



Phone Manager FAQ's

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Q. The Phone Manager call banner disappears after being displayed for a couple of seconds.

A. The Phone Manager call banner has been set to automatically disappear after a certain amount of time. To change this right-click on the Phone Manager icon that hovers on the right hand side of the desktop and select 'Settings'. Select 'Banner' from the tabs at the top of the dialogue box and uncheck the 'Auto hide call bar' if you require the Phone Manager call banner to always be displayed when on a call. If you require the Phone Manager call banner to be displayed for a longer or shorter time enter the time in the 'Auto hide timer' setting. Please note that this time is in milliseconds, so 5 seconds is equal to 5000 milliseconds.

Q. The Phone Manager icon in the taskbar is blue and has a cross on it.

A. The Phone Manager is not currently connected to the phone system and will not function correctly. Check the connection settings on the Phone Manager or contact your system administrator to make sure that the Xarios Application Server is running and has enough licenses to allow the Phone Manager to connect.

To change the connection settings for the Phone Manager right-click on the Phone Manager icon in the taskbar, next to the Windows clock, and select 'Settings' and then 'Connection Settings'. Enter the connection details in the relevant fields. If you do not know the settings that are to be entered enter contact your system administrator.

When the details have been entered the 'Test' button can be used to check that the details have been entered correctly. To save these settings select the 'Ok' button. The Phone Manager will now be able to connect to the phone system.

Q. Some options on the menu are 'greyed-out' and I can not select them.

A. Phone Manager uses a license to connect to the phone system, make sure that the license you are using has all the features that you require.

To check which license you are currently using right-click on the Phone Manager icon in the Windows taskbar, next to the clock, and select 'Settings' and then select 'Connection Settings' and then select the 'Licensing' tab.

The license with the green button selected is the current license that is being utilised on the Phone Manager. To change the license that is currently being used select another license from the list, either 'Standard', 'Professional', 'Professional Integrator' or 'Team Leader'. When 'OK' is selected the Phone Manager will disconnect the current license and reconnect with a new license, if there is an available license on the Xarios Application Server.

Q. The Phone Manager call banner does not have the correct fields on it. How do I add fields to the call banner?

A. To add fields to the Phone Manager call banner right click on the Phone Manager icon that floats on the desktop and select 'Settings' on the 'Field Choice' tab you can use the + button to add fields to the call banner. Buttons can also be added to the call banner on the same tab by selecting the appropriate checkbox.

Q. How do I change the colour of the Phone Manager call banner?

A. To change the colour of the call banner right click on the Phone Manager icon that floats on the desktop and select 'Settings' and then select 'Call Colours'. The colour of the text and background of the call banner can then be changed for when a call is 'In Progress', 'On Hold' and 'Ringing'. The call banner can be set to be partially see-through so that applications underneath the call banner can still be seen by selecting a position on the 'Opacity' slider, 100 being solid and 0 being invisible. When the desired colours have been selected select the 'Save' button.

Q. Phone Manager call banner is always on top of other applications on my computer, how can I make it so that other application are on top?

A. To change the Phone Manager call banner so that it is not on top of other applications that are being used on the computer right-click on the Phone Manager icon that floats on the desktop and deselect 'Always on Top'. When other applications are loaded the call banner will not be on top of them, but running underneath them in the background.

Q. Phone Manager call banner is not on top of other applications on my computer, how can I make it so that the Phone Manager call banner is always on top?

A. To change the Phone Manager call banner so that it is on top of other applications that are being used on the computer right-click on the Phone Manager icon that floats on the desktop and select 'Always on Top'. When other applications are loaded the call banner will now be on top of them.

Q. How do I display the DSS console?

A. To load the DSS console right-click on the Phone Manager icon in the Windows taskbar, next to the clock, and select 'Call Manager'. The Call Manager will now load up and the DSS console will be displayed.

Alternatively double click with the right mouse button on the Phone Manager icon in the taskbar and the DSS Console will be loaded.

Q. How do I set up a 'Hot Key'?

A. To set up a 'Hot Key' right-click on the Phone Manager icon in the Windows taskbar, next to the clock, and select 'Settings' and then select 'Application Settings'. When the settings options load select the 'Hot Keys' tab. To set a 'Hot key' highlight the action that is required to have the 'Hot Key' and select 'Edit'. A dialogue box will then be displayed from which the 'Hot Key' can be enabled and a combination of keys can be set to activate the function at any point by pressing this combination of keys while the Phone Manager is running.

Q. How do I turn on automatic macros?

A. To turn automatic macros on right-click on the Phone Manager icon in the Windows taskbar, next to the clock, and select 'Settings' and then select 'Application Settings'. When the settings options load select the 'Macros' tab, and to turn on automatic macros check the 'Enable Event Driven Macros' checkbox. The file path of where the macros are to be stored can also be set.

