

# Personal Agent Quick Reference





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## Introduction

The Personal Agent Quick Reference provides a feature overview for the Personal Agent. The Personal Agent is a feature-rich on-line user interface for the Cypress IP Telephony solution. Through the Personal Agent, you can enter your personal information, and configure services to your personal preferences. The browser-based format allows you to manage your preferences from any location with no software download. We recommend that you keep your Personal Agent open when following the steps described in this document. Screen captures shown in this document feature Internet Explorer as the default browser. However if you are using another browser your screen may look slightly different.

The Personal Agent Quick Reference does not contain specific configuration or information for a particular system. If you have questions regarding specific information about your system, please contact your next level of support.

### Additional documentation

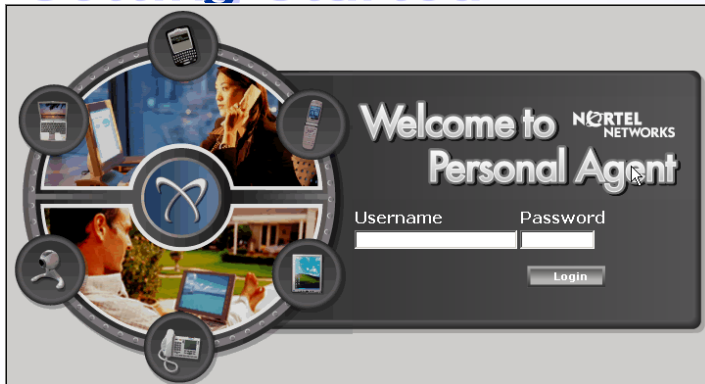
For more information, access the detailed Personal Agent User Guide available on CD, use the on product Help, or talk to your system administrator.

### Contacting support

If you have questions or encounter any issues, contact your system administrator.

## Getting Started

### Personal Agent login page

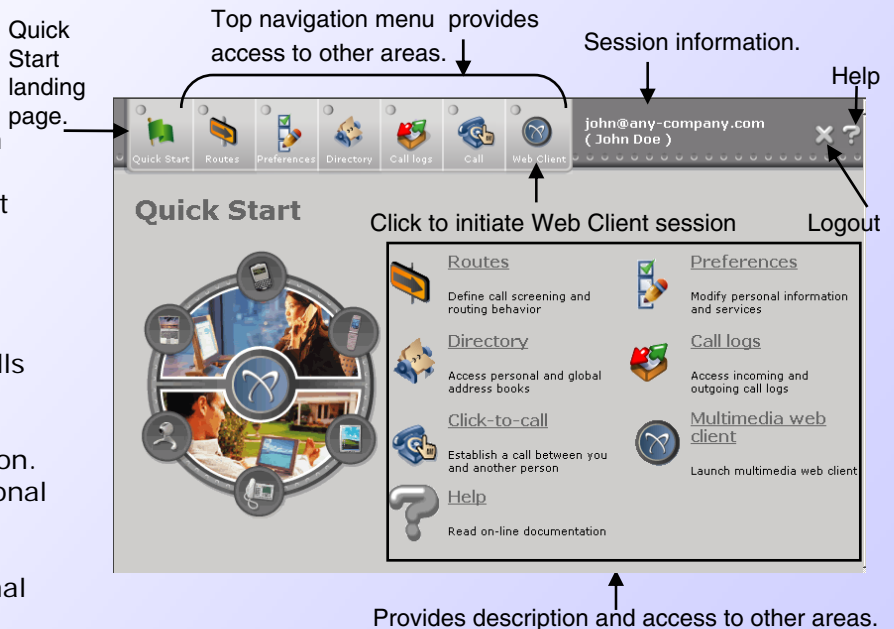


1. Start your Web browser.
2. From your Web browser, enter the URL (provided by your service provider or system administrator) for the Personal Agent.
3. Click enter. The Personal Agent welcome page appears.
4. Enter your user name, domain name, and password.
5. Click **Login**.

### Quick Start landing page

#### Access to Personal Agent services and features:

- **Routes** – define how to screen and route incoming calls.
- **Preferences** –manage account and personal information.
- **Directory** - Create, view, and manage personal and global address books.
- **Call Logs** – View and make calls from your inbox and outbox.
- **Click to Call**- Establish a call between you and another person.
- **Multimedia Web Client** -optional client used for making calls.
- **Help** – access to online help.
- **Logout** – log out of the Personal Agent.



