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Nortel Adaptive Application Engine
Personal Agent User Guide



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Contents

Welcome	9
Your Nortel Personal Agent	10
New in this release	10
Features	10
Personal Agent Rejuvenation SP1	10
Uniform Call Distribution	11
SIP Line Boss-Secretary Support	11
Call Pickup	12
Hunting and Hunting Groups	12
Caller Name Presentation	12
Presence Watch Authorization	13
Other changes	13
Rebranding	13
XMPP Gateway	13
Personal Agent services and features	14
Text and graphic conventions	14
Online help	14
Related publications	15
Language support	15
How to get help	15
Getting started with the Personal Agent	17
Before you begin	17
Minimum hardware and software requirements	17
Recommended hardware and software requirements	18
Logging on to the Personal Agent	19
Navigating the Personal Agent	21
Personal Agent portlets	21
Click To Call	22

Preferences	23
Routes	24
Address Book	25
Call Logs	26
Assistant Console Service	27
Call Pickup	28
Hunting	29
Exiting the Personal Agent	29
Starting the Multimedia Web Client	29
Managing Click To Call	31
Using Click To Call	31
Managing Preferences	33
Setting up your personal preferences	34
Modifying your contact information	35
Changing your password	35
Selecting a picture ID	35
Specifying reject reasons	36
Modifying the list of reasons	37
Setting up My Times date and time ranges	38
Adding a new day and time range	38
Modifying a day and time range	40
Copying a day and time range	40
Renaming a day and time range	41
Deleting a day and time range	41
Managing your IP Phone	41
Creating a subject list for your IP Phone calls	42
Changing the subject list order	42
Personalizing your presence	43
Checking the settings of your IP Phone	43
Viewing and modifying Meet Me conferencing	44
Modifying Meet Me preferences	44
Changing your Meet Me PIN	45
Viewing and modifying Unified Communications	46
Setting your active greeting message	46

Modifying your current greeting settings	47
Changing your PIN	47
Setting your email preferences	47
Controlling your automatic login	48
Setting recording time for incoming voicemail messages	48
Viewing and modifying Presence	49
Viewing and modifying your Watchers List	49
Viewing and modifying Banned watchers list	50
Viewing and modifying your Authorized Watchers list	50
Viewing and modifying your Show-Offline Watchers list	51
Modifying your presence service preferences	51
Viewing and modifying your Vertical Service Codes	53
Viewing prefixes	54
Modifying VSC routes	55
Changing your Vertical Service Codes PIN	55
Viewing and modifying Call Services	56
Call Return	56
Setting Ad Hoc Conferencing	56
Setting Call park	57
Viewing and modifying XMPP Gateway credentials	57
Managing Routes	61
Call Screening	61
Modifying call screening for Anonymous Calls	62
Screening calls based on the calling party	63
Screening calls based on Time of Day	64
Modifying call screening for Do Not Disturb	64
Screening incoming calls to a Call Treatment	65
Screening outgoing calls to a Call Treatment	66
Call Routes	66
Setting Call Routes using Call Forwarding Immediate	67
Setting Call Routes using Sequential Ringing	68
Setting Call Routes using Simultaneous Ringing	68
Setting Call Routes using Call Forward Variants	69
Advanced Call Routes	71
Creating a route	71

Managing Address Book	77
Understanding Personal Agent address books	77
Using your Personal Address Book	78
Managing the contacts in your Personal Address Book	79
Adding a new group	79
Adding a contact	79
Designating a contact as a Friend	81
Editing a contact	82
Deleting a contact	82
Viewing your contacts	82
Sorting your contacts	82
Searching for a contact	83
Viewing details about a contact	83
Initiating a call to a Personal Address Book contact	83
Viewing all contacts	84
Using the Global Address Book	84
Accessing the Global Address Book	84
Working with the Global Address Book	84
Sorting users	84
Searching for a user	85
Viewing user details	85
Initiating a call to a Global Address Book user	86
Adding users from the Global Address Book to your Personal Address Book	86
Managing Call Logs	89
Viewing call logs	89
Calling contacts from the call log	90
Saving contacts from the call log information	90
Clearing call log information	90
Managing Uniform Call Distribution	93
UCD Agent window overview	94
Setting UCD Agent status	94
Prerequisite	95
Setting UCD Queue Status	95

Prerequisite	95
UCD Administrator window overview	96
Setting and modifying Group Information parameters	100
Adding or deleting group members	101
Forcing out group members	102
Setting Queue Status	102
Managing Group Routes	103
Adding a group route	103
Modifying a group route	106
Copying a group route	107
Renaming a group route	108
Deleting a group route	108
Changing the order of a group route	109
Managing Assistant Console and Services	111
Assisted User	111
Adding an Assistant	111
Deleting an Assistant	112
Setting a Voicemail Assistant	112
Setting an Assistant Route	113
Assistant	113
Changing assisted user order	113
Removing assisted users	114
Selecting an assistant route	115
Modifying an assistant service route	115
Managing Call Pickup	117
Call Pickup Subscriber window overview	118
Changing Call Pickup Agent status	119
Call Pickup Admin window overview	120
Modifying Call Pickup Group information	121
Adding a member to a group	122
Deleting a member from a group	122
Deactivating members from a group	123

Managing Hunting	125
Hunt Group Agent window overview	126
Hunt Group Admin window overview	126
Modifying Hunt Group settings	129
Adding Hunt Group Members	129
Modifying Hunt Group Member settings	130
Understanding Address Book Search Criteria	131
Personal Address Book search criteria	132
Global Address Book search criteria	134
Troubleshooting	137
Terms you should know	139
Terms	139
Service package	139
Address	139
Click To Call	140
Global Address Book	140
Personal Address Book	140
Friends	140
Presence	141
Defining routes	142
Vertical Service Code	142
Acronyms	142
Index	145

Welcome

This guide provides you with instructions you need to get up and running with the Personal Agent.

This guide includes the following sections:

- [“Getting started with the Personal Agent” on page 17](#)
- [“Managing Click To Call” on page 31](#)
- [“Managing Preferences” on page 33](#)
- [“Managing Routes” on page 61](#)
- [“Managing Address Book” on page 77](#)
- [“Managing Call Logs” on page 89](#)
- [“Managing Uniform Call Distribution” on page 93](#)
- [“Managing Assistant Console and Services” on page 111](#)
- [“Managing Call Pickup” on page 117](#)
- [“Managing Hunting” on page 125](#)
- [“Understanding Address Book Search Criteria” on page 131](#)
- [“Troubleshooting” on page 137](#)
- [“Terms you should know” on page 139](#)

Topics in this section include the following:

- [“Your Nortel Personal Agent” on page 10](#)
- [“New in this release” on page 10](#)
- [“Personal Agent services and features” on page 14](#)
- [“Text and graphic conventions” on page 14](#)
- [“Online help” on page 14](#)
- [“Related publications” on page 15](#)
- [“Language support” on page 15](#)
- [“How to get help” on page 15](#)

Your Nortel Personal Agent

The Personal Agent is a feature-rich web portal. Using the Personal Agent, you can view, manage, and configure services to your personal preferences. Moreover, you can perform these functions from any location with a standard web browser.

The Personal Agent is your own communications concierge, ensuring that your calls are delivered wherever and whenever you like.

New in this release

The following sections detail what's new in *Nortel Adaptive Application Engine Personal Agent User Guide* for release Adaptive Application Engine 7.0 Service Package 1 (SP1).

- [“Features” on page 10](#)
- [“Other changes” on page 13](#)

Features

See the following sections for information about feature changes:

- [“Personal Agent Rejuvenation SP1” on page 10](#)
- [“Uniform Call Distribution” on page 11](#)
- [“SIP Line Boss-Secretary Support” on page 11](#)
- [“Call Pickup” on page 12](#)
- [“Hunting and Hunting Groups” on page 12](#)
- [“Caller Name Presentation” on page 12](#)
- [“Presence Watch Authorization” on page 13](#)

Personal Agent Rejuvenation SP1

The Rejuvenated Personal Agent for A2E 7.0 SP1 improves the user experience and feature set included in the Personal Agent. In addition to the enhanced features previously offered, it includes the following enhancements:

- Click To Call enhancements
- Address book enhancements
- Routes enhancements
- Assistant/boss services portlet
- Integration of PA portlets into an external portal
- Context Menus for tables
- My Times Enhancements

The following changes were made based on this feature:

- Updated [“Minimum hardware and software requirements” on page 17](#)
- Updated [“Recommended hardware and software requirements” on page 18](#)
- With the new portlet layout for the Personal Agent, this document is now organized similar to the Personal Agent; there is a separate chapter specific to each portlet.

Uniform Call Distribution

Uniform Call Distribution (UCD) allows businesses to improve call-completion rates by matching incoming calls to available answering locations. It allows for an even distribution of incoming calls to a Listed Directory Number (LDN) or URI over a group of subscribers associated with that LDN/URI. This group of subscribers is called a Uniform Call Distribution (UCD) group. Each subscriber in the UCD group has its own directory number(s)/URI. The following changes were made based on this feature:

- Added [“Managing Uniform Call Distribution” on page 93](#)

SIP Line Boss-Secretary Support

Assistant support enables you to designate other Adaptive Application Engine users to act as primary and alternate Assistants. Assistants can monitor, transfer, or route incoming and outgoing calls for the Assisted user from the Assistant Console. It is now supported for CS2000-A2E/SSL. The following change was made based on this feature:

- Updated [“Adding an Assistant” on page 111](#)

Call Pickup

Call Pickup (CPU) allows for a subscriber to answer a call that is ringing on another subscriber's device, as long as both subscribers belong to the same Call Pickup group. This allows for calls to be answered more efficiently, and provides for better call handling. The following changes were made based on this feature:

- [“Changing Call Pickup Agent status” on page 119](#)
- [“Modifying Call Pickup Group information” on page 121](#)

Hunting and Hunting Groups

Hunting can improve call-completion rates by clustering subscribers into groups called Hunt groups. Hunt groups are a series of subscribers organized in such a way that if the first group-member is busy the next group member is hunted and so on until a member of the group with no active call is found and can answer the call. The following changes were made based on this feature:

- Added [“Managing Hunting” on page 125](#)

Caller Name Presentation

Caller Name Presentation makes the remote party identity display consistently in the PCC. This adjustment applies to all modes of the PCC. If a match in the Personal Address Book (PAB) is found, the remote user nickname is displayed everywhere where it is applicable:

- session window title
- under the user picture
- session window tooltips
- task bar
- chat window
- To/From field in call logs (for outgoing/incoming calls)

The following changes were made based on this feature:

- Updated [“Adding a contact” on page 79](#)

Presence Watch Authorization

Presence Watch Authorization provides the ability for users to enable an authorization process when a watcher wants to see the user's status. Until the user approves the request, the watcher's request is left in a pending state.

The following changes were made based on this feature:

- Modified [“Viewing and modifying Presence” on page 49](#)
- Added [“Viewing and modifying your Watchers List” on page 49](#)

Other changes

See the following sections for information about changes that are not feature-related:

- [“Rebranding” on page 13](#)
- [“XMPP Gateway” on page 13](#)

Rebranding

Throughout this document, previous references to Session Server Lines (SSL) are changed to Communication Server 2000 - Adaptive Application Engine/Session Server Line (CS2000-A2E/SSL).

XMPP Gateway

Jabber provides the ability for the A2E to interact with an XMPP gateway connecting SIP subscribers to other available external communities for IM and Presence functions. Modified the following procedures for clarification:

- [“Viewing and modifying XMPP Gateway credentials” on page 57](#)
- [“Adding a contact” on page 79](#)

Personal Agent services and features

The Personal Agent solves the problem of having a different contact number for your office phone, home phone, mobile phone, and other communications devices. Using the Personal Agent, you can direct incoming calls to ring all of these devices at the same time or in a sequence.

Personal Agent features allow you to

- define how your incoming calls are treated
- view and customize your personal information and services (including viewing the presence of another user in your domain)
- manage, track, and maintain key contact information
- establish a call between you and another contact
- start the Multimedia Web Client from the Personal Agent

Text and graphic conventions

This guide uses the following text conventions:

bold text	Indicates the command key or link you need to press or click. Examples: Press Ok . Click Help .
<i>italic text</i>	Indicates new terms and document titles for reference

Screen captures in this guide show Internet Explorer as the default browser. However, if you are using another browser (for example, Firefox), your screen can look slightly different.

Online help

There are several ways that you can access Personal Agent help:

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

- a Table of Contents with hypertext links
- procedures that help you use the Personal Agent
- search method within the document
- rollover help - help text with a description and possible values that appear when your mouse pointer moves over a form field or an icon.

Related publications

The other publication related to the Personal Agent is the *Nortel Adaptive Application Engine Personal Communicator Client User Guide* (NN48111-121).

Language support

The Personal Agent user interface and Personal Agent User Guide is available in nine localized languages:

- English
- French
- Japanese
- Simplified Chinese
- German
- Spanish (Spain)
- Korean
- Portuguese
- Traditional Chinese
- Russian

How to get help

For service issues, contact your local support or Information Services team.

Getting started with the Personal Agent

This guide describes all the services and features available on the Personal Agent, although the user's administrator or service provider determines the actual set of services and features available to the user. Access to some of the features listed below depends on the services provided in your service package.

Topics in this section include

- [“Before you begin” on page 17](#)
- [“Logging on to the Personal Agent” on page 19](#)
- [“Navigating the Personal Agent” on page 21](#)
- [“Exiting the Personal Agent” on page 29](#)
- [“Starting the Multimedia Web Client” on page 29](#)

Before you begin

You need the following items to start using the Personal Agent:

- the URL to access the Personal Agent
- user name and password for logon (provided by your system administrator)
- PC configured with the required minimum software and hardware (see [“Minimum hardware and software requirements” on page 17.](#))
- internet access and a connection that meets the minimum transmission speed requirements

Minimum hardware and software requirements

- Pentium II 450MHz processor
- minimum memory requirements of your browser with Adobe Flash Player 9. See your browser documentation for more information.

- No additional hard drive space is required. (Local caching of web pages is performed by your web browser. See your browser documentation for information on the minimum disk space requirements.)
- mouse (optional)
- 640x480 @8bpp (256 colors) VGA graphics card
- Microsoft Windows 2000, Windows XP, or Windows Vista
- DSL, cable modem or LAN connection
- Adobe Flash Player 9
- Internet Explorer 7.0, or Firefox 3.0
There is a known issue with Firefox 3.0 and Adobe Flash Player 9, where some special characters, such as "=" cannot be typed into input fields. The issue should be resolved in the next version of Firefox. The affected characters can be cut and paste into the fields or Internet Explorer can be used as a work around.
- cookies and javascript enabled

The Multimedia Web Client has additional minimum hardware requirements. See *Nortel Adaptive Application Engine Personal Communicator Client User Guide* (NN48111-121) for its requirements.

Recommended hardware and software requirements

- Pentium III 1GHz processor
- recommended memory requirements of your browser with Adobe Flash Player 9. See your browser documentation for more information.
- No additional hard drive space is required. (Local caching of web pages is performed by your web browser. See your browser documentation for information on the minimum disk space requirements.)
- mouse (required)
- 1024x768 @24bpp VGA graphics card
- Microsoft Windows 2000, Windows XP, or Windows Vista
- DSL, cable modem or LAN connection
- Adobe Flash Player 9
- Internet Explorer 7.0 or 8.0, or Firefox 3.0
- cookies and javascript enabled

The Multimedia Web Client has additional recommended hardware requirements. See *Nortel Adaptive Application Engine Personal Communicator Client User Guide* (NN48111-121) for its requirements.



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

Logging on to the Personal Agent

Before performing any of the functions available in the Personal Agent, you must first log on.



Attention: Keep in mind that you can time out due to inactivity.

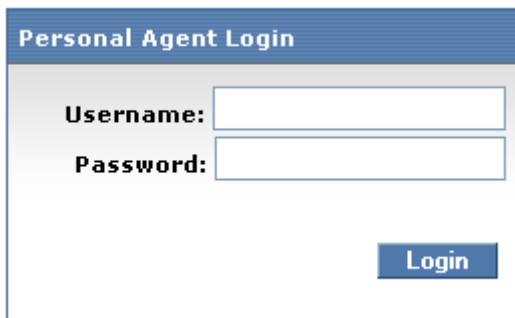
To log on to the Personal Agent

- 1 Start your Web browser.
- 2 Enter the Personal Agent URL (provided by your service provider or system administrator) in your Web browser.

OR

Through the Personal Communicator, select **Tools/Personal Agent**.
The Personal Agent Login window appears.

- 3 Enter your username and password.
Your username must use the user@domain format.



The screenshot shows a login form titled "Personal Agent Login". It features two input fields: "Username:" and "Password:". Below the fields is a blue "Login" button.



Tip: Your initial password is provided to you by your system administrator.

- 4 Click **Login**.
If you are prompted to change your initial password, the Password page appears.

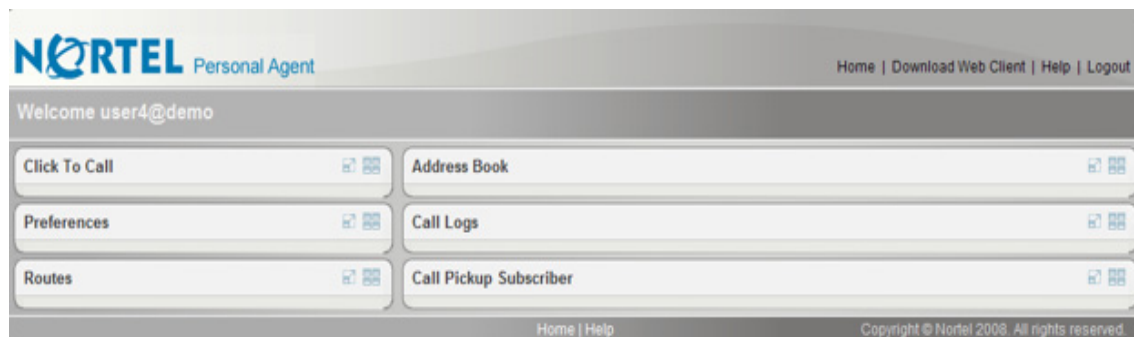


Attention: If your system administrator changed your initial password, then you are not prompted to change your password.

- 5 If prompted to change your password, complete the required fields.
- 6 Click **Save**.

