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MXIE 5.0 User Guide

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MXIE is the software interface by which system users can access MX services and resources. This guide introduces the most frequently used MXIE operations. This document covers features and functionality in MXIE version 5.0. Previous versions of MXIE may not support all the features outlined in this document.

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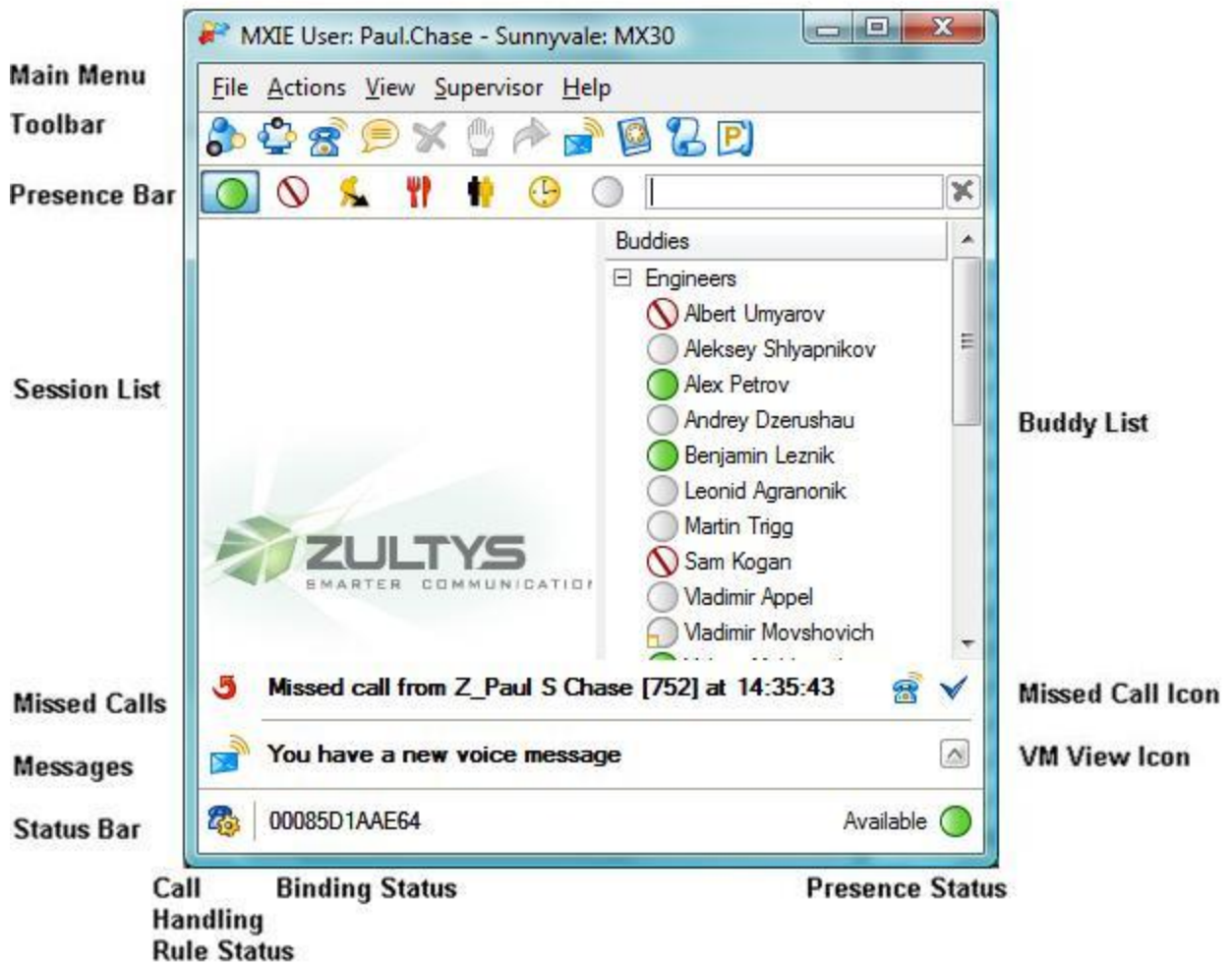
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2 Introduction

MXIE is the software interface by which system users can access MX services and resources. This guide introduces the most frequently used MXIE operations. It is assumed that the user is using version 5.0 of MXIE. Previous versions may not support all outlined features.

System Requirements: Windows 2000, 1 Gb memory (when using TAPI, Softphone and Outlook integration), 80 Mb on hard drive, sound card with microphone attached (quality headphones with the attached microphone is preferred, some laptop speakers can cause echo with built in microphone).



3 MXIE Window Components

The MXIE users' window is the primary window for accessing MX services. The following sections describe window components.

3.1 Toolbar

Each toolbar icon represents a communication method, session tool, or system utility. Press a toolbar icon to perform the associated function.

3.2 Presence Bar


The Presence bar provides a button for each presence state specified in the Toolbar Preferences panel (File | Preferences). The depressed button indicates your presence state. You can change your presence state by pressing a presence bar button.

3.3 Session List

The Session List is separated into role partitions containing the session blocks that represent your open communications sessions. You can perform session control functions through keyboard shortcuts, session control buttons, or drag and drop operations.






4 Keyboard Shortcuts

Available MXIE keyboard shortcuts.

Keyboard Key	Action
A or a	Accept a chat invitation
D or d	Disconnect a chat session or voice call
H or h.	Place an active voice call on hold or retrieve a call on hold
P or p	Park an active call
R or r	Reject a chat invitation
T or t	Transfer (unattended) voice call
V or v	Send an incoming voice call to voice mail
	Dials highlighted number from any application

5 Session Control Buttons

Session control buttons, when enabled in the Calls Preferences panel, are located on the right side of each session block. MXIE provides the following session control buttons:

Button	Action
	Transfer: sends a voice call to another user.
	Hold: places a voice call on hold
	Disconnect: rejects a chat invitation, sends an incoming voice call to voice mail, or disconnects a session.
	Answer: accepts a chat invitation
	Retrieve: resumes a call previously placed on hold

6 Buddy List

The Buddy List displays MX users with whom you are in regular contact. You can quickly initiate instant messages, chats, and voice calls with Buddy List members. The Buddy List displays the presence state for all buddies that permit others to view their presence and provides tools to send voice mail to your buddies. You can also organize your Buddy List into Buddy groups.

- To add a user to the buddy list, open the address book and display the contact list. Highlight the name of the person that you wish to add, press the right mouse button, and select Buddy. You cannot modify the buddy list for operator and agent roles.
- To add a buddy group to the list, point at the buddy list, click the right mouse button, and select Create a Group.
- To initiate communication sessions with buddy list members, point at a buddy and click the right mouse button.
- To perform Buddy Group operations, right click on your buddy list and select the desired operation. You can drag and drop buddy list members into any group. Users can belong to more than one buddy group.

7 Status Bar

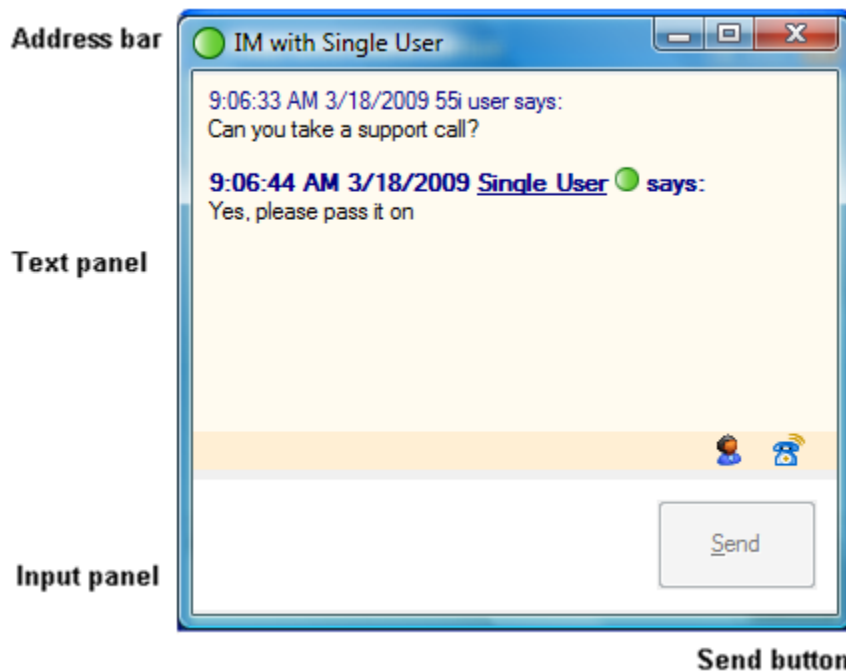
The Status bar is located at the bottom of the MXIE user window, The left side of the status bar displays the call handling rule status and the binding status. The right side of the bar displays the presence status.

8 Instant Messages and Chats

Instant Messages and Chats are methods of exchanging text messages with other MXIE users.

9 Message Window

The message window exchanges text with other MXIE users.



