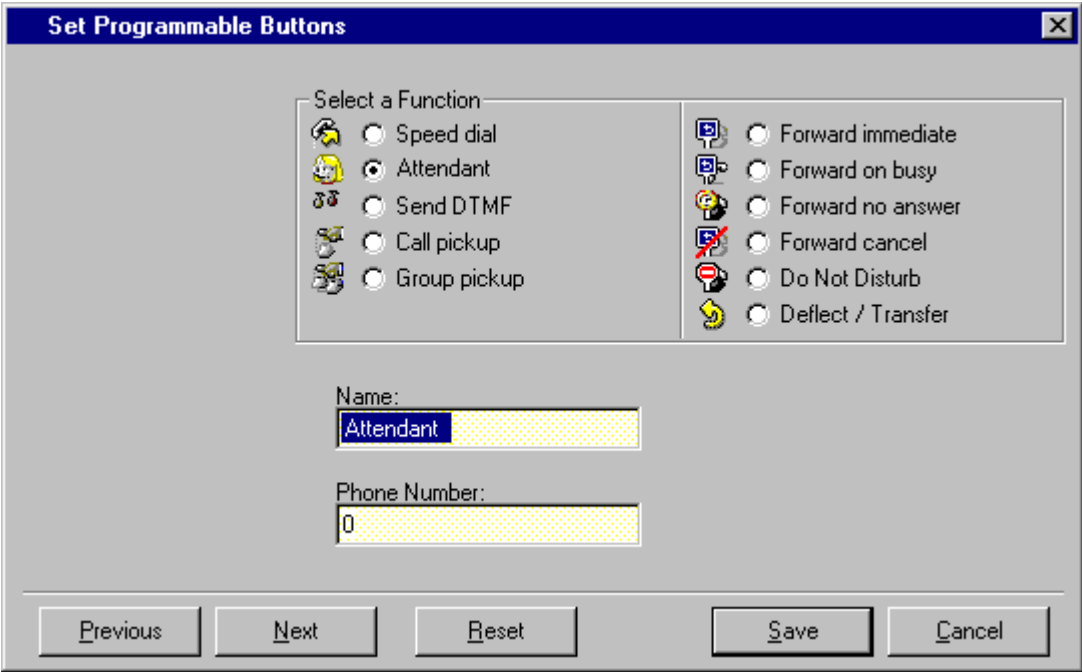
2. Left-click. The programmed action is activated.

 Using the Telephone module

Programming an unassigned function key

To program a function key

1. Right-click on an unassigned key. You enter programming mode and the following screen appears:



The dialog box titled "Set Programmable Buttons" contains a "Select a Function" section with two columns of radio button options. The first column includes Speed dial, Attendant, Send DTMF, Call pickup, and Group pickup. The second column includes Forward immediate, Forward on busy, Forward no answer, Forward cancel, Do Not Disturb, and Deflect / Transfer. Below this section are two text input fields: "Name:" with the value "Attendant" and "Phone Number:" with the value "0". At the bottom are five buttons: Previous, Next, Reset, Save, and Cancel.

Select a Function	
☐ Speed dial	☐ Forward immediate
☐ Attendant	☐ Forward on busy
☐ Send DTMF	☐ Forward no answer
☐ Call pickup	☐ Forward cancel
☐ Group pickup	☐ Do Not Disturb
	☐ Deflect / Transfer

Name:

Phone Number:

Previous Next Reset Save Cancel

2. Select a function from the list of pre-programmed functions:

- **Speed dial:** to directly dial a frequently called number.
- **Call interception:** to intercept a call to one terminal (in this case, the PCX must be programmed).
- **Group interception:** to intercept a call to a group of terminals (in this case, the PCX must be programmed).
- **DTMF** (Dial Tone Multi-Frequency): for using the keyboard to overdial (e.g. "#" key).
- **Attendant/Operator:** for direct access to the switchboard ("0" or "9" by default, depending upon country).
- **Immediate forwarding:** pre-programmed direct call forwarding.
- **Forwarding on busy:** pre-programmed forwarding on busy.
- **Temp. forwarding:** forwarding activated when called number fails to answer.
- **Do not disturb:** to prevent any call from being received on your terminal (you can still make calls).
- **Deflect:** to allow selective forwarding on incoming calls.
- **Cancel Forward:** to cancel a pre-programmed forward, "Do not disturb" or Deflect.

3. Enter the name to be displayed on the button and the number called (speed dial, attendant/operator, forwarding).

4. Click on **Save** to validate the programming or on **Next** to program another function key.

The **Reset** key resets all fields.

The **Cancel** key cancels the programming.

Remark:

In case of call interception, if non-hands-free sets are used, and if the system is at rest, the handset must first be lifted in order to be able to intercept.

Show forwarding in status window

When forwarding or "Do not disturb" is programmed, this is indicated in the status window, the background of which becomes grey. The type of forward (icon) and the receiving number are shown in the window.

The animated image and the Dialler icon also change, to display the new terminal status.



If a call appears in the status window, the forwarding display temporarily disappears (while the call remains active).

Notes:

Forwarded calls are not recorded in the calls received log.

The forwarding remains active on the terminal even if the PC is switched off.

 Using a programmable function key

Managing calls

Call management can be accessed from the status window and offers the following actions:

1. Making a call
2. Deflecting a call
3. Automatic callback

4. [Barging in \(Intruding\) on calls](#)
5. [Putting a call on hold](#)
6. [Transferring a call](#)
7. [Setting up a conference](#)

[Using the Telephone module](#)

Making a call

To make a call:

1. Using the keyboard, enter the number or name of the person required, in the entry window.
2. If the name is entered, when the first few letters have been typed, the name is completed from the PIM's list of contacts or from the personal directory.
3. Click on , to dial the number.

You can also select one of the last ten numbers dialed (Redial function):

1. Click on .
2. Select "Redial".
3. The numbers or names for the last ten numbers dialed are stored in a pull-down list.
4. Select one of the previous calls stored.

If the call is unanswered, the call status and management window appears as shown below:



-  indicates that the call is ringing (no answer).
- Control icon  indicates that the only available action is "terminate call".

When the call is answered and during the conversation, the call status and management window appears as shown below:



-  indicates that the call is connected.
- In this case, possible actions are, in order: "terminate call," "put on hold," "transfer" and "conference."

 [Managing calls using the Telephone module](#)

Deflecting a call

Deflecting a call means refusing an incoming call and diverting it to the person of your choice.

To deflect an incoming call:

1. Click the  icon corresponding to the unanswered call.
2. In the following window :



- Key in the number of the person to whom the call is to be re-routed.
- Validate.

 [Managing calls with the Telephone module](#)

Automatic callback

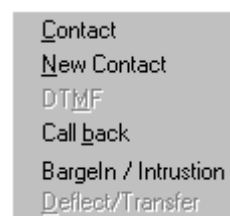
NOTE: For automatic callback, if two (or more) PCXs are interconnected, they must all be able to support this function.

When you are calling someone, the Call Status and Management window looks like this:



When the party is busy (engaged), you can do an automatic callback. Simply:

1. Move the cursor over the containing the contact's name (here, Charlie MILLER) and right-click. The following context menu appears:



2. In the context menu, select the command "Call back" and left-click.
The "MILLER" entry disappears from the Call Status and Management window.
When the contact's line becomes available, it is automatically re-called, and the Call Status and Management window takes on its former appearance.



Managing calls with the Telephone module

Intrusion

NOTE: Barge In/Intrusion involves the following pre-conditions:

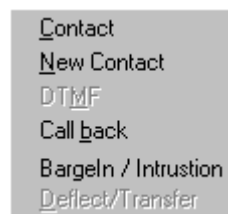
- The party being barged in (intruded) on is not protected against intrusion in the PCX configuration established by the installer, and
- The person performing the intrusion must be authorized for third-party entry by the configuration. of the PCX by the installer.

When you are calling someone, the Call Status and Management window looks like this:



When the party is busy (engaged), you can barge in (intrude) as follows:

1. Move the cursor over the field containing the contact's name (here, Charlie MILLER) and right-click. The following context menu appears:



2. In the context menu, select the command "Barge In/Intrusion" and left-click.
The Call Status and Management window now looks like this:



NOTE: The party is informed of the intrusion by regular background beeps.

Managing calls with the Telephone module

Putting a call on hold

Putting a call on hold enables you to suspend the call for a short time and to pick it up again later. The party hears hold music.

To put a call on hold:

1. Click on .

2. The call status and management window appears as shown below:



-  indicates that the call is on hold.
- Control icon  indicates that the only action available is to recover the call.

When making a consultation call, you can put the first call on hold and speak to the second party.

In the example shown below you are speaking to DAVIS and MILLER is on hold.

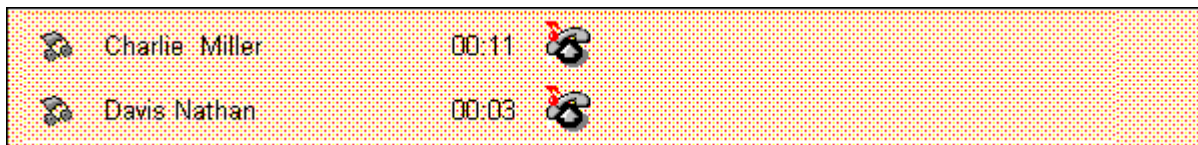


To put DAVIS on hold and speak to MILLER:

1. Click on control icon  for MILLER.

To put both calls on hold:

1. Click on control icon  for DAVIS.



 [Managing calls using the Telephone module](#)

Transferring a call

Transferring a call means diverting a call to another number of your choice.

In the example below, you want to transfer the call received from MILLER to extension 103.

To transfer the call received from MILLER:

1. Click on the control icon  for MILLER's call.



2. Enter the name or number of the person to whom you wish to transfer the call in the entry window and then click on .

Note: the person to whom you wish to transfer the call can also be obtained from the PIM or from the personal directory.



3. You are now in contact with extension 103. Inform the party that you are transferring a call to this party.
4. Click on the  icon for MILLER's call to validate the transfer.
5. MILLER and extension 103 are now connected.

 [Managing calls using the Telephone module](#)

Setting up a conference

Setting up a conference puts you in simultaneous contact with two other numbers. The conference initiator calls the other two people and can disconnect one or both of them.

In the example below, after receiving a call from STEINER, you want to set up a conference with extension 33699:

1. Click on the control icon  for STEINER's call. You are now the initiator of the conference.
2. Another line is then displayed, asking you to enter the name or number of the third person participating in the conference.



3. Enter the name or number of the second contact, and click on .

Note: the name of the third participant can also be obtained from the PIM or from the personal directory.

4. When extension 33699 answers, press the conference icon again.
5. You are in conference with STEINER and extension 33699.
6. You can disconnect one or both of the other participants.

 Managing calls using the Telephone module

The Popup module

The Popup module provides the interface between the **PIMphony** application and the PIM external to the application.

It displays telephone contact entries on the basis of criteria entered during the configuration.

Configuring the Popup enables the user to define criteria for the display and closing of the Popup entries (actions, events, filters).

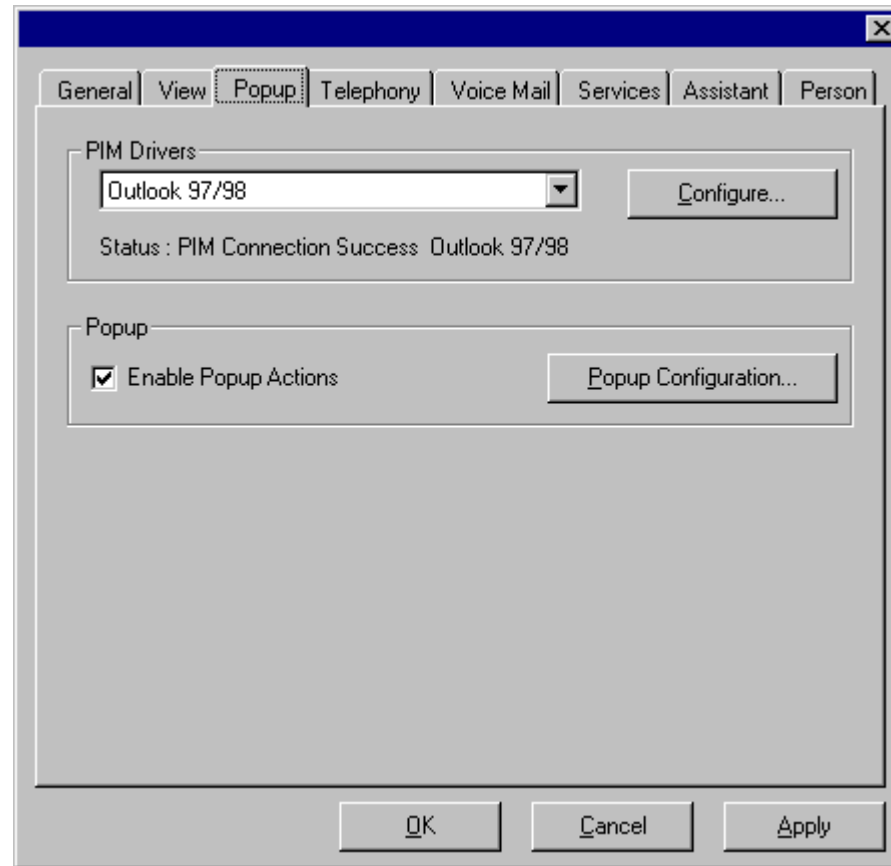
Examples:

- Displaying the Popup entry of the first outside caller (action), when the telephone rings (a filtered event).
- Sending an e-mail (action), if the first internal call is unanswered (a filtered event).

The selected action is automatically triggered, with or without the optional confirmation request window.

All these actions are accessible via this window. To call it up, use either:

- The "Popup..." command in the "Configuration" menu, or
- The  button.



In the above window:

- The "Configure" button, when active, calls up the PIM configuration window.
 - Outlook 97/98:
A maximum of 16 contact files can be selected;
Reset of the application and the PIM;
Synchronization of the application and the PIM.
 - Outlook 2000:
Synchronization of the application and the PIM.
 - ACT!
A login and password must be entered.
 - GoldMine

A login and password must be entered.

- Access 97/2000

When you select Access as the contact manager (PIM), the following information must be entered using the configure command.

- The "Popup configuration" button calls up the Popup Configuration window.

Access configuration:

General rules

- In an Access database, telephone numbers can be saved in canonical format : ++xx yyyyyy without any alpha character or in the numbering format (with the outgoing prefix).
- To use Access 2000 or higher, Access must be installed on the PC.

Creation of the contacts table under Access

- Before using the application with Access, it is necessary that the Access data base was created with at least the fields name, first name and telephone number (obligatory string character format), and a key field with the numerical format.

Contact : Table

	Field Name	Data Type	Description
	ID	Number	Identifiant
	Name	Text	Contact name
	Firstname	Text	Contact firstname
	Phone1	Text	phone 1
	Phone2	Text	phone 2
	Phone3	Text	phone 3

Field Properties

General

Lookup

Field Size

50

Format

Input Mask

Caption

Default Value

Validation Rule

Validation Text

Required

No

Allow Zero Length

No

Indexed

No

Unicode Compression

Yes

A field name can be up to 64 characters long, including spaces. Press F1 for help on field names.