Navigating the Personal Agent

The Personal Agent main page is always your starting point to access all the services and features of the Personal Agent. Use the maximize and minimize icons to open and close the various portlets. Depending on the services assigned to you and your status as either an administrator or an agent, the Personal Agent appears basically as follows:



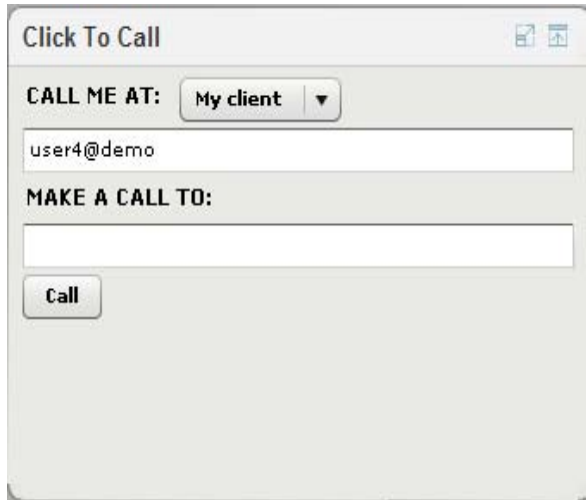
Personal Agent portlets

Depending on the services assigned to you, the following portlets are available on the Personal Agent:

- Click To Call
- Preferences
- Routes
- Address Book
- Call Logs
- Uniform Call Distribution
- Assistant Console Service
- Call Pickup
- Hunting

Click To Call

Use this portlet to make calls.



The image shows a web portlet titled "Click To Call". At the top right of the portlet are two small icons: a square with a plus sign and a square with a minus sign. Below the title, there is a section labeled "CALL ME AT:" followed by a dropdown menu currently showing "My client" with a downward arrow. Underneath this is a text input field containing the email address "user4@demo". Below that is a section labeled "MAKE A CALL TO:" followed by an empty text input field. At the bottom left of the portlet is a button labeled "Call".

Preferences

Use this portlet to manage your preferences, such as personal information, IP Phone, Meet Me Conferencing, and Unified Communications.

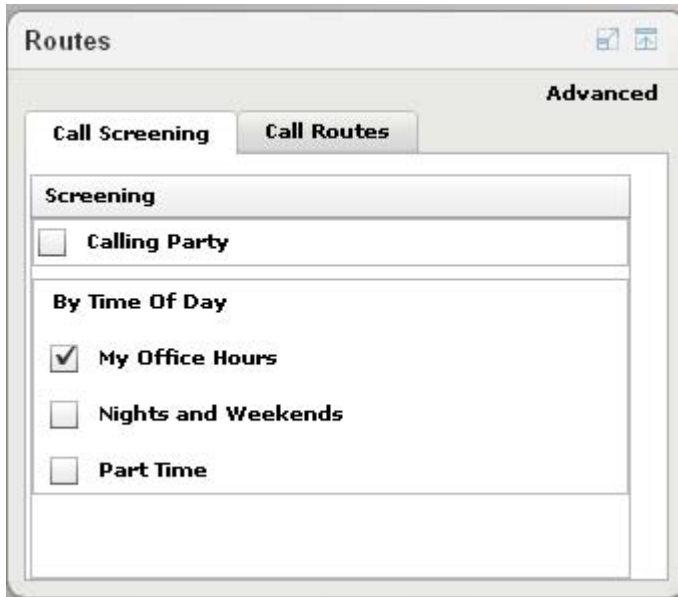
The screenshot displays the 'NORTEL Personal Agent' interface. At the top, it says 'Welcome s1@ds20sip1.com'. The main content area is titled 'Preferences' and is divided into two sections. On the left is a sidebar with a list of preference categories: Personal, Contact info, Password, Picture, Reasons, My Times, IP Phone, Meet Me Conferencing, Unified Communications, Presence, Vertical Service Codes, and Call Services. The 'Contact info' category is selected. The main area shows the following fields:

First name:	u7544
Last name:	sec
email:	s1@ds20sip1.com
Business phone:	(214)555-1212
Home phone:	(214)512-1234
Cell Phone:	(972)598-1212
Pager:	(469)324-1009
Fax:	(214)447-2114
Timezone:	Central Standard Time
Locale:	English

At the bottom of the main area are 'Apply' and 'Cancel' buttons. The footer of the page contains 'Home | Help'.

Routes

Use this portlet to route your incoming calls.



The screenshot shows a web-based interface for configuring call routes. The main window is titled "Routes" and has a tabbed interface with "Call Screening" and "Call Routes" tabs. The "Call Routes" tab is active. In the top right corner of the window, there is a "Advanced" label and two small icons. The "Call Routes" section contains a "Screening" sub-section with a checkbox for "Calling Party" which is unchecked. Below this is a "By Time Of Day" section with three checkboxes: "My Office Hours" (checked), "Nights and Weekends" (unchecked), and "Part Time" (unchecked).

Address Book

Use this portlet 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.

The screenshot shows the 'Address Book' portlet interface. At the top, there is a search bar with the text 'SEARCH' and a dropdown menu set to 'Personal Address Book'. To the right of the search bar is a 'View All' button. Below the search bar is a table with the following columns: Friend, Nickname, Last Name, First Name, and Group. The table contains two rows of contact information. At the bottom of the portlet, there is a toolbar with icons for adding a contact, viewing groups, sending an email, and making a call. To the right of the toolbar is a pagination control showing '<< Page 1 of 1 >>'.

Friend	Nickname	Last Name	First Name	Group
	JD	Doe	John	No Group
	Jane	Smith	Jane	No Group

Call Logs

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



To	Time	Duration	Address
2143355116	Wed Jun 24 2009 10:23:51 PM	0:00:00	2143355116@techtrial.com
esn4457790	Wed Jun 24 2009 10:23:20 PM	0:00:00	esn4457790@techtrial.com
9725551212	Wed Jun 24 2009 10:18:19 PM	0:00:03	9725551212@techtrial.com
esn4457790	Wed Jun 24 2009 10:17:50 PM	0:00:00	esn4457790@techtrial.com
2145551212	Wed Jun 24 2009 10:17:04 PM	0:00:13	2145551212@techtrial.com
esn4459505	Wed Jun 3 2009 10:53:08 AM	0:00:00	esn4459505@techtrial.com

Assistant Console Service

Use this portlet to designate other Adaptive Application Engine users to act as primary and alternate assistants for your calls. Assistants can monitor, transfer, or route incoming and outgoing calls for you. As an assistant, you use this portlet to manage your assisted users and the assigned routes

Assistant Console and Services

Primary Assistant **Alternate Assistant** **Assistant Route**

Add New Primary Assistant:

Primary Assistant Group Details:

Assistant	Delete

Voicemail Assistant:

Call Pickup

Use this portlet to set and modify call pickup settings, as a Call Pickup Group Administrator or a subscriber.

Call Pickup Subscriber

Agent Status: Active
 Inactive

Pickup Type Assigned: Group Call Pickup
 Directed Call Pickup
 Targeted Call Pickup

Pickup Group Name:

Group Identifier: callpickup@demo

Group Directory Number: 9725551235

Prefix Codes:

Name	Prefix

Hunting

Use this portlet to set and modify Hunting settings, as a Hunt Group Administrator or an agent.

The screenshot shows a web interface titled "Hunt Groups". At the top, there are two tabs: "Admin" and "Agent". Below the tabs, there is a "Group Name:" label and a text input field. A list of group names is displayed below, with "mlh2" selected and highlighted in blue. A "Select" button is located at the bottom of the list. To the right of the list, there are two tabs: "Group Settings" and "Group Members". The "Group Settings" tab is active, showing the following configuration options:

- Group Type: DLH
- DN: 44444464
- URI: mlh2@ds9sip1.com
- Agent call forward option: Hunt (dropdown menu)
- Call forward destination: 542234212 (text input)
- Overflow option: Route Announcement
- Overflow destination: 7716391853 (text input)

At the bottom right of the "Group Settings" section, there are two buttons: "Save" and "Reset".

Exiting the Personal Agent

To exit the Personal Agent, click **Logout** on the top right corner of any page on which you are working.

Starting the Multimedia Web Client

To start the Multimedia Web Client from the Personal Agent, click **Download Web Client** on the top right corner of the Personal Agent.

Managing Click To Call

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

Using Click To Call, you enter a phone number or SIP address of the device where you want to take the call, then enter the called-party number. The phone then rings at your preferred device. After the call is answered on your preferred device, a call is made to the called party.



Tip: Ensure that your Personal Communicator Client or Multimedia Web Client is running when you use **Click to Call**. If your Personal Communicator Client is not running, you cannot connect to the calling party using this feature.

Topics in this section include

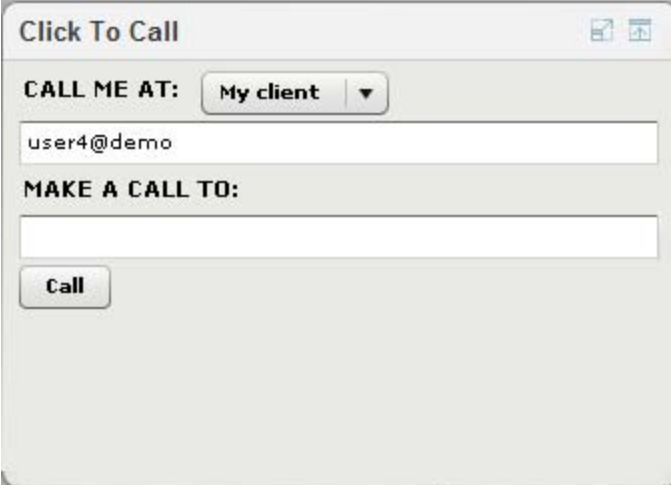
- [“Using Click To Call” on page 31](#)

Using Click To Call

To initiate a call using **Click To Call**,

- 1 Login to the Personal Agent.

- 2 In the **Click To Call** portlet, select your preferred device from the **Call Me At** drop down list.



The screenshot shows a web portlet titled "Click To Call". It features a dropdown menu labeled "CALL ME AT:" with "My client" selected. Below this is a text input field containing "user4@demo". Underneath is another section labeled "MAKE A CALL TO:" with an empty text input field. At the bottom left of the portlet is a "Call" button. There are also small icons in the top right corner of the portlet's header.

- 3 If you selected **Other**, enter the phone number or SIP address of your preferred device
- 4 Enter the called party's number in the **Make A Call To** field.
- 5 Click **Call**.
The call is initiated and your preferred device rings.
- 6 Answer the call.
This initiates the second part of the call, to the contact you added in the Make A Call To field. Once your contact answers, you can successfully start the conversation.

Managing Preferences

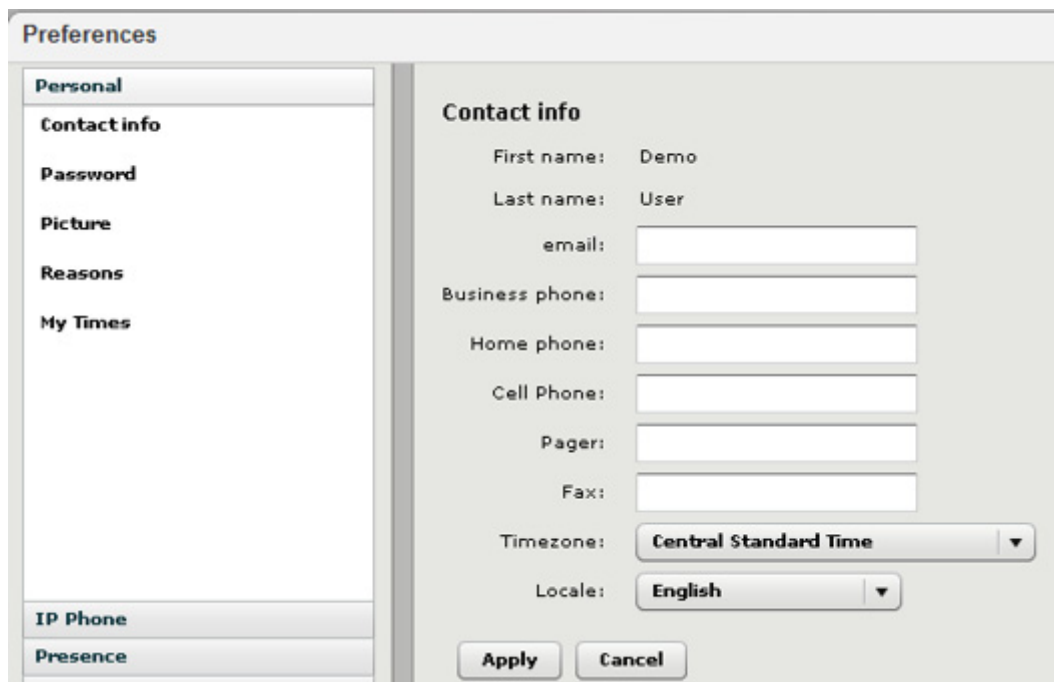
This section describes all the services and features available on the **Preferences** portlet of the Personal Agent. Your administrator or service provider determines the actual set of services and features available to you, therefore you might not have access to some of the services or parameters listed. To request changes to your services, contact your system administrator.

Topics in this section include:

- [“Setting up your personal preferences” on page 34](#)
- [“Managing your IP Phone” on page 41](#)
- [“Viewing and modifying Meet Me conferencing” on page 44](#)
- [“Viewing and modifying Unified Communications” on page 46](#)
- [“Viewing and modifying Presence” on page 49](#)
- [“Viewing and modifying your Vertical Service Codes” on page 53](#)
- [“Viewing and modifying Call Services” on page 56](#)
- [“Viewing and modifying XMPP Gateway credentials” on page 57](#)

Setting up your personal preferences

To view or modify your personal preferences, access the Preferences portlet.



The screenshot shows a web interface titled "Preferences". On the left is a vertical menu with the following items: "Personal" (highlighted), "Contact info", "Password", "Picture", "Reasons", "My Times", "IP Phone", and "Presence". The main area displays the "Contact info" section with the following fields and values:

- First name: Demo
- Last name: User
- email:
- Business phone:
- Home phone:
- Cell Phone:
- Pager:
- Fax:
- Timezone: Central Standard Time (dropdown menu)
- Locale: English (dropdown menu)

At the bottom of the form are two buttons: "Apply" and "Cancel".

By default, the Personal menu opens with the following submenu items, click on any one of them to view the options associated with that item:

- Contact info
- Password
- Picture
- Reasons
- My Times



Tip: The system uses the information you enter in the **Contact info** and **My Times** submenu items when setting up routes for your incoming calls. See [“Managing Routes” on page 61](#) for complete information on setting up routes.

Modifying your contact information

To modify your contact information,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **Contact**. The Contact info page appears.
- 3 Enter or modify the information on the contact info page. Locale shows your language and region for display in different languages, if supported. (You need to log off and log on again for changes to take effect.)
- 4 Click **Apply** to save your changes or **Cancel** to discard them.

Changing your password

When you change your password, your password changes across all Personal Communicator Clients (Personal Communicator Client, Personal Communicator Web Client, Personal Agent, and the Nortel IP Phone).

To change your password,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **Password**. The password page appears.
- 3 Complete the required fields.



Tip: For security purposes, Nortel recommends that you change your password periodically.

- 4 Click **Apply** to save your changes or **Cancel** to discard them.

Selecting a picture ID

You can add a picture to use as your picture caller ID in the Multimedia Web Client or the Personal Communicator Client. If you are replacing an existing picture ID, then your new picture overwrites the old picture.

To add or modify a picture,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **Picture**. The Picture page appears. The first time you access this page you will notice a shadow figure. This indicates that you have not yet selected a picture.
- 3 Click **Update**.
- 4 Enter the path and file name of the picture or click **Browse** and then select the picture file.



Tip: Pictures larger than 160 x 120 pixels are resized. Use only PNG or JPG files. The picture cannot be larger than 24 KB. However, your system administrator can provision a different picture size for you to load on the Personal Agent.

- 5 Click **Apply** to save the picture as your picture caller ID or click **Cancel** to discard your changes.
The picture file you specify is sent to your service provider's user database and appears on the Personal Communicator Web Client, Personal Communicator Client, and on the Picture page each time you use the Personal Agent. The picture also appears in the address book in **card view** mode. Click **Delete** to delete a picture.

Remember that a picture caller ID appears when the contact has been added to the address book of the person being called.

Specifying reject reasons

You can specify a reason or list of reasons to appear on your Nortel IP Phone to be used when rejecting a call through Personal Agent routing.

To specify a new reject reason or a list of reasons for rejecting an incoming call,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **Reasons**. The Reasons page appears.

-
- 3 Enter the text of the reason (for example, *Busy right now* or *Try again later*) in the **New Reasons** field.



Tip: The reasons appear in the order that you enter them.

- 4 Click **Add**.
The reason text appears in the Current Reasons window.
- 5 To save the reason, click **OK** or **Apply** or click **Cancel** to clear your input and reset your reason list to the last saved settings.



Tip: The reasons appear on your Nortel IP Phone, or in the Route Select rejection message window in the same order they appear in the Current Reasons window.

Modifying the list of reasons

You can reorder the list of reasons or delete reasons from the list.

To modify the list of reasons,

- 1 Click on a reason in the Current Reasons window.
- 2 Click **Up** or **Down** to reorder the reason.



Tip: The reasons appear on your Nortel IP Phone, or in the Route Select rejection message window in the same order they appear in the Current Reasons window.

- 3 To remove a reject reason from the list, highlight the entry in the Current Reasons list.
- 4 Click **Remove** to remove the selected reason, or, click **Remove All** to remove all reasons.
- 5 Click **OK** or **Apply**.

Setting up My Times date and time ranges

If the Advanced screening parameter is enabled in your service package, you can use the My Times page to create, modify, copy, rename, or delete day and time ranges to use when setting up conditions to screen and route your incoming calls.

Adding a new day and time range

To add a new day and time range,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **My Times**. The My Times page appears. The first time you use the Personal Agent, you will see the following default day and time options to choose from in the My Times window:
 - My Office Hours
 - Nights and Weekends

- Select a default option (for example, My Office Hours).
A graphic display for the default time range of 8:00 AM to 5:00 PM, Monday to Friday, appears in the Day/Time Details window.

	AM											PM												
	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11
Monday																								
Tuesday																								
Wednesday																								
Thursday																								
Friday																								
Saturday																								
Sunday																								

- Click **Add** to create a new Day/Time range.
- Enter a group name in the **Group Name** field.
Default group name is New Group 1.
- Select your Day/Time combinations by clicking on the appropriate time blocks.
- Click **Save** to save your new Day/Time range and combinations, or **Cancel** to return to the My Times page without creating a new range.
The new range appears in the My Times window.