10 Message Window Components

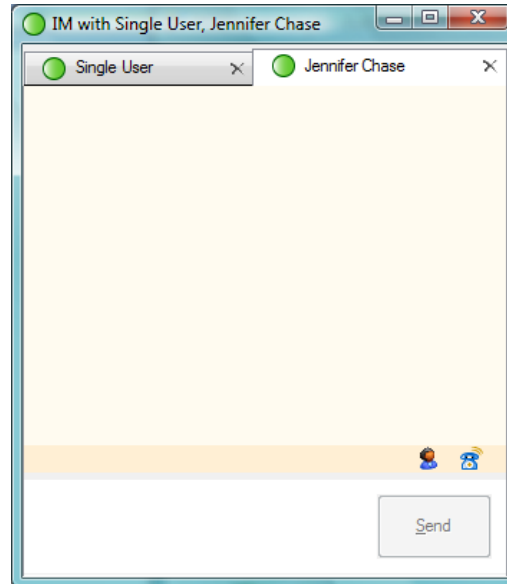
This window comprises four components:

- Address bar displays the recipient's name and the message type.
- Text panel displays previous messages, each preceded by the sender's name and the transmission time. Click the right mouse button in this region to copy, clear, and select all panel text.
- Input panel displays text that you are preparing to send. An adjustable splitter bar divides the Text panel and the Input panel.
- Send button transmits input to the recipient and the text panel.

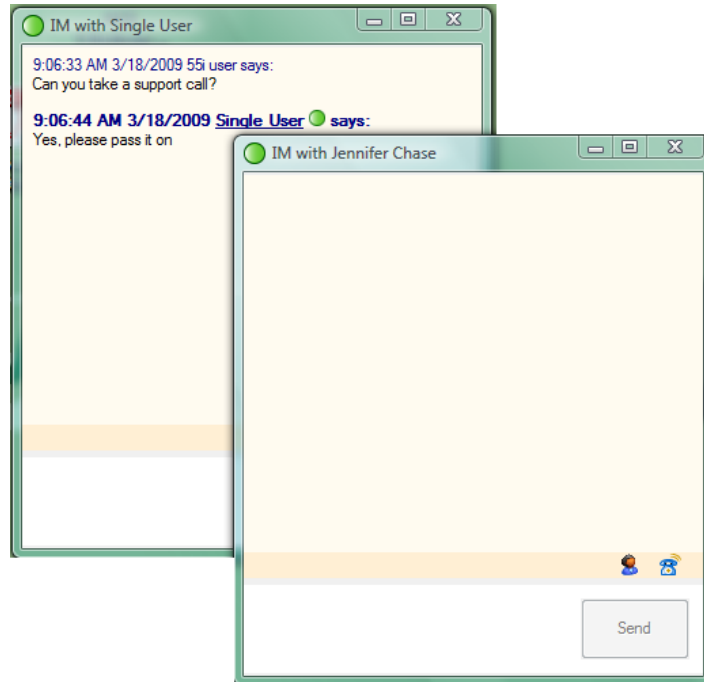
To adjust the time and date format and the Send button function, select File | Preferences to access the Chat and IM user preferences panel.

11 Docking Message Windows

Message windows can be docked into a single window. The new window contains one tab for each component message window. Message windows can be docked only for the same type of messages; an instant message window cannot be docked to a chat window.




To undock a docked window, drag the tab out of the docked window.



12 Instant Messages

An instant message is a single text message.

12.1 To send an instant message:

- **Toolbar:** press the instant message icon  and type the recipient's extension or user name in the resulting dialog box
- **Main Menu:** select Actions | Instant Message and type the user name or extension of the recipient in the resulting dialog box
- **Buddy List:** double-click on the recipient's icon
- **Address Book or Buddy List:** right click the mouse over the recipient's name and select Send instant message
- **Address Book or Buddy List:** drag a buddy list icon or address book entry onto the instant message icon in the toolbar

When you receive an instant message, MXIE opens a message window. The message persists until you close the window.

13 Voice Calls

You can send and receive voice calls through any SIP device that supports voice communication.

14 Device Management

A managed device is listed in the MX device database and assigned an MX device ID.

An unmanaged device is a device that is connected to the MX but is not listed in the MX device database and is not assigned an MX device ID.

Unmanaged devices can perform voice calls using system resources if its address of record is configured as a registered contact.

A registered contact is either:

- a managed device that the MX administrator has assigned to your user account.
- an unmanaged device that has an address of record that is constructed with either your user name or extension and with the domain name of your MX system.

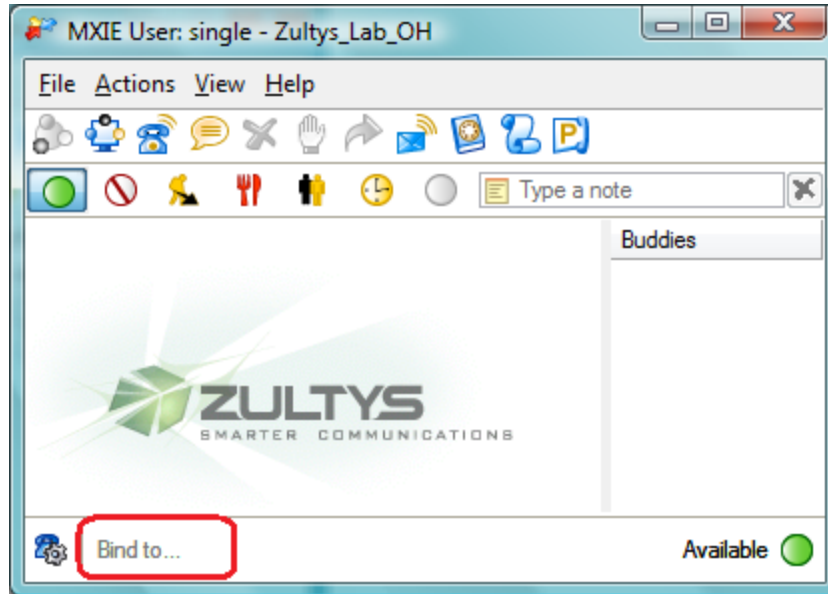
Address of record examples with this construction include:
Charlie.Smith@company.com and 7879@company.com.

15 Binding a Phone

A MXIE instance can manipulate voice calls through a registered contact regardless of its binding status. A MXIE instance can initiate voice calls and handle multiple voice calls only through SIP devices to which it is bound. MXIE instances can be bound to only one device at a time. The Bind a Phone window binds a MXIE instance to a SIP device.

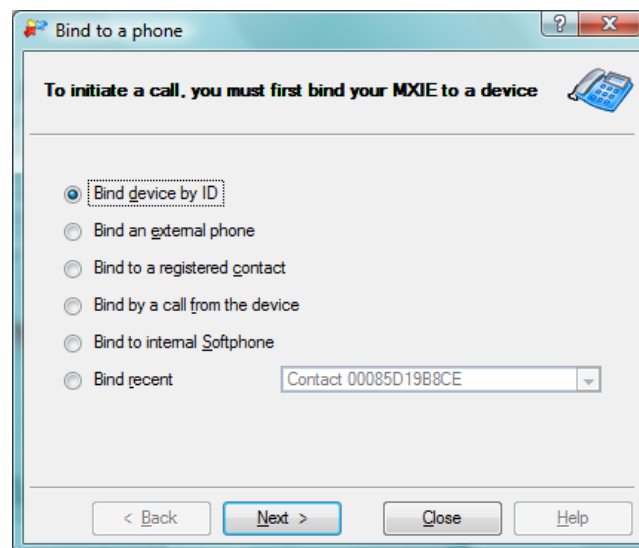
To access the Bind a Phone window:

- **Main Menu:** select File | Bind To
- **Status Bar:** press the binding status text



A MXIE instance can manipulate voice calls through a registered contact regardless of its binding status. A MXIE instance can initiate voice calls and handle multiple voice calls only through SIP devices to which it is bound. The Bind a Phone window binds your MXIE instance to a SIP device. To access this window, select File | Bind To from the main menu bar or select the binding status text in the Status Bar.

MXIE instances can be bound to only one device at a time. Binding a MXIE instance to a SIP device cancels any previous device binding to that instance.



15.1 Binding Status

The text in the top panel indicates the binding status of the MXIE instance and to which device, if any, the instance is bound. This panel refers to a SIP device as a device or as a contact, which are defined as follows:

- **Device:** This term indicates that the instance is bound to a managed device. You can bind to any managed device that has not been restricted by another user through a Device Access Policy preference assignment.
- **Contact:** This term indicates that the instance is bound to a registered contact. The Device Access Policy preferences window controls user access to your registered contacts.

15.2 Bind Device by ID

This option binds your MXIE instance to an MX managed device. To bind MXIE to a managed device:

1. Select this option and press the Next button.
2. Enter the device ID of the managed device to which you want to bind your MXIE instance. The device ID, which is case sensitive, must be entered exactly as defined in the MX device database. Contact your system administrator if you have problems entering the device ID.
3. Press the Next button. If the binding operation is not successful, this panel will describe the problem that MXIE encountered.