Filling the Access table

- The application does not make it possible to automatically update the Access table. It is up to the user to record contacts by using Access or following the actions (see below).

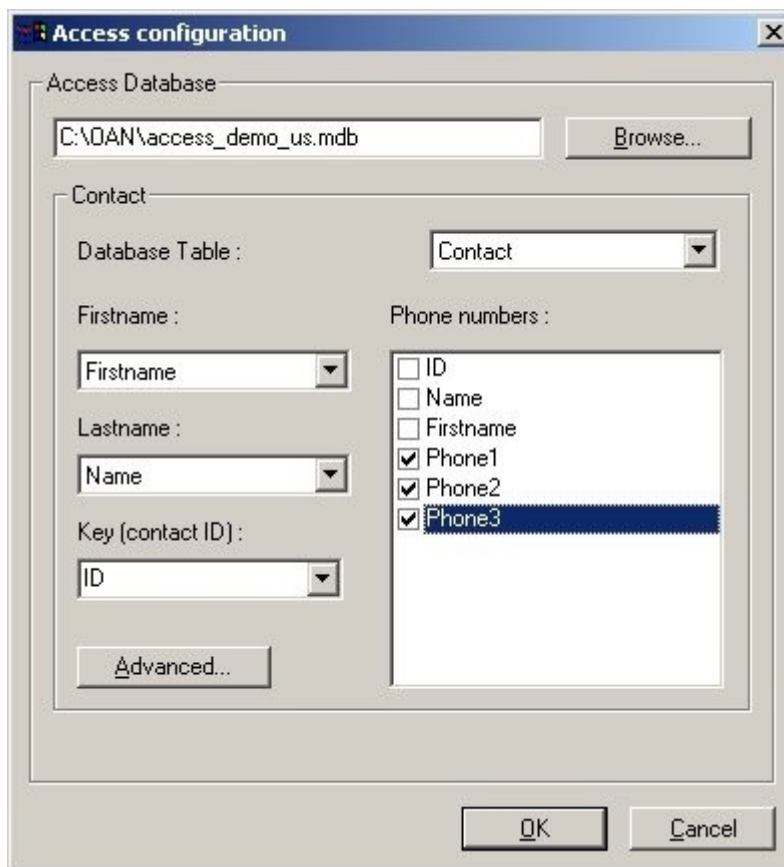
Contact : Table

	ID	Name	Firstname	Phone1	Phone2	Phone3
	0	Smith	John	916038867138	916068712878	916038161711
	0					

Record: 1 of 1

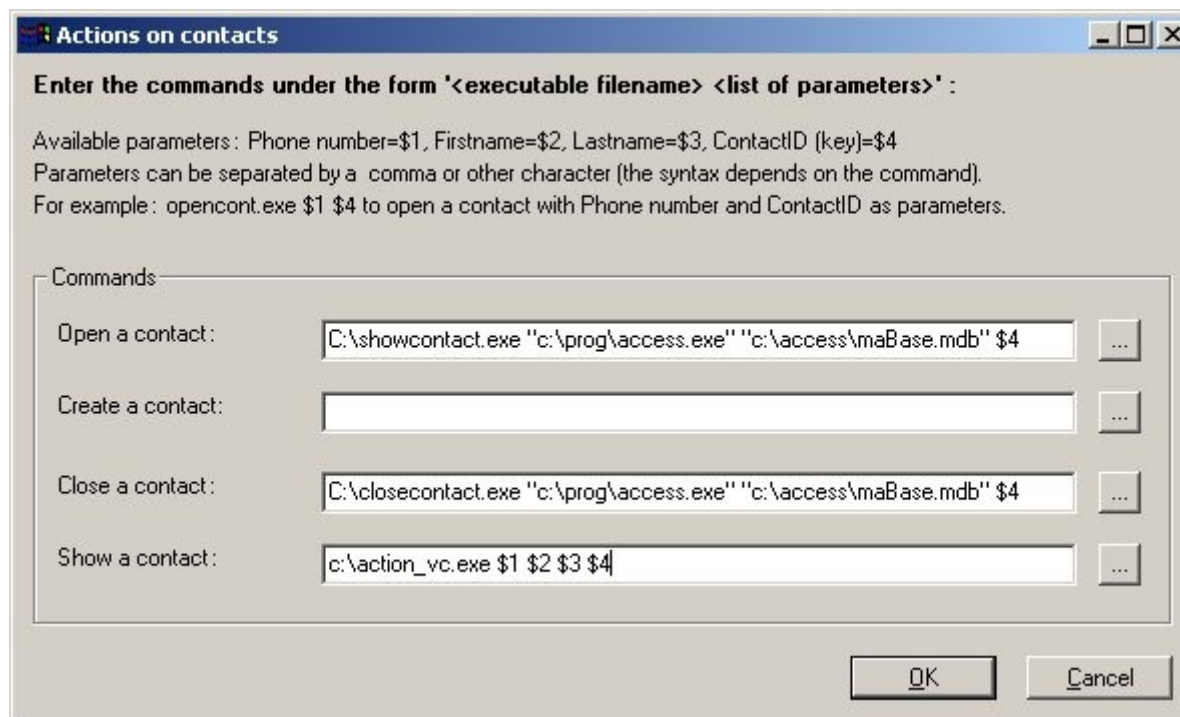
Configuration of the Access PIM

- In the configuration of the Access driver, start by indicating the Access file and its directory.
- Then select the table containing all the data of the contacts.
- Indicate the fields corresponding to the first name, name, key and select all those which contain the telephone numbers.

**Actions**

- The configuration of the actions is made while clicking on the button "Advanced...".
- The actions correspond to the orders allowing the opening, creation, the closing of a contact card for a telephone call, and the visualization of a contact card not in communication state ("Contact" button).
- The actions are executable programs to which the application sends the parameters to be displayed (name, first name, telephone, key).

- The actions are prepared with:
 - An executable file: .Exe, .bat, .cmd,...
 - The contact parameters:
 - \$1: Caller number (to use in contact creation)
 - \$2: Contact first name
 - \$3: Contact last name
 - \$4: Contact key
- These parameters are given to the program called by using the command line.



- The preceding figure is an example of configuration by using the programs provided on the CD-ROM.
- Programs **showcontact.exe**, **closecontact.exe**, **action_vc.exe** et **action_vb.exe** are available on the CD-ROM under subdirectory ...**\unsupported\access\action**.
- In this example, the four (4) parameters (telephone, name, first name, and identifying contact) are transmitted to the programs via the variables \$1, \$2, \$3 and \$4 (see the following paragraph for the use of the provided programs).
- The programs provided on the CD-ROM are only examples of applications. The end-user must create the programming to execute the 4 possible actions. **There**

is no program which created a contact.

Use of the programs provided on the CD-ROM

- **Action_vb.exe**: display contact informations in a dialog window. It is used for popup the card (to open a contact, to view a contact card). The information displayed in the window comes from the parameters of the command line (\$1 for the telephone number, \$2 for the first name, \$3 for the name and \$4 for the key).
- **Action_vc.exe**: same action as **action_vb.exe**. same parameters must be sent to the command line.
- **Showcontact.exe**: display contact informations by rasining the Access card. Be careful: the program works only by using the data bases provided on the CD-ROM (contact2000.mdb or contact90.mdb). This program is used for raising the card (open a contact, display a contact). Displayed informations come from command line :

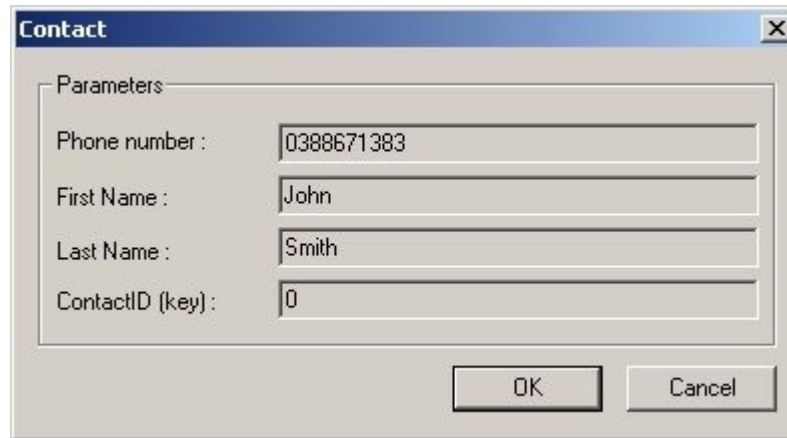
c:\showcontact.exe "access_path" "database_path" "\$4"

- *c:\showcontact.exe*: is the path for the **showcontact.exe** program.
- *"access_path"*: is the path to the **Access** program (i.e.: "c:\prog\access.exe").
- *"database_path"*: is the path to the database used (i.e.: "c:\access\maBase.mdb").
- *"\$4"*: is the contact key.

- **Closecontact.exe**: close the Access contact card. Be careful: the program works only by using the data bases provided on the CD-ROM (contact2000.mdb or contact90.mdb). This program is used for action "Close a contact." Displayed informations come from command line (same as **showcontact.exe**)

Example of use

- The following figure shows the result of opening a contact card from the application by using the action **action_vc.exe**.

A screenshot of a 'Contact' dialog box. The dialog has a title bar with the word 'Contact' and a close button. Inside, there is a section titled 'Parameters' containing four text input fields: 'Phone number :', 'First Name :', 'Last Name :', and 'ContactID (key) :'. The values entered are '0388671383', 'John', 'Smith', and '0' respectively. At the bottom right, there are 'OK' and 'Cancel' buttons.

Parameters	
Phone number :	0388671383
First Name :	John
Last Name :	Smith
ContactID (key) :	0

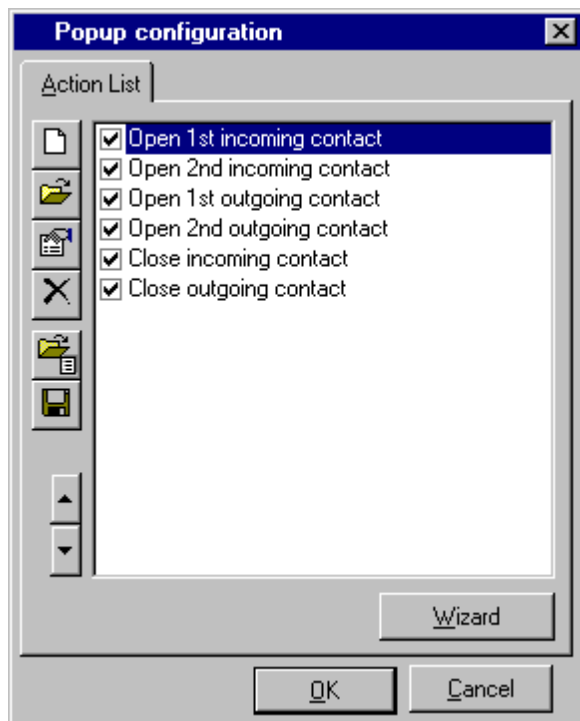
- More informations (examples, sources code, executable, etc.) can be found in the CD-ROM in subdirectory ...**unsupported\Access**. These functions will be executed by more expert users.

 [Alcatel PIMphony user's guide](#)

Popup configuration window

The **Popup Configuration** window is called using the "Popup Configuration" button on the Popup tab in the **PIMphony Configuration** window.

The default version of the Popup configuration window is shown below.



This window enables you to:

- Configure the Popup using the Wizard (**Wizard** key).
- or Customize the Popup configuration to suit your own requirements (vertical function buttons and tabs).

If you are relatively inexperienced, we recommend that you use the Wizard.

 [The Popup module](#)

Configuring Popup using the Wizard

Running the Wizard displays screens that give you instructions for the selection of a pre-recorded Popup configuration.

1. Follow the instructions given and select the options presented that correspond to your requirements.
2. To go on to the next screen, click on **Next**.

3. To cancel an action and return to the previous screen, click on **Back**.
4. To cancel all actions and exit from the Wizard, click on **Cancel**.

Step 1

Presents the Wizard, Click on **Next**.

Step 2

Step 2 defines the type of Popup use:

- **Incoming and Outgoing calls,**
- **Incoming calls,**
- **Outgoing calls,**
- **Incoming calls with Popup of caller information**

Select the option you want, then click on **Next**.

Step 3

Step 3 defines the moment at which the caller's Popup entry is displayed (event) and the action to be performed for a consultation/enquiry call.

Select the options you want, then click on **Next**.

Step 4

In Step 4, you select the event to close the Popup (at hang-up or after a timed delay, with or without confirmation).

Select the options you want, then click on **Next**.

End of configuration

The **Congratulations** screen indicates that the Popup configuration was successful.

Click on **Finish**, To validate your options, close the Wizard and run the Popup.

 [Popup configuration window](#)

Customized Popup configuration

From the main Popup configuration window, you can customize Popup operation to suit your own requirements.



This window presents a list of six default actions:

- Popup of the entry of the first and second callers (case of enquiry call),
- Popup of the entry of the first and second persons called (case of enquiry call),
- Close the Popup entries of the caller and the person called.

To configure Popup:

1. Select one or more actions in the list, by selecting the appropriate square.
2. Click on **OK** to validate the configuration.

If no predefined action suits your requirements, you can:

- [Create a new action](#)
- [Modify an existing action](#)
- [Load a pre-programmed action file \(*.saa\)](#)



[Popup configuration window](#)

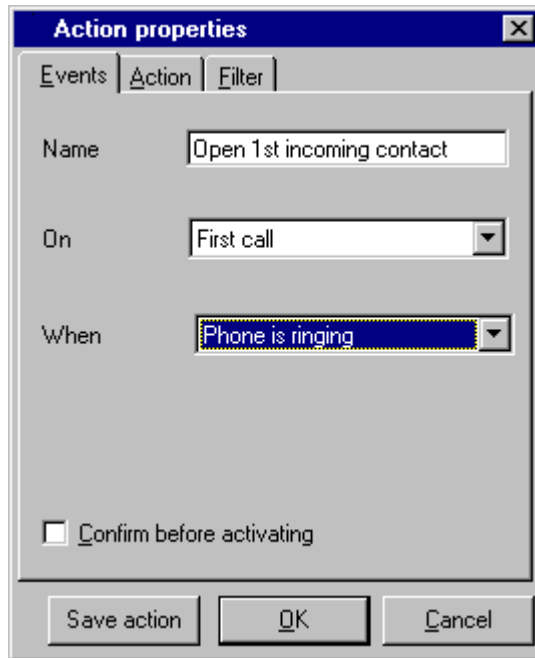
Creating or modifying an action

From the main Popup configuration screen, you can:

- Create a new action: click on .
- Modify an existing action: click on .

The action Features screen appears, with three configuration tabs: Event, Action and Filter.