Example

If you work part time, you might want to add a Day/Time combination that will only apply on Mondays, Wednesdays, and Fridays between the hours of 7:30 AM and 5:30 PM. To set up these hours,

- 1 Click **Add**.
- 2 Create a new group called **Part Time**.
- 3 Click to select the appropriate time blocks (7:30 AM and 5:30 PM) under Monday, Wednesday, and Friday.
- 4 Click **Save**.
The graphic display in the Day/Time Details window is updated with your selected days and times.

Modifying a day and time range

To modify an existing day and time range,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **My Times**.
The My Times page appears with Day/Times options in the My Times window.
- 3 Click an option in the My Times window (for example, My Office Hours).
A graphic display for the day and time range appears in the Day/Time Details window.
- 4 Click **Modify**.
- 5 Enter your changes to the days and time ranges on the My Times page.
- 6 Click **Save** to save your Day/Time changes or **Cancel** to return to the My Times page.

Copying a day and time range

To copy a Day/Time range,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **My Times**.
The My Times page appears.
- 3 Select the option you want to copy in the My Times window.
- 4 Click **Copy**.
The My Times copy page appears.
- 5 Enter a name for the new Day/Time Range.

-
- 6 Click **Save** to save your changes, or **Cancel** to return to the My Times page. The My Times page appears with the new Day/Time range in the Day/Time Details window.

Renaming a day and time range

To rename a day and time range,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **My Times**. The My Times page appears.
- 3 Select an option in the My Times window.
- 4 Click **Modify**. The My Times rename window appears.
- 5 Enter a new name for the Day/Time range.
- 6 Click **Save**, or **Cancel** to return to the My Times page.

Deleting a day and time range

To delete a day and time range,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, under the Personal sub-menu, click **My Times**. The My Times page appears.
- 3 Select an option from the My Times window.
- 4 Click **Delete**.
- 5 At the confirmation box, click **OK** to confirm that you want to delete the My Times option, or **Cancel** to return to the My Times page.

Managing your IP Phone

Using the Personal Agent, you can view or modify your IP Phone preferences. The following IP Phone preferences can be modified, click on any of them to view the associated options.

- Subjects
- Personalized presence
- Logout

Creating a subject list for your IP Phone calls

On the IP Phone, you can select from a list of subjects when you place an outgoing call. The subject appears on the IP Phone, as well as other registered SIP clients, of the person you are calling to alert them as to why you are calling.

To create a new subject in the list,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **IP Phone, Subjects**.
The **Subjects** page appears.
- 3 Enter the text of the subject in the **New Subject** field.
- 4 Click **Add**.
The subject text appears in the Current Subjects window.
- 5 To save your subject list, click **OK** or **Apply**.
- 6 To remove a subject, select the entry, and click **Remove**.
To remove all subjects in the list you created, select all the entries, and click **Remove All**.

Changing the subject list order

To specify the order in which the subjects appear on a IP Phone,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **IP Phone, Subjects**.
The **Subjects** page appears.
- 3 Click on a subject in the Current Subjects window.
- 4 Click **Up** or **Down** to change the order of the subject list.
- 5 To save your changes, click **OK** or **Apply**.

Personalizing your presence

To customize a presence status note for display on the IP Phone,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **IP Phone, Personalized presence**. The Personalized presence page appears.
- 3 Enter a note in the New Note text field to appear on your IP Phone.
- 4 Click **Add**.
The note text appears in the Current notes window.
- 5 Click **Up** or **Down** to reorder the presence note for display on the IP Phone.
- 6 To save the note, click **OK** or **Apply**, or click **Cancel** to clear your input and reset your note list to the last saved settings. (To remove a note, click **Remove**, or **Remove All** to remove all notes.)

Checking the settings of your IP Phone

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.

To check the logon status of an IP Phone,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **IP Phone, Logout**.
The Logout page appears.
- 3 Look for the IP Phone that you are logged on to, based on the Device Label, MAC address, or Users.



Tip: The **IP phone** option lists a separate entry for each phone you are logged on to.

- 4 Click the **Log Me Out** link for the IP Phone from which you want to log off.
- 5 Click **OK** at the confirmation message.

Viewing and modifying Meet Me conferencing

The Meet Me audio conferencing service enables you to have a personal conference bridge, available 24 hours a day. Use of the bridge is strictly enforced through PIN access. Participants dialing into the bridge are greeted and prompted to enter in an Access Code that uniquely identifies a personal bridge. Only you, as the chairperson (the person who owns the bridge), can open the bridge and allow all participants to join.

The following submenu items are available for Meet Me Conferencing, click on any of them to view the associated options:

- **Preferences**
- **PIN**

Modifying Meet Me preferences

To view and modify the details of your bridge,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Meet Me Conferencing, Preferences**. The Meet Me page appears.
- 3 View the specific details of your conference information, including
 - Dial-In Number
 - Access Code
 - Collaboration URL (static) used by participants to join a future or current web collaboration conference. This URL is provided to participants that can be calling in from a location where they do not have access to the Personal Communicator Client or Multimedia Web Client (but do have access to a web browser).
 - URL (dynamic) for the Chairperson's web collaboration access (appears once the collaboration session is activated). This URL is provided to participants who are using a non-multimedia phone set to start the conference, but are using a PC with a browser to participate in the conference.

Remember to contact your service provider or system administrator to request any changes to the conference phone number(s), conference access code, or static conference URL.

- A checkbox to allow fast start.
 - A checkbox to indicate whether or not the conference ends when you disconnect from the call.
 - A checkbox to indicate whether or not to receive instant messages (such as attendance roster and collaboration material access) during the time when you are the chairperson.
 - A checkbox to allow interactive participants to use audio emoticons. (Your system administrator is responsible for providing the media source files for the audio emoticons.)
 - Email address where recordings of the conference are sent.
 - Option buttons to select audio entry/exit tone indicators to announce the arrival and departure of conference participants.
- 4** Click **Apply** to save your changes or **Cancel** to discard them. If you choose to discard your changes the page is refreshed back to your original settings.

Changing your Meet Me PIN

To change your Meet Me Chairperson PIN,

- 1** Login to the Personal Agent.
- 2** In the Preferences portlet, click **Meet Me Conferencing, PIN**. The Meet Me: Change PIN page appears.
- 3** Enter a number between 4 and 10 digits long for the New Chair PIN.
- 4** Enter the new PIN again in the Confirm PIN box.
- 5** Enter your Personal Agent password.
- 6** Click **Apply** to save your changes or **Cancel** to discard them. If you choose to discard your changes the page is refreshed back to your original settings.

Viewing and modifying Unified Communications

The Unified Communications service provides you with integrated access to your voicemail messages from a preferred client device, such as a PC, voice over IP (VoIP) phone, wireless phone, or a traditional circuit switched telephone. Use the Personal Agent to view and modify the details of your account.

The following Unified Communications submenu items are available, click on any of them to view the associated options:

- **Overview**
- **Set active greeting**
- **Greeting settings**
- **PIN**
- **Email Preferences**
- **Auto identification**
- **Message storage**

Setting your active greeting message

To select which recorded greeting is played when a user leaves you a message,

- 1** Login to the Personal Agent.
- 2** In the Preferences portlet, click **Unified Communications, Greetings, Set active greetings**.
The Unified Communications: Set active greetings page appears.
- 3** From the drop-down list, select which recorded greeting is played when a user leaves you a message:
 - System
 - Temporary
 - Personal
 - Custom (up to three custom greetings)
- 4** Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Modifying your current greeting settings

To modify your greeting settings,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Unified Communications, Greeting settings**.
The Unified Communications: Current greeting settings page appears.
- 3 For each greeting, click **Modify** to specify the email address to which the voicemail message is delivered and to assign transfer destinations.
- 4 Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Changing your PIN

To change your Personal Identification Number (PIN),

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Unified Communications, PIN**.
The Unified Communications: Change PIN page appears.
- 3 Enter a new PIN for accessing your mailbox.
- 4 Enter the new PIN again in the Confirm PIN box.
- 5 Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Setting your email preferences

To change the email delivery options of your voicemail messages,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Unified Communications, Email preferences**.
The Unified Communications: Email Preferences page appears.

- 3 Set the email delivery options for your voicemail messages.
- 4 Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Controlling your automatic login

To control your Unified Communications logon when using other PSTN telephony devices (such as a cell phone) that are not hosted by the Adaptive Application Engine network,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Unified Communications, Auto Identification**.
The Unified Communications: Auto Identification Addresses page appears.
- 3 Select the option to use automatic identification when calling from your client.
- 4 Click **Apply** to save your settings.
- 5 Provide direct access to your mailbox by using the customizable option to enter up to three different PSTN or ESN numbers.
- 6 Click **Save** to save your changes.

Remember that the customizable option only allows you to enter valid PSTN or ESN digits and not a user name. Only PSTN numbers not hosted by the Adaptive Application Engine network can be used for automatic identification. For example, automatic identification does not work when subscribers call from a known device, such as the cell phone or home phone.

Setting recording time for incoming voicemail messages

To set the maximum recording time for incoming voicemail messages,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Unified Communications, Message Storage**.
The Unified Communications: Message storage page appears.

- 3 Set the maximum length (in seconds) for an incoming voicemail message.
- 4 Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Viewing and modifying Presence

Presence enables you to see the online status of other users on the network, lets others know your status, and also allows you to be immediately notified when a new watcher is requesting authorization to view your presence. The following Presence submenu items are available, click on any of them to view the associated options:

- Watchers
- Authorized watchers
- Banned watchers
- Show offline watchers
- Preferences

Viewing and modifying your Watchers List

To see a list of people who have subscribed to your presence information,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Presence, Watchers**.
The Watchers page appears.

The list shows only the active usernames watching your presence, not all users registered to your presence. The date when an active watcher subscribed to your presence information also appears.

The "Pending" column allows a Personal Agent user to know if a watcher is pending authorization or not.

- 3 To ban an active watcher from seeing your presence information, click the checkbox beside the watcher's username.

4 Click Ban watchers.

The Banned watchers list appears with the new banned watcher's username.

Viewing and modifying Banned watchers list

You might want to ban someone from subscribing to your presence information in the future. Use the **Banned watchers** option to restrict access by other users who do not currently appear in your watchers list.

To ban someone from viewing your presence information,

1 Login to the Personal Agent.

2 In the Preferences portlet, click **Presence, Banned watchers**.

The Banned watchers page appears.

3 Enter the SIP address of the person you want to ban.

4 Click **Add**.

The person you added to the Banned watchers can still call you, but they can no longer see your online status. The name now appears in the Banned watchers list.

5 To delete a user from your Banned watchers list, click to select the Banned User, click **Delete**, and then click **OK** at the confirmation message.

The party is removed from the Banned watchers list.

Viewing and modifying your Authorized Watchers list

You might want to add someone to your list of authorized watchers, which allows them to subscribe to your presence information in the future. Use the **Authorized watchers** option to allow access by other users who do not currently appear in your watchers list.

To allow someone to view your presence information,

1 Login to the Personal Agent.

2 In the Preferences portlet, click **Presence, Authorized watchers**.

The Authorized watchers page appears.

3 Enter the SIP address of the person you want to authorize.

- 4** Click **Add**.
The person you added to the Authorized watchers can see your online status. The name now appears in the Authorized watchers list.
- 5** To delete a user from your Authorized watchers list, click to select the Authorized User, click **Delete**, and then click **OK** at the confirmation message.
The party is removed from the Authorized watchers list.

Viewing and modifying your Show-Offline Watchers list

You might want to appear as Offline to particular users. Use the **Show-Offline watchers** option so that watchers see your status as "Offline".

To appear as "Offline" to specific users,

- 1** Login to the Personal Agent.
- 2** In the Preferences portlet, click **Presence, Show-Offline watchers**.
The Show-Offline watchers page appears.
- 3** Enter the SIP address for the person for which you want to appear Offline
- 4** Click **Add**.
The person you added to the Show-Offline watchers can still call you, but they see your online status as Offline. The name now appears in the Show-Offline watchers list.
- 5** To delete a user from your Show-Offline watchers list, click to select the User, click **Delete**, and then click **OK** at the confirmation message.
The party is removed from the Show-Offline watchers list.

Modifying your presence service preferences

If you have the Auto presence service enabled in your service package, you can automatically let other users in your domain know whether you are away from your PC, or on the phone.

This window also allows you to set the "Enhanced authorization" setting, which allows you to opt-in or out of this feature. There are 3 values for Enhanced Authorization: Yes (white/black list), No (black list) or Not Set (same effect as No). By default, a user's value is set to "Not Set", which allows watchers to see the user's presence unless specifically banned. If the user opts-in ("Always ask before accepting watchers"), then the user is asked before allowing a watcher to see their presence status.

To modify your presence service preferences,

- 1** Login to the Personal Agent.
- 2** In the Preferences portlet, click **Presence, Preferences**.
The Preferences page appears.
- 3** Select **Yes** or **No** in the "Report when on the phone" box to allow other users to know when you are on the phone or when you are inactive.
- 4** Enter a time value in the **Inactivity Timer (in minutes)** field.
This value is the number of minutes that must elapse before your status is reported as inactive. People who have subscribed to your presence are alerted to your presence status after the elapsed time.

The Inactivity Timer (in minutes) option only applies to the Personal Communicator Client and the Personal Communicator Web Client, if the option **Report when inactive** is selected. This option does not apply to the IP Phone.

- 5** Select an entry in the "Enhanced authorization" box. There are three possible values:
Yes (white/black list) - enables Enhanced Authorization; you are asked for authorization before a watcher can see your presence status
No (black list) - disables Enhanced Authorization; all watchers are allowed to see your presence status unless specifically banned
Not Set (same effect as No) - this is the default setting. All watchers are allowed to see your presence status unless specifically banned.
- 6** Click **Apply** to save your changes or **Cancel** to discard them.
Any changes to your service package are reflected the next time you log in.

Viewing and modifying your 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 following VSC submenu items are available, click on any of them to view the associated options:

- **VSC (Vertical Service Codes)**
- **SDC (Short Dialing Codes)**
- **MCT (Malicious Call Trace)**
- **Vertical Service Codes PIN**

The following table gives a brief description of the VSC services.

Service	Description
Anonymous Call Rejection	Allows you to automatically reject calls where the number is withheld or Privacy Indicator (Privacy Header) is set to restrict display.
Call Forward Immediate	Allows you to forward all incoming calls to a specified DN.
Do Not Disturb	Allows you to forward your calls to voicemail so that you are not disturbed. If voicemail is not in your service package, the call is rejected with "Do Not Disturb" text.
Call Forward Conditional	Allows you to block or forward calls based on the response of the your device.
Call Forward Variants Busy	Allows you to forward calls whenever your device is busy (that is, engaged in a call).
Call Forward Variants No Answer	Allows you to forward calls whenever you do not answer.
Call Forward to Voicemail	Allows you to forward calls to voice mail when your device is busy.
Adjust Rollover timer (# of rings)	Allows you to set the number of Rings your primary device is tried before trying the next route, including voicemail.

Service	Description
Disable All Call Forwardings	Allows you to turn off all forms of call forwarding except for Default Route.
Ad Hoc Conferencing via VSC	Allows you to activate/deactivate and check status check of Ad-Hoc service.
Calling Name/Number Privacy per call	Allows you to restrict user details in SIP message to the terminator for only the specified call.
Calling Name/Number Presentation per call	Allows you to restrict user details in SIP message to the terminator for only the specified call when Privacy service is active.
Calling Name/Number Restriction per call	Allows you to restrict user details in SIP message to the terminator for only the specified call, whether Privacy service is active or not.
Network Call Waiting Disable via VSC	Allows you to activate/deactivate and check status of the Network Call Waiting Disable service.
Network Call Waiting Disable per call	Allows you to activate Network Call Waiting Disable service for only the initiated session.
Short Dialing Code	Allows you to initiate a call with a VSC to a pre-defined destination provisioned by your service provider.
Last Call Return	Allows you to check the time and telephone number of the last received call, and also to initiate a call back to the last caller.
Voicemail Retrieve via VSC	Allows you to retrieve voicemail with a VSC.
Malicious Call Trace	Allows you to instruct AS5200 to trace the last call and forward the information to the carrier or law enforcement.

Viewing prefixes

You can view the prefixes for VSC, SDC, and MCT features through the Personal Agent. To view the prefixes for the VSC services available to you in your service package,

- 1 Login to the Personal Agent.

- 2 In the Preferences portlet, click **Vertical Service Codes**.
- 3 Click the **VSC, SDC, or MCT** submenu item.
The VSC prefix page lists the VSC prefixes along with the prefix name and function. The Short Dialing Codes Prefixes page lists the Short Dialing code name, prefix, and pre-defined call destination. The Malicious Call Trace Prefixes page lists the MCT prefix and name.

Modifying VSC routes

While you cannot modify a VSC itself, for several of the VSCs, the destination or action associated with them are capable of being modified. The VSC routes capable of being modified are:

- Anonymous Calls
- Do Not Disturb
- Call Forward Immediate
- Call Forward Variants.

Modifying the routes, associated with the VSCs above, is done using the Routes portlet. For details on modifying routes, see [“Managing Routes” on page 61](#).

Changing your Vertical Service Codes PIN

To change your VSC PIN,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Vertical Service Codes, Vertical Service Codes PIN**.
The Vertical Service Codes PIN page appears.
- 3 Enter the required information.
- 4 Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Viewing and modifying Call Services

Call Services allows you to view and modify the status of your assigned call services. The following Call Services submenu items are available, depending on your service package:

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

Call Return

Call Return allows you to dial the last caller, whether or not you answered the call. This service must be enabled in your service package.

To view or modify the status of Call Return,

- 1** Login to the Personal Agent.
- 2** In the Preferences portlet, click **Call Services, Call Return**.
The Call Return page appears.
- 3** To change the status of the service, from the drop-down menu, select **No** to deactivate or **Yes** to activate.
- 4** Click **Apply** to save your changes or **Cancel** to discard them.
If you choose to discard your changes the page is refreshed back to your original settings.

Setting Ad Hoc Conferencing

Ad Hoc Conferencing allows you to join multiple calls into one conference call. This service must be enabled in your service package.

