

# HOSTED VOIP - PERSONAL AGENT

## Getting started user guide

June 2012

Application release 8.0 | Document version 1



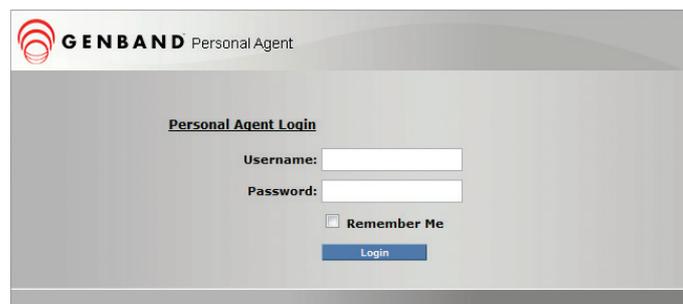
The Personal Agent is a feature-rich web portal which is used to view, manage, and configure services to your personal preferences. Moreover, you can perform these functions from any location with a standard web browser, with Adobe Flash Player installed, and an internet connection.

**Online help** - from any page, click the **Help** icon on the top right of any page to view a PDF-based user guide.

## Logging on to the Personal Agent (PA)

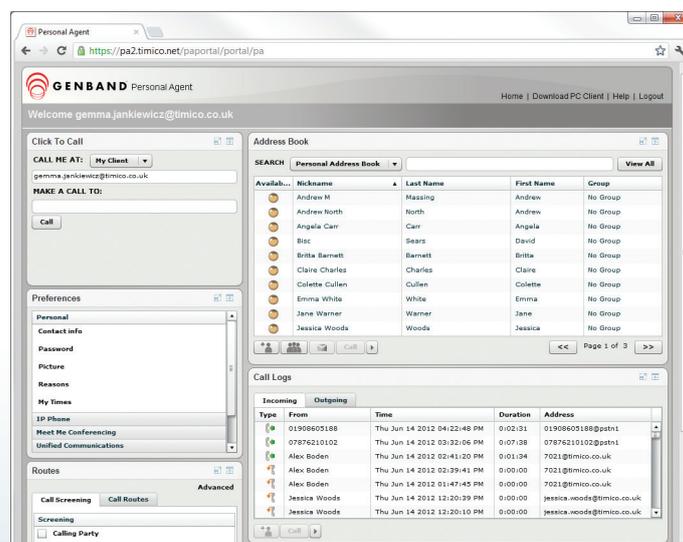
Launch the Personal Agent either by entering the URL into your web browser, as given to you with the confirmation of your order, <https://pa2.timico.net>, or alternatively, you can launch the page via the Personal Communicator or the Multimedia Office Client.

Disable the pop-up blockers within your web browser when using the Personal Agent to ensure that the pop-ups associated with the Personal Agent appear on your screen.



To log in you will need your username and password as provided to you.

The Personal Agent main page is always your starting point to access all the services and features of the Personal Agent. Depending on the services assigned to you, the Personal Agent appears as follows:



## Using the Personal Agent: Click-to-Call



The screenshot shows a web-based interface titled "Click To Call". At the top, there is a dropdown menu labeled "CALL ME AT:" with "My Client" selected. Below this is a text input field containing the email address "gemma.jankiewicz@timico.co.uk". Underneath is a section labeled "MAKE A CALL TO:" with an empty text input field. At the bottom left of the form is a "Call" button.

The Personal Agent enables you to initiate calls to contacts in your Personal Address Book as well as the Global Address Book (if enabled in your domain) by using the Click-To-Call functionality.

Using Click-To-Call, you enter a phone number or the SIP address of the device where you want to take the call, then enter the called-party number.

Click **'Call'**.

The phone then rings at your preferred device.

Once the call is initiated and your preferred device rings, answer the call. This initiates the second part of the call, to the contact you added in **'Make A Call To'**. Once your contact answers, you can successfully start the conversation.

## Using the Personal Agent: Preferences

Use this area to manage your preferences, such as personal information, IP Phone, Meet Me Conferencing, and Unified Communications. Click on any of them to view the specific menu options.

### Personal

Here you can make amendments to the settings for your:

1. **Contact information**
2. **Password**
3. **Picture** - displays your photo to other users
4. **Reject reasons** - add a comment that is displayed to other users when you reject calls

The screenshot shows the 'Contact info' section of the Timico Preferences window. The left sidebar lists various preference categories, with 'Contact info' selected. The main area contains the following fields:

- First name: Gemma
- Last name: Jankiewicz
- Email: gemma.jankiewicz@timico.co.uk
- Business phone: 08451530503
- Home phone: [empty field]
- Cell Phone: [empty field]
- Pager: [empty field]
- Fax: [empty field]
- Timezone: BST (dropdown menu)
- Locale: English (dropdown menu)

At the bottom of the form are 'Apply' and 'Cancel' buttons.

**Tip:** For security purposes, we recommend that you change your password regularly and when doing so ensure that you choose a strong password.