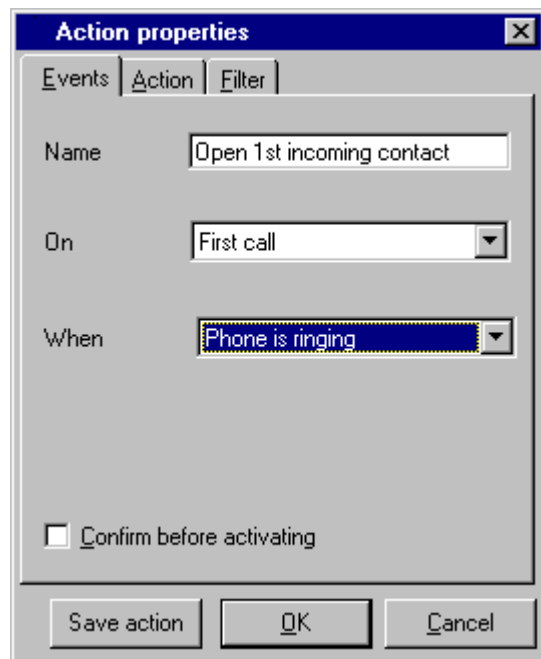
Configuring an event



1. In the **Name** window, enter or modify the name of the action, which will then appear in the list of actions (for example **Close outgoing contact**).
2. Select the event which will trigger the action (for example On: **Each call**).
3. You can request the display of an optional confirmation screen before the action is executed.

Configuring an action

1. Click on the **Action** tab. The following screen is then displayed.



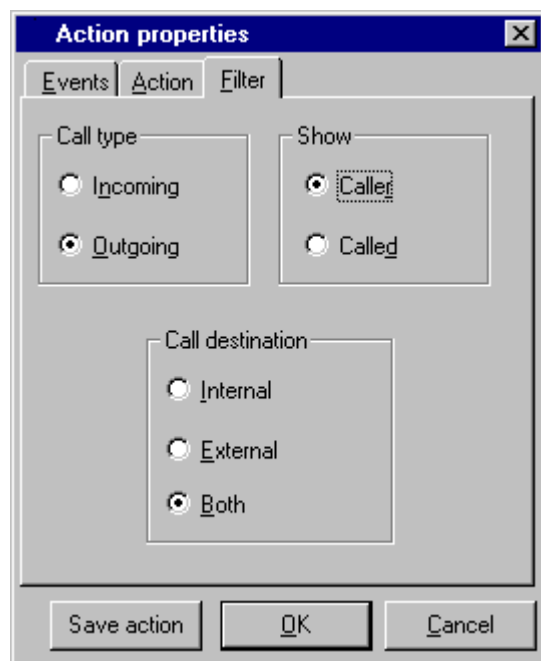
2. Select the action to be executed, for example **Send mail to**.
3. In the **Values** column, enter the destination e-mail address.
4. Select the attached condition: **confirm before activating or not**.
5. Using the cursor, select the timed delay before the action is executed (from 0 to 60 seconds).

IMPORTANT: Only one action is possible per telephone operation. For example, if the "Phone is ringing," it is not possible perform two operations simultaneously:

- Open the contact
- Send an e-mail to

Configuring a filter

1. Click on the **Filter** tab. The following screen is then displayed.



2. Select the criteria for the filtering or non-filtering of the previously defined event.

 [Customized Popup configuration](#)

Loading a pre-programmed action file

1. On the main Popup configuration screen, click on .
2. This will open a window for the selection of a file with suffix **saa** (stand alone action), from within the file organization structure.
3. Validate and the action file is loaded. The name of the action is automatically displayed in the list of actions in the Popup configuration window.

 [Customized Popup configuration](#)

The Dialer module

The Dialer module is the basic level of the **Alcatel PIMphony** application, and is represented by an icon which is always visible in the Windows tool bar.

If the Windows tool bar is hidden, use the mouse to make it visible.

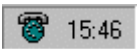
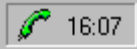
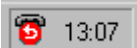
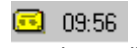
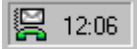


The Dialer module is automatically activated when the PC is started up.

Displaying the status of the PC-telephone connection and the terminal

The appearance of the Dialer module icon indicates the status of the PC-telephone connection and your telephone.

Supplementary information is given in the ToolTip which appears when the mouse pointer is on the icon.

Telephone status	Icon	ToolTips
Application not operational	 11:20 (Telephone with bar)	
Application is operational	 15:46 (Green telephone)	Personal number
Set ringing	 13:08  13:08 (Green bell, alternating with yellow bell)	Caller number
Phone set busy	 16:07 (green handset)	Caller number (or number called)
Phone set forwarded	 13:07 (Red telephone with white forwarding arrow)	Number receiving forward
New messages in voice mailbox	 09:56 (Yellow voice mailbox)	You have received voice mail messages
Telephone connected with unanswered calls	 12:06 (Green telephone)	Number of unanswered calls

 [Alcatel PIMphony user's guide](#)

Using the Dialer module

The Dialer is a fully independent module which can be used for various simple operations, without using the Telephone module:

- Pick up a call directly, by clicking on the icon with the mouse left-hand button.
- Dial using copy-paste or directly , using the right-hand mouse button in an application such as Notepad, Word, Outlook, Excel, etc.
- Access more sophisticated features in a context menu, using the mouse right-hand button.

 [The Dialer module](#)

Dialing using Copy and Paste

The Dialer module enables a call to be made by "copying and pasting" from a Windows compatible application such as Notepad, Microsoft Word, Microsoft Outlook, Microsoft Excel, etc.

The telephone number of the person you wish to call is "copied and pasted."

To make a call using "copy and paste:"

1. Open a Microsoft compatible application (for example, Notepad).
2. Copy (CTRL+C) the telephone number or name of the person you wish to call, recorded in the PIM or personal directory.
3. Left-click the Dialer icon. The **New Call** window appears, with the number already entered in the appropriate field.
4. Modify the number if necessary (for example for an international call).
5. Click on , and the number is dialed.
6. The Telephone window is then displayed, if it was closed.
7. The call status and management window then indicates the call status, and gives you the name of the person called and the actions available.

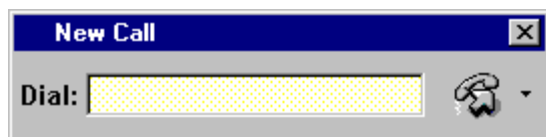
 [Using the Dialer module](#)

Dialing using the mouse right-hand button

The Dialer module can be used to make a call directly using the right-hand mouse button.

To make a call using the right-hand mouse button:

1. Right-click the Dialer.
2. In the context menu, click the command "Dial." The following window appears:



3. Now either:
 - Key in the number, or
 - Perform one of the Windows actions.
4. Modify the number if necessary (for example, for an international call).
5. Click on **Dial** and the call is dialed.
6. The Telephone window is displayed, if it was closed.
7. The call status and management window indicates the call status and gives the name of the person called and the actions available.

 [Using the Dialer module](#)

Dialer context menu

The context menu is called up by right-clicking the Dialer module.

The context menu varies according to the CTI link and station status.

Whatever the status of the CTI link and station, the following commands are always present in the context menu:

- Maximize: activates the main Telephone window
- Properties: for configuring speed dialing by using the mouse right button
- Close: quits the Dialer

Depending on the CTI link and station status, some of the following commands may also be present:

- Connect: connects up the re-established link
- Answer: to answer a call

- Dial: a window appears in which to enter the number for dialing
- Hang Up: terminates a call in progress
- Redial (number): redials the last number called.



[Using the Dialer module](#)

Speed dialing

Speed dialing allows you to make calls very quickly with a minimum of keyboard and mouse actions.

To enable speed dialing, make the following setting:

- General tab (**PIMphony Configuration** window),
 - In the "For short dial, press..." area:
 - Select the checkbox, and
 - Select the desired option.
 - Validate.

To speed dial:

1. Press the Shift or Ctrl key, or both together, depending on the option chosen above.
2. Right-click. The **New Call** window appears.
3. Now either:
 - Key in the number, or
 - Use one of the Windows actions.
4. Modify the number if necessary.
5. Click : dialing begins.
6. The Telephone window opens (if it was previously closed).
7. The Call Status and Management window displays the call status, caller ID and available actions, as in the previous example.
8. As soon as your party picks up the phone, you can start talking.



[Alcatel PIMphony user's guide](#)

The Visual Mailbox

NOTE: the Visual Mailbox is only accessible from the "pro" and "team" installations.

It enables use of the PCX Mailbox system via the PC instead of using the keys on the telephone.

- A message may be listened to using either the PC sound card, the telephone speaker, or the telephone handset (default option).
- Recording requires use of the telephone handset.

These functions are configured using [the Visual Mailbox configuration](#).

The Visual Mailbox in PIMphony is used via the [main Visual Mailbox window](#).

Messages may also be listened to by using [Outlook](#) (on the multimedia PC system).

 [Alcatel PIMphony user's guide](#)

Mailbox configuration

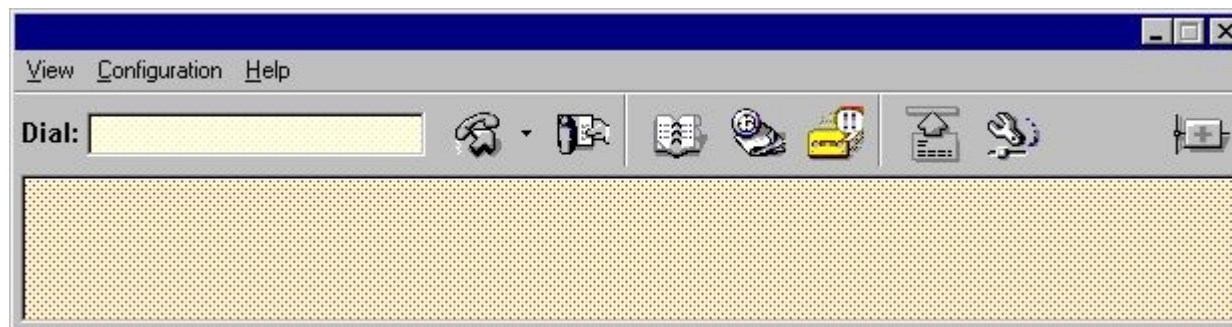
The Mailbox is customized by the following:

- The items selected on the "Voice mail" tab in the main **PIMphony Configuration** window.
- Configuration of the "[Visual Mailbox](#)" window

This is used to record, listen to, and to manage the messages left in the voice mailbox by callers .

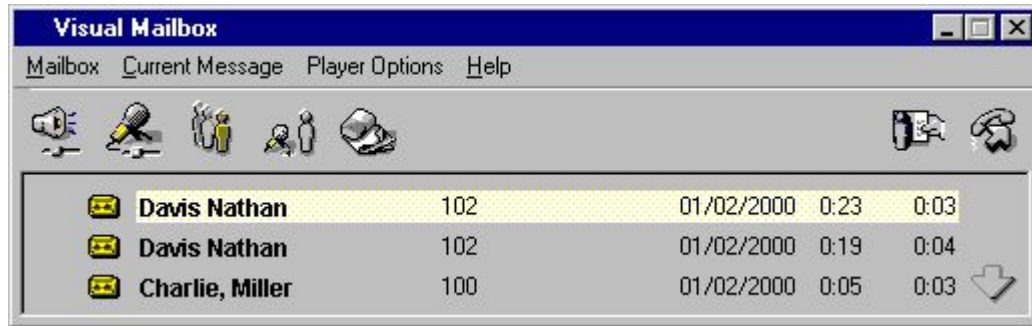
In addition, if your phone set allows recording of conversations, those recordings may also be managed in the same way as voice messages.

The icon  means there is at least one unopened message in the voice Mailbox.



You are notified that at least one new message has arrived by the  icon on the dialer module .

By clicking on the icon , or the information prompt for "New voice mails ..." you can open the main Visual Mailbox window.



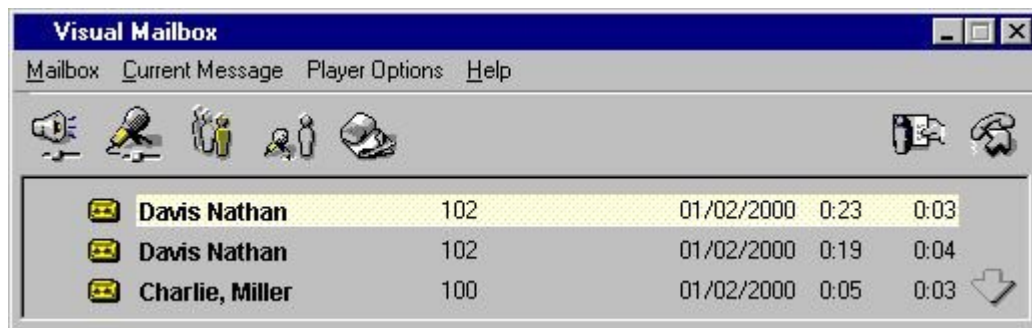
- The icon  means that the messages have not been listened to (is unopened).
- The icon  means that the message has already been listened to (has been opened).
- The icon  means that a conversation has been recorded.
- The messages are presented in 'last in' order.

 [Alcatel PIMphony user's guide](#)

The main Visual Mailbox window

This is main the Visual Mailbox window, shown containing three unopened messages.

To listen to the messages.



It is used to manage the Mailbox voice messages.

It is composed of several option bars and windows:

- Menu bars to listen to, record, transfer, forward and save messages
- Icon bar for the main Mailbox voice message options window
 - Message statuses:
 - Either the listened to status (opened):
 - Or not-listened to status (unopened):
 - Name of sender:
 - Either from the Outlook file, if there is one
 - Or from the PCX subscriber directory
 - Number only, if no name has been entered
 - Date message deposited
 - Time message was deposited
 - Message duration in minutes and seconds
- Message browser bar (multimedia type system)
- Menu, in the message browse window

[Alcatel PIMphony user's guide](#)

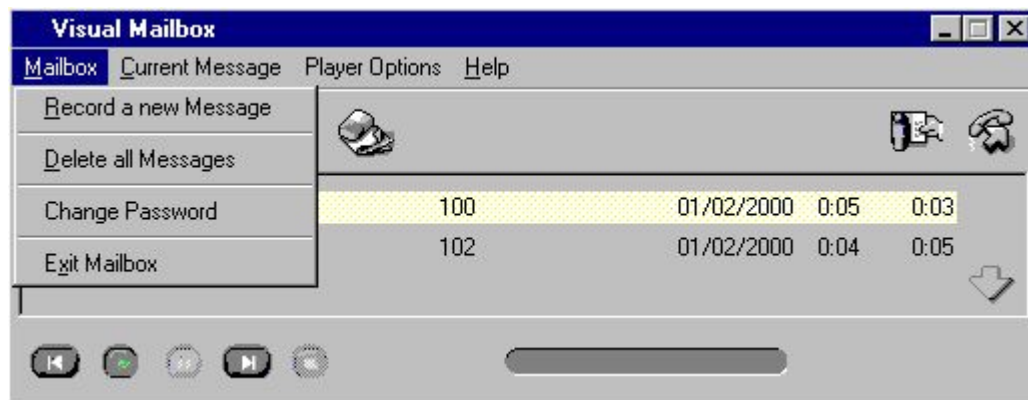
Menu bar

The menu bar offers the following menus:

- Mailbox

- Current message
- Player options
- Help

Mailbox menu



This menu is composed of the following options:

- **Record a new message:** Records a new message.
- **Delete all Messages:** Delete all messages for the subscriber in the PCX.
- **Change Password:**



Used to change the Mailbox password.