To view or modify the status of Ad Hoc Conferencing,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Call Services, Ad Hoc Conferencing**. The Ad Hoc Conferencing page appears.
- 3 To change the status of the service, from the drop-down menu, select **Yes** to activate or **No** to deactivate.
- 4 Click **Apply** to save your changes or **Cancel** to discard them. If you choose to discard your changes the page is refreshed back to your original settings.

Setting Call park

Call park allows you to place a call on hold so that someone else can retrieve it. You can have the call returned to you if it is not picked up after a specified amount of time. This service must be enabled in your service package.

To change your call park settings,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **Call Services, Call park**. The Call Park page appears.
- 3 Select **Yes** or **No** from the Auto-Retrieve parked calls drop-down list.
- 4 Enter the amount of time (in seconds) that must elapse before a call is auto-retrieved. This step is not required if you chose to not auto-retrieve calls.
- 5 Click **Apply** to save your changes or **Cancel** to discard them. If you choose to discard your changes the page is refreshed back to your original settings.

Viewing and modifying XMPP Gateway credentials

The Extensible Messaging and Presence Protocol (XMPP) Gateway enables you to send and receive Instant Messages (IMs) using your Personal Communicator Client with users on external communities: Yahoo, Google, AOL, MSN and Jabber. You can also subscribe to the presence of these external community users.

When the Personal Communicator Client sends an IM to an external community, the XMPP Gateway logs into the external community on your behalf using the credentials that you provide in the Personal Agent. Similarly, when a user from an external community sends you an IM, the XMPP Gateway uses your credentials to deliver the IM to you.



Tip: For the XMPP Gateway to function, you must have a Jabber account.

To view or modify your XMPP Gateway credentials,

- 1 Login to the Personal Agent.
- 2 In the Preferences portlet, click **XMPP Gateway, XMPP Gateway**. The XMPP Gateway page appears.

The screenshot shows a 'Preferences' window with a sidebar on the left and a main content area on the right. The sidebar contains several menu items: Personal, IP Phone, Meet Me Conferencing, Unified Communications, Presence, Vertical Service Codes, Call Services, XMPP Gateway, and XMPP Gateway. The main content area is titled 'XMPP Gateway' and contains several input fields for user credentials. The fields are: Jabber user@domain (with a dropdown menu showing 'userid@yourdomain.com'), Jabber password (masked with asterisks), Yahoo user (with a dropdown menu showing 'yahoouserid'), Yahoo password (masked with asterisks), MSN user@domain, MSN password, AOL user, AOL password, Google-Talk user (with a dropdown menu showing 'gtalkuserid'), and Google-Talk password (masked with asterisks). A 'Save' button is located at the bottom right of the form.

- 3 Enter your Jabber user name and password.
- 4 Enter your user name and password for any other the external communities with which you want to exchange IMs and presence information.

5 Click Save.

You receive a confirmation IM stating that you are now logged into the XMPP Gateway and any other external community that you are trying to access.



Tip: Some systems do not allow you to be logged into more than one location. For example, you can not be logged into Yahoo Messenger and your PC client at the same time and receive presence updates from the Yahoo community.

Managing Routes

The Personal Agent Routes portlet has two functions: call screening and call routing.

Call screening provides you the functionality to screen calls and route the call to your voicemail or based on the calling party, day and time, or call treatment.

Call routes provides you the functionality to set up basic routes for your incoming calls.

If Advanced screening is not enabled in your service package, you cannot use the Personal Agent routing capabilities. If you do not have routing capability, a default route is defined for you. It rings your phone, and, if you are subscribed to the voicemail service, the call is sent to voicemail.

The Assisted user uses the Routes portlet in the Personal Agent to route incoming calls to the designated assistant groups.

Topics in this section include

- [“Call Screening” on page 61](#)
- [“Call Routes” on page 66](#)
- [“Advanced Call Routes” on page 71](#)

Call Screening

Call screening provides you the functionality to screen calls and route the call to your voicemail or route the call based on a specified call treatment. You can screen your calls by:

- Anonymous calls
- Calling Party
- Do Not Disturb

- By Time of Day
- Specified Call Treatment

Modifying call screening for Anonymous Calls

Anonymous Call Rejection (ACR) allows you to reject calls from callers who have blocked the display of their telephone numbers from a Caller ID device. ACR discourages anonymous calls, since callers must allow their numbers to be displayed in order to reach you.

Anonymous Calls is associated with a VSC. To determine the associated VSC, see [“Viewing prefixes” on page 54](#).

To modify the Anonymous Call Rejection route,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, under **Call Screening**, check the box for **Anonymous Calls**.
- 3 Click **Anonymous Calls**.

Anonymous Calls

Specify an action to take when anonymous call rejection is activated.

The anonymous call option is: On Off

Reject all calls with the reason:

Ok Apply Cancel

- 4 Change the settings as required.
- 5 Click **Apply**.

Screening calls based on the calling party

To screen your calls to voicemail based on the calling party,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, under the **Call Screening** tab, click **Calling Party**.

Calling Party
Screen Calls to voice mail based on the calling party's number.

The calling party option is: On Off

Create a list of numbers that will be directly forwarded to voice mail should they call:

Add

b1@ds20sip1.com **Remove**

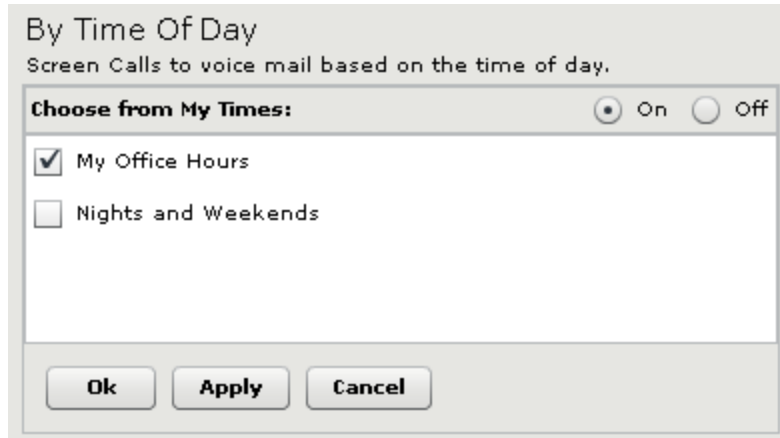
Ok **Apply** **Cancel**

- 3 Select the **On** radio button.
- 4 Enter the name, phone number or SIP address to be screened.
- 5 Click **Add**.
The calling party appears in the list.
- 6 Click **Apply**.

Screening calls based on Time of Day

To screen your calls to voicemail based on your Time of Day settings,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, under the **Call Screening** tab, click **By Time Of Day**.



- 3 Select the **On** radio button.
- 4 Select the desired day/time ranges.
The time options are set in [“Setting up My Times date and time ranges” on page 38](#).
- 5 Click **Apply**.

Modifying call screening for Do Not Disturb

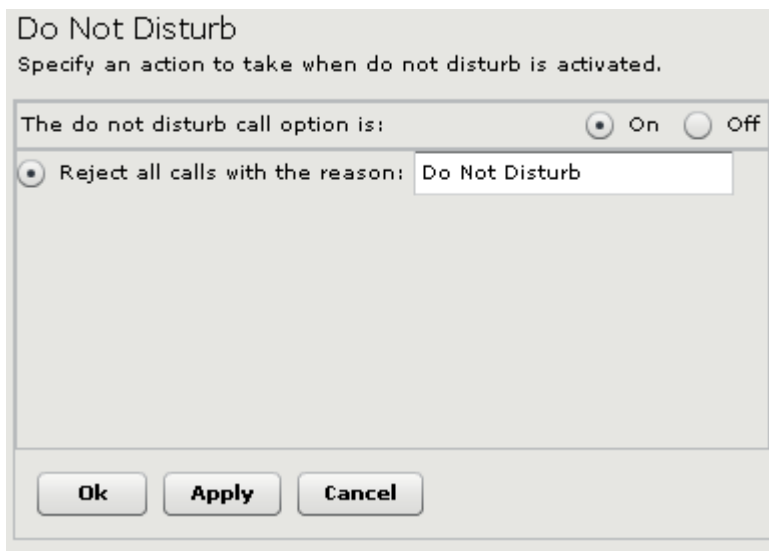
The Do Not Disturb option allows you to have your calls forwarded immediately to a voicemail destination, if you have voicemail service in your service package. This voicemail destination cannot be changed.

Do Not Disturb is associated with a VSC. To determine the associated VSC, see [“Viewing prefixes” on page 54](#).

To modify the Do Not Disturb route,

- 1 Login to the Personal Agent.

- In the Routes portlet, under **Call Screening**, select **Do Not Disturb**. The Routes portlet maximizes.
- In the **Do Not Disturb** window, changes the settings as required.



- Click **Apply**.

Screening incoming calls to a Call Treatment

To screen your calls to a call treatment,

- Login to the Personal Agent.
- In the Routes portlet, under the **Call Screening** tab, select **Screening To a Call Treatment**.
- Select **Incoming**.
- In the **Selective reject** tab, enter a phone number, SIP address or wildcard to be screened.
- Click **Apply**.
The new entry is added to the blocked list of incoming calls.
- To screen all calls, select the **Deny all calls** tab.
- Check the box for **All Incoming Calls**.

- 8 Click **Apply**.
All incoming calls are screened.
- 9 Click **OK**.

Screening outgoing calls to a Call Treatment

When outgoing calls are screened, the call is redirected to an audio recording. To screen outgoing calls,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, under the **Call Screening** tab, click **Screening To a Call Treatment**.
- 3 Click **Outgoing**.
The Routes portlet maximizes.
- 4 In the **Selective reject** tab, enter a phone number, SIP address or wildcard to be screened.
- 5 Click **Apply**.
The new entry is added to the blocked list of outgoing calls.
- 6 To screen all calls, select the **Deny all calls** tab.
- 7 Check the box for **All Outgoing Calls**.
- 8 Click **Apply**.
All outgoing calls are barred.
- 9 Select the **Call Type Based** tab.
- 10 Check the boxes applicable to the call types you want barred.
The options include: International, Long Distance Inter Rate Area, Local, Premium, and Long Distance Intra Rate.
- 11 Click **Apply**.
Outgoing calls based on the selected types are barred.

Call Routes

Call Routes provides you with four basic route settings:

- Call Forwarding Immediate

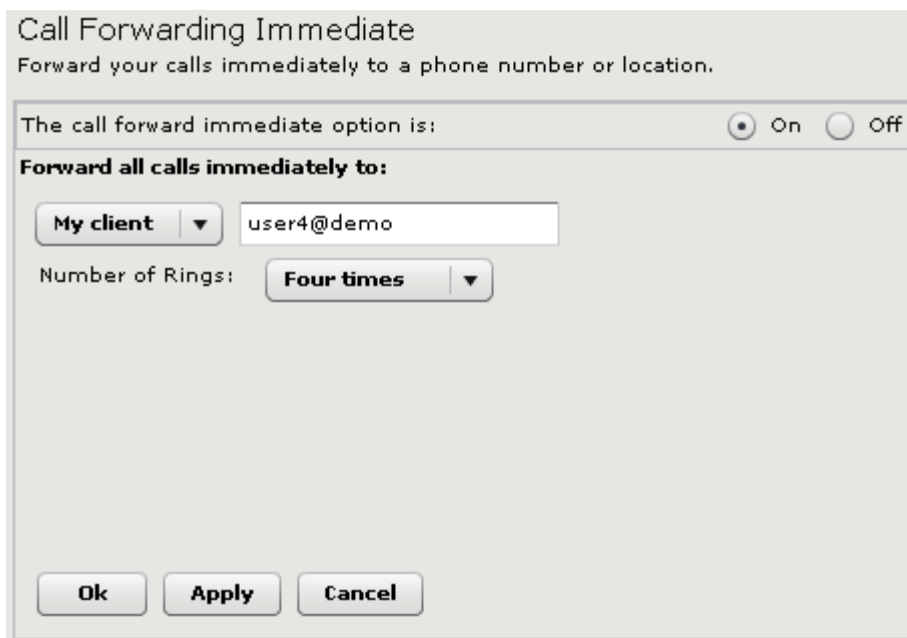
- Sequential Ringing
- Simultaneous Ringing
- Call Forward Variants

Setting Call Routes using Call Forwarding Immediate

Call Forwarding Immediate is associated with a VSC. To determine the associated VSC, see [“Viewing prefixes” on page 54](#).

To set all your calls to be routed immediately,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, select **Call Routes**.
- 3 Select **Call Forwarding Immediate**.



The screenshot shows a dialog box titled "Call Forwarding Immediate" with the subtitle "Forward your calls immediately to a phone number or location." The dialog contains the following elements:

- A label "The call forward immediate option is:" followed by two radio buttons: "On" (which is selected) and "Off".
- A section titled "Forward all calls immediately to:" containing a dropdown menu with "My client" selected and a text input field containing "user4@demo".
- A label "Number of Rings:" followed by a dropdown menu with "Four times" selected.
- At the bottom, there are three buttons: "Ok", "Apply", and "Cancel".

- 4 Select the **On** radio button.
- 5 Select a destination for the forwarded call.
- 6 Select the number of rings for the call destination.
- 7 Click **Apply**.

Setting Call Routes using Sequential Ringing

To set your calls to be routed using sequential ringing,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, select **Call Routes**.
- 3 Select **Sequential Ringing**.

The screenshot shows a dialog box titled "Sequential Ringing" with the subtitle "Forward your calls to up to three numbers at the same time and be sure to never miss an important call." The dialog contains the following elements:

- A label "The sequential ringing option is:" followed by two radio buttons: "On" (selected) and "Off".
- A dropdown menu set to "Three times" and a label "Number of rings before calling the next number:".
- A section titled "Ring the following numbers in sequence:" containing a table with three rows:

Order	Category	Number
1	My client	user4@demo
2	Other	
3	Other	

At the bottom of the dialog are three buttons: "Ok", "Apply", and "Cancel".

- 4 Select the **On** radio button.
- 5 Select the number of rings before the call is forwarded to the next number.
- 6 In order, enter the numbers to be called.
- 7 Click **Apply**.

Setting Call Routes using Simultaneous Ringing

To set your calls to be routed using simultaneous ringing,

- 1 Login to the Personal Agent.
- 2 In the Routes portlet, select **Call Routes**.

3 Select **Simultaneous Ringing**.

The screenshot shows a dialog box titled "Simultaneous Ringing" with the subtitle "Ring up to 3 multiple numbers at the same time." The dialog contains the following elements:

- A label "The simultaneous ringing option is:" followed by two radio buttons: "On" (which is selected) and "Off".
- A dropdown menu set to "Three times" with the label "Number of rings" to its right.
- A section header "Ring the following numbers at the same time:".
- A table with three rows for entering numbers:

1	My client	user4@demo
2	Other	
3	Other	
- Buttons for "Ok", "Apply", and "Cancel" at the bottom.

4 Select the **On** radio button.**5** Select the number of rings.**6** Enter the numbers to be called at the same time.**7** Click **Apply**.**Setting Call Routes using Call Forward Variants**

Call Forward Variants are associated with a VSC. To determine the associated VSC, see [“Viewing prefixes” on page 54](#).

To set your calls to be routed based on variants,

1 Login to the Personal Agent.**2** In the Routes portlet, select **Call Routes**.

3 Select **Call Forward Variants**.

Call Forward Variants
Forward your calls to a location or number based upon your availability.

The call forward variants option is: On Off

Under the following conditions forward my calls:

Number of Rings:

If busy, route to

If no answer, route to

Then send to Voicemail

4 Select the **On** radio button.**5** Select the number of rings before the call is forwarded.**6** Select the destination for the call if busy.**OR**

Select the destination for the call if no answer.

OR

Make selections for both.

7 Click **Apply**.

Attention: The condition of Call Forward Variants is saved as a route, and this route is prioritized higher than the routes defined under Advance Call Routes. Therefore, the routes defined under Advance Call Routes will not be activated, when you enable Call Forward Variants.

Advanced Call Routes

A route enables you to perform different actions on your incoming calls and Instant Messages based on a set of conditions or exceptions. For example, you can create a route named “Lunch” that specifies a condition that calls received between 12:00 pm and 1:00 pm Monday through Friday are to be affected by the route. The route “Lunch” would also have an action that specifies that calls that are affected by the route will ring your mobile phone first, and then send the call to voicemail.



Tip: Routes are applied to incoming calls in the order in which they are listed in the List of Routes window. 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. If a route has no conditions or exceptions it will apply to all calls, so it should be ordered below the rest of the routes.

For example, if you create a route to handle calls from an anonymous caller, you would order that route higher in the route list than a route to handle calls from “anyone” with exceptions specified.

Creating a route

You can create routes with the Personal Agent Route portlet. The Routes portlet provides a step-by-step procedure that makes the task of creating rules and conditions for your incoming calls easier.

Use the Route portlet to:

- define routes for how your incoming calls and Instant Messages (IM) are handled
Instant messaging must be enabled in your service package in order to see the option that enables you to be able to send and receive instant messages.
- specify conditions as to how and on which devices specific calls should be presented to you in a simultaneous or sequential fashion

- define personalized time blocks to further define your routes so that you are always in reach
- send an IM or push a web page when certain conditions and exceptions that match the call are met.
As with instant messaging, the web page option must be enabled in your service package.

Limitations and restrictions

If the destination in the route does not directly correspond to an existing alias, username, or DN in the database, and the destination is later translated using private translation and then becomes the alias, username, or DN of the route owner, the call is not routed correctly. It goes into an endless loop.

Understanding the route creation steps

The following table describes the steps to follow when you create a route using the Personal Agent Routes portlet.

This step...	Specifies...
Initiate action	the main action or actions that initiates the processing of the route. There are two options listed here to select from: When a call is received or When an Instant Message is received (if enabled in your service package). Select the desired option by clicking on the appropriate checkbox.
Conditions	filtering of conditions respective to the call originator and the time of day that must apply before the Actions can take place.
Outcome Actions	what action or actions are performed when a call is received. Actions are defined with respect to the services enabled in your service package.
Exceptions	what are the exceptions to the filtering conditions defined in Conditions.

To create routes using the Personal Agent Routes portlet,

- 1** Login to the Personal Agent.
- 2** In the Routes portlet window, click **Advanced**.
The first time you use the Routes portlet, the list of routes has a default

(permanent) route checked and dimmed. The default route forwards all calls and instant messages to your client.

- 3 Click **New**.
- 4 Enter a name for the route.
- 5 Click **OK**.
- 6 Select the **Initiate Action** tab.