15.3 Bind to External Phone

ConnectAnywhere is a feature which allows users to Bind MXIE to any telephone number in the world. Once bound to a phone number, when the User / Agent initiates a call from MXIE, the MX system will firstly call the user at the bound phone number, when that call is answered MX will then initiate a call to the phone number that the User / Agent called from MXIE. Once connected all standard MXIE functions are available such as Hold and Transfer. For incoming calls, the MX system will initiate an outgoing call to the bound phone number and at the same time display the callers' details in MXIE, all standard call functions are available from MXIE. This feature allows users to make and receive calls as if they are in the office from any location in the world where they have access to a landline or mobile phone.

15.4 Bind Registered Contact

This option binds your MXIE instance to an MX registered contact. To bind MXIE to a registered contact:

1. Select this option and press the Next button.
2. Select the contact name from the list that identifies the unmanaged device to which you want to bind your MXIE instance. An empty contact list implies

- that there are no devices registered with the system that can serve as your registered device.
3. Press the Next button. If the binding operation is not successful, this panel will describe the problem that MXIE encountered.

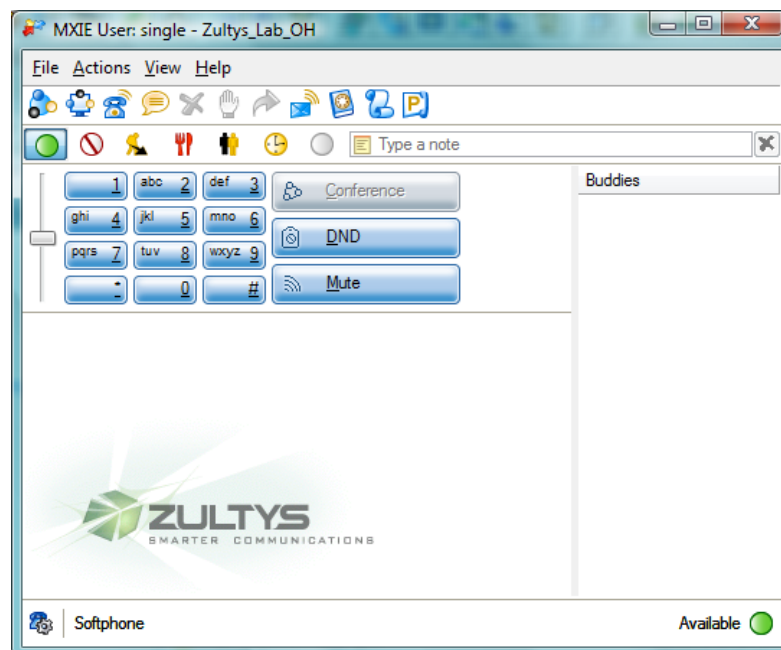
15.5 Bind by a Call from the Device

This option binds your MXIE instance to an MX managed device that you designate by making a voice call. To bind MXIE to a device through a call:

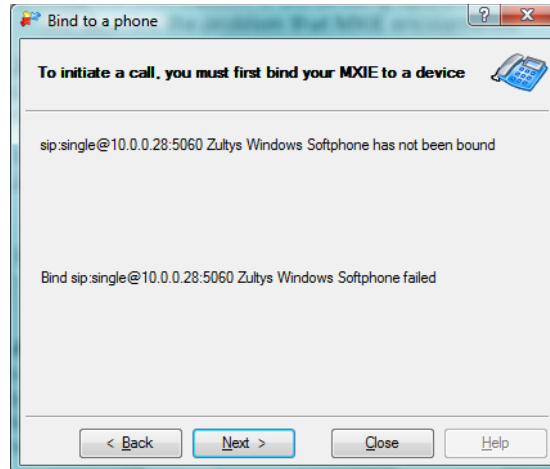
1. Select this option and press the Next button.
2. The MXIE panel will display a phone number and a timer. Dial that number from the device that you want to bind to your MXIE instance before the timer expires.
3. Press the Next button. If the binding operation is not successful, this panel will describe the problem that MXIE encountered. MXIE cannot bind unmanaged devices to your instance through this option.

15.6 Bind to Internal Softphone

This option binds your MXIE instance to the MXIE internal Softphone. You can bind only one instance to the Softphone. To bind MXIE to the Softphone, select this option and press the Next button.



If the binding operation is not successful, this panel will describe the problem that MXIE encountered.



15.7 Bind Recent

This option allows you to select from a menu of devices and registered contacts to which your MXIE was recently bound. This menu may include devices that are removed from the system or names that are no longer valid. To bind MXIE to a recently bound device:

1. Select this option and press the Next button.
2. Select the device or contact name from the list that identifies the SIP device to which you want to bind your MXIE instance.
3. Press the Next button. If the binding operation is not successful, this panel will describe the problem that MXIE encountered.


15.8 Cancel a Bound Device

The following actions cancel a bound device:

- Select File | Cancel Bind from the main menu bar.
- Click on the binding status text on the left side of the Status Bar and select Cancel Bind from the drop down menu.
- Bind your MXIE instance to another device. This cancels the binding of the initial device.
- Physically remove the device from being registered with the MX.

16 Making and receiving calls

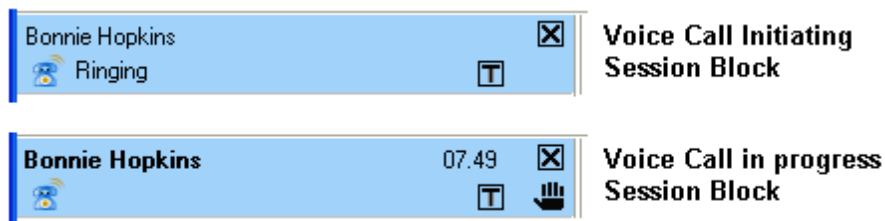
16.1 To place a voice call from a bound device through MXIE:

- **Main Menu:** select Actions | Voice Call, enter the contact information in the entry box, and press the Call button
- **Toolbar:** press the Voice Call icon , enter the contact information in the entry box, and press the Call button
- **Buddy List:** drag and drop a contact into the session list or the toolbar voice call icon
- **Address Book or Buddy List:** right click the mouse over a contact and select Make a Call
- **Address Book:** drag and drop a contact into the session list or the toolbar voice call icon
- **Call Log:** right click mouse over a record and select Call Back from the menu

16.2 To initiate a conference call from a bound device through MXIE:

- **Toolbar:** press the Conference icon 
- **Main Menu:** select Actions | Conference
- **Buddy List:** Drag a Buddy Group into the Session List or onto the Conference icon in the toolbar

After you initiate the call, the MXIE window displays a session block that represents the call. Below are session blocks at the various stages of a voice call: the top block was displayed after dialing the contact and before the call is answered; the bottom block was displayed during the phone conversation.



16.3 Receiving a Voice Call

You can receive a voice call through:

- a managed device bound to your MXIE instance
- a managed device assigned to your user account
- a registered contact

When a caller dials your contact information, all devices that fit these descriptions are alerted and MXIE displays a session block that lists the incoming contact information or the name of the caller.

16.4 To answer a call:

Take one of your ringing devices off hook; the remaining devices become inactive. The session block displays the name or number of the caller, the elapsed time, and (if enabled) session control buttons.

16.5 To reject a call:

- **Session List:** click the right mouse button over the ringing session block and select Disconnect
- **Keyboard:** type 'D' or 'd'

16.6 To send a call directly to voice mail:

- **Session List:** click the right mouse button over the ringing session block and select Send to Voice Mail
- **Session List:** if visible, press the disconnect button in the ringing session block
- **Keyboard:** type 'V' or 'v'

During the Call MXIE can perform control functions on calls that arrive on any device that you can access regardless of its binding status. You can perform the following operations during an active call.

16.7 Hold

After placing a call on hold, you must retrieve the call from the same phone to resume the conversation. You can also pick the call up from hold by dialing the extension number + * (Example: if the call is held on extension 5030 to pick it up dial 5030*).

To place a conversation on hold:

- **Session List:** press the Hold session control button
- **Session List:** right click the mouse over the session block and select Hold.
- **Toolbar:** press the Hold icon
- **Keyboard:** type 'H' or 'h'

16.7.1 Device Access Policy = Manage by MXIE

The phone is silent. Although the phone is off hook, it does not provide you with a dial tone nor automatically reserve a call appearance.

When using MXIE to place a call on hold, do not perform any operations from the phone before retrieving the call. Pressing phone buttons during this time (such as a new call appearance button) disconnects the first call. To retrieve a conversation that is on hold from MXIE:

- **Session List:** right click the mouse over the session block and select Retrieve
- **Session List:** if visible, press the retrieve session control button
- **Toolbar:** press the Hold icon

- **Keyboard:** type 'H' or 'h'

16.7.2 Device Access Policy = Manage by Device

The phone is silent. Although the phone is off hook, it does not provide you with a dial tone nor automatically reserve a call appearance.

You may press another call appearance to make a new call, without disconnecting the call on hold.