## Preferences

- **Personal**
  - Enter or change your contact information.
- **Password**
  - Change your password.
- **Picture**
  - Upload or update a picture.
- **My Times**
  - Predefine day and time ranges for your routes and rules.



- **i200x**
  - Manage your i2002/i2004 information.
  - Logout of your i2002/i2004.
- **Services**
  - View your service package details.
  - Modify your presence services information.
  - View and modify your Meet Me Conferencing settings.

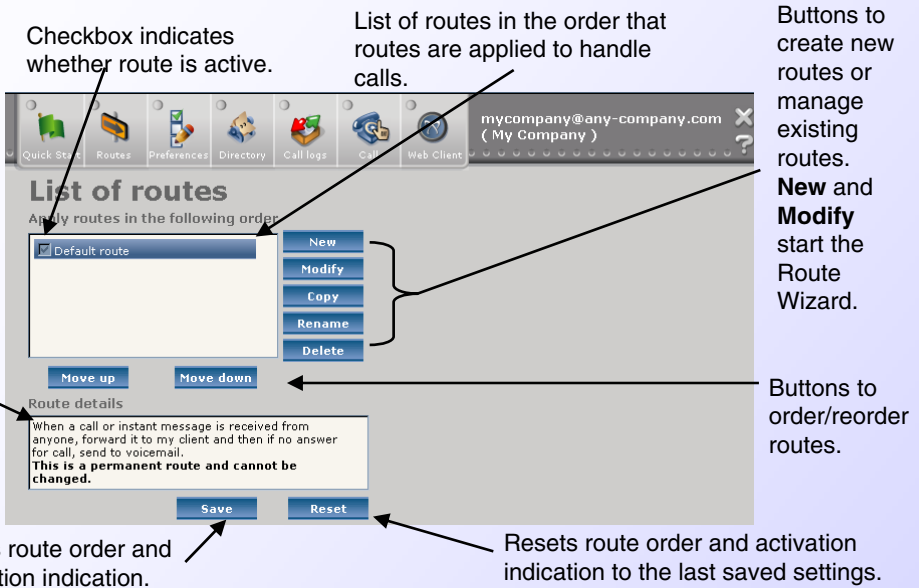
# Routes

## List of Routes

➤ Define how you want to manage your incoming calls by specifying the routing and filtering of your calls.



The ability to define Routes is only accessible when Advanced Screening is enabled in your service package.



Annotations for the 'List of routes' interface:

- Checkbox indicates whether route is active.
- List of routes in the order that routes are applied to handle calls.
- Buttons to create new routes or manage existing routes. **New** and **Modify** start the Route Wizard.
- Buttons to order/reorder routes.
- Save: Saves route order and activation indication.
- Reset: Resets route order and activation indication to the last saved settings.

## Route Wizard

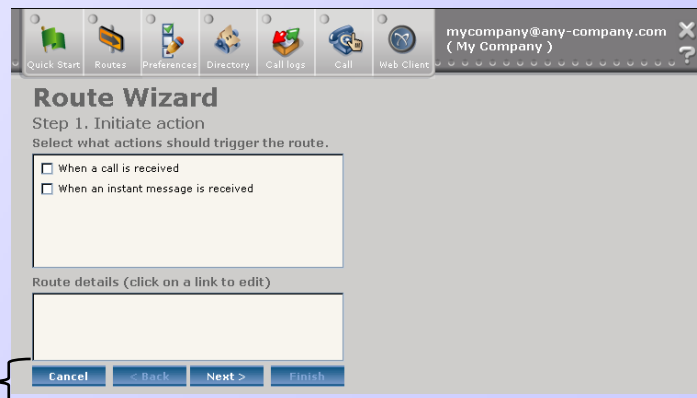
➤ The Route Wizard is a step-by-step process that you use to create a new route or modify an existing route. The Route wizard starts from the List of routes page and from the **New** or **Modify** button. Using the Route Wizard you can:

- define and order routes for how your incoming calls are handled.
- specify conditions as to how specific calls should be presented to you, and on what devices, in a simultaneous or sequential fashion.
- define personalized time blocks to further define your routes so that you are always in reach.
- send an Instant Message (IM) when processing a ring list.

## Step 1: Initiating Action

➤ Specifies the main action or actions that initiates the processing of the route. In the current release, the only option that you can select is "When a call is received".