The screenshot shows the 'Routes' dialog box with the 'Initiate Action' tab selected. The 'Route name' is set to 'Vacation'. Below the name, there is a section titled 'Select what actions should trigger the route.' with two checked options: 'When a call is received' and 'When an instant message is received'.

- 7 Select the actions to trigger the route.
If you do not have Instant Messaging enabled in your service package, you do not see the Instant Messaging option.
- 8 Click **OK**.
- 9 Select the **Conditions** tab.



The screenshot shows the 'Routes' dialog box with the 'Conditions' tab selected. The 'Route name' is still 'Vacation'. Below the name, there is a section titled 'Select how you would like to filter calls received.' with several unchecked options: 'From THESE PEOPLE in my Personal Address Book', 'From THESE GROUPS in my Directory', 'From THESE TELEPHONE NUMBER(S)', 'From anonymous', 'Received in "Unavailable Busy"', and 'Received in SPECIFIC DAY/TIME RANGE(S)'.

10 Select all the conditions that apply to your route.

If you select a condition that contains underlined text, a new window opens and you must make further selections. The day and time ranges are controlled by your My Times settings, see “[Setting up My Times date and time ranges](#)” on page 38.

11 Click **OK**.

12 Select the **Outcome Actions** tab.

The options listed in the **Outcome Actions** tab vary depending on your selections in the **Initiate Actions** tab. For instance, the **Forward or reply** action only appears when you select **When an instant message is received** in the Initiate Actions tab.

The screenshot shows the 'Routes' configuration window with the 'Outcome Actions' tab selected. The 'Route name' is 'Tanya's route'. The main area is titled 'Select what actions you would like to perform.' and contains a list of actions with checkboxes:

- Ring my devices in the following ordered lists
 - Ring THESE NUMBERS first in my list
 - Ring THESE NUMBERS second in my list
 - Ring THESE NUMBERS third in my list
 - If busy then ring THESE NUMBERS
 - If no answer then ring THESE NUMBERS
 - Then send to voicemail and play greeting: System ▼
- Send straight to voicemail and play greeting: Active ▼
- Rejection MESSAGE (PSTN callers receive busy tone)
- Request an email (PSTN callers receive busy tone)

13 Select the action you would like performed.

If you select an action that contains underlined text, click on the underlined text and make further selections.

Ring my devices in the following ordered lists - allows you to create a list of numbers to either forward the call, send an instant message, or push a web page.

Forward or reply - allows you to forward the instant message to a specific phone number or SIP address, send an instant message, or push a web page.

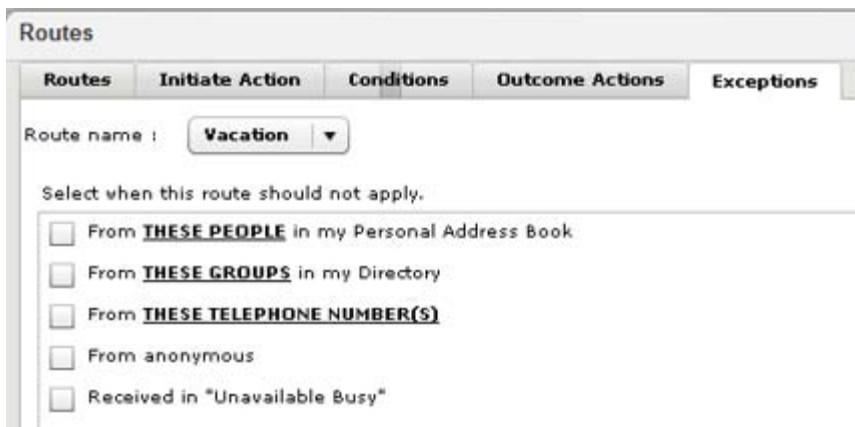
Send straight to voicemail - allows you to send the call to your voicemail and play the selected greeting

Rejection message - allows you to create a rejection message to be sent to the caller.

Request an email - requests an email from the caller.

14 Click **OK**.

15 Select the **Exceptions** tab.



16 Select the exceptions when this route should not apply.

If you select an action that contains underlined text, a new window opens and you must make further selections.

17 Click **OK**.

When a route specifies that all incoming calls be forwarded to another user, then the collaboration features, specifically sharing whiteboard and transferring clipboard, are also forwarded to the user specified in this route. However, this call forwarding route does not permit sending web pages to the user specified in this route. To forward web pages to another user, a route must be created to forward all incoming instant messages to a specific user.

Remember, as a Converged desktop user, when you create a new route, you must ensure that your contact information is completely populated in your Personal Address Book. Make sure that the preferred audio device (PAD) number is populated as a valid phone number in the Contact Details window. The PAD number is usually your business phone number, but it can also be your home phone or mobile number. For more details, see [“Adding a contact” on page 79](#).

Managing Address Book

The **Address Book** is available from the Personal Agent main or top navigation tabs. It enables you to

- create and maintain a Personal Address Book of your personal contacts and groups of contacts.
- access a Global Address Book of all users in your domain (if enabled in your system).
- call a contact from your Personal or Global Address Book.
- access details about a contact including their presence status on the system.

Topics in this section include:

- [“Understanding Personal Agent address books” on page 77](#)
- [“Using your Personal Address Book” on page 78](#)
- [“Using the Global Address Book” on page 84](#)

Remember that if your system administrator has disabled the Global Address Book for your domain, you will not see the option to select the Global Address Book in the SEARCH drop-down list.

Understanding Personal Agent address books

The following address books are available in the Personal Agent:

- Personal Address Book contains contact information set up by you.

- Global Address Book (if enabled in your system) contains contact information (maintained by your system administrator and for reference only) of all users in your domain.



Tip: Information in your Personal and Global (if enabled) address book can be used as a condition when defining a route to handle your incoming calls. For more information, see [“Managing Routes”](#) on page 61.

Using your Personal Address Book

Your Personal Address Book is a dynamic list of contacts, which you maintain. It lists the nickname, first name, and last name of your contacts. You can also view and define a group for the contact to belong to and whether or not to include the contact in your list of Friends.

Friend	Nickname	Last Name	First Name	Group
	jeffm	middleton	jeff	No Group



Tip: Anytime you add a contact or make a change to a contact using the Personal Agent, your Personal Address Book automatically updates and synchronizes with the Personal Communicator Client, Personal Communicator Web Client, and Nortel IP Phone, enabling you to view your Friends online from any of these devices.

Managing the contacts in your Personal Address Book

Your Personal Address Book helps you manage, track, and access information about all of your key contacts.

Adding a new group

You can create a group in which to place your contacts. For example, you can create a group called **Work** for your office contacts, and another group called **Personal** for your personal contacts. To add a new group,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select the Group icon in the bottom left. The Groups window opens.
- 3 Enter a group name.
- 4 Click **Add**.

Adding a contact

The maximum number of contacts that you can add to your Personal Address Book is dependent on your service package.

To add a contact to your Personal Address Book,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, click the **Add New** icon at the bottom left. The Add new entry page appears.

- 3 Complete the fields with your contact's personal information. Required fields are indicated with an asterisk (*).



The screenshot shows a dialog box titled "Address Book" with a light gray background. On the left side, there is a placeholder for a contact's profile picture, represented by a gray silhouette of a person with a question mark inside. Below the placeholder is a small orange circle icon and a checkbox labeled "Friend". On the right side, there are several text input fields and a dropdown menu, each with a label and a value. The fields are: "First Name" (John), "Last Name" (Doe), "Nickname" (John), "SIP address" (jdoe@yahoo), "Email address" (jdoe@test.com), "Business phone" (213-223-2345), "Home phone" (341-321-2341), "Mobile", "Pager", "Fax", and "Group" (No Group). Red asterisks are placed to the right of the "Nickname" and "SIP address" fields, indicating they are required. At the bottom of the dialog box, there are two buttons: "Apply" and "Cancel".



Tip: The information you add as your contact's nickname is displayed where applicable, in all modes of the Personal Communicator Client (PCC).



Tip: If your contact has a user ID for an external community, enter that information in the SIP address field. Using the external community user name for "user", the SIP address must be formatted as follows:

Jabber - as specified by your service provider or company administrator
AOL - "user@aol"

MSN - For the hotmail.com domain, use "user@msn", and for other MSN domains use "user@msn.domain".

Yahoo - "user@yahoo"

Google Talk - For the gmail.com domain, use "user@gmail", and for other Google Talk domains, use "user@gtalk.domain".



Tip: Adaptive Application Engine supports the + (plus) format as an international number designator when placed in the first position of a Directory Number (DN) or alias.

- 4 To add the new contact to a group, select a group from the Group drop-down list.
- 5 To designate the new contact as a Friend, select the checkbox next to the **Friend** icon. This allows you to see the online status of the contact, if they are an external community user.
- 6 Click **Apply**.

Designating a contact as a Friend

Presence must be enabled in your service package to be able to select the Friend check box for designating a contact as a Friend in your Personal Address Book. Your service package determines the maximum number of contacts that you can designate as Friends. By designating a contact as a Friend, you are able to view their activity by clicking the **Friends Online** icon in the Personal Communicator Client or the Personal Communicator Web Client. For more information, see *Nortel Adaptive Application Engine Personal Communicator Client User Guide* (NN48111-121).

The Personal Agent enables you to create, view, and update a contact as a Friend. Friends can be people that you work with or correspond with regularly.

To designate a contact as a Friend,

- 1 Click on the checkbox next to the **Friend** icon when entering or completing contact information in your Personal Address Book.
- 2 Click **Apply**.
The contact you designated as a Friend now appears in your Personal Address Book with the **Friend** icon in the **Friend** column.
- 3 To delete a contact as a Friend, uncheck the checkmark next to the **Friend** icon in the contact details page.
- 4 Click **Apply**.



Tip: You can also use the Personal Communicator Client, Personal Communicator Web Client, or Nortel IP Phone to see whether or not a Friend is online.

Editing a contact

There can be times when you want to modify information about a contact in your address book. To edit details about a contact,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select the contact that you want to edit.
- 3 Click the arrow icon at the bottom of the Address Book portlet.
- 4 Select **Edit**.
- 5 Make the desired changes.
- 6 Click **Apply**.
- 7 Click **Back** to return to your Personal Address Book.

Deleting a contact

To delete a contact (or a number of contacts) to delete,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select the contact that you want to delete.
- 3 Click the arrow icon at the bottom of the Address Book portlet.
- 4 Select **Delete**.
A confirmation window appears.
- 5 Click **Yes**.
The Address Book portlet refreshes.

Viewing your contacts

To view your Personal Address Book contacts, login to the Personal Agent. By default the Personal Address Book is open.

Sorting your contacts

To sort your contacts, click a column name (for example, **Friend**, **Nickname**, **Last name**, **First name**, or **Group**). Click the column name again to sort in reverse.

Remember that you might have to sort users each time you open the Global Address Book.

Searching for a contact

To search for a contact,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, enter a search string in the field provided. The list of contacts updates to match your entry.



Tip: You can enter a wildcard symbol (*) at the beginning or end of a search string. For example, searching for *en will return all contacts named Ben, Jen, and so on. Use quotation marks before and after a search string to specify an exact match. For a complete list of the search criteria see [“Understanding Address Book Search Criteria” on page 131](#).

Viewing details about a contact

To view details about a contact,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select the desired contact.
- 3 Click the arrow icon at the bottom of the Address Book portlet.
- 4 Select **Details**.

Initiating a call to a Personal Address Book contact

To call a contact using the Personal Address Book,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select the desired contact.
- 3 Click **Call**.
The Click to Call page appears. See [“Managing Click To Call” on page 31](#), for complete information on using Click To Call.

Viewing all contacts

To display all the contacts in your Personal Address Book, click **View All**.

Using the Global Address Book

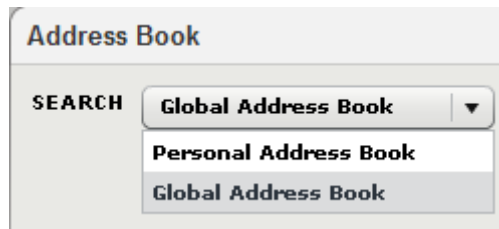
Your Global Address Book is a directory of all users in your domain. This list is created and maintained by your service provider or system administrator.

However, if your system administrator has disabled the Global Address Book for your domain, you will not see the option to select the Global Address Book in the SEARCH drop-down list.

Accessing the Global Address Book

To access the Global Address Book (if enabled),

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select **Global Address Book** from the Search drop down list.



Working with the Global Address Book

The Global Address Book enables you to access a single, common, network-wide address book.

Sorting users

To sort users in the Global Address Book,

-
- 1 Login to the Personal Agent.
 - 2 In the Address Book portlet, select **Global Address Book** from the Search drop down list.
 - 3 Click a column name (for example, **Last name**, **First name**, **Office**, or **Home**).
 - 4 Click the column name again to sort in reverse.

You might have to sort users each time you open the Global Address Book.

Searching for a user

To search for a user in the Global Address Book,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select **Global Address Book** from the Search drop down list.
- 3 Enter a search string in the field provided.
The list of users updates to match your entry.



Tip: You can enter a wildcard symbol (*) at the beginning or end of a search string. For example, searching for *en will return all users named Ben, Jen, and so on. Use quotation marks before and after a search string to specify an exact match. For a complete list of the search criteria see [“Understanding Address Book Search Criteria” on page 131](#).

- 4 Click **Return to my address book** to access your Personal Address Book.

Viewing user details

To view details about a user in the Global Address Book,

- 1 Login to the Personal Agent.
- 2 In the Address Book portlet, select **Global Address Book** from the Search drop down list.
- 3 Select the desired user.
- 4 Click the arrow icon at the bottom of the Address Book portlet.

5 Select Details.

A page appears listing details about the user, including an icon that indicates their presence status on the network.

6 Click Close to return to the Global Address Book page, or click **Add** to add this user as a contact in your Personal Address Book.**Initiating a call to a Global Address Book user**

To initiate a call to a user in the Global Address Book (if enabled),

1 Login to the Personal Agent.**2** In the Address Book portlet, select **Global Address Book** from the Search drop down list.**3** Select the desired user.**4** Click **Call**.**OR**

Double-click on the contact name.

The Click To Call window appears.

For information on using Click To Call, see [“Managing Click To Call” on page 31](#).

Adding users from the Global Address Book to your Personal Address Book

To select a user to add to your Personal Address Book from the Global Address Book, you must first perform a search in the Global Address Book to find the desired user. See [“Searching for a user” on page 85](#).

1 Following the search, select the user (or number of users) you want to add to your Personal Address Book.**2** Click the **Add new entry to Personal Address Book** icon.

The Adding address book entries window appears.

3 If you want to designate the new contact as a friend, select the **Add users as friends** checkbox.

- 4** Designate a group if desired.
You will receive an error message if you attempt to add users from your Global Address Book that have the same **Last name** or **First name** as the **Nickname** field defined in your Personal Address Book.
- 5** Click **OK**.
Your Personal Address Book appears, showing the entry you added from the Global Address Book.

Managing Call Logs

The Personal Agent enables you to view a list of incoming and outgoing calls made by any device for which you are logged on.

Topics in this section include

- [“Viewing call logs” on page 89](#)
- [“Calling contacts from the call log” on page 90](#)
- [“Saving contacts from the call log information” on page 90](#)
- [“Clearing call log information” on page 90](#)

Viewing call logs

To view your list of incoming and outgoing calls,

- 1 Login to the Personal Agent.
- 2 In the Call Logs portlet, select the **Incoming** or **Outgoing** tabs to see the calls.

The Incoming tab shows information about the caller’s name, the time and duration of the call, and caller address. The icons in the **Type** column of your inbox indicate whether you answered the call or not.

The Outgoing tab shows the names of people you called, the time and duration of the calls, and their SIP addresses.

Network-based call logs capture all missed calls whether a caller leaves a voice mail or disconnects without leaving a voice mail.

Calling contacts from the call log

To call a contact from the call logs,

- 1 Login to the Personal Agent.
- 2 In the Call Logs portlet, select the **Incoming** or **Outgoing** tab.
- 3 Select a call log.
- 4 Click **Call**.
OR
Double-click the call log.
The Click To Call window opens. See [“Using Click To Call” on page 31](#).

Saving contacts from the call log information

To save a contact from a call log to your Personal Address Book,

- 1 Login to the Personal Agent.
- 2 In the Call Logs portlet, select the **Incoming** or **Outgoing** tab.
- 3 Select a call log.
- 4 Click the **Add to Personal Address Book** icon in the bottom left.
- 5 Click **OK**.

Clearing call log information

To remove one or more entry(ies) in a call log,

- 1 Login to the Personal Agent.
- 2 In the Call Logs portlet, select the **Incoming** or **Outgoing** tab.
- 3 Select the call log you want to delete.
- 4 Click the arrow icon to the right of **Call**.
You are prompted to confirm the deletion.

- 5 Click **Yes** to confirm the deletion.
The Call logs page refreshes and the entry is gone.

Managing Uniform Call Distribution

Uniform Call Distribution (UCD) allows businesses to improve call-completion rates by matching incoming calls to available answering locations. UCD enables even distribution of incoming calls to a Listed Directory Number (LDN) or URI over a group of subscribers associated with that LDN/URI. This group of subscribers is called a UCD group. Each subscriber in the UCD Group has its own directory number(s)/URI.

There are two types of subscribers for every UCD Group: Agents and Administrators.

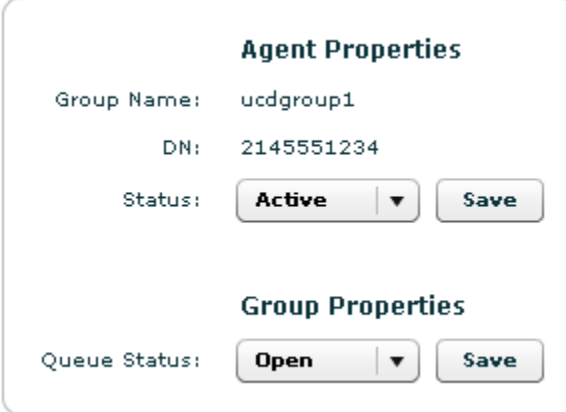
UCD has its own independent portlet on the Personal Agent through which agents and administrators see the details of UCD services and modify group or agent properties. UCD Administrators can login to the Personal Agent with their username and password to view and manage services and features of the UCD Groups for which they are responsible. To show the UCD portlet, the user must be a member of a UCD group or a UCD administrator.