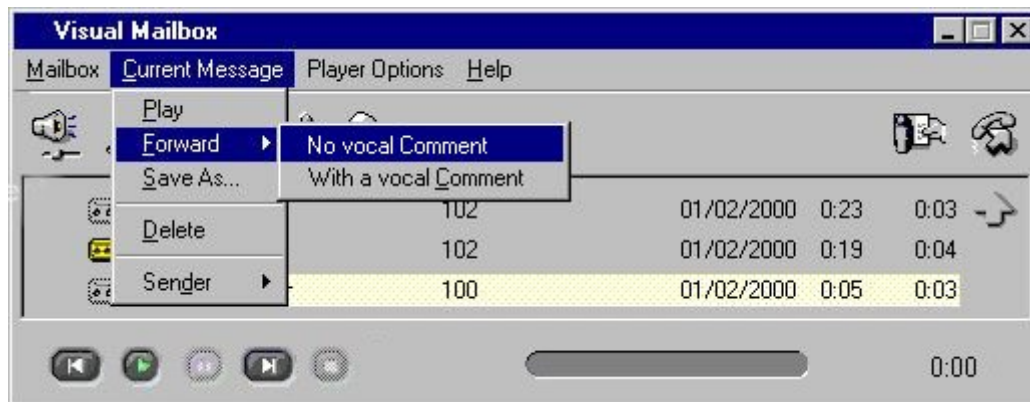
- **Exit Mailbox.**

Current Message menu

This menu is composed of the following options:

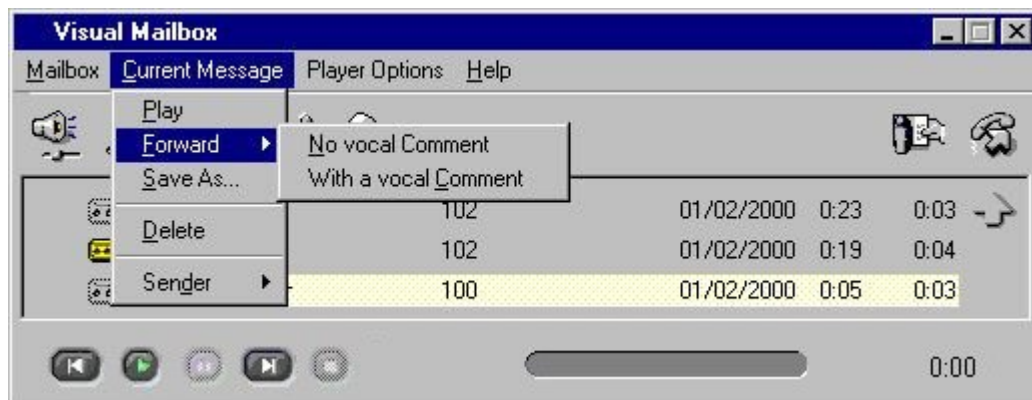
- **Play:** Used to listen to the selected message.
- **Forward – No vocal comment:**

Used to select a message, then forward it to one or more persons.



- **Forward – With a vocal comment:**

Used to select a message, then forward to one or more persons, preceded by a comment.



- **Save As ...:** Used to save the message, in .wav format, in the directory of your choice.
- **Delete:** Deletes message selected.

Player Options menu

This menu is composed of the following options:

- **Player device:** Select the player device, telephone or PC.



- **Sequential Play:** Activate or de-activate sequential playing of message.
- **Volume Control:** Access to volume control panel (Windows screen).

Help menu

The menu offers the **Contents** option, for access to on-line help.



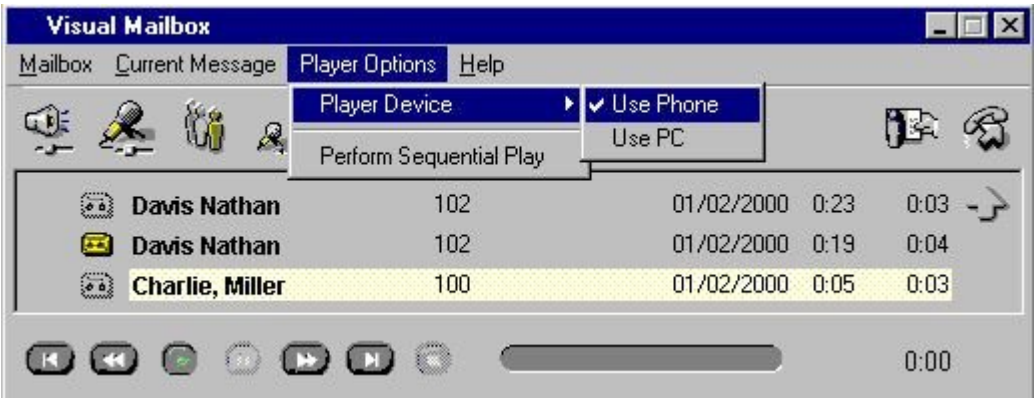
Listening to the selected message

You may listen to a message (new or old) in two different ways:

Using the telephone set (default option)

You may listen to the message on the telephone, by using the Visual Mailbox screen.

From the menu, select "Player Options," "Player Device..." or "Use Phone."



The telephone set is used to listen to the message. If the telephone has a hands-free function, the message can be played over the station speaker.



- To listen to the message selected, click on the icon .
- To pause during listening, click on ; in this case, the elapsed time flashes. A click on the listen key de-activates the pause.
- Listening may be stopped with the key.
- Listening may be fast forwarded or reversed using the arrows and . These buttons are used to skip forwards or backwards, in steps of 10 seconds.
- The and arrows are used to listen to the previous or the next message.
- The key is used to listen to a message already played.
- The time elapsed display shows whether listening or recording is in progress.

NOTE: when listening to the message, the telephone set screen (if it has one) displays "Visual Mailbox".

This bar is only visible when the set is used for the Voice Mailbox. When the set is hung up, or being used for a telephone call, this bar does not appear.

Using the PC

You may listen to the message on the PC, by using the Visual Mailbox screen.

From the menu, select "Player Options," "Player Device..." or "Use PC."



Listening over the PC multi-media system: the message is played over the PC speaker(s).

NOTE: a sound card must be installed on the PC to be able to use this function.

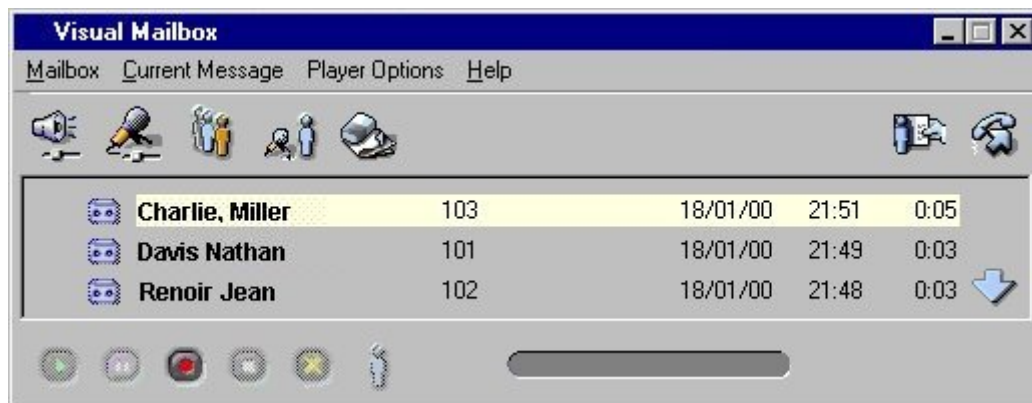


- To listen to a message, click on the icon .
- To pause during listening, click on ; clicking on the listen icon  de-activates the pause.
- Listening may be stopped with key .
- The  and  arrows are used to listen to the previous or next message.
- The  key is used to listen to a message already played.

 Menu bar

Recording and addressing a new message

You must use the telephone handset in order to record.



Activate recording by clicking on the red button , record your message, then stop the recording by clicking on the white button .

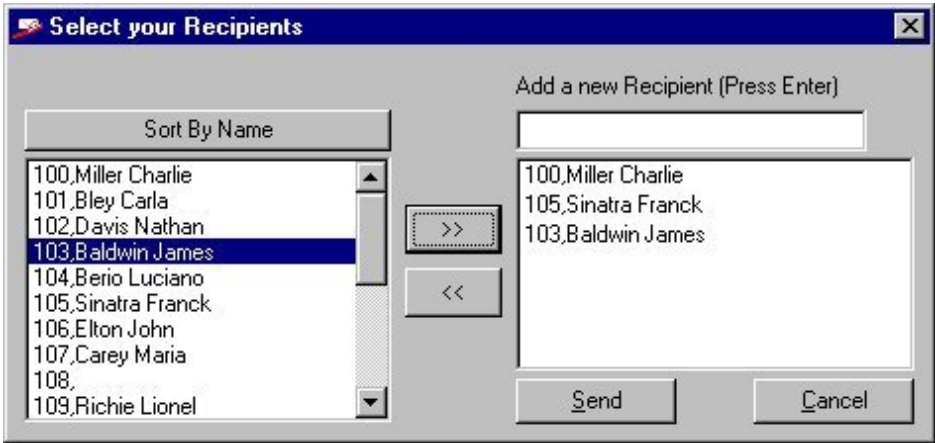
While recording, you may pause by clicking on ; clicking on the recording button  de-activates the pause.

The  key is used to listen to the message recorded.

The  key is used to delete the message selected.

NOTE: the recording stops automatically after a few seconds' silence.

Once the recording is completed, click on  to display the list of subscribers and choose the message addressee.



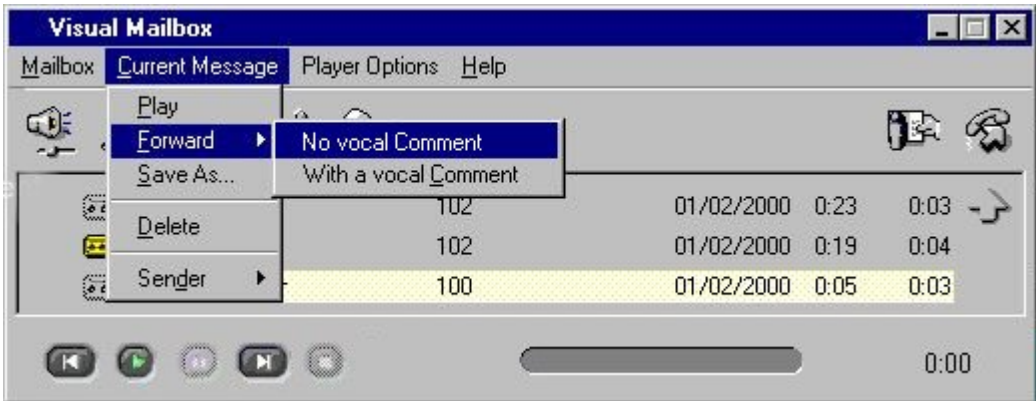
After selecting it, send the message.



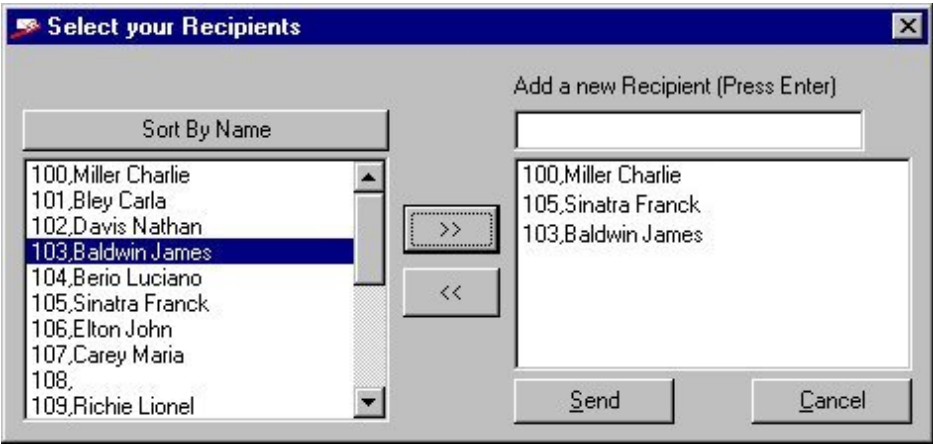
Forwarding a message, no vocal comment

Select a message from the list of messages.

From the menu, select "Current Message," "Forward," "No vocal Comment."



Once the function is selected, click on the  icon to show the list of subscribers and select the message addressee(s).



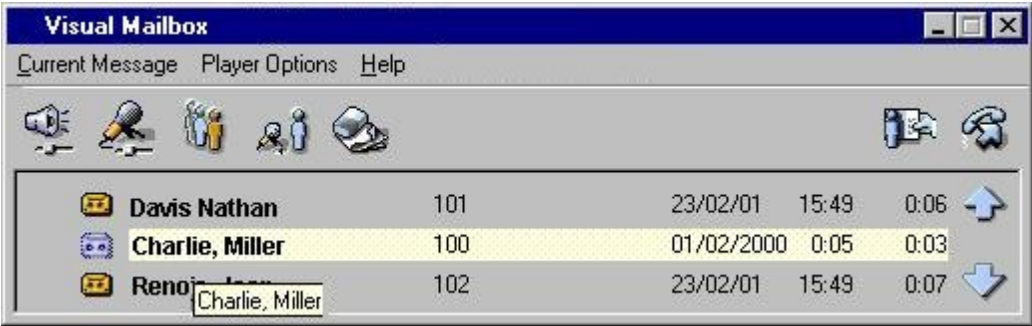
After selection, send the message.



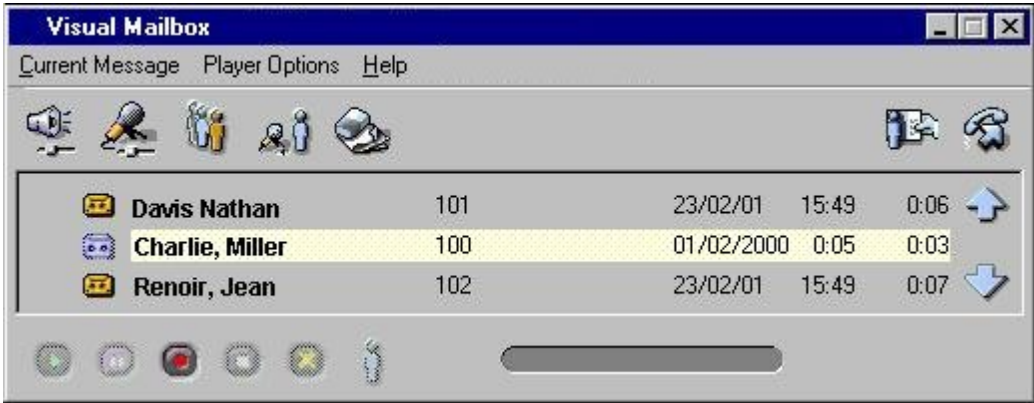
Menu bar

Forwarding a message, with a vocal comment

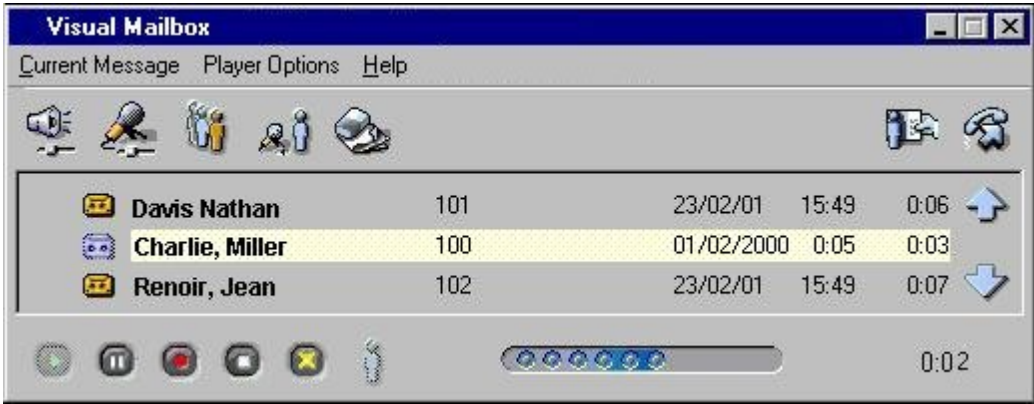
Select a message from the list of messages.