Route Wizard step navigation buttons (**Cancel**, **Back**, **Next**, **Finish**) enable you to transition between the Route Wizard steps and the ability to cancel creation or modification of the route.



Route Wizard Step 1: Initiate action

Select what actions should trigger the route.

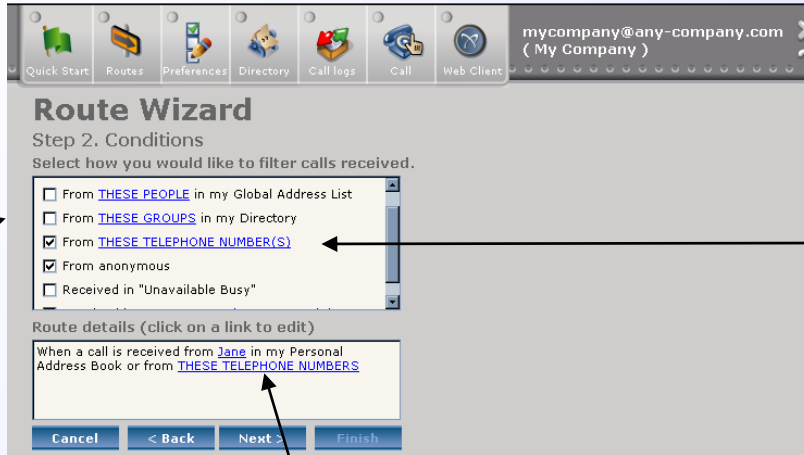
- When a call is received
- When an instant message is received

Route details (click on a link to edit)

Navigation buttons: **Cancel**, **< Back**, **Next >**, **Finish**

## Step 2: Conditions

➤ Specifies the filtering of conditions respective to the call originator and the time of day that must apply before the Actions in Step 3 can take place.



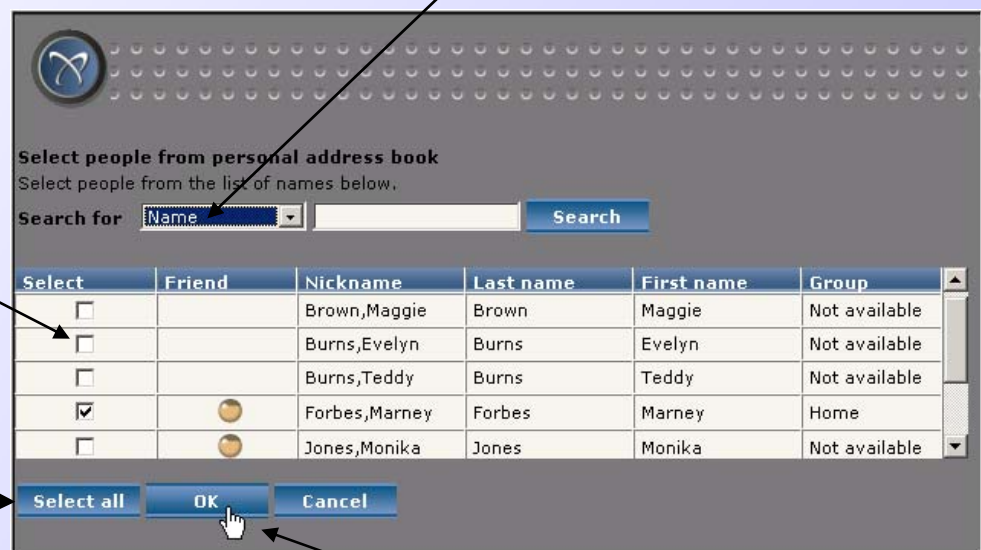
Checkboxes to select desired conditions.



Hyperlinks in Conditions window enable you to provide details of Condition criteria.

Hyperlinks in Route details window enable quick navigation of Route Wizard.

**Step2: Conditions** (From [THESE PEOPLE](#) in my Personal Address Book).

Provides ability to narrow scope of Personal Address Book contacts that are displayed for selection.