Topics in this section include:

- [UCD Agent window overview](#)
- [Setting UCD Agent status](#)
- [Setting UCD Queue Status](#)
- [UCD Administrator window overview](#)
- [Setting and modifying Group Information parameters](#)
- [Adding or deleting group members](#)
- [Forcing out group members](#)
- [Setting Queue Status](#)
- [Managing Group Routes](#)

UCD Agent window overview

UCD agents login to the Personal Agent with their username and password to access their UCD services and features through the UCD Agent portlet.



The screenshot shows a web interface for managing UCD agents. It is divided into two sections: "Agent Properties" and "Group Properties".

Agent Properties

- Group Name: ucdgroup1
- DN: 2145551234
- Status: Active (dropdown menu) [Save]

Group Properties

- Queue Status: Open (dropdown menu) [Save]

The UCD Agent window has the following fields:

- **Group Name** - displays the name of the UCD Group to which the agent is assigned.
- **DN** - displays the DN of the UCD Group
- **Status** - displays UCD agent status (active or inactive) and allows agents to change their status for that UCD Group.
- **Queue Status** - displays the queue status of the UCD Group and allows agents to change the queue status for the group.

Setting UCD Agent status

To receive UCD calls, UCD Agents must be active in a UCD group. An agent can be only assigned to one UCD group at a time. The group marks an agent as busy only when they directly receive a call from that UCD group. Each incoming call terminates on the agent who has been idle for the longest period of time. UCD agents can toggle their status (active or inactive) using the Personal Agent Uniform Call Distribution portlet.

Prerequisite

The UCD Group must have an assigned SESM profile.

To set your UCD Agent status,

- 1 Login to the Personal Agent.
- 2 In the **Uniform Call Distribution** portlet, select the **Agent** tab.
This step applies only if you are a UCD Group Administrator. If you are an agent, the Agent tab is your default view.
- 3 In the Agent tab, under **Agent Properties**, select your status from the **Status** drop down menu.
Select **Active** to set your status as active to receive calls; or select **Inactive** to set your status as inactive to not receive calls.
- 4 Click **Save**.

Setting UCD Queue Status

A UCD agent queue is a queue of available agents in a particular UCD Group, in the order they become available from previous calls. The UCD queue is priority based. The agent who has been idle for the longest time has the smallest priority value. You can set Queue Status from the Personal Agent UCD Agent portlet.

Prerequisite

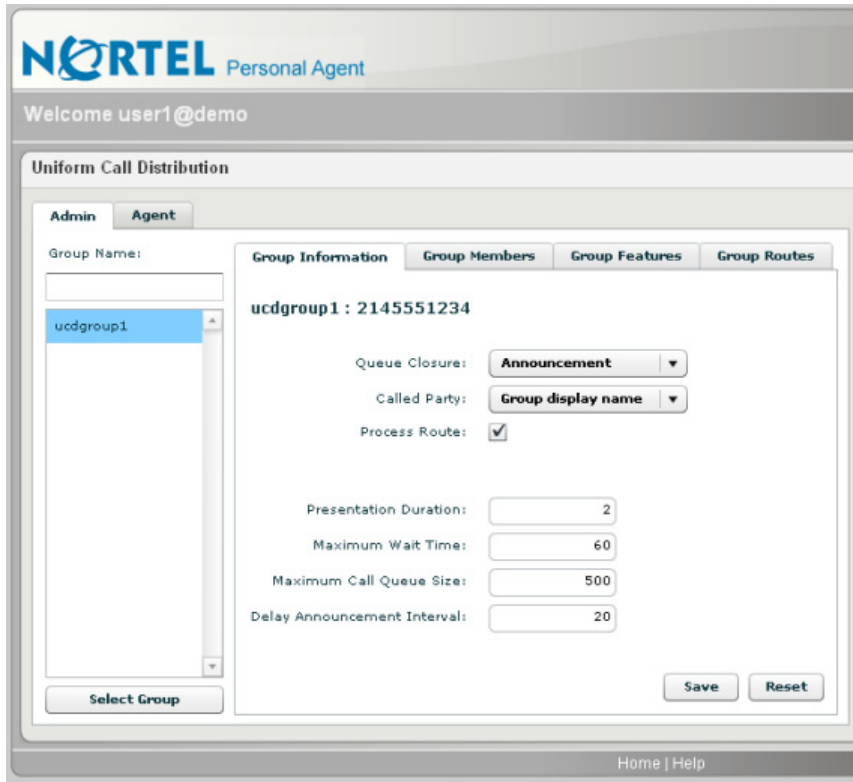
The UCD Group must have an assigned SESM profile.

To set your UCD Group Queue Status,

- 1 Login to the Personal Agent.
- 2 In the **Uniform Call Distribution** portlet, select the **Agent** tab.
This step applies only if you are a UCD Group Administrator. If you are an agent, the Agent tab is your default view.
- 3 In the **Agent** tab, under **Group Properties**, select **Open** or **Closed** from the Queue Status drop down menu.
- 4 Click **Save**.

UCD Administrator window overview

When you login as an Administrator, the UCD window has two tabs: **Admin** and **Agent**. The **Admin** tab displays UCD Group name(s) and allows you to select a specific UCD Group to view and manage. The **Agent** tab allows you to view and manage your personal UCD Agent and Queue services.



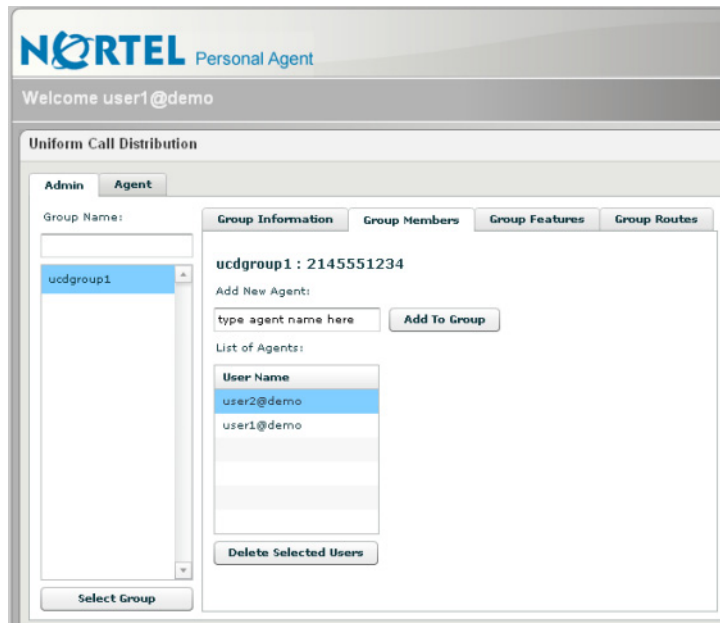
The **Administrator** tab has the following sub-tabs:

- **Group Information** - displays the following fields:
 - **Queue Closure** - displays which option is used when the queue is closed (by either the administrator or agent). When “Announcement” is selected, incoming calls are terminated to MAS for announcement. When “Route” is selected, incoming calls are routed to a defined destination.

-
- **Called Party** - displays what information is sent to the caller. The Application Server (AS) sends agent information if “Agent” is selected or sends UCD Group information if “UCD Group” is selected.
 - **Process route** - this option, if selected, allows the Agent to redirect an incoming UCD call to their route list. Otherwise agent route list is ignored and agent cannot redirect incoming UCD calls.
 - **Presentation Duration** - displays (in seconds) how long a call can be presented to an available UCD Group Agent before the AS tries to find another available agent to make a new connection.
 - **Maximum Wait Time** - displays the queue wait timeout (in seconds). If a caller stays more than the maximum wait time in queue without attempting, then the call is terminated to the MAS to inform the user that the call has terminated.
 - **Maximum Call Queue Size** - displays the queue length threshold. Any incoming call after maximum call queue size is reached is terminated to MAS for announcement.
 - **Delay Announcement Interval** - displays the number of minutes the AS waits before playing the delay announcement. When set to five minutes, a caller listens to ringback for five minutes and then AS connects the caller to delay announcement.

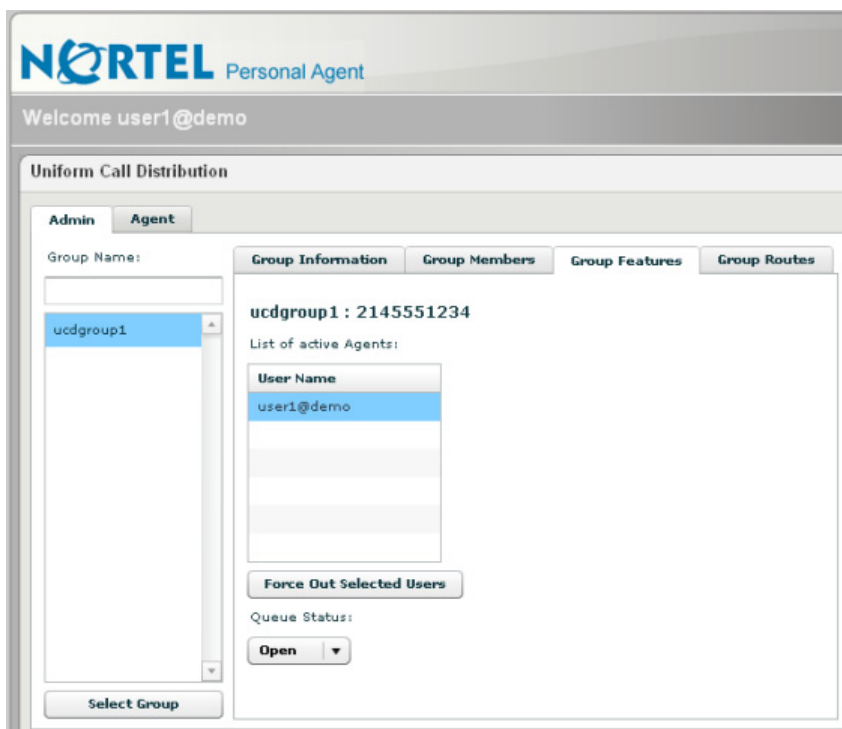
See [“Setting and modifying Group Information parameters”](#) on page 100 for more information on setting and modifying Group Information parameters.

- **Group Members** - the Group Members sub-tab allows the UCD Group Administrator to add and delete agents for the group.



See [“Adding or deleting group members”](#) on page 101 for more information on adding new group members and deleting existing group members using the Group Members sub-tab.

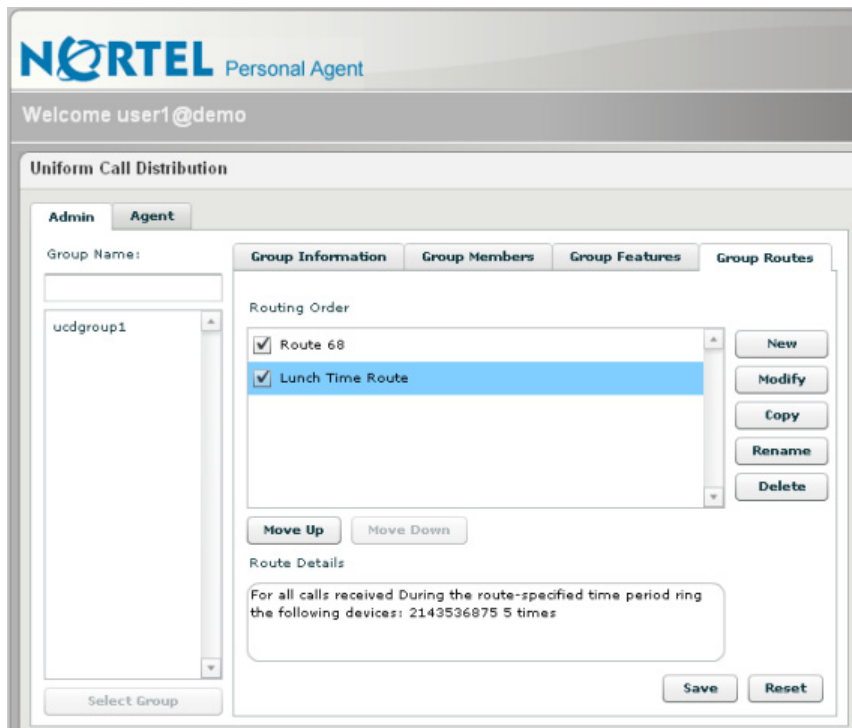
- **Group Features** - the Group Features sub-tab allows the UCD Group administrator to perform user force outs and set the group's queue status. The administrator cannot activate an inactive agent. Queue activation can only be done if the group has an assigned SESM profile.



See [“Forcing out group members”](#) on page 102 for more information on forcing out group members and [“Setting Queue Status”](#) on page 102 for modifying Queue Status using the Group Features sub-tab.

- **Group Routes** - the Group Routes sub-tab allows the UCD Group Administrator to create new routes, modify, copy, rename, and delete existing routes, and set or edit the routing order. The UCD Group Administrator can create new routes based upon incoming calling party numbers, day/time of

incoming call and can also set the device(s) to ring. The Route creation and modification tab is has three collapsible panels; each panel can be expanded and collapsed independently by clicking arrow button in the top right of the panel.



See [“Managing Group Routes” on page 103](#) for more information on managing group routes using the Group Routes sub-tab.

Setting and modifying Group Information parameters

UCD Administrators can set and modify UCD Group Information parameters and thresholds using the Group Information sub-tab on the UCD portlet of the Personal Agent. For more information on UCD Group Information parameters see [“UCD Administrator window overview” on page 96](#).

Prerequisite

- You must be a group administrator.

To set or edit UCD Group Information parameters,

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
The Group Information sub-tab is selected by default.
- 4 Set or modify the parameters as required.
- 5 Click **Save**.

Adding or deleting group members

UCD Administrators can add or delete UCD group members using the Group Members sub-tab on the UCD portlet of the Personal Agent. For more information on UCD Group Members sub-tab see [“UCD Administrator window overview” on page 96](#).

Prerequisite

- You must be a Group Administrator.

To add or delete UCD group members,

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
- 4 Select the **Group Members** sub-tab.
- 5 To add a new member, enter the new member’s username in the **Add New Agent** field.
- 6 Click **Add To Group**.
- 7 To delete an existing member, select the user name of the member to be deleted from the **List of Agents** field.
- 8 Click **Delete Selected Users**.

Forcing out group members

UCD Administrators can force out members of a UCD group using the Group Features sub-tab on the UCD portlet of the Personal Agent. For more information on UCD Group Features sub-tab see [“UCD Administrator window overview” on page 96](#).

Prerequisite

- You must be a group administrator.

To force out UCD group members,

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
- 4 Click the **Group Features** sub-tab.
- 5 Select a username from the **List of Active Agents** pick list.
- 6 Click **Force Out Selected User**.

Setting Queue Status

UCD Administrators can set the queue status of a UCD group using the Group Features sub-tab on the UCD portlet of the Personal Agent. For more information on UCD Group Features, see [“UCD Administrator window overview” on page 96](#).

Prerequisite

- You must be a Group Administrator.

To set the queue status of a UCD group,

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
- 4 Click the **Group Features** sub-tab.
- 5 Click **Queue Status**.

- 6 Select **Open** or **Closed** from the **Queue Status** pick list.

Managing Group Routes

UCD Administrators can manage (add, delete, copy, modify, copy, rename) UCD group routes using the Group Routes sub-tab on the UCD portlet of the Personal Agent. For more information on UCD Group Routes, see [“UCD Administrator window overview” on page 96](#). Administrators can perform the following functions using the Group Routes tab:

- [Adding a group route](#)
- [Modifying a group route](#)
- [Copying a group route](#)
- [Renaming a group route](#)
- [Deleting a group route](#)
- [Changing the order of a group route](#)

Adding a group route

UCD Administrators can add new UCD group routes using the **Group Routes** sub-tab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.

To add a new UCD group route:

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
- 4 Click the **Group Routes** sub-tab.
- 5 Click **New**.
- 6 Enter a name for the new route in the **Route Name** field.
- 7 To create a route based on incoming calls by number, click the check box beside **Incoming From: These Numbers**.

OR

To create a route including calls received during a day and time range, click the check box beside **Received: Day/Time** panel.

This enables the rules defined by the selected panel to be applied to the route.

Uniform Call Distribution

Route Name:

Incoming From: [These Numbers](#) ◀

Received: [Day/Time](#) ◀

Ring devices in this order ◀

- 8 To define the rules for **Incoming From: These Numbers**, click the arrow button located to the right of the **Incoming From: These Numbers** panel to expand that panel.

Uniform Call Distribution

Route Name:

Incoming From: [These Numbers](#) ▼

add numbers here

2143354115
8174458845
4698755412
2145897444

Include anonymous callers

Received: [Day/Time](#) ◀

Ring devices in this order ◀

- 9 Enter the directory numbers in the left pane.

- 10 Click **Add to List**.

- 11 Check **Include anonymous callers** to include anonymous callers in the list.
- 12 To define the rules used for **Received: Day/Time** panel, click the arrow button located to the right of the **Received: Day/Time** pane to expand that panel.
- 13 Select a day and time range by clicking on the appropriate day and time blocks.

Uniform Call Distribution

Route Name:

Incoming From: [These Numbers](#) ◀

Received: [Day/Time](#) ▼

Select one or more day/time ranges as a condition for this route.

	AM											PM										
	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	7	8	9	10	11		
Monday																						
Tuesday																						
Wednesday																						
Thursday																						
Friday																						
Saturday																						
Sunday																						

Ring devices in this order ◀

- 14 Click the check box beside **Ring Devices in this order** panel.
This enables the rule defined by this panel to be applied to the route.
- 15 Click the arrow button located to the right of the **Ring devices in this order** panel to expand that panel.

- 16** Enter the directory number(s) of the device(s) to be called.
You must provide at least one device to call before the new route information can be saved.

The screenshot shows the 'Uniform Call Distribution' configuration window. At the top, there is a 'Route Name:' text box. Below it are three sections, each with a checkbox and a link: 'Incoming From: [These Numbers](#)', 'Received: [Day/Time](#)', and 'Ring devices in this order'. The 'Ring devices in this order' section is expanded, showing a list of three devices. The first device has an empty text box, while the second and third are greyed out. Below the list is a 'Number of Rings:' section with a spin box set to '1' and a checked 'Indefinitely' checkbox. At the bottom right are 'Save' and 'Cancel' buttons.

- 17** Specify the number of rings in the **Number of Rings** pick list.
Select **Indefinitely**, if you want to the destination device to ring indefinitely.
- 18** Click **Save**.
The main Group Routes window appears.
- 19** Click **Save** again.