Q. How do I set up a macro?

A. To set up a macro right-click on the Phone Manager icon in the Windows taskbar, next to the clock, select 'Settings' and then select 'Macro Design'. The macros screen will now load. To create a new macro right-click on the white section to the left of the macros screen and select 'Add Macro'. A name can then be given to the macro, the script language can be selected, and the macros can be enabled as well as setting parameters can be set for when the macro is fired executed. The 'Macro Text' box is where the macro can be entered, some functions have been pre-programmed into the macros option

and these are accessible by right-click on the white 'Macro Text' box and then selecting the function, which will then be inserted into the macro text box automatically. To save the macro select the 'Save' button. The 'Test' button can be used to test the functionality of the macro.

Q. How do I enable SMS messaging from Phone Manager?

A. For SMS messaging to work this needs to be enabled on the Xarios Application Server as well as having a premicell connected to the machine running Xarios Application Server. If these two conditions are met, SMS messaging can be enabled on Phone Manager clients. To do this right-click on the Phone Manager icon in the windows taskbar, next to the clock, select 'Settings' and then select 'Application Settings'. On the 'General' tab enable the SMS option by selecting the checkbox 'Enable SMS' so that it has a tick in it, if a password has been set enter this next to the checkbox. Users will now be able to SMS message a system speed dial or personal speed dial from the DSS Console.

Q. How do I clear my call history?

A. To clear the call history stored in the Phone Manager Call History section, load the Call History and then right-click on the section containing the calls in the call history and select 'Clear History'.

Q. How do I clear my missed call history?

A. To clear the missed call history stored in the Phone Manager Call History section, load the Missed Calls History and then right-click on the section containing the calls that have been missed and select 'Clear History'.

Q. When I use the Quick Directory not all the numbers I usually have are in there, how do I get my other numbers back?

A. The Quick Directory uses the options on the Directory on the DSS Console to search for numbers, some of the checkboxes have been deselected on the DSS Console Directory, these need to be checked to enable to search all numbers in all directories.

To do this right click on the Phone Manager icon in the Windows taskbar, next to the clock, and select 'Phone Manager'. The Phone Manager DSS Console will then be displayed, select the 'Directory' tab on this window. The current items that are being displayed in the Quick Directory are the checkboxes that

are checked on the left hand side of this window. To enable more items to be searchable in the Quick Directory check the relevant boxes.

Q. How do I enable Outlook integration with Phone Manager?

A. Xarios Phone Manager allows integration with Microsoft Outlook to provide a more integrated environment. To enable Microsoft Outlook integration right-click on the Xarios Phone Manager in the Windows taskbar and select 'Settings' and then 'Application Settings', to enable Outlook integration select the 'Outlook' tab. The options for integration with Microsoft Outlook can then be selected.

To enable Xarios Phone Manager to download your stored Microsoft Outlook contacts enable the 'Download contacts into directory' option.

The DND (Do Not Disturb) feature of Xarios Phone Manager can be automatically linked to your Microsoft Outlook calendar. To enable this feature select the 'Synchronise DND status with Calendar' option. When you now have an entry in your Microsoft Outlook calendar Xarios Phone Manager will automatically put your phone into DND when the appointment in the calendar is set as 'Busy' or 'Out of Office'. The extension will be placed in DND when the appointment starts and taken out of DND when the appointment finishes. The DND text that will appear on the extension will be whatever is put into the subject line of the appointment in your Outlook calendar, if the 'Use subject as DND text' is enabled.

When the 'Create journal entries for external calls' is selected whenever an external call is placed or received on the extension an entry into the Outlook journal is created with the call details.

To allow Phone Manager to screen pop contacts that are in your Outlook contacts enable the 'Screen pop contacts on inbound calls' option. With this enabled when a call is received on the extension and the contact number appears in your Outlook contacts the contacts record will be screen popped. Dependent on which option is selected in the 'Search' box is how Xarios Phone Manager will search for the contact in Outlook.

Q. How do I get Xarios Phone Manager to automatically log me in to my extension every time the application starts?

A. To enable Xarios Phone Manager to automatically log an agent ID into the extension associated with the Phone Manager the agent ID required needs to be put into the settings on Xarios Phone Manager. To do this right-click on the Xarios Phone Manager icon in the Windows taskbar and select 'Settings' and then 'Application Settings'. On the 'General' tab enable the 'Auto login / logout' option and then enter the agent ID to be logged into the extension every time the Xarios Phone Manager is loaded. When Xarios Phone

Manager is closed the agent ID will be automatically logged out of the extension.

Q. How do I login to my phone via Phone Manager?

A. To log your phone in with an agent ID by using Phone Manager right-click on the Phone Manager icon in the Windows taskbar and navigate to 'ACD Login / Logout' and can then select the green 'Login' button, then agent ID can then be entered into a text box, when the enter key is pressed the user will be logged into their extension.