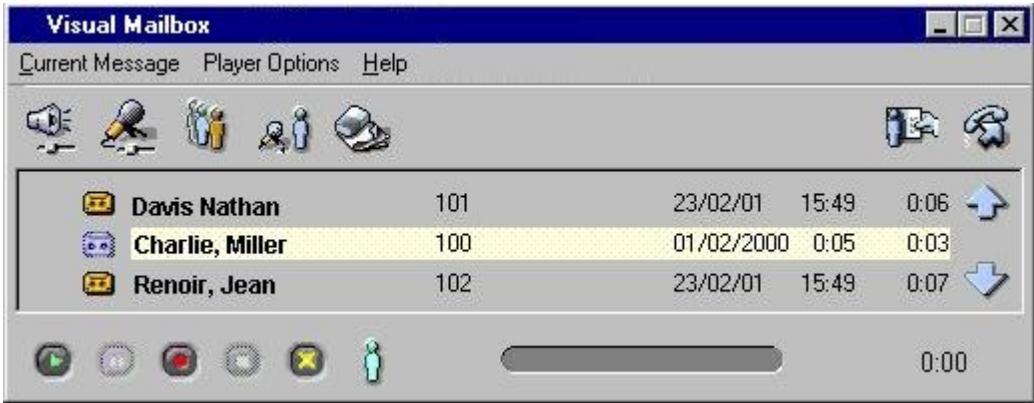
From the menu, select "Current Message," "Forward," or "With a vocal Comment."



Activate recording by clicking on the red button , record your message, then stop recording by clicking on the stop button .



During recording, you may pause by clicking on . Clicking on the record button  de-activates the pause and recording resumes.

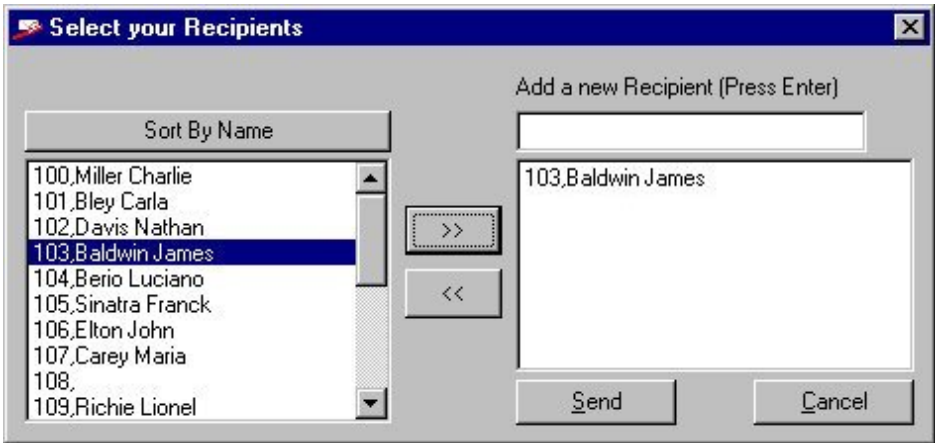


The  key is used to play back the comment recorded.

The  key is used to delete the comment recorded.

The  key is used to re-record the comment recorded.

Once the comment is recorded, click on  to show the list of message addressee(s).



After selecting, send the message.



Option icons bar

The option icons in the main Visual Mailbox window are used as the direct shortcuts to the options available for each selected (highlighted) message on the list. They are as follows:

-  : Listen to message selected
-  : Record a new message
-  : Forward the message selected
-  : Forward with a voice comment
-  : Delete line selected
-  : Show file recorded in the PIM (example Outlook), concerning the message sender.
-  : Call back the message sender.



Message window context menu

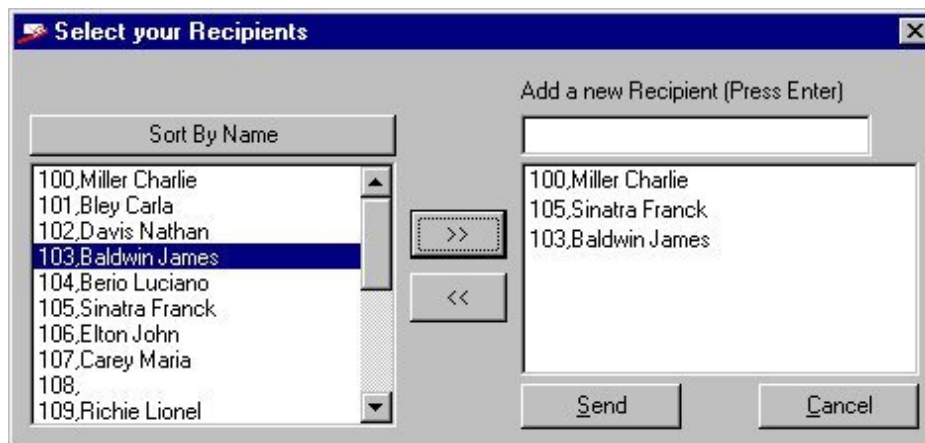
The following menu is called up by right-clicking with the mouse on a message in the message window.



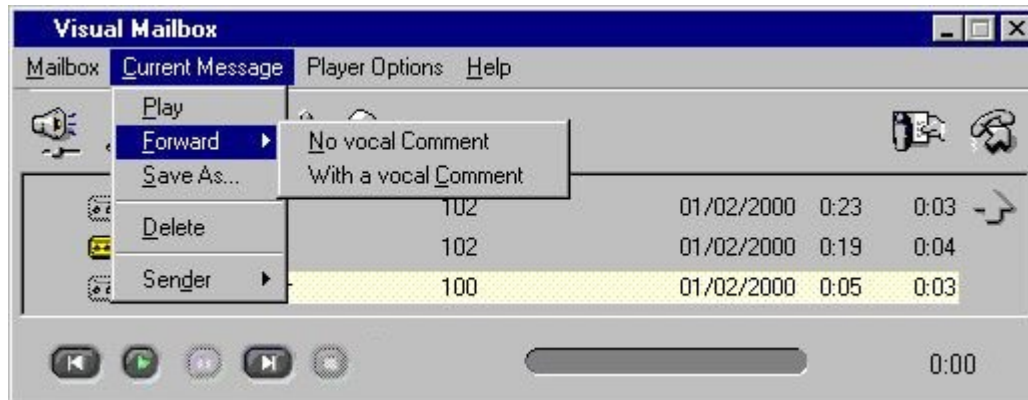
The menu options are as follows:

- **Play:** Listen to message selected.
- **Forward – No vocal Comment:**

From the left-hand list select the message addressee, then send the message.



- **Forward – With a vocal Comment:**



- **Save As ...:** To save the current message in .wav format, in the directory of your choice.
- **Sender:**
 - **Contact:** Display the PIM file.
 - **New contact:** Create a new file in the PIM.
 - **Call:** Call the message instigator.

 [Visual Mailbox main window](#)

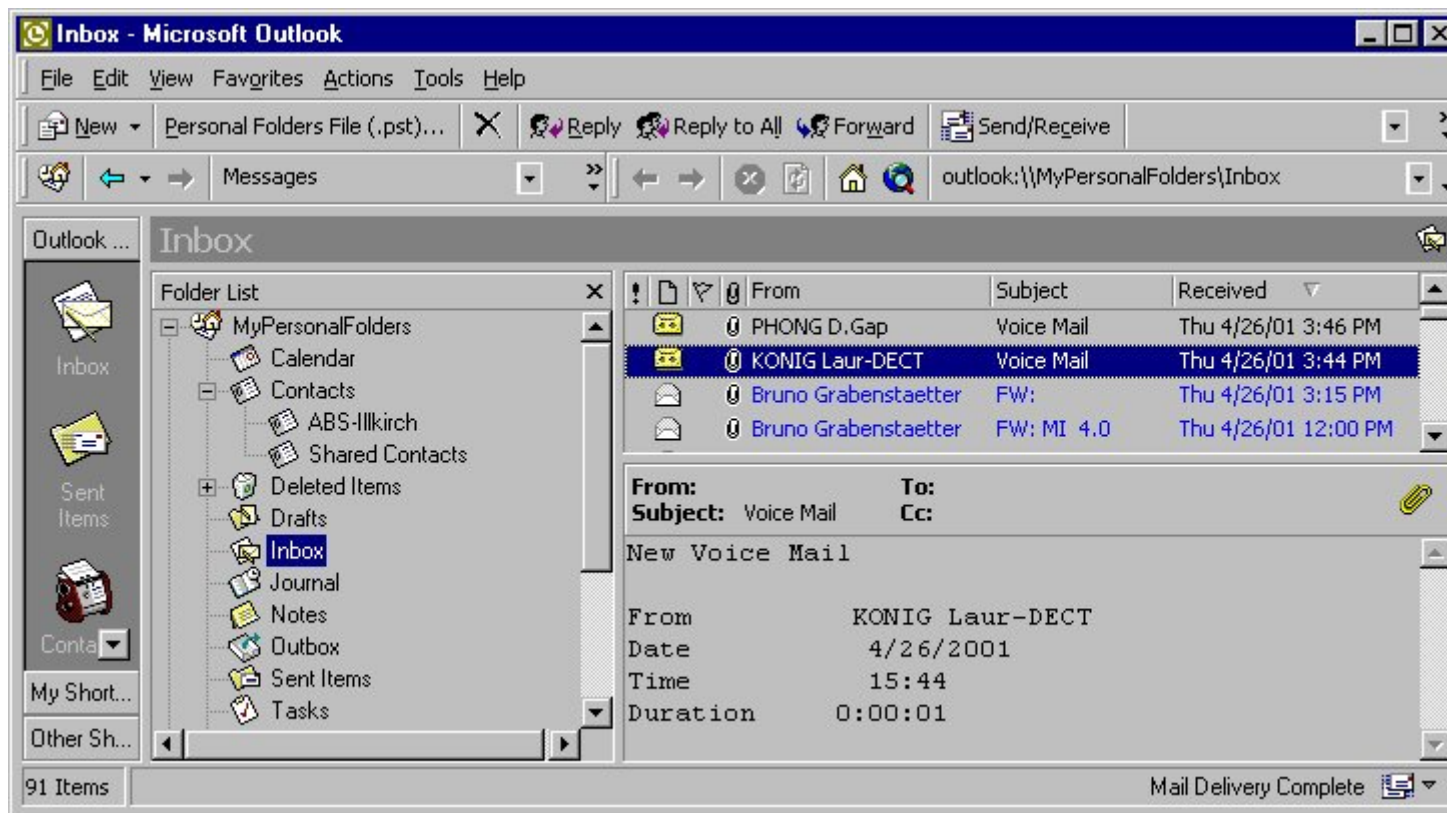
Using the Visual Mailbox in Outlook

Messages transmitted in .wav file format in Outlook may be viewed in Outlook.

- **Open Outlook**

Select the messages directory.

The messages appear in the In box, with the icon PIMphony.



The information supplied on the message line consists of:

- The icon for messages from the Visual Mailbox
- The message file indication, as an attachment, in .wav format, for use with the PC multimedia system
- The message origin information
- The Visual Mailbox message reception date.
- **Listening to the messages**

The messages may be listened to by double clicking on the message attachment, to open the PC multimedia system.

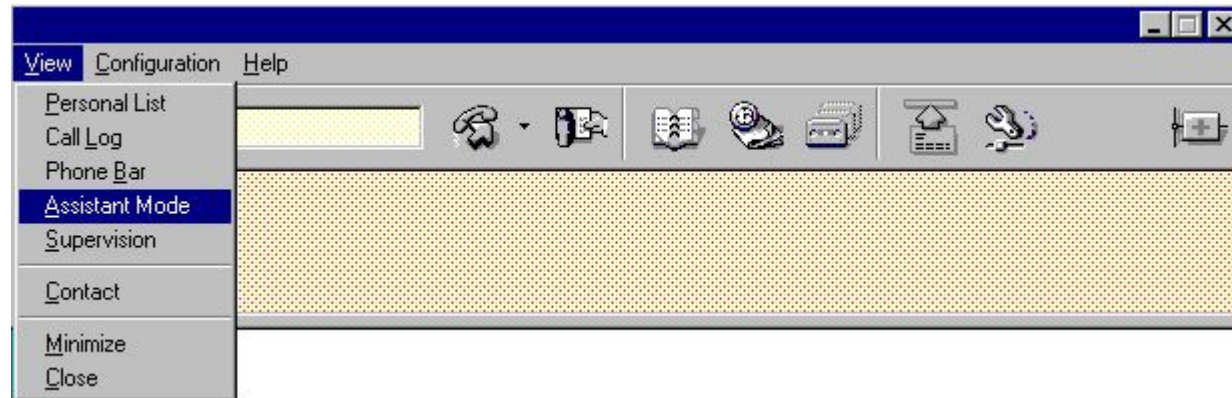


 [The Visual Mailbox](#)

Assistant mode

NOTE: Assistant mode is only accessible from the "Team" installation.