Modifying a group route

UCD Administrators can modify existing UCD group routes using the **Group Routes** sub-tab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.

To modify an existing UCD group route:

-
- 1 Login to the Personal Agent.
 - 2 In the UCD portlet, within the Admin tab, click the desired group name.
 - 3 Click **Select Group**.
 - 4 Click the **Group Routes** sub-tab.
 - 5 From the **Routing Order** pick list, click the route to be modified.
 - 6 Click **Modify**.
 - 7 In the window that appears, make changes as required in the **Incoming From: These Numbers, Received: Day/Time, Ring devices in this order** panels. See [“Adding a group route” on page 103](#) for information on how to set the parameters in these panels.
 - 8 Click **Save**.
The main **Group Routes** window appears.
 - 9 Click **Save** again.

Copying a group route

UCD Administrators can copy UCD group routes using the **Group Routes** sub-tab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.

To copy a UCD group route:

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
- 4 Click the **Group Routes** sub-tab.
- 5 From the **Routing Order** pick list, select the route to be copied.
- 6 Click **Copy**.
A dialog box appears.
- 7 Enter a name for the new route.
- 8 Click **Save**.

Renaming a group route

UCD Administrators can rename an existing UCD group routes via the **Group Routes** sub-tab on the UCD portlet of the Personal Agent.

Prerequisite

- You have to be a group administrator.

To rename an existing UCD group route:

- 1** Login to the Personal Agent.
- 2** In the UCD portlet, within the Admin tab, click the desired group name.
- 3** Click **Select Group**.
- 4** Click the **Group Routes** sub-tab.
- 5** From the **Routing Order** pick list, click the route to be renamed.
- 6** Click **Rename**.
A dialog box appears.
- 7** Enter a new name for the route.
- 8** Click **Save**.

Deleting a group route

UCD Administrators can delete UCD group routes via the **Group Routes** sub-tab on the UCD portlet of the Personal Agent.

Prerequisite

- You have to be a group administrator.

To delete a UCD group route:

- 1** Login to the Personal Agent.
- 2** In the UCD portlet, within the Admin tab, click the desired group name.
- 3** Click **Select Group**.
- 4** Click the **Group Routes** sub-tab.

- 5 From the **Routing Order** pick list, click the route to be deleted.
- 6 Click **Delete**.
- 7 Click **Save**.

Changing the order of a group route

UCD Administrators can change the order of UCD group routes using the **Group Routes** sub-tab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.

To change the order of a UCD group route:

- 1 Login to the Personal Agent.
- 2 In the UCD portlet, within the Admin tab, click the desired group name.
- 3 Click **Select Group**.
- 4 Click the **Group Routes** sub-tab.
- 5 From the **Routing Order** pick list, click the route whose order is to be changed.
- 6 Click **Move Up** or **Move Down**.
- 7 Click **Save**.

Managing Assistant Console and Services

Assistant support enables you to designate other Adaptive Application Engine users to act as primary and alternate assistants. Assistants can monitor, transfer, or route incoming and outgoing calls for you, the assisted user. This service must be enabled in your service package.

As an assisted user you can select a default route to be used for Assistant Service. You can select whether to redirect calls to your own voicemail service or an assistant voice mail service, and set the number of times a phone can ring before the unanswered call is forwarded to an alternate assistant, who makes the routing decision.

Topics in this section include:

- [“Assisted User” on page 111](#)
- [“Assistant” on page 113](#)

Assisted User

As an assisted user, you can add assistants to monitor, transfer, or route your incoming and outgoing calls.

Adding an Assistant

You can add a Primary or Alternate assistant from the Assistant Console and Services Portlet.

To add an assistant,

- 1 Login to the Personal Agent.
- 2 In the Assistant Console and Services portlet, click on the **Primary Assistant** tab to add a Primary Assistant.

OR

Click on the **Alternate Assistant** tab to add an Alternate Assistant.

- 3** Enter a valid user name in the **Add New Assistant** field.
- 4** Click **Add**.

Deleting an Assistant

You can delete an assistant from the Assistant Console and Services Portlet.

To delete an Assistant:

- 1** Login to the Personal Agent
- 2** In the Assistant Console and Services portlet, click on the **Primary Assistant** tab to delete a Primary Assistant.

OR

Click on the **Alternate Assistant** tab to delete an Alternate Assistant.

- 3** Select an assistant from the **Assistant** field.
- 4** Click **Delete**.
- 5** Click **OK** in the Alert dialog box.

Setting a Voicemail Assistant

You can set a Voicemail Assistant Route from the Assistant Console and Services portlet. You must have voicemail services assigned to you.

To set a Voicemail Assistant Route:

- 1** Login to the Personal Agent
- 2** In the Assistant Console and Services portlet, click on the **Primary Assistant** tab or the **Alternate Assistant** tab.
- 3** Pick a voicemail assistant from the **Voicemail Assistant** drop down list.
- 4** Click **Apply**.
- 5** Click **OK** in the Voicemail Configuration dialog box.

Setting an Assistant Route

You can set an Assistant Route from the Assistant Console and Services portlet.

To set an Assistant Route:

- 1 Login to the Personal Agent
- 2 In the Assistant Console and Services portlet, click on the **Assistant Route** tab.
- 3 Select a route from the **Route** drop down menu.
The list of routes is populated from the routes in your Routes portlet.
- 4 Click **Apply**.

Assistant

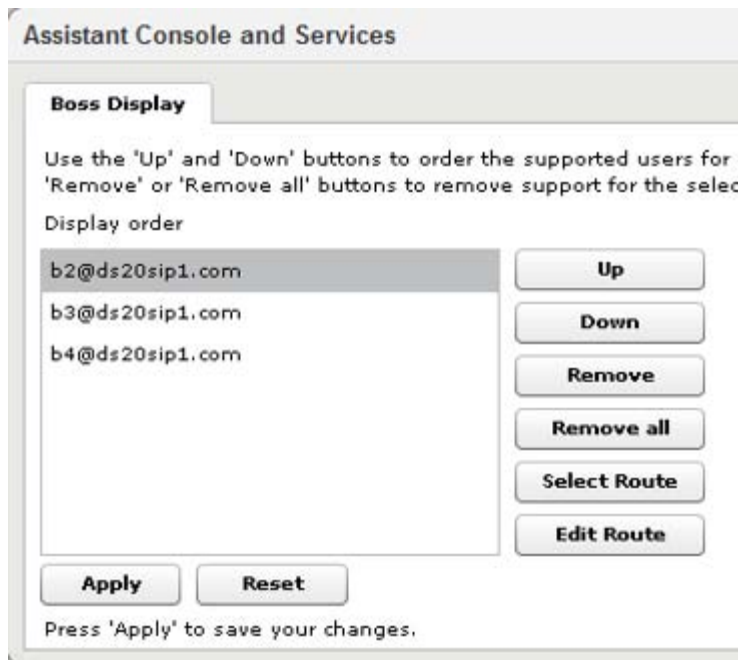
As an assistant to an assisted user or multiple assisted users, you can change the order of your assisted users, remove assisted users, and select or modify the routes used for your assisted users.

Changing assisted user order

To change the order of assisted users as they appear on the Assistant Console,

- 1 Login to the Personal Agent.

- 2 In the Assistant Console and Services portlet, under the **Boss Display** tab, click on the desired assisted user.



- 3 Click **Up** or **Down** to move the assisted user in the list.
- 4 Click **Apply**.

Removing assisted users

To remove assisted users,

- 1 Login to the Personal Agent.
- 2 In the Assistant Console and Services portlet, under the **Boss Display** tab, click on the desired assisted user.
- 3 Click **Remove**.
OR
Click **Remove All** to remove all assisted users.
- 4 Click **Apply**.

Selecting an assistant route

- 1 Login to the Personal Agent.
- 2 In the Assistant Console and Services portlet, under the **Boss Display** tab, click on the assisted user for whom you want to select a route.
- 3 Click **Select Route**.
A new window opens.
- 4 Select an assistant service route from the **Route** drop down list.
The list of routes is populated from the routes in your Routes portlet.



- 5 Click **Apply**.
The Assistant service route is updated.

Modifying an assistant service route

You can modify the routes listed, to specify how, where, and when to route calls for your assisted users.

To modify a route,

- 1 Login to the Personal Agent.
- 2 In the Assistant Console and Services window, in the Boss Display tab, click on the assisted user who's route you want to modify.
- 3 Click **Edit Route**.
A new window appears for modifying routes.
- 4 In the Routes tab, select the route to be modified.
- 5 Using the tabs, modify the route as desired. For complete details on the tabs and their features, see [“Creating a route” on page 71](#).

- **Routes** - allows you to add, delete, copy, rename, and change the order of routes.
 - **Initiate Action** - allows you to define what action(s) trigger the route. For example receiving a call or receiving an IM could trigger the route
 - **Conditions** - allows you to set filters to manage calls received. For example receiving a call from specific people in your personal address book or receiving a call during a specified day/time range
 - **Outcome Actions** - allows you to define what actions you would like to perform when a call is received. For example, when a call is received, ring my client first, then ring my office, and then send the call to voicemail.
 - **Exceptions** - allows you to define instances when the route should not apply. For example, when a call is received from specific people in your address book or from a specific phone number.
- 6 Click **OK** after each change.

Managing Call Pickup

Call Pickup allows you to pick up a call that is ringing on another device, as long as both subscribers belong to the same Call Pickup group. This increases call answering efficiency and provides better call handling.

Call Pickup is a provisionable service that can be assigned to a user. Every agent in a Call pickup group must have the Call Pickup service assigned to them. The service must first be assigned to the domain that the users are in, before it can be assigned to the user.

Topics in this section include:

- [Call Pickup Subscriber window overview](#)
- [Changing Call Pickup Agent status](#)
- [Call Pickup Admin window overview](#)
- [Modifying Call Pickup Group information](#)
- [Adding a member to a group](#)
- [Deleting a member from a group](#)
- [Deactivating members from a group](#)

Call Pickup Subscriber window overview

You can view the Call Pickup Subscriber window through the Personal Agent Call Pickup portlet.

The screenshot shows the 'Call Pickup Subscriber' configuration window. It includes the following fields and options:

- Agent Status:** Radio buttons for 'Active' (selected) and 'Inactive'.
- Pickup Type Assigned:** Checkboxes for 'Group Call Pickup', 'Directed Call Pickup', and 'Targeted Call Pickup', all of which are checked.
- Pickup Group Name:** A text input field containing 'CallPickup1'.
- Group Identifier:** A text input field containing 'callpickup@demo'.
- Group Directory Number:** A text input field containing '9725551235'.
- Prefix Codes:** A table with two columns: 'Name' and 'Prefix'. The table is currently empty.

At the bottom right of the window are two buttons: 'Save' and 'Reset'.

The Call Pickup Subscriber window has the following fields:

- **Agent Status** - indicates whether the Call Pickup agent is active or inactive. It also allows agents to activate or deactivate themselves. **Agent Status** is the only field that is editable.
- **Pickup Type Assigned** - indicates the call pickup variants assigned to the agent
 - **Group Call Pickup** allows you to pickup a call that was presented to any member of the group to which you belong. You are typically notified of all available calls to the group and allowed to pick from that list of calls. Group call pickup is supported with Vertical Services Codes (VSC).

-
- **Directed Call Pick-up** allows you to pickup a call that was presented to any member of the group by explicitly specifying a particular Group ID while picking up the call. The Group ID must be specified in one of two ways:
 - Subscribe messages to identify the group for which the call is to be picked up. The call picked up is based on the Notification received.
 - VSC which requires use of an access code, followed by the ringing group ID, to grab or answer the incoming call.
 - **Targeted Call Pick-up** allows you to explicitly specify the DN or userid of the subscriber whose ringing call you would like to pickup. The subscriber must be part of your assigned Call Pickup group in order for Targeted Call Pickup to work.
 - **Pickup Group Name** - identifies the name of the Call Pickup group assigned to you.
 - **Group Identifier** - this information is used when making a call to a CPU Group with SIP URL. The usage is equivalent to username of a subscriber so the identifier must be unique in the domain.
 - **Group Directory** - the directory number assigned to the group. At least one Directory Number must be provided for a Call Pickup Group.
 - **Prefix Codes** - the VSC codes assigned to you. VSC codes are the same for all call pickup agents in a given domain.

Changing Call Pickup Agent status

Call Pickup allows agents who are part of the same call pickup group to answer calls ringing on another agent's device. As a call pickup agent, you are able to modify your status to indicate whether you are Active or Inactive.

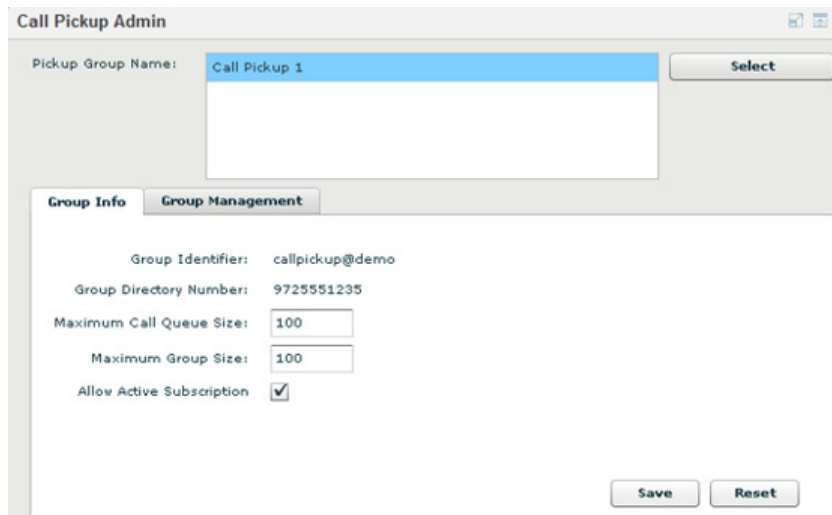
To modify your agent status,

- 1 Login to the Personal Agent.
- 2 In the Call Pickup Subscriber portlet, beside **Agent Status**, select **Active** or **Inactive**.
- 3 Click **Save**.

Call Pickup Admin window overview

You can view the Call Pickup Admin window using the Personal Agent Call Pickup portlet. The Call Pickup Admin window has two tabs, **Group Info** and **Group Management**. The Pickup Group Name field is visible above both tabs. This field identifies the name of the Call Pickup Group.

Click on the **Group Info** tab to view information specific to the group.



The screenshot shows the 'Call Pickup Admin' window. At the top, there is a 'Pickup Group Name' field containing 'Call Pickup 1' and a 'Select' button. Below this, there are two tabs: 'Group Info' (selected) and 'Group Management'. The 'Group Info' tab displays the following fields:

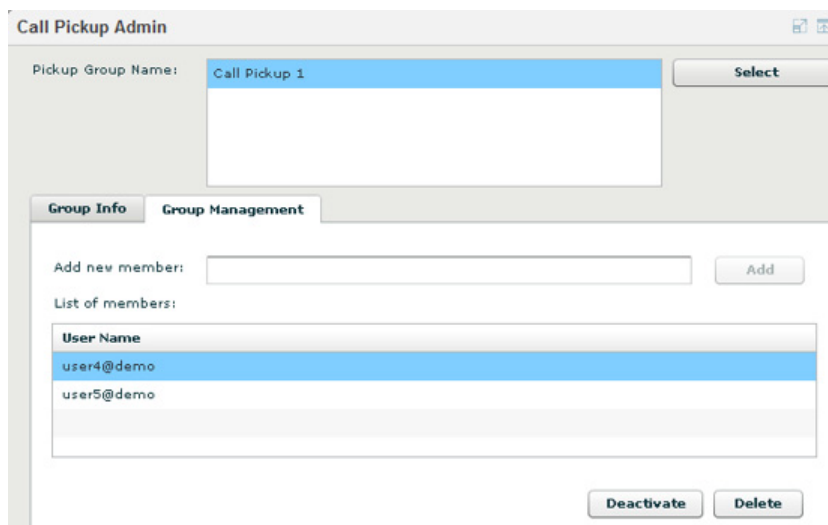
- Group Identifier: callpickup@demo
- Group Directory Number: 9725551235
- Maximum Call Queue Size: 100
- Maximum Group Size: 100
- Allow Active Subscription:

At the bottom right of the form, there are 'Save' and 'Reset' buttons.

The Group Info tab has the following fields:

- **Group Identifier** - used when making a call to CPU Group with SIP URL. The usage is equivalent to username of a subscriber so the identifier must be unique in the domain.
- **Group Directory Number** - the directory number assigned to the group. At least one Directory Number should be provided for a Call Pickup Group.
- **Maximum Call Queue Size** - the maximum number of calls that can queue in this group.
- **Maximum Group Size** - the maximum number of users allowed in the group.
- **Allow Active Subscription** - controls whether Active Subscriptions are accepted or rejected by the group.

Click the **Group Management** tab to perform Group Management information tasks.



The screenshot shows the 'Call Pickup Admin' window. At the top, there is a 'Pickup Group Name' field containing 'Call Pickup 1' and a 'Select' button. Below this, there are two tabs: 'Group Info' and 'Group Management'. The 'Group Management' tab is active. It contains an 'Add new member' field with an 'Add' button. Below that is a 'List of members' section with a table:

User Name
user4@demo
user5@demo

At the bottom of the 'Group Management' tab, there are 'Deactivate' and 'Delete' buttons.

The Group Management tab has the following fields:

- **Add new member** - allows the administrator to add new members to this group.
- **List of members** - displays all members belonging to the group, also allows the administrator to deactivate or delete a member.

Modifying Call Pickup Group information

As an administrator of a Call Pickup Group, you can modify the Maximum Call Queue Size, Maximum Group Size, and activate/deactivate that group.

To modify Call Pickup Group information,

- 1 Login to the Personal Agent as an administrator of that group.
- 2 In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.
- 3 Click **Select**.
- 4 Click the **Group Info** tab.

- 5 Modify Maximum Call Queue Size, Maximum Group Size, and Allow Active Subscription as necessary.
- 6 Click **Save**.

Adding a member to a group

As an administrator of a Call Pickup Group, you can add members to that group.

To add a group member,

- 1 Login to the Personal Agent as an administrator of that group.
- 2 In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.
- 3 Click **Select**.
- 4 Click the **Group Management** tab.
- 5 Enter a member name in the **Add new member** field.
You must enter a valid member name, for example: user@domain. Adding an invalid member name generates an error message.
- 6 Click **Add**.
The new added member name appears in **List of Members**.