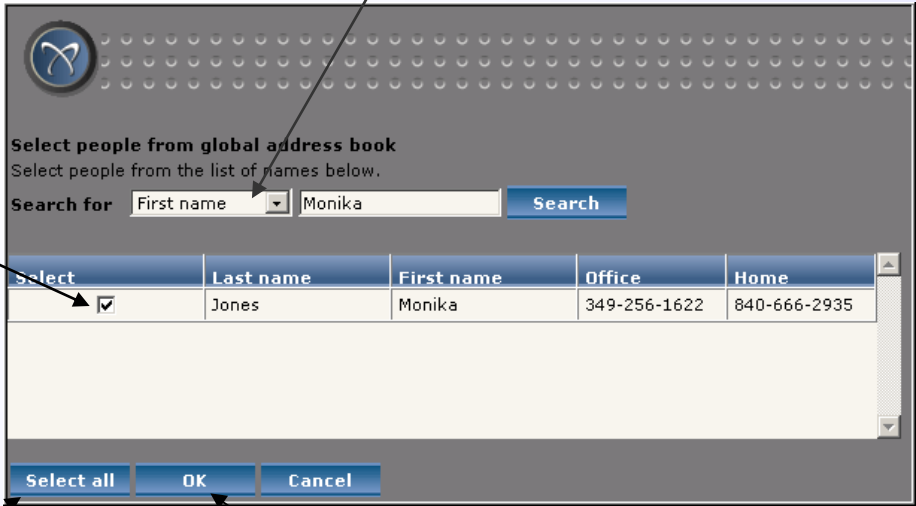
Select	Friend	Nickname	Last name	First name	Group
<input type="checkbox"/>		Brown,Maggie	Brown	Maggie	Not available
<input type="checkbox"/>		Burns,Evelyn	Burns	Evelyn	Not available
<input type="checkbox"/>		Burns,Teddy	Burns	Teddy	Not available
<input checked="" type="checkbox"/>		Forbes,Marney	Forbes	Marney	Home
<input type="checkbox"/>		Jones,Monika	Jones	Monika	Not available

Checkboxes enable you to select a contact.

Click **Select all** to select all contacts displayed.

Click **OK** to accept the selected contact (or contacts), or **Cancel**, to quit this page.

**Step2: Conditions** (From **THESE PEOPLE** in the Global Address Book).



Enter search criteria to display candidate users for selection.

Checkboxes enable you to select a user.

Select	Last name	First name	Office	Home
<input checked="" type="checkbox"/>	Jones	Monika	349-256-1622	840-666-2935

Click **Select all** to select all users displayed.

Click **OK** to accept the selected user (or users), or **Cancel**, to quit this page.

**Step2: Conditions**  
(From **THESE GROUPS** in Directory).



Checkboxes enable you to select a group or click **Select all** to select all groups displayed.

Click **OK** to accept the selected group (or groups), or **Cancel** to quit this page.

**Step2: Conditions**  
(Call From **THESE TELEPHONE NUMBERS**).



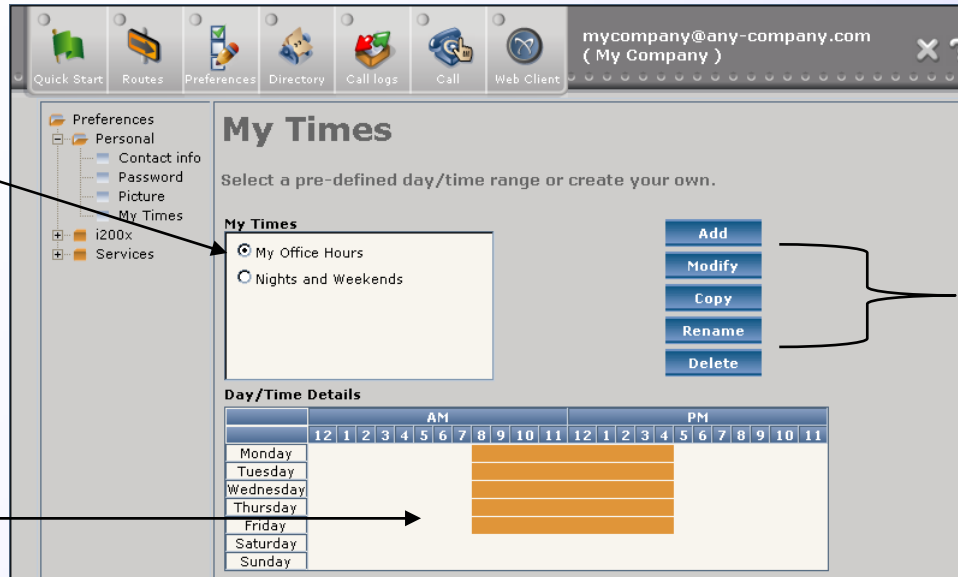
Enter a list of phone numbers or SIP address(es), one per line. Press Enter to move to next line.