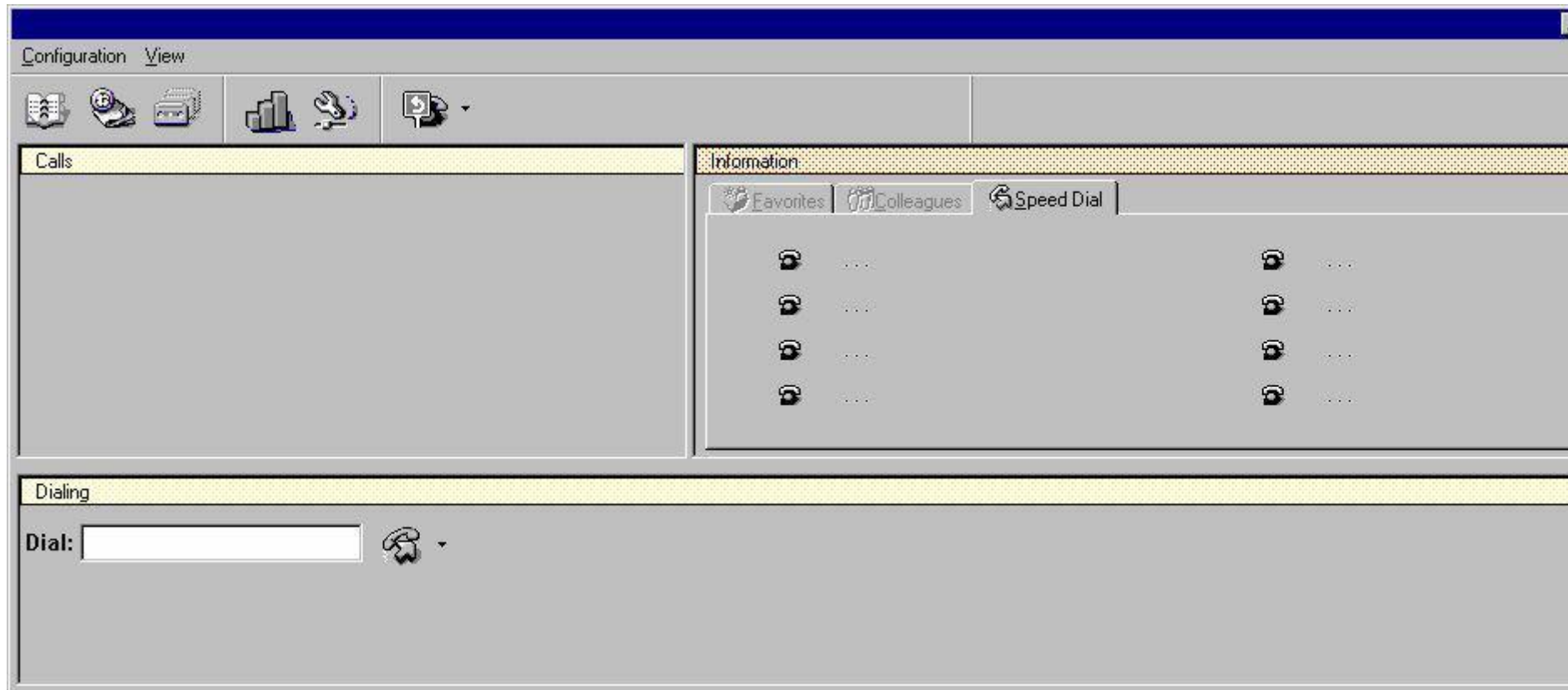
To use Assistant mode, click on the menu bar in the main Telephone module window.



Assistant mode has the same telephone features * as the Telephone module enriched with telephone call directing tools.

* **Restrictions:** tone dialing, call diversion, automatic callback, initialize a conference.

Using the Assistant mode.



Additional tools are:

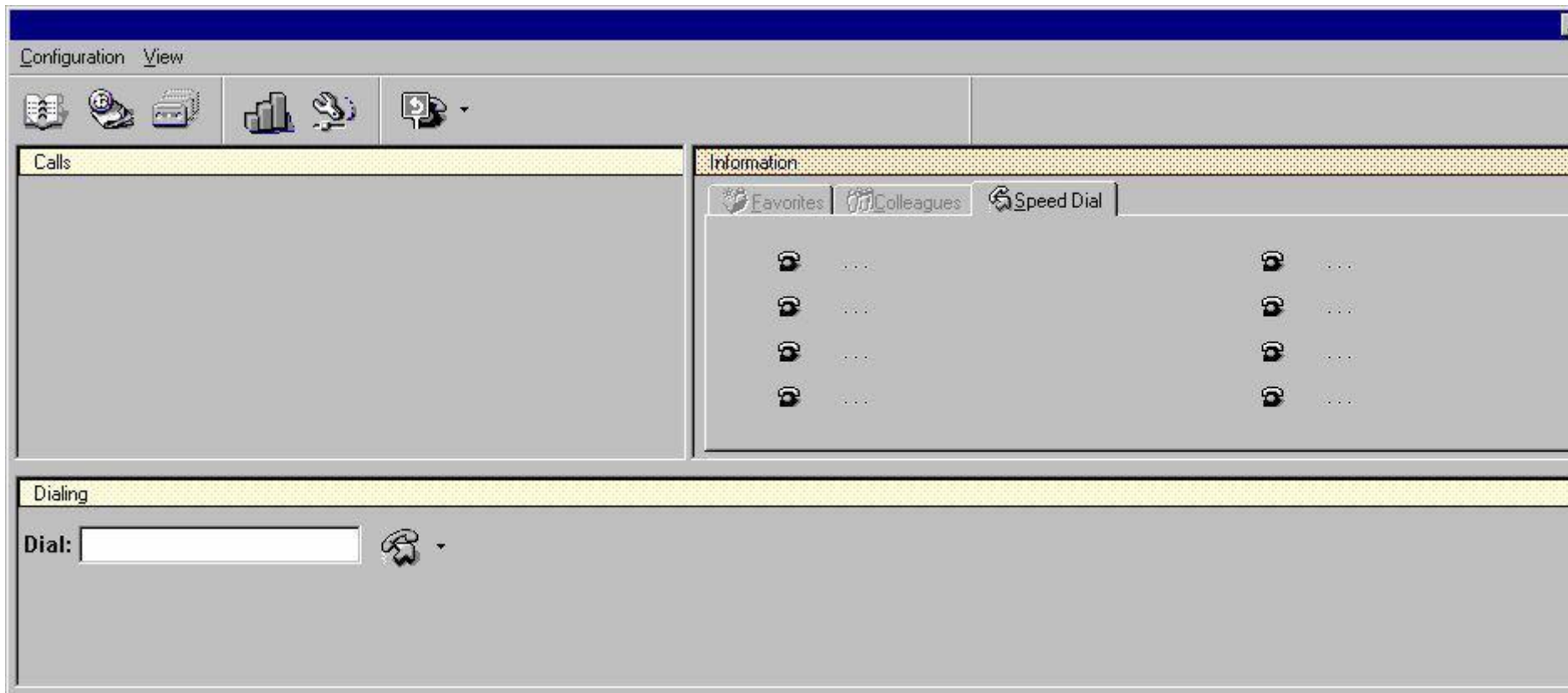
- A [Supervision window](#)
- A [Statistics tool](#)
- Function [Programming call forwarding](#)

 [Alcatel PIMphony user's guide](#)

Using the Assistant mode

The Assistant mode is composed of several windows and command bars of varying sizes some of which are optional:

1. **Menu bar** for access to the assistant **Configuration** (activation of transfers in supervised or non-supervised mode); **View** of the supervision window, change the size of the calls window (4 or 8 calls), statistics validation, and choice of View in telephone mode / assistant mode,
2. **Command bar** for access to the personnel directory , to the calls log , the statistics tool , the voice mail system , the application configuration , the forwarded calls ,
3. The **Calls** window,
4. The **Dialling** window,
5. The **Information** window with its three tabs.

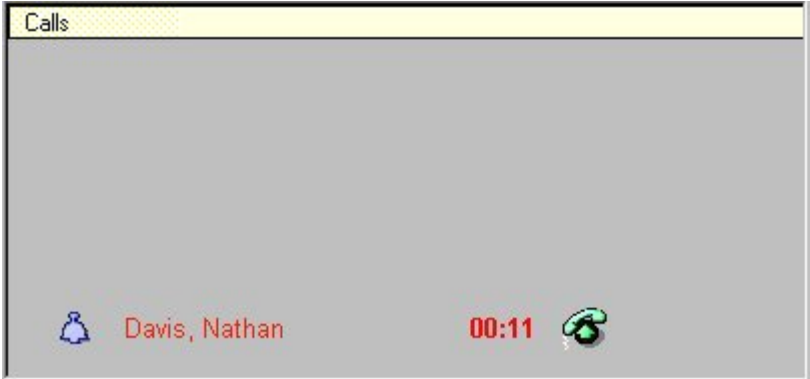


Calls window

Current calls are shown in this window.



Where the alarm boxes are activated under the configuration Assistant tab, the call is in alarm mode when the pre-defined threshold is reached.



Dialing window



Dialing

Dial: 

Business  Assistant

Status: Free

Department: Administration Email Address: Lionel.Richie@busines

This window is composed of a command bar for dialing:

- Dialing by number,
- Dialing by name.

When dialing by name for a person, the windows shows additional information:

- **Status** of phone set called (available, engaged, in conversation, forwarded, etc.)
- Information from the person file (department, e-mail address, ...)
- Different associated numbers are given, as well as the assistant number (if they have been entered).



Dialing

Dial: 

Business  Assistant

109

Status: Free

Business: 109

Department: Administration Email Address: Lionel.Richie@busines

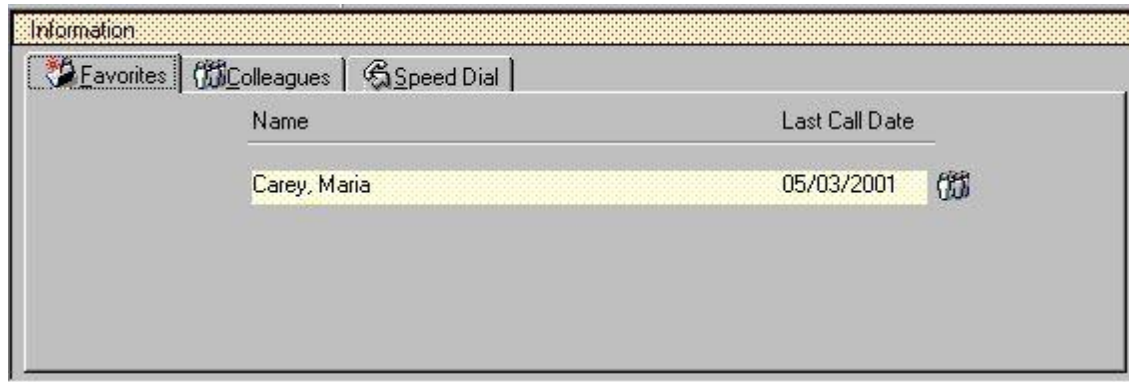
An incoming call may be transferred supervised or non-supervised, simply by clicking on one of the Supervision window buttons, or by dialing a name or number directly from the window .

Information window

This window has three tabs:

- **Favorites tab:** If an incoming caller is identified (because he has already made one or more calls), the phone sets to which he was directed are given in the list

(maximum of four).

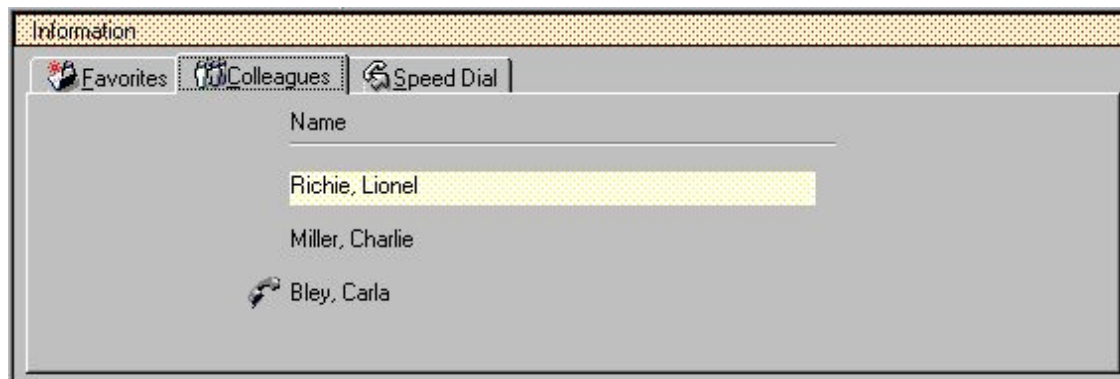


This list is sorted per the parameters entered in the configuration menu, Assistant tab (Sort on Date / Sort on Count).

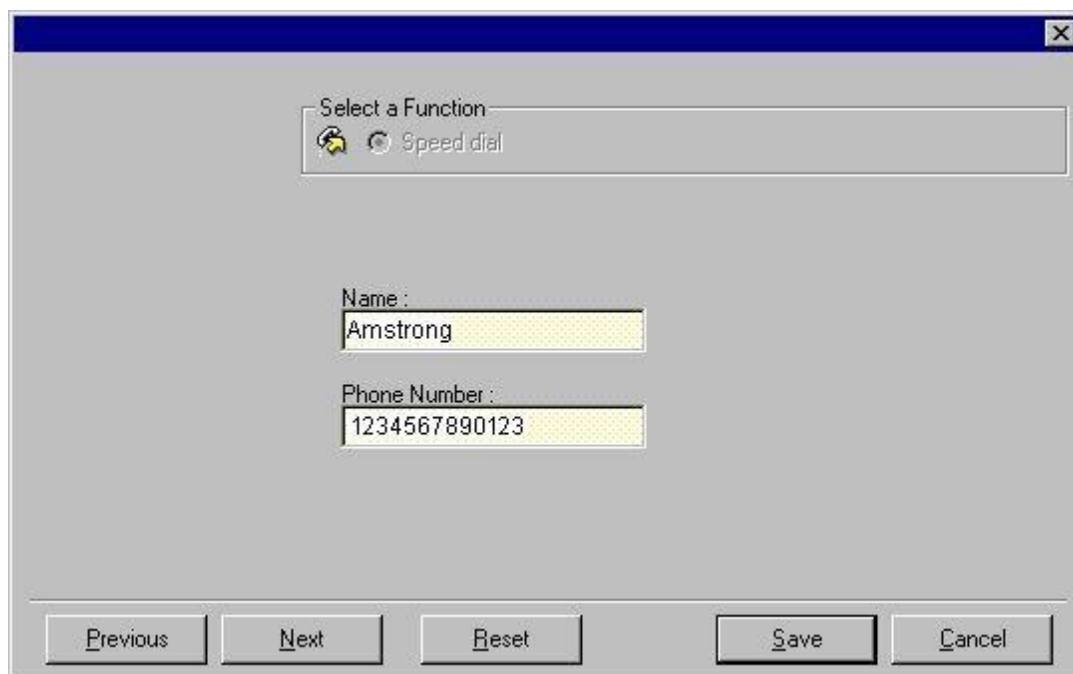
These are the last four calls by the caller, sorted either by call frequency, or by the call dates.

This list enables the person receiving the call, to transfer the caller quickly as possible to the person requested, while immediately having available information on the caller's previous calls.

- **Colleagues tab:** Gives access to persons defined as colleagues in the person file.



- **Speed Dial tab.:** Used to set up speed dialing, by right-clicking on a free key, in order to save the Name and Number information.



Select a Function

Speed dial

Name :
Armstrong

Phone Number :
1234567890123

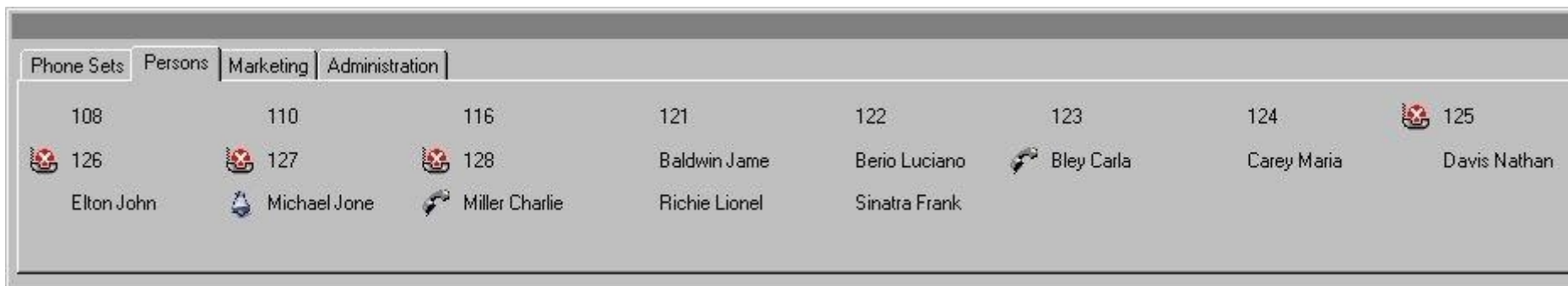
Previous Next Reset Save Cancel

 [The Assistant mode](#)

The Supervision window

NOTE: the Supervision window is only accessible from the "Team" profile.