16.8 Blind Transfer

When performing a Blind Transfer, you do not speak with the party to whom you are transferring the call.

16.9 To perform a blind transfer:

- **Session List:** right-click while pointing in the session block
- **Session List:** drag and drop the session block to the address book or buddy list contact that is to receive the transferred call
- **Session List:** press the Transfer session control button
- **Keyboard:** type 'T' or 't'
- **Toolbar:** press the Transfer icon

16.10 Attended Transfer

In an attended transfer, you speak to the party to whom you are transferring the call prior to the transfer.

16.11 To perform an attended transfer:

16.11.1 Device Access Policy = Manage by MXIE

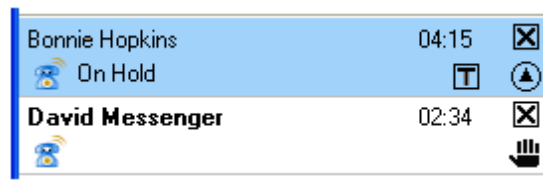
1. Call the first party.
2. Place the first party on hold by pressing the hold button on MXIE. Do Not Use controls on the phone to place the call on hold!
3. Call the second party.
4. To transfer the call:
 - **Session List:** right click mouse while pointing at the session block and select Transfer to <recipient's user name>
 - **Session List:** press the Transfer session control button
 - **Session List:** drag and drop the session control block to the recipient's address book or buddy list contact

16.11.2 Device Access Policy = Manage by Device

1. Call the first party.
2. Place the first party on hold by pressing the hold button on MXIE or the Device.
3. Call the second party.
4. To transfer the call:


- **Session List:** right click mouse while pointing at the session block and select Transfer to <recipient's user name>
- **Session List:** press the Transfer session control button
- **Session List:** drag and drop the session control block to the recipient's address book or buddy list contact

In figure below Bonnie Hopkins is on hold while David Messenger was called. Pressing the Transfer icon (T) transfers Bonnie Hopkins to David Messenger.





16.12Park

The Park function maintains the state of a call but suspends the conversation. To park a call:

- **Session List:** click the right mouse button over the session block and select Park
- **Session List:** drag and drop the session block into the Park Pickup icon  in the toolbar
- **Keyboard:** type 'P' or 'p'

When you park a call, the MX issues a two-digit call code and a multi-digit phone number for retrieving the call.

16.13To Pickup a Parked Call:

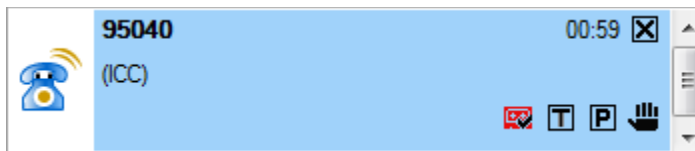
- **Toolbar:** press the Pickup icon , enter the two-digit call code in the entry box, then press the Pickup button
- **Toolbar:** press the Voice Call icon . Enter the multi-digit phone number in the entry box and press the Call button
- **Main Menu:** select Actions | Voice Call, enter the multi-digit phone number in the entry box, and press the Call button


16.14Call Recording

Call Recording is available to ICC agents or authorized users on a system with an active call recording license. MXIE roles that are permitted to record calls display a red recording icon on the right side of all voice call session blocks, as shown below.




To record a call, press the recording icon. While recording a call, the session block extends and displays recording control icon. A popup will state that your are recording, and the recording will be processed at the end of the call. If you do not want to see this message again click on the "Do not show this message in the future".



To stop recording, press the recording button  in the recording block. If you resume recording after stopping, everything recorded prior to pressing the stop button is deleted.

17 Terminating the Connection


17.1 To terminate a voice call:

- **Session List:** click the right mouse button over the session block and select Disconnect
- **Session List:** press the Disconnect button in the session block
- **Toolbar:** press the Disconnect icon 
- **SIP Device:** place the device on hook

18 Call Handling Rules

Call handling rules manage incoming calls that you do not answer.

18.1 To view and edit your call handling rules:

- **Main Menu:** select File | Preferences | Call Handling
- **Status Bar:** press the Call Handling Rule Status icon 

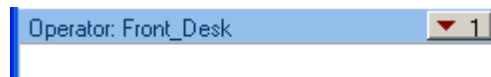
19 Operators and ACD Agents

In addition to logging into MXIE through your user role, you can also log into any of the ACD or Operator Groups to which you belong. MXIE opens a role partition for each group to which you login. MXIE provides features for ACD agents and operators that either differ to those available to users or are not available to users.

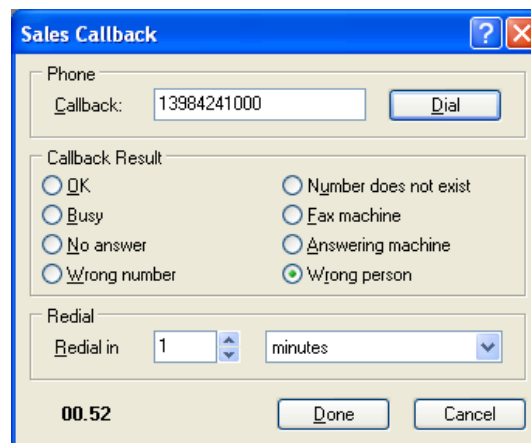
19.1 Callback

The MX Voice Mail system provides an option that allows callers who are unable to reach an operator, ACD agent, or hunt group agent to leave a phone number. This callback number is inserted into a panel that is accessible by members of the group that received the call.

When a caller is unable to connect to a member of an operator, ACD, or hunt group, the voice mail system allows the caller to leave either a voice mail message or a callback number. After the caller leaves a callback number, a callback icon appears in the partition header of each member of the group that is logged onto MXIE. The callback icon remains on the partition header until one member of the group accesses the Callback panel. In figure 10, a callback icon appears on the right side of the Front_Desk operator partition.



To access the Callback panel, press the Callback icon. When any group member presses the icon, it is removed from the partition header of all members of the group. You can return the call and report the result of the call from this panel, as shown below.



Sales Callback

Phone
Callback: 13984241000

Callback Result


OK Number does not exist
 Busy Fax machine
 No answer Answering machine
 Wrong number Wrong person

Redial
Redial in 1 minutes




00.52

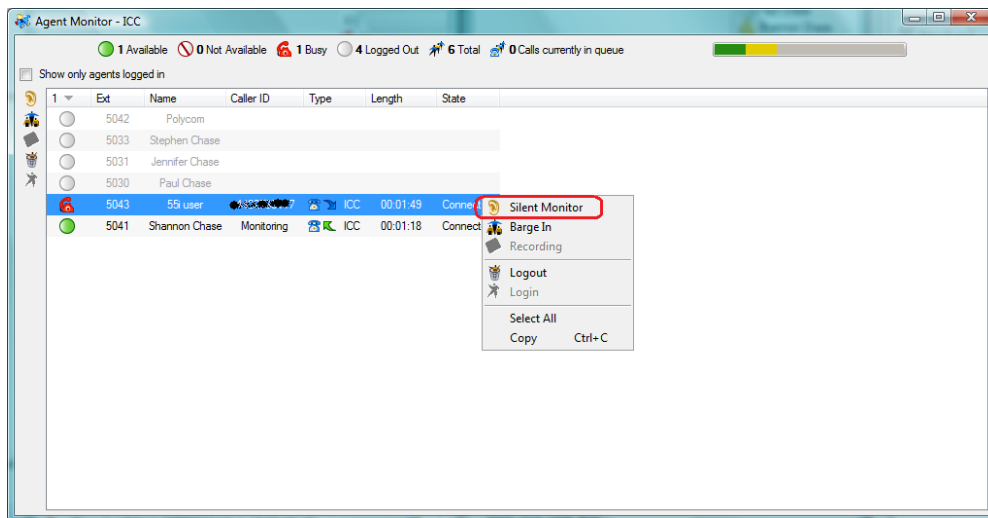
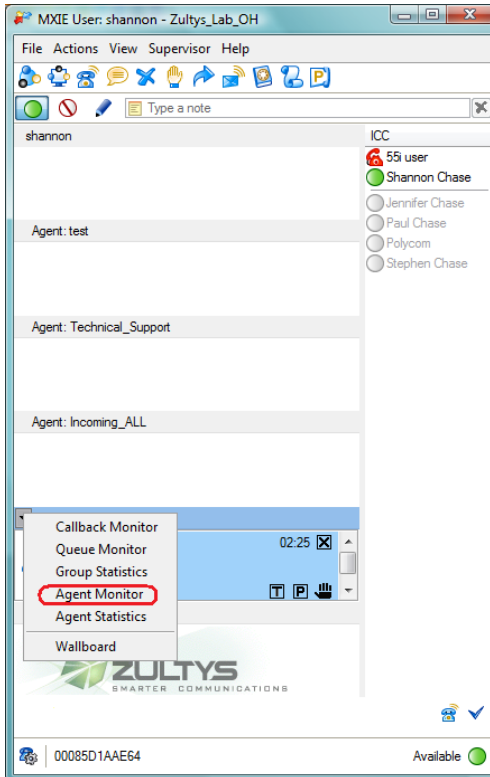
20 ICC Groups

ICC groups provide features that are not available to ACD, operator, or hunt groups, including call queues, supervisor capabilities, status monitors, and call recording.