Click **OK** to accept the selected group (or groups), or **Cancel**, to quit this page.

**Step 2: Conditions** (Received in **SPECIFIC DAY/TIME RANGES**).

Checkboxes to select desired My Time Day/Time ranges for conditions.

Graphic display of highlighted My Time in the list above.

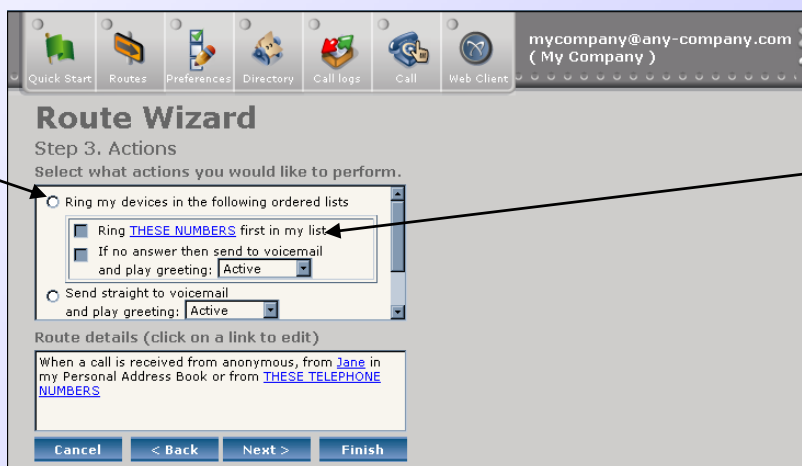


Buttons to create new My Time Day/Time ranges or manage existing My Time Day/Time ranges.

**Step 3: Actions**

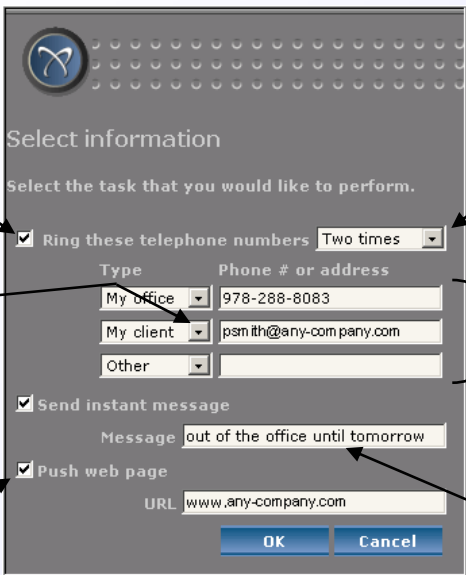
➤ Specifies what action, or actions, are performed when a call is received. Actions are defined with respect to the services, such as Advanced Screening, enabled in your service package. Voicemail actions are only enabled when you are subscribed to the Voicemail service.

Actions are mutually exclusive (via option button).



Hyperlinks in conditions enable you to provide Ordered List details or specify Rejection Messages.

**Step 3: Actions** (Ring **THESE NUMBERS** ) in my list.



Checkboxes to select the desired actions for the ordered list.

Drop down menu. The type auto-populates the Phone # or address fields with My office, My home, My mobile, My client.


Web page pushed when processing Ordered List.

Drop down menu to choose how many times to ring the specified numbers. The specified numbers will ring at the same time.

Used to specify numbers that will ring (simultaneously) at the same time when routing a call to this ordered list.

Instant Message sent when processing Ordered List.

**Step3: Actions** (Rejection **MESSAGE** PSTN callers receive busy tone).




Option button for selecting desired rejection message.

Buttons to create, modify, and delete rejection messages.

**Step 4: Exceptions**

➤ Exceptions to the filtering conditions defined in Step 2. The method for specifying Exceptions is consistent with the method for specifying Conditions.