It is called up by clicking on the **Supervision** menu.



This window is used to display the status of the system phone sets and to assign the following telephone operations:

- Call generation
- Call transfer
- Call pick-up, by right-clicking with the mouse on the phone set that is ringing.

Initial tabs

- **Phone sets:** this tab shows the list of all of the phone sets declared on the PCX. This list is downloaded every time PIMphony is started up.

NOTE: if the system configuration has changed, the changes must be passed on to the persons, shaded gray in the window. It is necessary to synchronize the configuration.

The following icons are used to show the status of a phone set:

: Busy / off the hook

: Ringing

: Unavailable

: Forward immediate

: Phone set free

: Forward on busy

: Do not disturb

: Forward text

Under this tab, the phone sets are displayed in three ways:

- Either only the phone set number:

Phone Sets							
Phone Sets	Persons	Marketing	Administration				
100	 101	102	103	104	105	106	107
108	109	110	112	116	121	122	123
124	 125	 126	 127	 128			

- A phone set number: this set is declared on the PCX
 - A phone set number in bold type: this set is declared on the PCX and there is a [person file](#) for it.
- Or the name of the person assigned to this phone set (in this case, if a name is not yet assigned to the phone set, the phone set number is shown)

Phone Sets							
Phone Sets	Persons	Marketing	Administration				
108	110	116	121	122	123	124	 125
 126	 127	 128	Baldwin Jame	Berio Luciano	 Bley Carla	Carey Maria	Davis Na
Elton John	Michael Jone	 Miller Charlie	Richie Lionel	Sinatra Franc			

- Or the phone set number and the name of the person assigned to this phone set (in this case, if a name is not yet assigned to the phone set, the phone set number is shown):

Phone Sets							
Persons							
108	110	116	121	122	123	124	125
 126	 127	 128	Baldwin Jame	Berio Luciano	 Bley Carla	Carey Maria	 Davis Na
Elton John	Michael Jone	 Miller Charlie	Richie Lionel	Sinatra Frank			

Three menus are accessible by right clicking with the mouse.

- **Persons:** this tab is empty initially; the user may create person files from the phone set numbers.

Phone Sets							
Persons							
 Bley Carla	Carey Maria	Miller Charlie	Richie Lionel				

✓ Numbers
Names
Names and Numbers

Add supervision view

Create all the persons
Remove all the persons

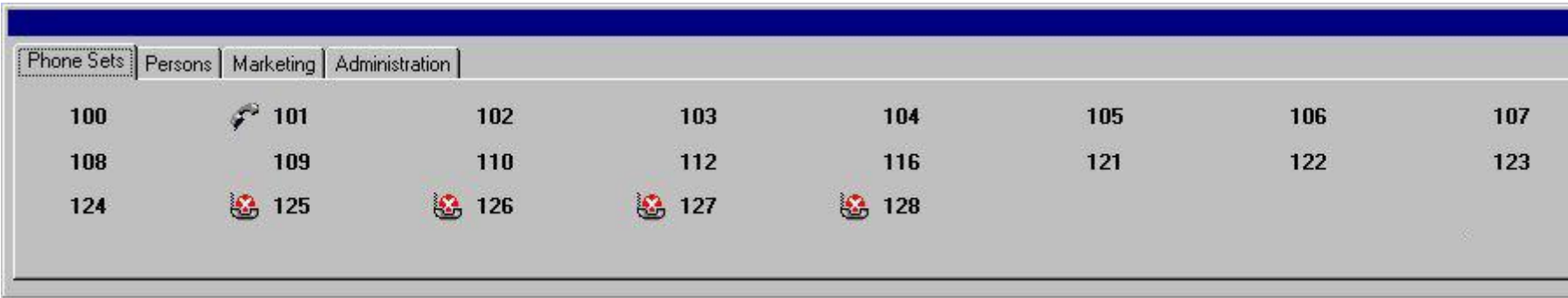
✓ Sort Ascending
Sort Descending

Two menus can be accessed by right-clicking with the mouse.

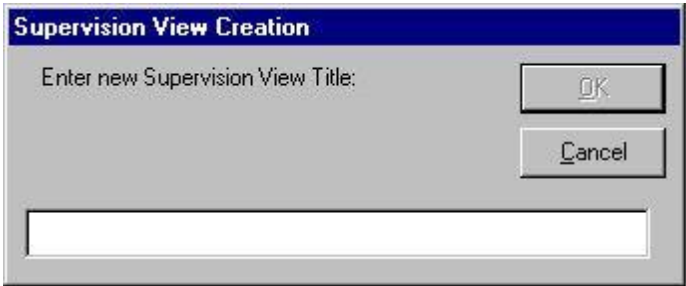
Additional tabs

The creation of additional tabs is by right-clicking with the mouse on one of the Supervision window tabs.

- Confirm the command **Add supervision view** (supervision view creation).

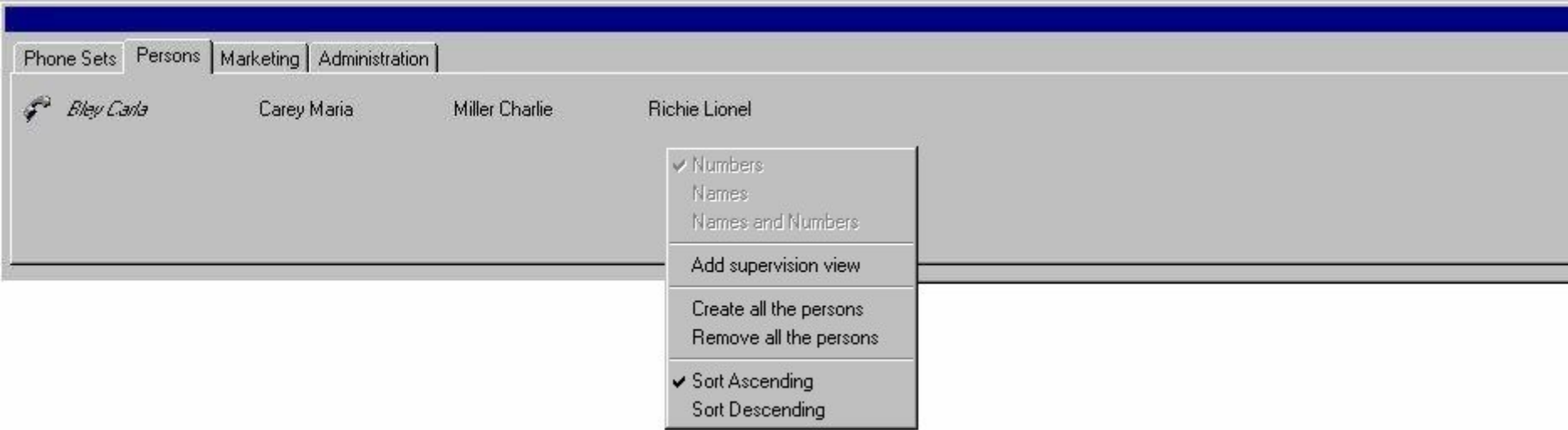


- A window is opened:



Enter the name of the view to be added.

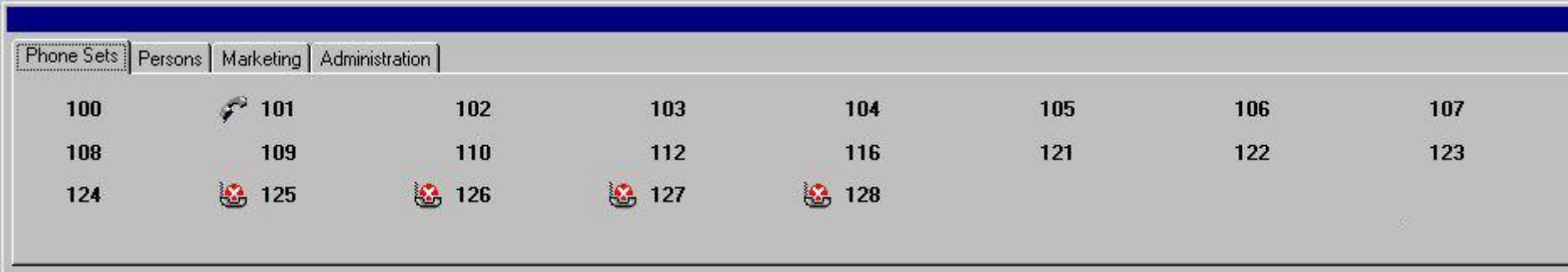
- The maximum number of tabs is 9.



 [Assistant mode](#)

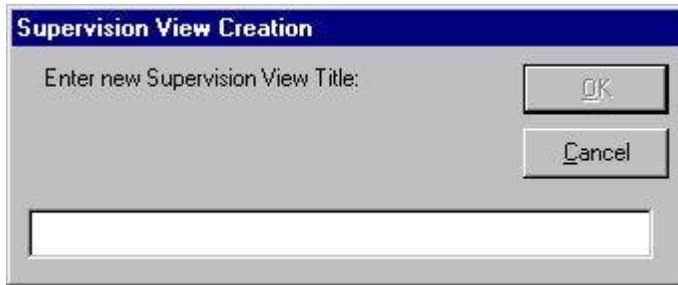
Phone sets tab context menus

The following menu appears by right-clicking with the mouse on the background.



The menu commands are as follows:

- Numbers: Changes display by showing phone set numbers.
- Names: Changes display by showing phone set names.
- Names and Numbers: Changes display by showing phone set names and numbers.
- Add supervision view: Click on this option to see:



Fill in the title for the view to be added (maximum capacity: 7 views).

- Sort Ascending: Shows numbers or names in ascending order.
- Sort descending: Shows numbers or names in descending order.

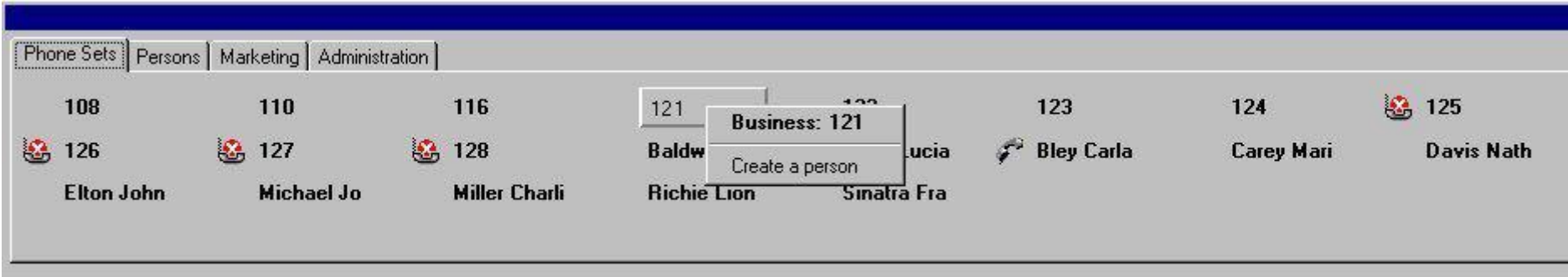
The following menu is called up by right-clicking with the mouse on a button in the Supervision window, if the phone set is assigned to someone (shown in **bold**).



The menu commands are as follows:

- Access to the properties already assigned to someone (phone set number, name).

The following menu is called up by right-clicking with the mouse on a button in the Supervision window, if the phone set is not assigned.



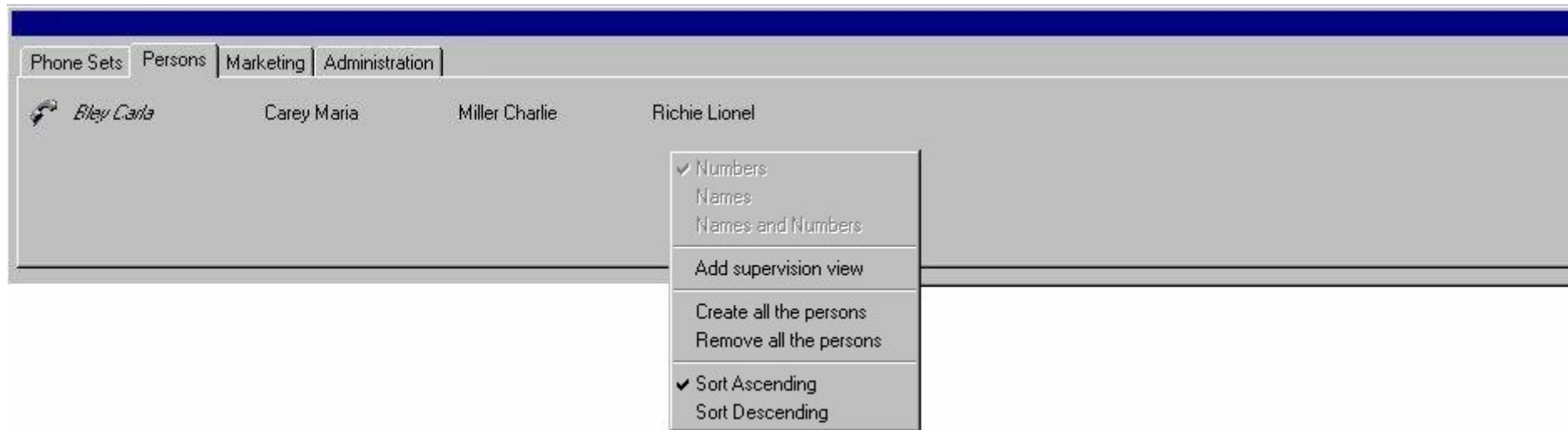
The menu command is described below:

- Create a person for a phone set number.

 [The Supervision window](#)

Persons tab context menus

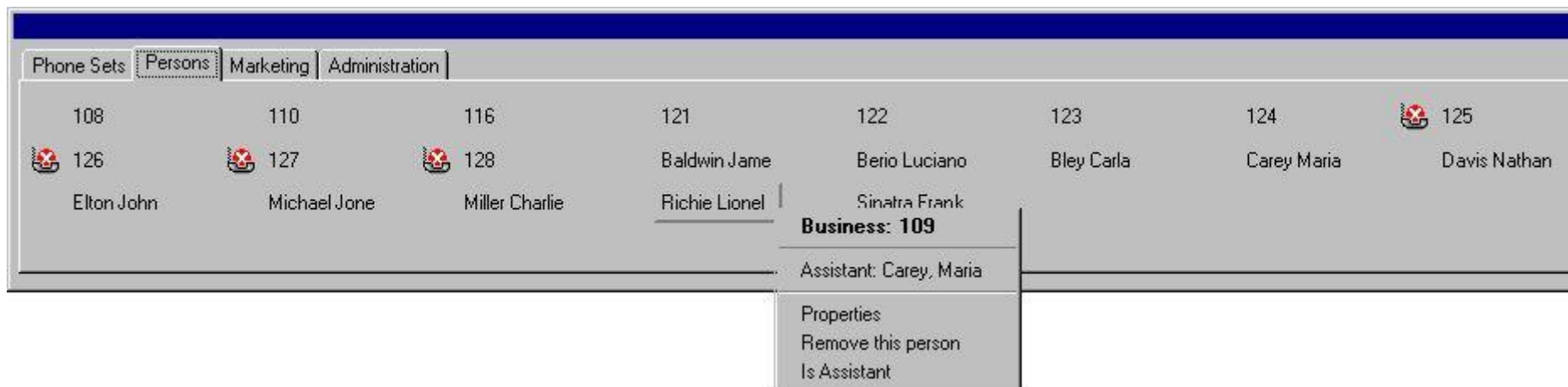
The following menu is displayed by right-clicking the mouse on the background.