Figure below displays the MXIE window for a user that belongs to two ACD groups. The session block is active for the Sales ACD group. The session block is inactive for the Tech_Support ICC ACD group. The arrow icon on the left side of the session control block indicates that Tech_Support is an ICC ACD group. The Supervisor text that is right of the arrow icon  indicates that the user has supervisor rights for the group.

Supervisors can monitor agent activity, and intervene in calls that agents are handling. Call intervention options include

- **Silent Monitor:** The supervisor listens to both sides of an agent call. Neither party is aware of the supervisor's presence. To access the ICC monitors, press the arrow icon  on the left side of the session control block. (ZIP2x2, ZIP5, Polycom and 3rd Party)
- **Whisper:** The supervisor can listen to both sides of the call and speak to the agent. The other party is not aware of the supervisor's presence. To access the ICC monitors, press the arrow icon  on the left side of the session control block. (ZIP2x2 Only)
- **Barge-In:** The supervisor can speak to both sides of the call. To access the ICC monitors, press the arrow icon  on the left side of the session control block. Supervisor functions are performed from the ICC monitors. (ZIP2x2 Only)



21 Presence

Presence allows you to verify the availability of system users. The buddy list displays the presence of selected system users. The address book displays the presence icons for all system users.

21.1 Presence States

Each user is assigned a presence state based on online status and communication availability. Users logged into MXIE as an operator or an ACD agent are assigned an additional presence state for that role. Presence states are represented by icons. Select the icon style that MXIE uses to display your presence from the Toolbar Preferences panel.

21.1.1 User presence states include

- Available
- Not Available
- Busy
- At Lunch
- In a Meeting
- Be Right Back
- Appear Offline
- On the Phone

21.1.2 Operator presence states include

- Available
- Not Available
- On the Phone
- Logged Off

21.1.3 ACD and hunt group agent presence states include

- Available
- Not Available
- Active, Wrap Up
- Logged Off

21.2 Presence Rules

Presence rules define the automatic transitions between presence states.

21.3 Users

These conditions trigger transitions between user presence states:

- **Available to Not Available** triggers if the user's computer is inactive for a period specified in the Presence Preferences panel.
- **Available to On the Phone** triggers when the user makes or receives a voice call.
- **On the Phone to Busy (wrap up time)** triggers when the user terminates a call if the Busy state was entered from the On the Phone state because of that call.

- **Wrap up to Available** triggers after remaining in the Busy (wrap up time) condition for a specified period.
- **Available to Busy** the user has a role as an operator or an agent and is busy within that role.

21.4 Operators

These conditions trigger transitions between operator presence states:

- **Available to On the Phone** triggers when an ACD agent or operator initiates or accepts a call. This rule cannot be removed or changed.
- **On the Phone to Available** triggers when an operator terminates a call.
- **Available to Not Available** triggers when the user changes to a state specified by the ACD and Operator User Preferences window.

21.5 ACD and Hunt Group Agents

These conditions trigger transitions between agent presence states:

- **Available to Active** triggers when an ACD agent initiates or accepts a call. This rule cannot be removed or changed.
- **Active to Wrap up** triggers when an agent terminates a call.
- **Wrap up to Available** triggers after remaining in the wrap up state for a period specified by the ACD and Operator User Preferences window.
- **Available to Not Available** triggers when the user changes to a state specified by the ACD and Operator User Preferences window.

21.6 Manual State Transitions

To manually change your presence state:

- **Presence bar:** Press a presence state icon.
- **Status bar:** Press the Presence Status text to access a menu that lists the available states. When MXIE displays an operator or agent role, this menu provides a global option that sets the presence state for all roles.

Manually entering any state except Available disables any presence transition rule that defines an automatic method of leaving the state.

22 Voice Mail

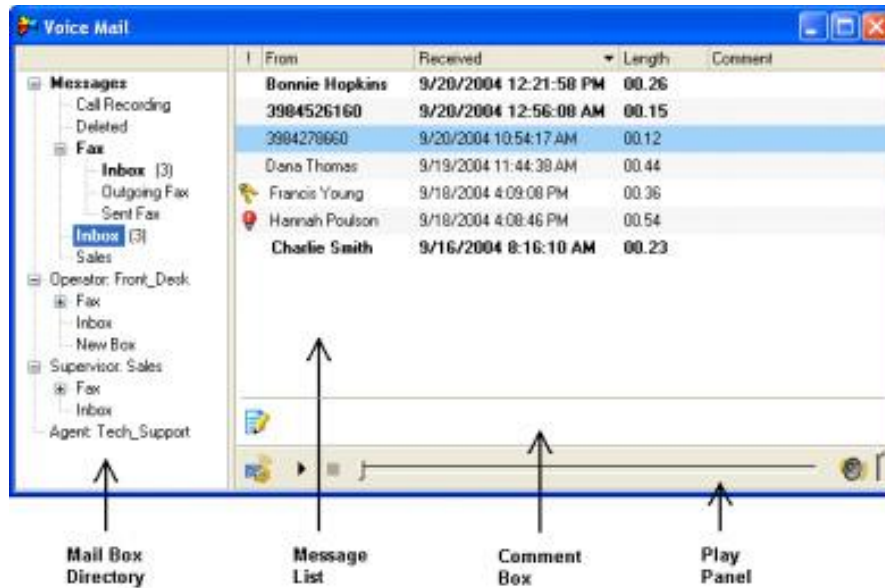
This window displays, organizes, and manages your voice messages and faxes.

To access the Voice Mail window from the MXIE user window:

- **Toolbar:** Press the Voice Mail  icon.
- **Main Menu:** Select View | Voice Mail.
- **Session List:** if visible, click the You have new voice messages text.

22.1 Mail Box Directory

The Mail box directory is located on the left side of the window. Mail folders store voice mail messages. Mail box service options create, copy, move, delete, or compact the voice mail folders. System folders (Inbox or Deleted) cannot be moved or deleted.



To access mail box services, right click the mouse over the mail box directory.

22.2 Message List

The right side of the Voice Mail window displays all voice messages and faxes stored in the mail box selected in the Mail Box Directory panel.

Message service options allow you to listen to, reply to, and forward your messages and perform message management tasks.

New messages are displayed in bold typeface; saved messages are displayed in regular typeface.

- To access message services, right click the mouse button while pointing in the Message List.
- To alter the saved status of a message, select the message and access message services: Press Save to change an unread message to a saved message. Press Mark as Unread to return a message to new status.
- To move a message into a mail box, Drag and drop a message from the message list or a mail box into the desired mail box.
- To copy a message into another mail box, Press the Shift key while moving a message into the desired mail box.

- To forward a voice message to another user, right click on a message title and select Forward or drag and drop a voice message title line into an address book entry or buddy list contact.
- To reply to a voice message from another system user, right click on a message and select Reply.
- To save a comment with the highlighted message, click in the comment box to the right of the folder & pencil icon, then type a text message.
- To listen to a voice message or display a fax, double click on the desired message or select the message and press the play button in the play panel.
- To send a voice message, click the right mouse button while pointing the recipient and select Send a Voice Mail.
- To send a fax, click the right mouse button while pointing the recipient and select Send a fax.

22.3 Voice Mail Settings

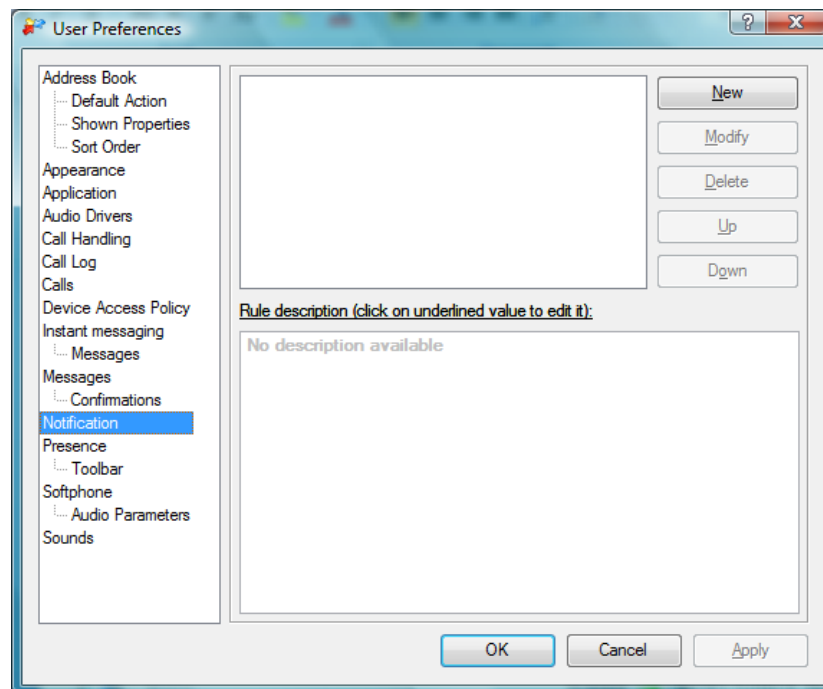
The Voice Mail Settings panel changes your active greeting and displays your voice mail storage capacity.