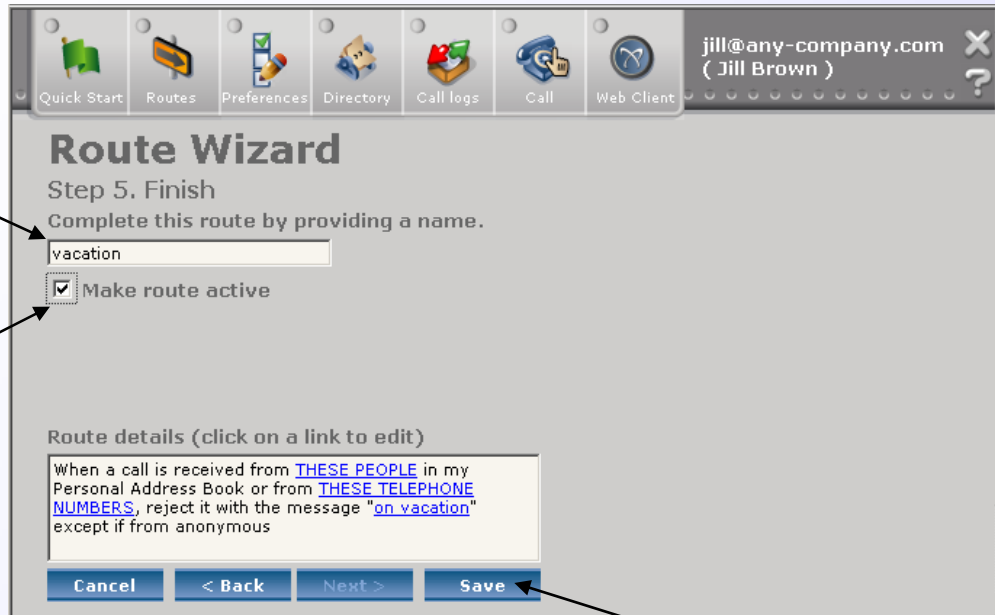
Checkboxes to select desired criteria.

Hyperlinks in Exceptions window enable you to provide details of Exception criteria.

**Step 5: Finish**

Provide the name of the Route (this must be uniquely named).

Specify whether the route should be actively used to handle calls.



Click **Save** to save the route.

## Directory

- Maintain Personal Address Book of contacts and groups of contacts.
- Provides enhanced Global Address Book search and sort capabilities.
- Provides Click to Call capability from Personal Address book and Global Address Book.
- Provides ability to determine Presence of contact in Personal Address Book or subscriber listed in the Global Address Book.

### Personal Address Book – List View

Personal Address book search on Nickname, Name, First name, Last name, SIP Address, Phone number, Group, Friends.

Click icons to add, delete, contacts and contact groups.

Use to select address book display view.

Click hyperlink to see details of the address book contact; edit contact from the details page.

Checkbox to select contacts to delete.



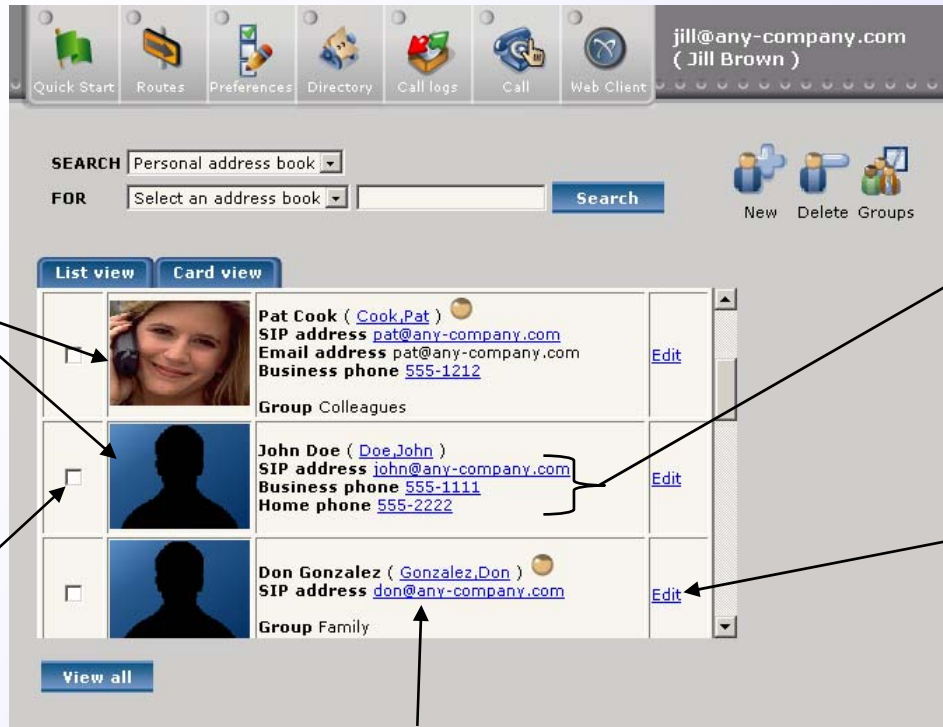
Select	Friend	Nickname	Last name	First name	Group	Call
<input type="checkbox"/>		<a href="#">Brown,Maggie</a>	Brown	Maggie	Billerica	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">Burns,Evelyn</a>	Burns	Evelyn	Work	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">Burns,Teddy</a>	Burns	Teddy	Work	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">Forbes,Marney</a>	Forbes	Marney	Home	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">Jones,Monika</a>	Jones	Monika	Not available	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">Lally,David</a>	Lally	David	Home	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">Sanchez,Doug</a>	Sanchez	Doug	Not available	<a href="#">Call</a>
<input type="checkbox"/>		<a href="#">burns,elena</a>	burns	elena	Home	<a href="#">Call</a>