5. **Times** - set your working days and times, which you can later use to route your incoming calls. To do so, select your required combinations by clicking on the appropriate time blocks

The screenshot shows the 'My Times' section of the Timico Preferences window. The left sidebar lists various preference categories, with 'My Times' selected. The main area contains the following elements:

- Buttons: Add, Copy, Modify, Delete, Save, Cancel, Back
- Group Name: [empty field]
- Time grid: A grid showing days of the week (Monday to Sunday) and hours (12 AM to 11 PM). The grid is currently empty.
- Text: All times are in timezone: BST

For more detailed instructions on how to do this, please see the online help.

## IP Phone

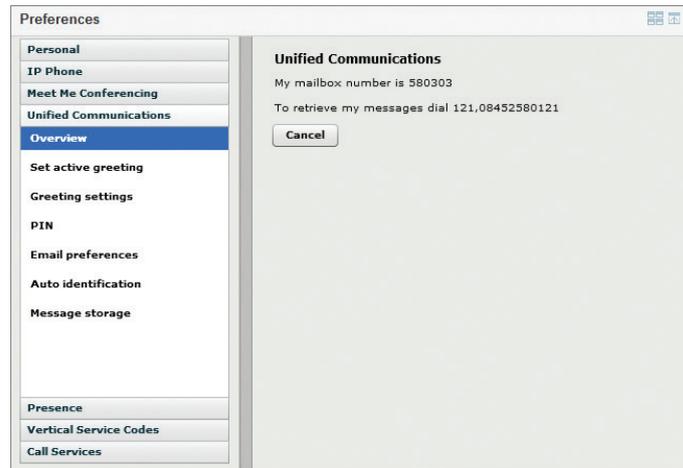
Here you can make amendments to the settings for:

1. **Subjects** - create a list of subjects that you can choose from when making outgoing calls. When calling other VoIP users, the subject would appear on their IP phone to alert them as to why you are calling. For example “customer query”.
2. **Personalised Presence** – customise a presence note to display on the IP Phone. For example “In a meeting”.
3. **Logout** - If you work in a number of locations and often log on to several IP Phones, you can use the Logout option to check your logon status and log yourself off from an active phone (as shown below).



## Unified Communications

The Unified Communications section allows you to view and amend your voicemail settings.



You can choose which recorded greetings are played when a caller leaves a message (the recordings will only appear in the list once they have been recorded by calling the voicemail system and following the appropriate menu options). You can also choose whether you would like the voicemail to be emailed to you as well, and amend the settings for this too.

For more information on how to change these settings please click on the Help guide from within the Personal Agent to download the full documentation.

## Presence

Here you can see who can have access to seeing your presence information and who you want to prevent from seeing your presence status. Auto presence is where you can set the time out parameters for how your presence is shown.

Examples of presence information that can be show include; Do Not Disturb, Available, On the Phone.

## Vertical Service Codes

Vertical Service Codes (VSCs) are special telephone numbers that usually begin with the \* (star) key on the keypad. VCSs, also referred to as star codes or feature codes, are used to trigger specific features and actions.

The VSC services that are available to you will be displayed in this section.

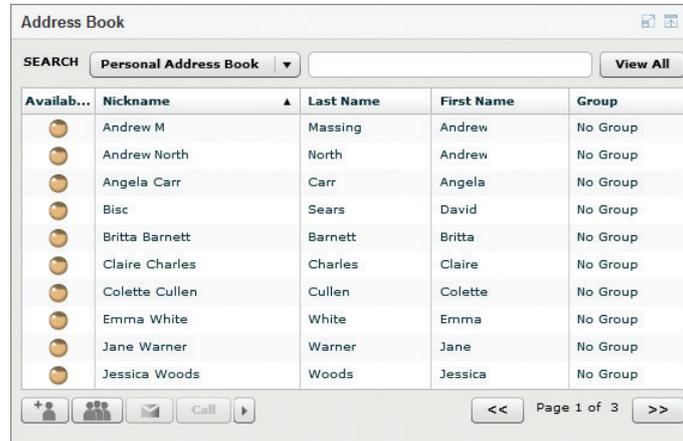
## Call Services

Call Services allows you to view and modify the status of your assigned call services. The following Call Services sub menu may be available, depending on your service package:

- Call Return
- Ad Hoc Conferencing
- Network Call Waiting Disable
- Call Park
- Calling Line ID Restriction

## Using the Personal Agent: Address book

Use this area to manage your Global and Personal Address Book, to add or delete contacts and groups, to email contacts, and to call your contacts directly from the address book.



Any time you add a contact or make a change to a contact using the Personal Agent, your Personal Address Book automatically updates and synchronises with the Personal Communicator Client and the Nortel/Avaya IP Phone - enabling you to view your Friends online from any of these devices.

## Using the Personal Agent: Call logs

Use this to view your incoming and outgoing calls, to add contacts to your address book, and to place calls directly from the Call Logs area.

## Using the Personal Agent: Advanced Routes

Routing via the Personal Agent solves the problem of having different contact numbers for different communication devices (office phone, home phone, mobile). Basic call screening allows you to choose a default route for all incoming calls and to block any anonymous callers.