To access the Voice Mail Settings panel, press the icon on the left side of the play panel.

22.4 Message Notification

The MX can send an email to notify you of any incoming voice messages and faxes. Notification rules determine how you are notified of incoming messages.

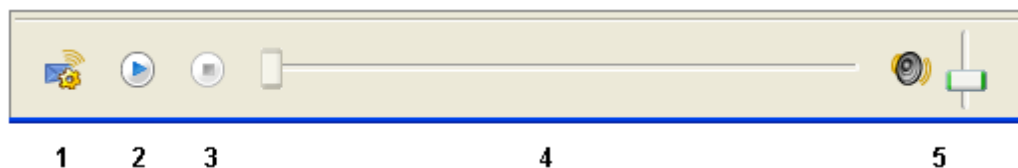
To view and edit your notification rules: select File | Preferences | Notification.



23 Playing Voicemails and Call Recordings

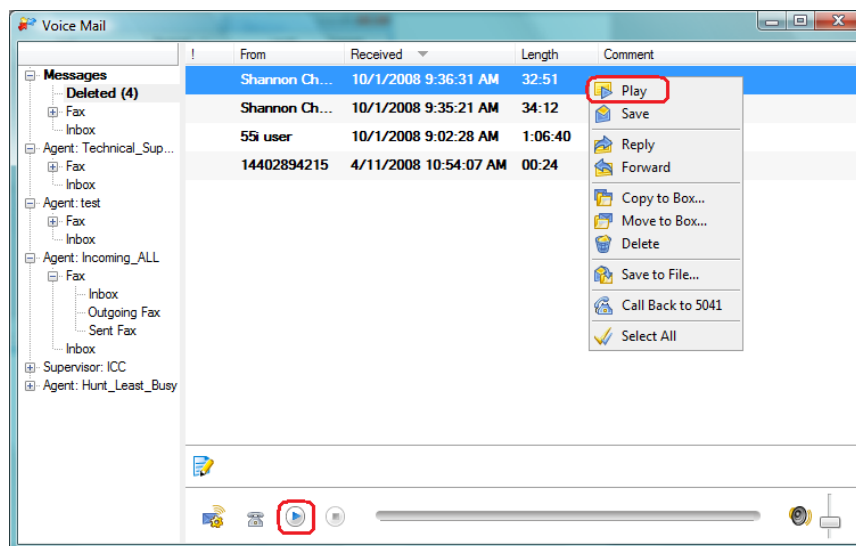
The Play panel, shown in figure below, is located at the bottom of the Message list and controls the audio playback of the selected Voice Message or On Demand Call Recordings. Play panel buttons include:

1. **Voice Mail Settings:** Opens the Voice Mail Settings window.
2. **Play / Pause:** Begins playback of the selected voice mail message. When MXIE is playing a message, this area displays the Pause button. Pressing the pause button temporarily stops playback of the selected message. To resume playback, press the pause button again.
3. **Stop:** Stops playback of the audio message and resets the playback pointer to the beginning of the message.
4. **Progress bar:** Displays the message playback progress. The vertical bar moves across the horizontal track during playback. You can move the bar with the mouse to replay or skip portions of the message.
5. **Volume:** Adjusts the volume of the message playback.



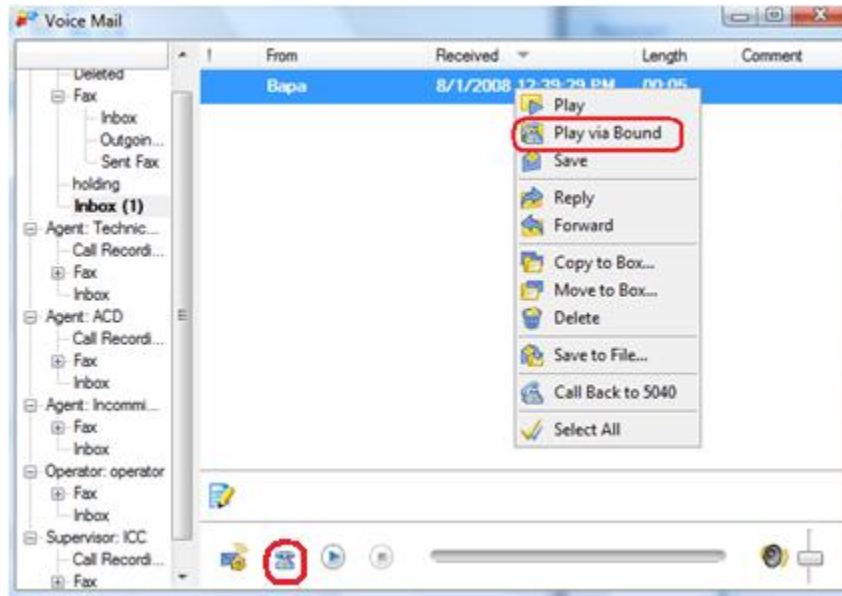
23.1 Playing via the computer

Users may select to playback Voice Mail messages and Call Recordings using the computers speakers.



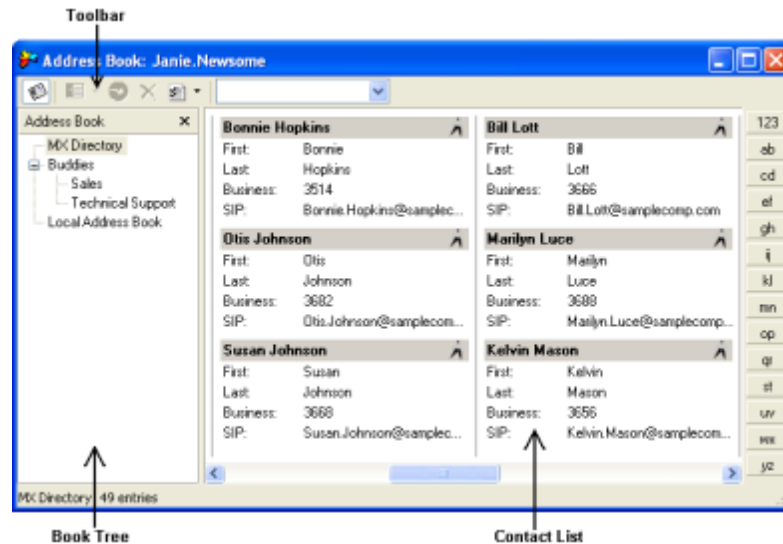
23.2 Playing via bound device

Users may select to playback Voice Mail messages and Call Recordings using the device / phone currently bound to MXIE as the audio device. This feature provides improved privacy as users no longer need to play audio through the computer speakers and also enhances functionality in Thin Client environments (EG: Terminal Services / Citrix) where client machines often have inadequate performance to support audio playback or have no speakers. New MXIE preference option is available to force all playback via the bound phone for situations where the user's computer does not have speakers.



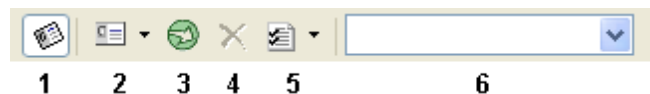
24 Address Book

The Address Book window, shown below, accesses the MX user directory and supports the creation of personal address books.



24.1 Toolbar

The following is a description of the Toolbar buttons:



1. **Show/Hide Book Tree:** Toggles the Book Tree display status.
2. **New Entry:** Adds an entry to the contact list. Press the arrow to add a New Address Book to the Book Tree.
3. **Import Book:** Imports data file contents into the current address book.
4. **Delete:** Removes the selected entity – either a book from the book tree or an entry from the contact list.
5. **Options:** Accesses the Address Book Settings window Press the arrow to sort the Address Book contacts.
6. **Search box:** Finds users in the contact list.

24.2 Book Tree

The book tree displays your address books. The contact list displays the content of the book highlighted in this panel. The book tree always displays the MX Directory

(derived from the MX user list) and the Local Address Book; you cannot edit, move, or delete these books.

- The Show/Hide Book Tree button is depressed when the book tree is displayed and is not depressed when the book tree is hidden.
- To change the display status of the Book Tree, press the Show/Hide Book

24.3 Tree button.

- To add new books to the book tree, press the New Entry arrow.
- To delete books from the book tree, press the Delete button.

After creating new address books, you can move them within the book tree by using drag and drop operations.

24.4 Contact List

This list displays the contact names and information stored in the current address book, as designated by the book tree.

24.5 Editing the Contact List

- To edit an entry, double-click the contact to access the Entry Information dialog panel.
- To delete an entry, select the entry and press the Delete button.
- To add an entry, press the New Entry button on the address book toolbar.
- To import data file contents into an address book, press the Import Book button in the address book toolbar.
- Search for a contact: Type the first or last name of the contact in the search box and press the enter key. Search box contents are case sensitive.
- Press the enter key again to resume the search.
- Select the data fields displayed for each entry: Access the Shown Entry Properties panel of the Address Book Settings window by pressing the Options button in the toolbar.