Deleting a member from a group

As an administrator of a Call Pickup Group, you can delete members from that group.

To delete a group member,

- 1 Login to the Personal Agent as an administrator of that group.
- 2 In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.
- 3 Click **Select**.
- 4 Click the **Group Management** tab.
- 5 Click on a member name in the **List of Members** field.
- 6 Click **Delete**.

- 7 Click **OK** in the confirmation dialog box to confirm that you want to delete the selected member.
The selected member name is no longer visible in **List of Members**.

Deactivating members from a group

As an administrator of a Call Pickup Group you can deactivate members from that group.

To deactivate members from a group,

- 1 Login to the Personal Agent as an administrator of that group
- 2 In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.
- 3 Click **Select**.
- 4 Click the **Group Management** tab.
- 5 Click on a member name in the **List of Members** field.
- 6 Click **Deactivate**. A confirmation window appears.
- 7 Click **OK**.
The selected member name is no longer active in **List of Members**.

Managing Hunting

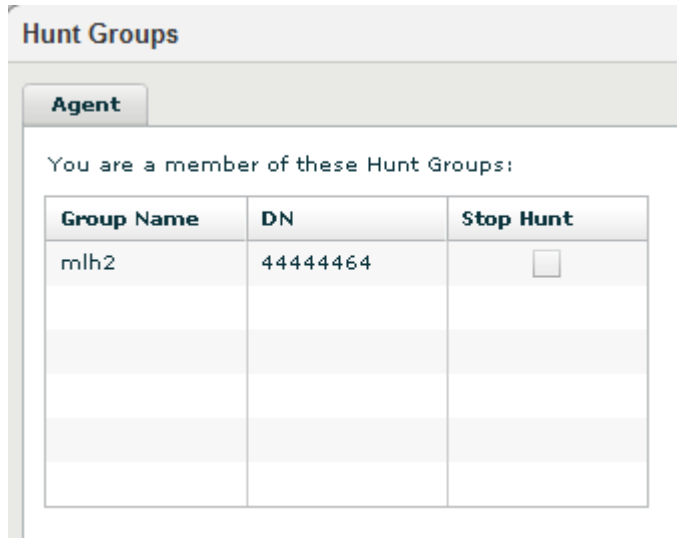
Hunting allows businesses to improve call-completion rates by clustering their customer-services agents into groups called **Hunt groups**. Hunt groups are a series of subscribers organized in such a way that if the first group member is busy the next group member is hunted (checked) and so on until a member of the group with no active call or session is found. A group member is not available if any of the group member's registered devices are busy, set to a state of **Do Not Disturb**, or if the group member has a presence state of **Unavailable**. Hunting is useful in an environment where multiple individuals can answer incoming calls/sessions.

Topics in this section include:

- [“**Hunt Group Agent window overview**” on page 126](#)
- [“**Hunt Group Admin window overview**” on page 126](#)
- [“**Modifying Hunt Group settings**” on page 129](#)
- [“**Adding Hunt Group Members**” on page 129](#)
- [“**Modifying Hunt Group Member settings**” on page 130](#)

Hunt Group Agent window overview

You can view the Hunt Groups Agent window through the Personal Agent Hunt Groups portlet.



The Hunt Groups Agent window has the following fields:

- **Group Name** - name of the group(s) of which you are a member
- **DN** - Pilot directory number of the hunt group
- **Stop Hunt** - specifies whether hunting stops at the group member during the hunt sequence.

These fields are not editable.

Hunt Group Admin window overview

You can view the Hunt Groups Admin tab through the Hunt Groups portlet. The Hunt Group Admin tab has two tabs, **Admin** and **Agent**. The Admin tab has two additional tabs, **Group Setting** and **Group Members**. The Group Name field is visible to the left of both Group Setting and Group Members tabs. It displays the name of the Hunt Group.

The screenshot shows the 'Hunt Groups' configuration window. It has two tabs: 'Admin' and 'Agent'. The 'Agent' tab is selected. On the left, there is a 'Group Name' field with a dropdown menu showing 'mlh2' selected. Below the dropdown is a 'Select' button. On the right, the 'Group Settings' tab is active, displaying the following fields:

- Group Type: DLH
- DN: 44444464
- URI: mlh2@ds9sip1.com
- Agent call forward option: Hunt (dropdown menu)
- Call forward destination: 542234212
- Overflow option: Route Announcement
- Overflow destination: 7716391853

At the bottom right of the 'Group Settings' tab, there are 'Save' and 'Reset' buttons.

The Group Settings tab has the following fields:

- **Group Type** - the type of Hunt group. The different types of groups are: Sequential Directory Number Hunting (SDNH), Circular Directory Number Hunting (CDNH), Multi Line Hunting (MLH), and Distributed Line Hunting (DLH).
- **DN** - Pilot directory number of the hunt group
- **URI** - the Pilot SIP URI of the hunt group. Mandatory field except for SDNH and CDNH group types. The pilot URI must be uniquely routable across the system.
- **Agent call forward option** - determines the action to be taken when a hunt group member does not answer a call. The following call forwarding options are available:
 - **Hunt** - Hunting occurs if the first hunt group member does not answer the call.
 - **Route** - If the first hunt group member does not answer the call, then the call is forwarded using the CFGDA route.

- **Route Local** - If the incoming call is from a subscriber within the hunt group's sub-domain and the first group member does not answer the call, then the call is forwarded using the CFGDA route. For subscribers calling from outside the hunt group's sub-domain, hunting occurs.
- **Route Foreign** - If the incoming call is from a subscriber outside the hunt group's sub-domain and the first group member does not answer the call, then the call is forwarded using the CFGDA route. For subscribers calling from within the hunt group's sub-domain, hunting occurs.
- **Call Forward destination** - the directory number to which a call is forwarded if the call forwarding option is set to Route. This field is ignored if call forwarding option is set to Hunt.
- **Overflow option** - the action to take if all members of the hunt group are busy. There are two types of overflow actions; Route and Announcement. If Announcement is selected, all hunt groups in the domain use the same generic hunt group announcement.
- **Overflow destination** - the directory number to which a call is forwarded if all members of the Hunt group are busy and the overflow option is set to Route. This field is ignored if overflow option is set to Announcement.

The Group Members tab has the following fields:

The screenshot shows the 'Hunt Groups' configuration window. The 'Group Members' tab is active. On the left, there is a 'Group Name' field with a dropdown menu showing 'mlh2'. Below it is a 'Select' button. The main area is divided into two sections: 'Group Settings' and 'Group Members'. The 'Group Members' section contains an 'Add New Agent' field with the placeholder text 'add new agent here'. Below this is a radio button group for 'Assign Stop Hunt?' with 'Yes' and 'No' options, and an 'Add to List' button. A table titled 'List of Agents' is displayed with the following data:

Order	Username	Stop Hunt
1	a1851@ds9sip1.	<input type="checkbox"/>
2	a1852@ds9sip1.	<input type="checkbox"/>

Below the table are three buttons: 'Move Up', 'Move Down', and 'Delete'.

- **Add New Agent** - allows the administrator to add a new agent to the Hunt group.
- **Assign Stop Hunt** - allows the administrator to stop an agent from hunting.
- **List of Agents** - the list of agents assigned to that Hunt group.

Modifying Hunt Group settings

As an administrator of a Hunt group, you can modify Hunt Group Member settings for your group.

To modify Hunt Group Member settings:

- 1 Login to the Personal Agent as Administrator.
- 2 In the Hunt Groups portlet, in the **Group Name** list, click on a Hunt Group name.
- 3 Click **Select**.
- 4 Click on the **Group Settings** tab.
- 5 Modify the Agent call forward, Call forward destination, Overflow option, and Overflow destination fields as required.
- 6 Click Save.

Adding Hunt Group Members

As an administrator of a Hunt group, you can add additional members to your Hunt group.

To add additional members:

- 1 Login to the Personal Agent as Administrator.
- 2 In the Hunt Groups portlet, in the **Group Name** list, click on a Hunt Group name.
- 3 Click **Select**.
- 4 Click on the **Group Members** tab.
- 5 Enter the name of the new agent in **Add New Agent**.

- 6 Click **Add to List**.

Modifying Hunt Group Member settings

As an administrator of a Hunt group, you can modify Hunting information for your group.

To modify Hunt group settings:

- 1 Login to the Personal Agent as Administrator.
- 2 In the Hunt Groups portlet, in the **Group Name** list, click on a Hunt Group name.
- 3 Click **Select**.
- 4 Click on the **Group Members** tab.
- 5 In the **List of Agents** field, click to select an agent.
- 6 Click the check box under **Stop Hunt** to stop that agent from Hunting, or click **Move Up** or **Move Down** to move the agent in the Hunting list, or **Delete** to delete the selected agent.

Understanding Address Book Search Criteria

Topics in this section include

- [“Personal Address Book search criteria” on page 132](#)
- [“Global Address Book search criteria” on page 134](#)

Note that the only field that is case sensitive is the phone number field. This field is case sensitive for the entire string. All other fields are case insensitive for the entire string.

Personal Address Book search criteria

The following table provides a detailed description of the Personal Address Book search criteria.

Field	Example search criteria	Results
Nickname	*nick	Returns entries ending with nick, and starting with anything (appends *).
	nick	Same as *nick.
	nick	Finds anything that starts with nick (appends *).
	nick*	Same as nick.
Name	name	Returns anything starting with first name and starting with last name (appends * to both).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.
	firstname lastname	Returns anything starting with last name and starting with first name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname*,*firstname*	Same as "lastname*,*firstname".

Field	Example search criteria	Results
	*lastname, firstname	Returns entries containing last name and starting with firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name (*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.
SIP Address	*sipAddress	Returns entries containing sipAddress.
	sipAddress*	Same as *sipAddress.
	sipAddress*	Returns entries starting with sipAddress.
	sipAddress	Same as sipAddress*.
Friends	Rules similar to the last name and first name search apply to this search criteria, but the search is carried out for the string with the condition that the entry being searched for is a Friend.	
Group	*groupName	Returns entries belonging to group containing groupName in the name of the group (appends *).
	groupName	Same as *groupName
	groupName	Finds entries belonging to the group starting with groupName (appends *).
	groupName*	Same as groupName.
no criteria		Returns all the entries in the address book.

Global Address Book search criteria

If your system administrator has disabled the Global Address Book for your domain, you will not see the option to select the Global Address Book in the SEARCH drop-down list.

The following table provides a detailed description of the Global Address Book search criteria. Note that the only field that is case sensitive is the phone number field. This field is case sensitive for the entire string. All other fields are case insensitive for the entire string.

Field	Example search criteria	Results
Username	user@domain*	Returns entries that have username starting with user@domain.
	user@domain	Same as user@domain*.
	user*	Returns entries that have username starting with user.
	user	Returns entries containing user in the username.
Name	name	Returns anything with first name or last name starting with name (appends * at end).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.
	"name"	Returns all users that have the last name or first name that match the search criteria within the quotation marks.

Field	Example search criteria	Results
Name	firstname lastname	Returns anything starting with first name and starting with last name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	Same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.

Troubleshooting

The Personal Agent will not respond to requests if a machine making the requests is blocked as a possible DoS (Denial of Service) originator.

If you experience difficulty while using the Personal Agent, contact your service provider or system administrator.

Terms you should know

This section defines the terms and acronyms used in this guide.

Terms

The Personal Agent uses some terms that might be new to you. Take a moment to read through the explanations to familiarize yourself with the following terms.

Service package

Your service provider or system administrator assigns a service package with pre-defined features and options for you. Some features are only available to you if they are listed in your service package. For example, your service package defines how many entries in the list of Friends you can have, how many callers you can have join in on an audio conference, and whether you have voice-mail enabled.

Address

When a procedure instructs you to enter an address, it means entering either a telephone number or a Session Initiation Protocol (SIP) address. A SIP address is a unique identifier of users on the IP network. It has the same format as an email address, for example, `jdoe@lab1.org`, but it is not an email address. The network can identify where you are and route your calls by tracking your SIP address when you sign in to any Personal Communicator Client, Personal Communicator Web Client, or Nortel IP Phone.

In order to make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in your Personal Address Book.

Click To Call

The Click To Call feature enables you to initiate a call from any device, for example, a Public Switched Telephone Network (PSTN phone) or registered Adaptive Application Engine SIP client, to a specified number.

Global Address Book

Your Global Address Book is a list of all users in your domain. This list, if enabled in your domain, is maintained by your service provider or system administrator. Using the Personal Agent, you can search for a Username/UserID, Name, First name, Last name, or phone number. You can initiate a call by clicking on an entry in your Global Address Book.

Personal Address Book

Your Personal Address Book is a key tool for managing contacts. You can save contact information for quick call (Click To Call) access as well as organize your contacts into groups. Your Personal Address Book is synchronized across all your network access devices. If you make a change in your Personal Address Book on the Personal Agent, the change automatically appears on your other network access devices (for example, your Personal Communicator Client, Personal Communicator Web Client, and/or your Nortel IP Phone).

Friends

Within your Personal Address Book, you can designate entries as Friends. People that you contact frequently are good candidates as Friends. If you have marked an address book entry as a Friend, then you can see the online presence status for that entry in the Personal Communicator Client, Personal Communicator Web Client, or Nortel IP Phone.



Note: The ability to designate entries as Friends is a feature of the Presence service and is dependent upon your service package. If your service package does not support the Presence service, then you cannot designate entries as Friends.





Presence




- **Presence:** a service on the Personal Communicator Client, Personal Communicator Web Client, or Nortel IP Phone that enables you to see the online status of other users on your network and also a way to alert others to your status.
- **Automatic presence:** a service on the Personal Communicator Client, Personal Communicator Web Client, or Nortel IP Phone that enables you to set the system to automatically alert others when you are away from your PC or on the telephone.



Note: The ability to configure automatic presence notifications on the Personal Agent is dependent upon your service package. If your service package does not support automatic presence, then you will not be able to use the automatic presence feature.

- **Presence Indicators:** You can determine the status of anyone registered in the system by querying the Personal Agent's Global Address Book. This feature is extremely helpful when sending instant messages or after unanswered calls. The following table lists the Presence states.

Presence Indicator	Status	Description
	Active available	The user is active on their computer. This is an auto presence enabled state and is shown on the user's behalf.
	Active on the phone	The user is active on a call on one of their clients. This is an auto presence enabled state and is shown on the user's behalf.
	Connected	The user is registered on the network.
	Connected inactive	The user has not used their computer for a period of time. The inactivity timer is configured in the Preferences portlet, under Personal, Presence, Preferences .

Presence Indicator	Status	Description
	Connected <user defined>	The user is connected, but not readily available. The available user defined states are Away, Out to Lunch, and Be Right Back.
	Unavailable <user defined>	The user is registered in the network but is unavailable, or the user is not registered on the network. The available user defined states are Unavailable - Busy, Unavailable - On Vacation, and Unavailable - Offline.
	Unknown	No Presence information is available.

Defining routes

With this service, you can define a route list in the Personal Agent. For more information, see [“Managing Routes” on page 61](#). If you want to set up rules for rejecting calls from specific users, see [“Advanced Call Routes” on page 71](#).

Vertical Service Code

A vertical service code (VSC) is a special telephone number that usually begins 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. For example, the VSC “*67” can be used to signal that the originator's identity should be blocked from presentation.

Acronyms

This guide uses the following acronyms:

AS	Application Server
DN	Directory Number
IM	Instant Message

IP	Internet Protocol
MCP	Multimedia Communication Portfolio
PA	Personal Agent
PAD	Personal Audio Device
PIN	Personal Identification Number
PNG	Portable Network Graphic
PSTN	Public Switched Telephone Network
QoS	Quality of Service
SIP	Session Initiation Protocol
URL	Universal Resource Locator (internet address)
VSC	Vertical Service Code
VoIP	Voice over IP

Index

A

- acronyms 142
- address
 - definition 139
 - SIP address 139
- Ad-Hoc Conferencing 56
- advanced screening parameter 38
- Assisted user 61
- audience 14
- authorized watchers list 50
- automatic presence
 - definition 141
 - inactivity timer option 52
 - modifying options 51

B

- banned watcher's list 50

C

- Call park 57
- Call Return 56
- Click to Call 140
 - description 31
 - initiating a call 31
- contact information
 - locale field 35
- contacts
 - initiating a call (personal address book) 83
 - searching (personal address book) 83

E

- Editing a contact 82

F

- Friends
 - adding a contact 81
 - definition 140
 - deleting a contact 81

G

- global address book
 - accessing 84
 - add icon 86
 - adding a user 86
 - definition 140
 - initiating a call to user 86
 - searching 85
 - sorting 84
 - table of search criteria 134
 - viewing user details 85

H

- hardware requirements
 - minimum 17
 - recommended 18
- help
 - Help icon 14
 - using 14

I

- IP Phone preferences
 - changing subject list order 42

- creating a subject list 42
 - IP phone option 43
 - personalized presence status 43
 - specifying reasons 36
- IP Phones preferences
- reordering reasons 37

M

- Meet me audio conferencing 44
- Access Code 44
 - changing chairperson PIN 45
 - Dial-In Number 44
 - viewing bridge details 44
- My Times
- adding new day and time range 38
 - copying a day and time range 40
 - day/time combinations 39
 - deleting a day and time range 41
 - modifying 40
 - renaming a day and time range 41

P

- PAD (preferred audio device) 75
- password
- changing 35
- personal address book 78
- adding a contact 79
 - adding a Friend 81
 - definition 140
 - deleting a contact 82
 - list view 82
 - searching for a contact 83
 - sorting contacts 82
 - storing addresses 139
 - table of search criteria 132
 - viewing contact details 83
- Personal Agent
- accessing 19
 - before you begin 17
 - description 10
 - exiting 29

- interface, understanding 21
 - logging in 19
 - services and features 14
- picture caller ID
- adding 35
 - deleting 36
 - shadow figure 36
 - size limits 36
- preferences
- presence option 49
 - service package 49
- preferred audio device (PAD) 75
- presence
- definition 141
- presence indicator
- active available 141
 - active on the phone 141
 - connected 141
 - connected inactive 141
 - unavailable 142
 - unknown 142
- publications, hard copy 15

S

- service package
- definition 139
- show-offline list 51
- software requirements
- minimum 17
 - recommended 18

T

- technical publications 15
- technical support 15
- text conventions 14

V

- Vertical Service Codes 53

W

Watch List

definition 50

watcher's list 49

wildcard symbol 83, 85

X

XMPP Gateway 57

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