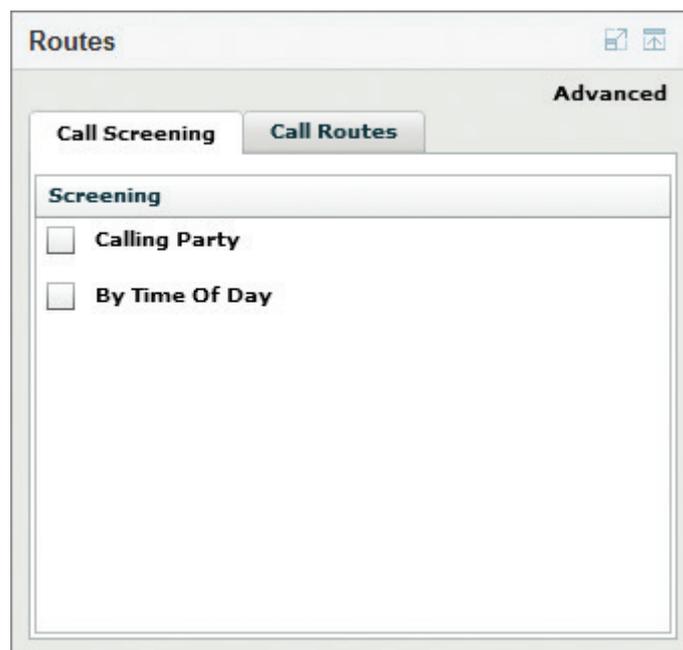
By default, whichever devices you are logged in to, whether it be your desktop phone, or the PC Client, all will ring. The manner in which your voicemail is set up will determine how voicemail is handled.

When you create a new route, other than the default, you can choose which Clients you would like to ring, and when. The advanced settings allow you the greatest flexibility to direct incoming calls.

You can programme your routing to:

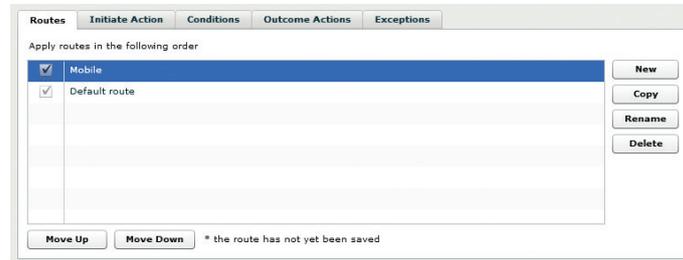
- Ring several devices at once (simultaneous)
- Ring different devices in a specific order (sequential)
- Automatically send a web page or request for an e-mail to a caller
- Send an Instant Message

To set up a new route, click on the '**Advanced**' link in the Routes window to open up the configuration screen.



Use the tabs along the top of the window to guide you through the process.

1. The **Routes** tab allows you to create additional routes, or modify existing ones. You can also select which should be active, and choose in which order they should occur.



2. **Initiate Action** is where you determine when this route should be used.

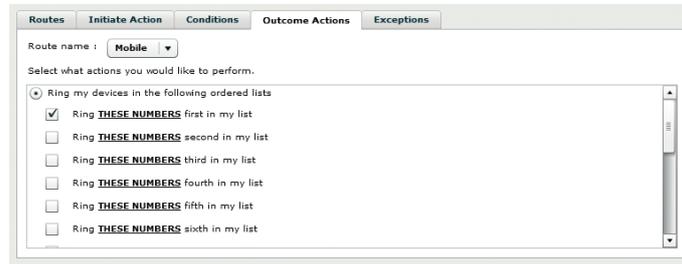


3. The next tab allows you to choose the **Conditions** which determine how you would like to filter the calls.



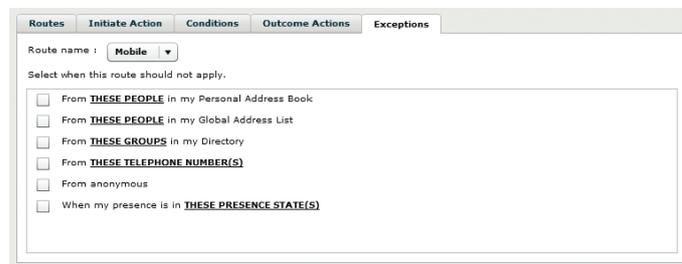
Click on the links to enter specific detail.

4. **Outcome Actions** is where you can select specifically how you would like the calls to be delivered.



Scrolling down this window will give you more options to filter calls.

5. The final **Exceptions** tab gives you the option to choose conditions when this rule should not apply. Having gone through all of the above steps to build your route. You can see the full outcome as shown below.



6. Having gone through all of the above steps to build your route. You can see the full outcome as shown below.



It is possible to create as many routes as you wish which you can then enable/disable as you need them. Routes are applied to incoming calls in the order in which they are listed in the Routes tab. Click Move up or Move down to change the order of how your incoming calls are treated. When there are multiple active routes in the route list, only one route will apply to the call. The first active route which has conditions and exceptions that match the call will apply. Please note that simple route changes made in the Call Screening or Call Routes section of the agent will over ride what has been set-up in the Advanced Routes and these will take priority.