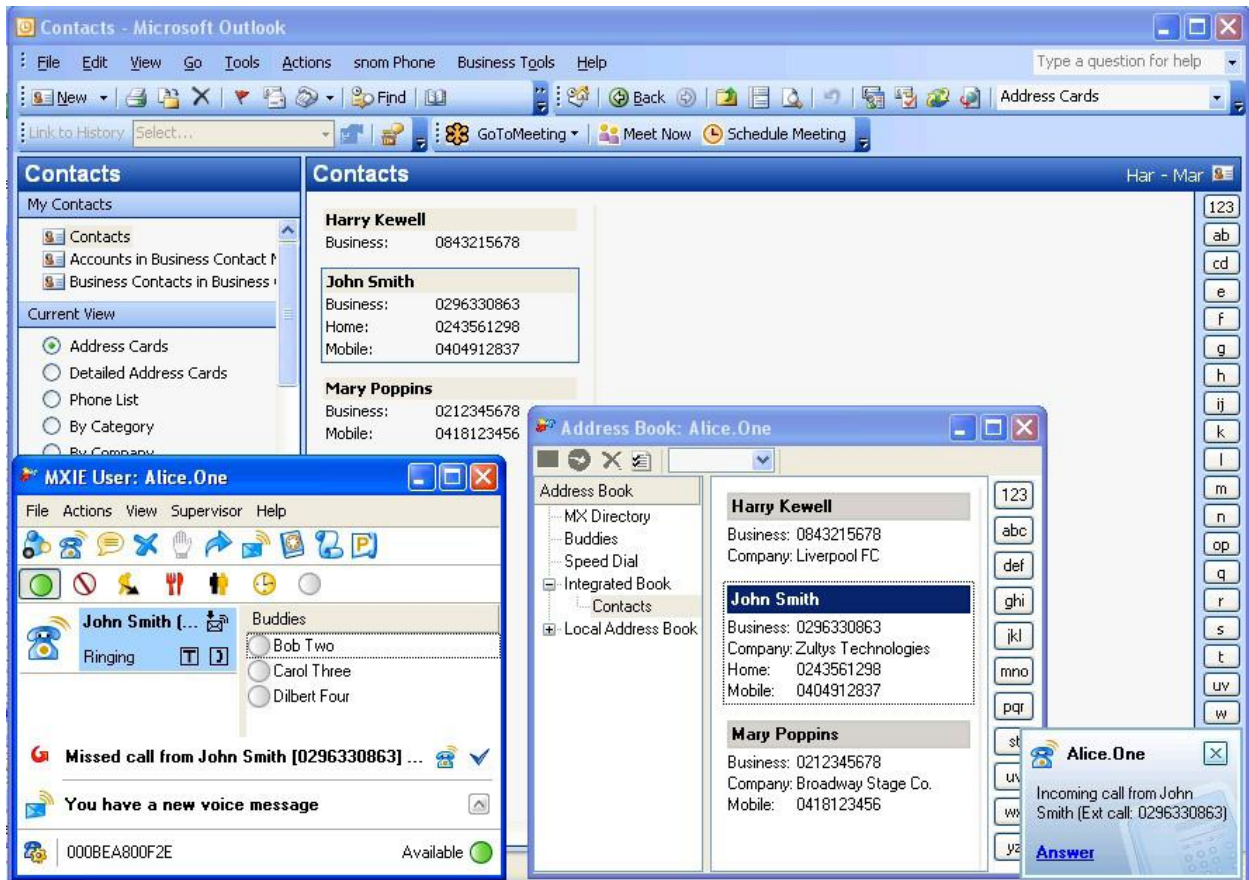
24.6 Outlook Integration

Microsoft Outlook Contact records are now available in MXIE address book. New address book 'MS Outlook' is displayed on the top level of MXIE Address Book window. All Contact information (contact name, company name, business, mobile, and home phone numbers) is available for placing and receiving calls from within MXIE. The Caller ID number of incoming calls is checked against Outlook contacts with a match resulting in screen pop showing customer name, phone number and company name.

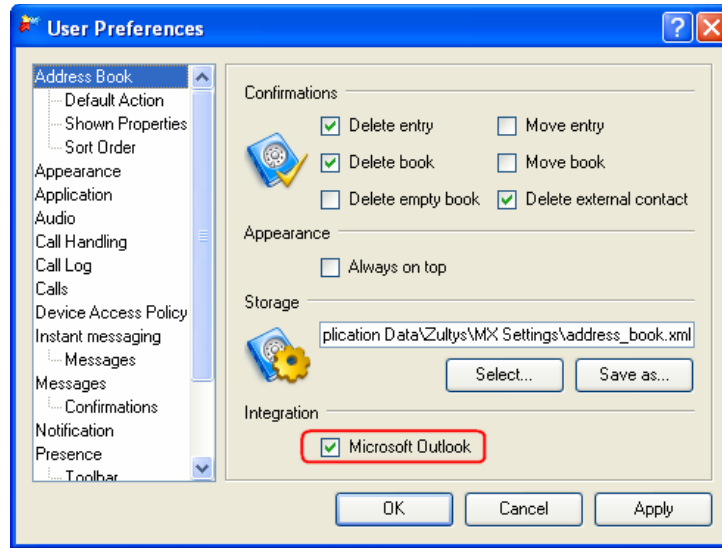
The following features are provided by MXIE Outlook Address Book Integration:

- All contact folders visible in MS Outlook appear in the MXIE address book

- Updates to existing contact records in MS Outlook are immediately reflected in MXIE
- MXIE Screen pops display contact information based on Caller ID match to Outlook contact
- Initiate and transfer calls to Outlook Contacts directly from MXIE
- Call Log history displays Outlook Contact names based on Caller ID

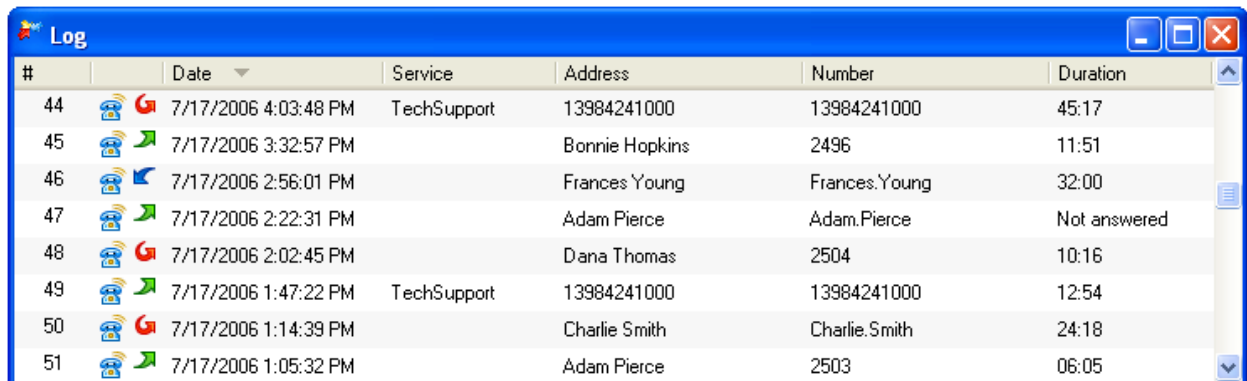


To integrate your MXIE with Outlook® go to File | Preferences | Address Book, select Microsoft® Outlook® from the integration options.



25 Call Log

The MXIE Log, displays each voice call that generated a MXIE session block over a specified period. Each record within the log refers to one voice call. To access the call log, select View | Log from the main menu bar.



#		Date	Service	Address	Number	Duration
44		7/17/2006 4:03:48 PM	TechSupport	13984241000	13984241000	45:17
45		7/17/2006 3:32:57 PM		Bonnie Hopkins	2496	11:51
46		7/17/2006 2:56:01 PM		Frances Young	Frances.Young	32:00
47		7/17/2006 2:22:31 PM		Adam Pierce	Adam.Pierce	Not answered
48		7/17/2006 2:02:45 PM		Dana Thomas	2504	10:16
49		7/17/2006 1:47:22 PM	TechSupport	13984241000	13984241000	12:54
50		7/17/2006 1:14:39 PM		Charlie Smith	Charlie.Smith	24:18
51		7/17/2006 1:05:32 PM		Adam Pierce	2503	06:05





Log records are obtained from the system Call Detail Records database and cannot be moved or deleted. The number of records displayed in the log is configured in the Call Log Preferences panel. The maximum number of records displayed is based on the number of days specified on the Call Preferences panel. When you reduce the size of the call log display by altering preference panel settings, the call records are only removed from the Call Log panel and can be restored to the display by resetting the Preferences parameter setting.