Use column headers to sort address book (ascending and descending).

Click hyperlink to initiate a call to the address book contact through the Click to Call page.

Click **View all** to expand list to display all contacts in personal address book

**Personal Address Book – Card View**



User's Picture ID. The dark silhouette is displayed when no picture of the contact is available.

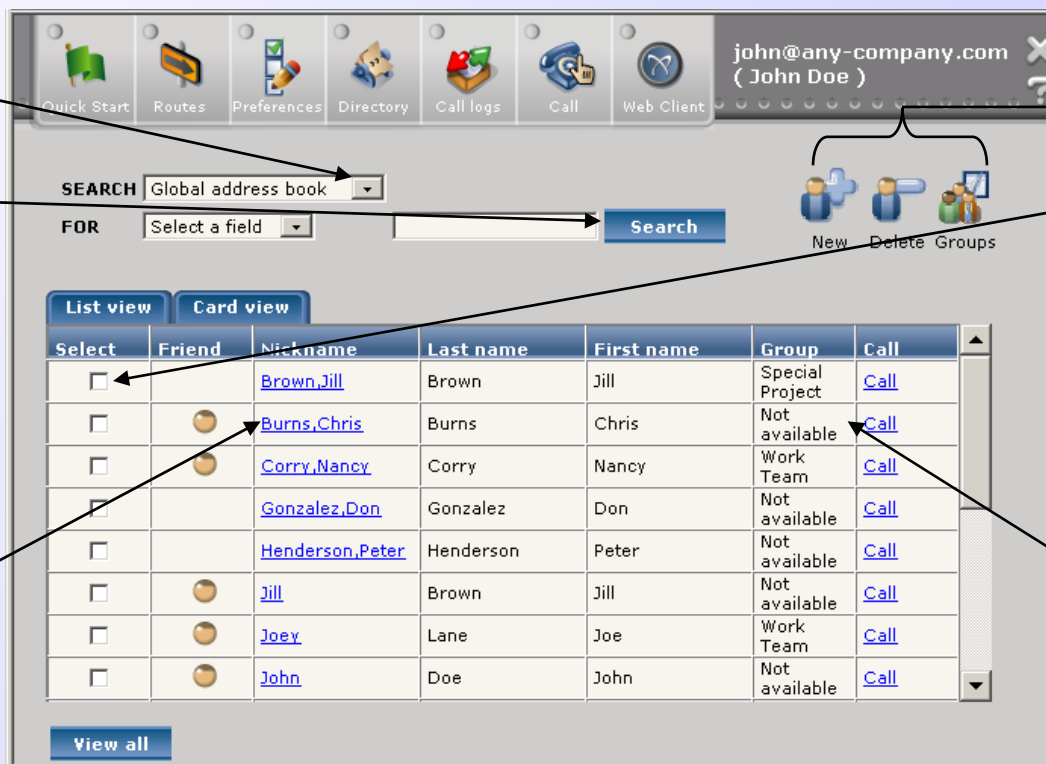
Use SIP address and Phone field hyperlink to initiate a call to the address book contact through the Click to Call page.

Use hyperlink to edit details of the address book contact.

Checkbox to select contacts to add, delete or group in Personal address book.

Use hyperlinks to see details of address book entry. You can choose to edit the contact from the details page.