The menu commands are the following:

- Add supervision view.
- Create all the persons: Create a pre-completed Person file (with the information supplied by the PCX) for each declared PCX station.
- Delete all the persons.
- Sort Ascending: Persons listed in increasing alphabetical order.
- Sort Descending: Persons listed in decreasing alphabetical order.

The following menu is displayed by right-clicking with the mouse on a button in the Supervision window.



The menu commands are as follows:

- Access person file properties for consultation or updating.
- Remove the person's file.
- Define person as an assistant in his/her supervision group.

[The Supervision window](#)

Person files

To create a person file, with the right mouse button, click on the telephone number to be assigned to the individual on the **Phone Sets** tab and click the menu **Add a person**.

Phone Sets																Persons																Marketing																Administration															
100			101		102		103		104		105		106		107																																																
108			109		110		112		116		121		122		123																																																
124			125			126			127			128																																																			

The **Update Person** window appears.

Update Person

Last Name

Richie

First Name

Lionel

Email Address

Lionel.Richie@business.com

Department

Administration

Business

Richie, Lionel (109)

Pager

Business2

Other

Mobile

Home

Supervision Views

Colleagues

Administration

Assistant

Bley, Carla

Displays in

☒ Persons

☒ Administration

☐ Marketing

OK

Cancel

- Enter the person's data.
- Link the person to a Supervision group and its assistant.
- Have the new person on other lines in the supervision window.
- Confirm by clicking on the **OK** button.

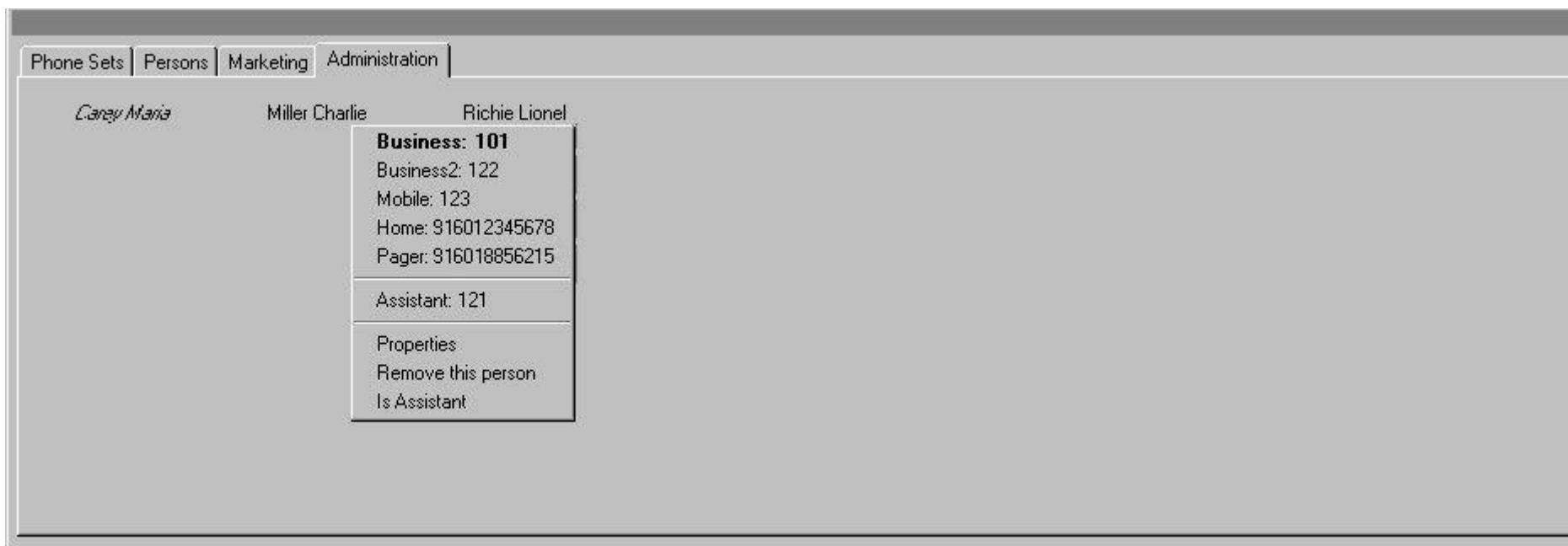
To copy person files between tabs

Click on the person in the **Persons** tab, and by holding down the right mouse button, you may copy the person's file into another tab. This enables the composition of supervision groups under the different tabs.

The person

A click on the right mouse button opens a menu showing the different phone sets for the person, and also allows the properties for this person file to be altered.

The first phone set in the list is the main phone set.



- It is possible to delete this person file

- It is possible to declare this person as an "assistant." In this case, the name of the person will be shown in italics.

The assistant

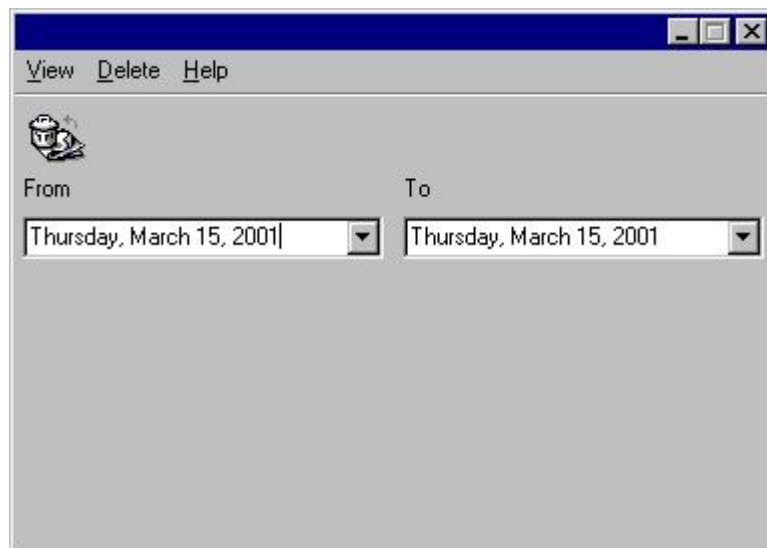
A person who is declared an assistant under a tab, appears in the files of his/her colleagues (direct forwarding possible).

 [The Supervision window](#)

Statistics tool

Accessible using icon  on [Assistant mode](#) screen.

After clicking on the  icon, the Statistics window is displayed:



This window is used to define, for the period required (in this example, Thursday, March 15, 2001), the data to be retrieved. This data is prepared in .CSV file format, for use with Excel or other compatible software.

File creation is done by using the **View** menu, and selecting **Export**.

The following information is given for each day:

- Number of calls received
- Number of unanswered calls
- Number of calls transferred
- Number of returns to attendant/operator
- Time to answer (average in seconds)
- Time to transfer (average in seconds)

 [The Assistant mode](#)

Programming call forwarding



This feature enables the user to set:

- Immediate forwarding to the phone set designated in the **Telephone** window.
- Forward on busy to the phone set designated in the **Telephone** window.
- The station to a particular mode, which makes it available (in this case, the **Phone Number** window does not need to be filled in).

 [The Assistant mode](#)

Keyboard shortcuts

All of the functions offered by PIMphony Assistant are accessible via the mouse, but they may also be activated using the keyboard, facilitating and accelerating the answering and directing of calls.

This is the list of shortcuts available:

- **Space bar:** Answers the first call in the queue. If the person being called is already engaged, he is notified of the incoming call.
- **Control + Keypad "1" to "7":** Answers a call selected from the list of calls in the queue. Resume a call on hold. If the person being called is engaged, he is notified of the incoming call.
- **Enter:** Dial a number.
- **Escape + Keypad "-":** Hang up on current call.
- **Escape + Keypad "+":** Notification of current call.
- **Escape + Keypad "/":** Transfer current call.

NOTE: These shortcuts are not default functions. The option "**Enable keyboard shortcuts**" must be activated in the configuration of Assistant.



The Assistant mode

Miscellaneous

This section includes:

- A Glossary of the technical terms given in this Online Help
- A list of frequently asked questions and their answers
- Instructions to follow in the event of technical problems
- A statement of the rights associated with the use of this software (copyright)



Introducing Alcatel PIMphony

Glossary

This glossary defines the main technical terms used in this Online Help:

A B C D E F G H I J K L M N O P Q R S T U V W

- **Action:** Action executed automatically by the Popup when a specific event occurs (e.g., contact window Popup).
- **Alcatel PIMphony:** Application providing the interface between an Alcatel Reflexes telephone connected to a Alcatel OmniPCX Office and a commercial PIM (e.g., Outlook).

- **Assistant mode:** The Assistant mode has the telephony features of the Telephone module enriched by call distribution techniques.
- **Calls log:** Archive record of the last 400 calls and their main characteristics.
- **CTI** (Computer Telephone Integration): PC - Telephone connection.
- **Colleagues:** Group of persons belonging to the same supervision view.
- **Conference:** Telephone feature that provides a conversation with two other terminals simultaneously.
- **Dialer:** **PIMphony** Module shown as an icon in the tool bar.
- **DECT** (Digital European Cordless Telecommunications): European telecom standard for digital wireless telephones.
- **DNS** (Domain Name Server): Service enabling the translation of the IP address of a computer into its name and inversely. The name constitutes a mnemo-technical means of facilitating access to information and sending messages.
- **E-mail:** Electronic mail.
- **Ethernet:** Type of connection used as the basis for local high speed networks.
- **Event:** Situation detected by the Popup to trigger a specific action.
- **Filter:** Operating parameter that determines when events detected by the Popup should trigger a specific action.
- **Forward:** Telephone action which directs all calls to made to a terminal, to another terminal that is designated to receive the forwarded calls.
- **Full-Duplex:** Ability to transmit information from both ends of a connection at the same time.
- **IP address:** Network member computer identifier. Quadruplet of bytes presented in the format xxx.xxx.xxx.xxx, which represents both the part of the network to which the computer belongs, and the number of the computer in the network. There is only one computer for one IP address.
- **LAN** (Local Area Network): Local network; set of computers linked together, usually by a high-speed link.
- **MS Access:** Microsoft database manager.
- **MS Outlook:** Microsoft application which manages the sending and receiving of e-mail, and the address book and personal directory functions.
- **MS Word:** Microsoft word processing software.
- **MS Excel:** Microsoft spreadsheet software.
- **Notepad:** Small Microsoft Windows text edit/print application.
- **Packet:** Group of bytes used to transfer files.
- **Person:** A person is described by a file containing the person's name, first name, internal telephone numbers (supervised) and external telephone numbers (unsupervised), e-mail address, department, etc.
- **Personal directory:** **PIMphony** Module providing the telephone directory functions if PIM is absent.
- **PIM (Personal Information Manager):** Application which manages the address book and personal directory functions.
- **Popup:** **PIMphony** Module providing the interface with the PIM installed on your PC. Provides an automatic PIM window Popup facility.
- **PWT** (Personal Wireless Telecommunications): a North American telecom standard for wireless telephones.
- **Putting on hold:** Telephone action of putting a call on hold.
- **Supervision (view):** A supervision view may cover a department, a division, a group of persons.
- **Supervision (window):** This window is used to display the status of the system phone sets and to execute telephone operations such as a call, transfer and interception.
- **TAPI** (Telephone Applications Programming Interface): Microsoft telephony applications control software.
- **TCP/IP** (Transmission Control Protocol/Internet Protocol): Internet communication Protocol that uses packet switching (the same as X.25). The message is divided into fixed-length packets or Datagrams, which are marked (with information defining the sender, the receiver, the packet number in the sequence, etc.), then transmitted one by one over the available lines. Unlike X25, TCP/IP is an end-to-end protocol; only the sender and the receiver are responsible for checking the integrity of the transmission.
- **Telephone:** the **PIMphony** module providing main user interface.

- **Transfer:** Telephone action which, following a consultation call, allows the first call to be transferred to another terminal.
- **Voice Mailbox:** Enables consultation of voice messages from the PCX.
- **Wizard:** Popup configuration aid.



[Alcatel PIMphony user's guide](#)

Frequently asked questions

A number of frequently asked questions, and the corresponding answers, are given below:

 What is the minimum hardware configuration required to install **Alcatel PIMphony**?

- Refer to the Installation Manual.

 What is the minimum software configuration required?

- Refer to the Installation Manual.

 What do the icons represent in the various windows?

- Depending on the screen displayed, refer to the [Telephone module](#), [Calls log](#) or [Personal directory](#).

 How can I make a telephone call using **PIMphony**?

- Refer to [Making a call](#) if you want to use the Telephone module, or on [Dialing using Copy-paste](#) if you want to use the Dialer.

 What is the Popup used for?

- **Popup** provides the interface your PIM and the application. For example, when a specified event occurs, it automatically opens the window of a terminal designated in your PIM.

 How can I configure Popup?

- Use the [Wizard](#), which will guide you through the configuration using predefined profiles.

 What should I do if the system is not operating correctly?

- Click on [In the event of technical problems](#). If the problems persist, contact your dealer.

What must be done in case of bad audio quality with PIMphony version IP during remote access?

- The type of codec must be changed using the Telephone tab in the PIMphony Configuration window. The G711 algorithm is preferable for a LAN link and G723 is better for a modem link.

 How is echo avoided at a remote station?

- Echo is a problem typically caused by the sound card and its volume configuration. To correct this problem, all of the unused volume controls must be set to zero for recording and for listening. In addition, avoid setting the reception volume too high.

 [Alcatel PIMphony user's guide](#)

In the event of technical problems

If the application is not operating correctly after installation:

1. Check the hardware installation by referring to the installation manual.
2. Check the Windows telephone configuration (in the **Control Panel, Telephone** folder).
3. Check your network is operating correctly.
4. For IP editing, check your network is operating properly.
5. In **Configuration/Options/Telephony/Configure**, either manually set the IP address for the PCX to the direct connection configuration, or to the name of the Microsoft TAPI 2.1 Server (if this architecture is used), then restart **PIMphony**.

If the dialing function is unavailable:

Check the associated line. To do so:

- Open the [Telephony](#) tab in the **PIMphony Configuration** window.
- If you are using Microsoft TAPI Server 2.1:
 - A. Service provider: Microsoft Windows [™] Remote Service Provider
 - B. Associated line: ALCATEL - 101 (line number)
- If you are connected directly to the PCX:
 - A. Service provider: ALCATEL Service Provider
 - B. Associated line: ALCATEL - 101 (line number)

If, after several attempts, the application is still not working:

- Contact your dealer.



[Alcatel PIMphony user's guide](#)