25.1 Record Parameters




Each record displays the following information about the voice call or chat session to which it refers:

- **#:** This column lists the record number within the log.
- **Icon** (blank column heading): The icon in this column specifies the type and direction of the session.
- **Date:** This column specifies the date and time that the session began.
- **Service:** This column lists the operator, ACD, or hunt group role from which the session was initiated.
- **Address:** This column lists the SIP address of the other party.
- **Number:** This column lists the extension or phone number of the other party.
- **Duration:** This column lists the duration of the session.

Call Type icons

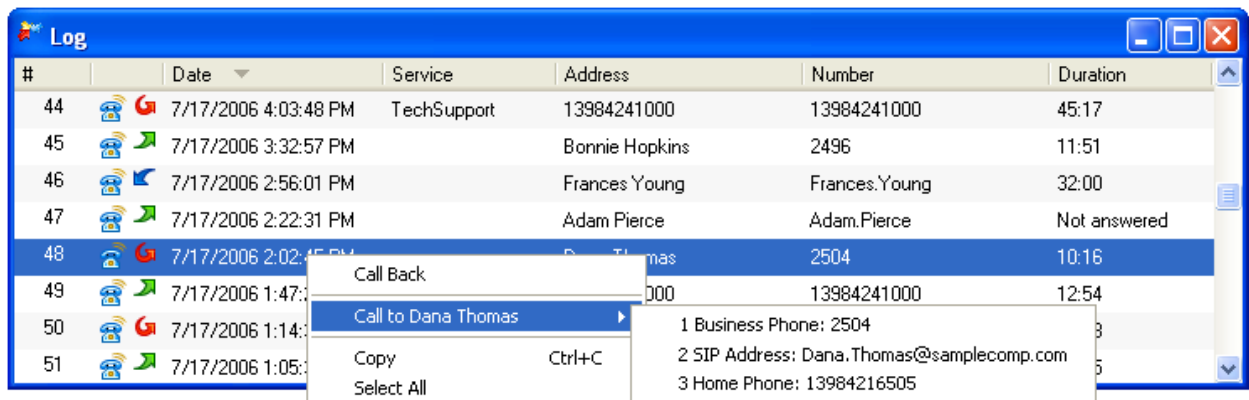
-  call sent to voice mail
-  call redirected by call handling rule
-  voice call
-  fax call

Direction icons

-  incoming call
-  missed call
-  outgoing call

25.2 Log Functions

You can access log functions by right-clicking the mouse while the cursor points in the log. Functions accessible in this manner include:

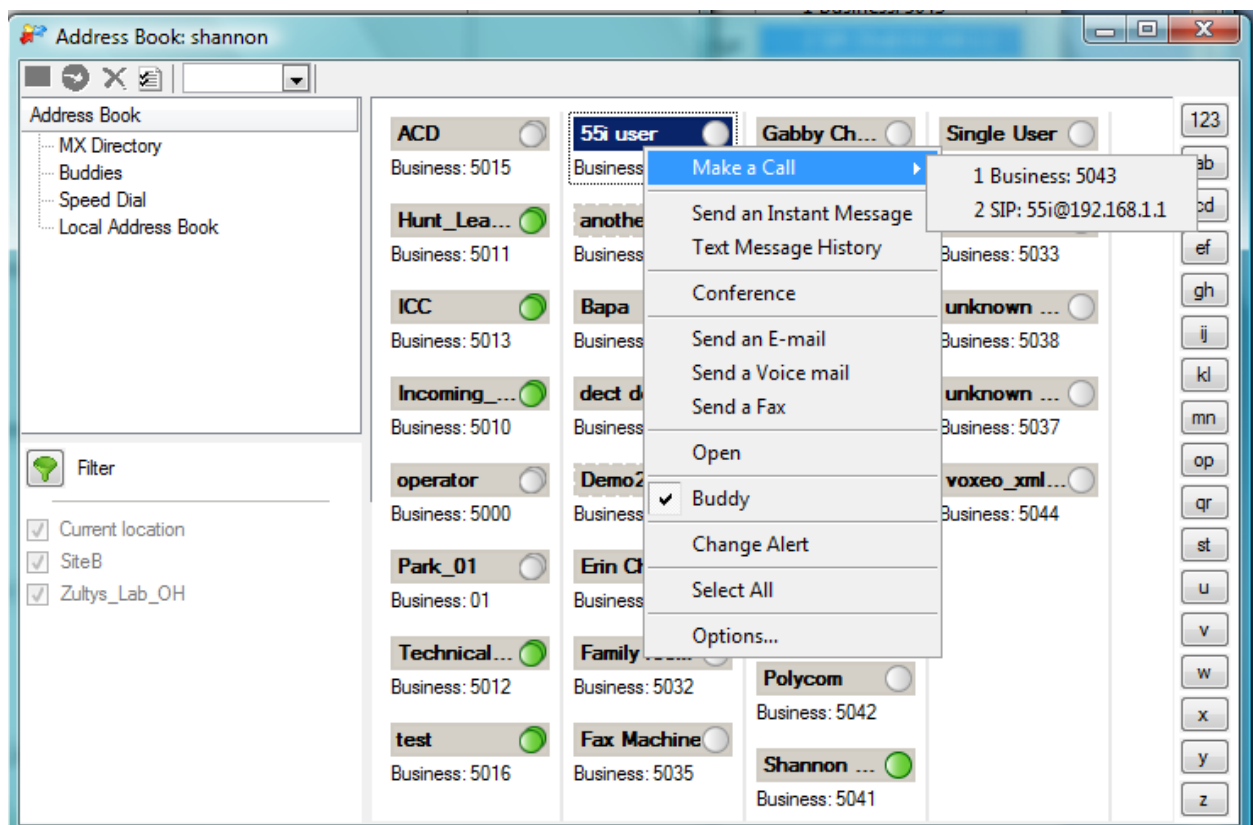


- **Call or Call Back:** This option calls the address or number listed under the Number heading in the selected Log entry. If the call entry is an inbound voice call, this option is Call Back.
- **Call to:** This option lists all of the contact methods that are listed in the address book for the contact that the log entry references. Click on one of the contact methods to place a call to the contact.

- **Copy:** This option copies all selected log records to the windows clipboard. You can select records using standard Window edit procedures with your mouse and keyboard.
- **Select All:** This option selects all of the call log records.
- **Add to Address Book:** Select this option to add the contact to the address book. This option appears if the contact in the highlighted entry is not in the address book.

26MXIE Operations

To perform MXIE operations from the Contact List, access an operations panel by right clicking the mouse while pointing at a contact.




26.1 Functions

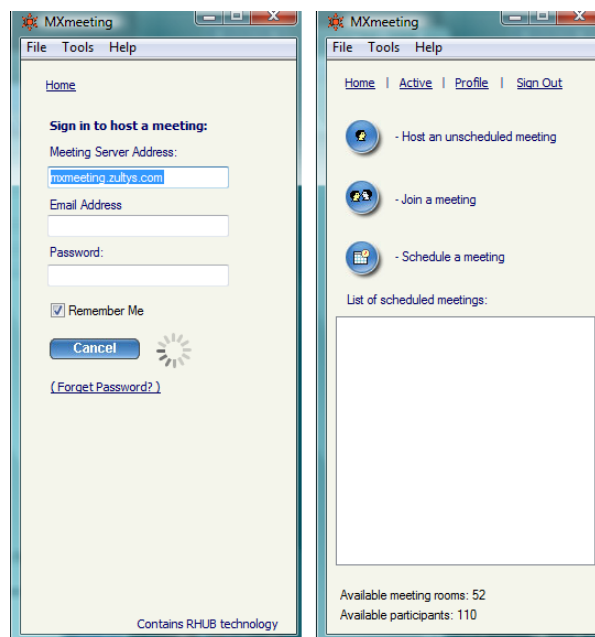
- **Make a call:** Place a phone call to this user
- **Send a text message:** Send a text message to this user
- **Text message history:** View any text message history for this user. Text messages are stored locally on the PC they were sent from, and are stored per the storage length set in the MXIE's options.
- **Conference:** Start a conference call

- **Send an E-mail:** Send this user an email. The email fields must be populated to use this function.
- **Send a Voice mail:** Send this user a voicemail. The PC must have speakers and a microphone to use this function.
- **Send a Fax:** Send this user a fax. The fax driver must be load and a valid fax license available to use this function.
- **Open:** Open this contact to modify locally
- **Buddy:** Convert this user to a buddy, or remove them from the buddy list.
- **Change Alert:** Add, or remove an alert from this user. An alert is a notification that a users state has changed. It may be a popup window or audio.
- **Select All:** Select all users
- **Options....:** Shortcut to MXIE's options

27 MXmeeting Integration

Used to start an MXmeeting from MXIE. MXmeeting software must be installed prior to using, and an MXmeeting appliance must be installed and configured.

- **Toolbar:** press the MXmeeting icon  , the MXmeeting application will launch. MXmeeting is a separate application and must be installed prior to using it.
- **Main Menu:** select Actions | Web Conference, the MXmeeting application will launch. MXmeeting is a separate application and must be installed prior to using it.



28 TAPI

MXIE has built in support for TAPI, it will need to be configured before using it. Please refer to TAPI Documentation for more information on installing and configuring TAPI for your computer.