**Global Address Book - List View**



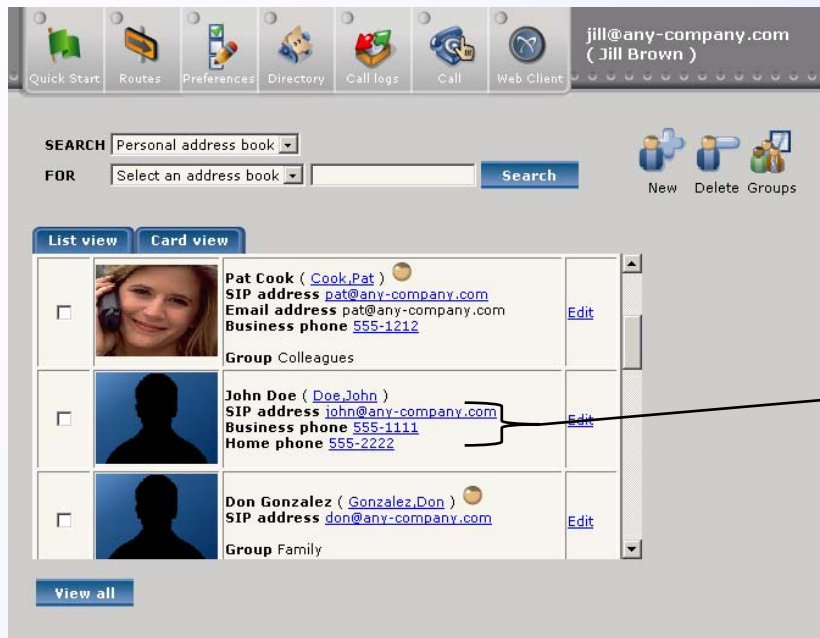
Use the dropdown menus along with the search button to narrow address book displayed list.

Use **New, Delete** and **Groups** to add or edit **"Selected"** users to your Personal Address book.

Use hyperlinks to initiate call to a user through the Click to Call feature.

Use hyperlink to see details of the user.

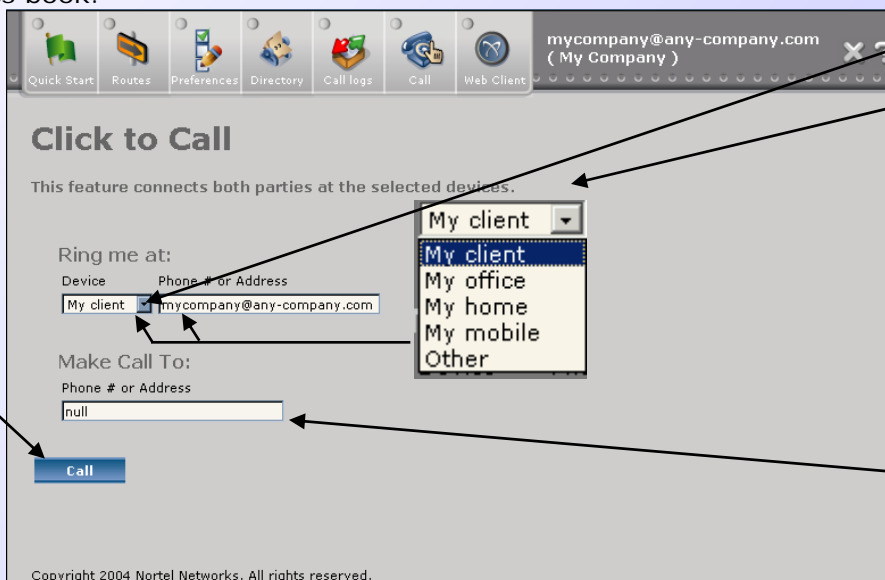
## Global Address Book – Card View



Use SIP Address and Phone field hyperlink to initiate a call to a user through the Click to Call feature.

## Click to Call

- Initiates calls to contacts in your personal address book as well as to the global address book.
- Establishes a call to the originating device, then refers the originating device to the specified phone number or SIP Address to complete the call to the terminating device. The originating device must answer the call.
- To access, click the Click to Call icon, or click the Call hyperlink in the Call column (List view) or the phone number or SIP address hyperlink (Card view) for the contact global address book.



Select the device that you wish to use to originate the call. Call could originate from SIP Client, or PSTN number.

Click **Call** to initiate the call.

SIP Address or phone number for the who you want to call.