If an agent has been logged in before their agent ID will be shown next to another Login button this can then be selected and that agent ID will be logged into the extension.

Q. How do I logout of my phone via Phone Manager?

A. To log an agent ID out of all hunt groups that they are currently logged into you can right-click on the Phone Manager icon in the Windows taskbar and then navigate to 'ACD Login / Logout' and can select the red 'Logout' button. You will then be logged out of all hunt groups that you are currently logged into.

Q. How do I log into selected hunt groups that I am a member of?

A. It is possible for an agent to choose which hunt groups they are logged into. If the agent is currently logged into the extension the agent can log themselves out of selected hunt groups by right-clicking on the Phone Manager icon in the Windows taskbar and then navigate to 'ACD Login / Logout' and then select the green button next to the hunt group name, the agent will then be logged out of this hunt group and will not receive hunt groups calls for that group until they log back into it.

This process can be carried out again so that the agent can be logged out of more hunt groups.

Q. How do I put myself in DND (Do Not Disturb) with Xarios Phone Manager?

A. To put yourself in DND right-click on the Phone Manager icon in the Windows taskbar and navigate to 'Do Not Disturb'. When selected a list of DND messages will be displayed, select the appropriate DND message and left click on it. This will then be applied to the extension associated with Phone Manager.

By right-clicking on the DND message a pop-up box will be displayed so a custom DND message can be entered, this will appear beneath the selected DND message on the extension.

Q. How do I take myself out of DND (Do Not Disturb) with Xarios Phone Manager?

A. To take yourself out of DND by using Phone Manager right-click on the Phone Manager icon in the Windows taskbar and navigate to 'Do Not Disturb'. When selected the list of DND message will be displayed, the current DND set on the extension will have a green tick next to it to indicate what DND message is currently selected. To remove DND from the extension either click the '(Remove DND)' option at the bottom of the DND messages list or click on the currently set DND message.

Q. How do I set a forward on my extension when using Phone Manager?

A. To set call forwarding on your extension right-click on the Phone Manager icon in the Windows taskbar. Once the menu has appear navigate to 'Call Forwarding' where a second menu option will appear with the call forwarding options that can be selected.

To set a forward on the agent's telephone the user can select which forward they require to be applied to their extension.

To select one of these forwards click on the required forward type. A drop-down box will appear for the agent to enter the destination of where the call will go to when the forwarding rules are applied. To forward to an outside number simply enter the outside number in the forward drop-down box.

Once the required forward destination has been entered into the drop-down box you can set the call forwarding by pressing enter. The forward will then be applied to the agent's extension.

The below outlines the types of forwards that are available and a brief description as to what they do.

- All Calls- Forward all calls to the forward destination as soon as they hit the agent's phone.
- When Busy- Forward all calls that hit the agent's phone if they are already busy on another call.
- No Forwarding - No forwarding will be applied.
- No Answer- If the agent does not answer the phone the forward set will be applied.

- No Answer & Busy- If they agent does not answer, or they are busy on the phone the forwarding that is set will be applied.

Q. How do I remove a forward on my extension using Phone Manager?

A. To remove a forward from your extension right-click on the Phone Manager icon in the Windows taskbar. Once the menu has appear navigate to 'Call Forwarding' where a second menu option will appear.

If a forward is currently set the 'No Forwarding' option is not greyed out and a forward is currently set on the extension, indicated with a green tick next to the call forwarding rule.

To remove this forward select the 'No Forwarding' option, the forward that is currently applied to the extension will now be removed.

Q. How do I change the forward currently set on my extension using Phone Manager?

A. To change a forward that is set on your extension right-click on the Phone Manager icon in the Windows taskbar. Once the menu has appear navigate to 'Call Forwarding' where a second menu option will appear.

You can change the call forwarding type or destination by selecting the new type of forward that you require or to change the destination of the currently applied forward select the current forward type and when the forward drop-down box appears enter the new forward destination and press enter.

Q. How do I dial from the Quick Directory?

A. To dial from the Quick Directory first load the directory by right-clicking on the Phone Manager icon in the Windows taskbar and select 'Quick Directory'. The Quick Directory can also be loaded by using the hot-key combination; in default this is set as Alt and D.

When the Quick Directory is loaded internal or external numbers can then be dialled. You can start typing into the Quick Directory pop-up box. As you begin to type the system will automatically match what you are typing to the closest internal extension number or a system speed dial number.

Alternatively the drop-down menu system on the Quick Directory can be used to search for entries in the directory. Left-click on the down arrow next to the

'Dial' button and a list of all entries will then be displayed, the desired entry can then be selected.

To dial the selected entry click on the 'Dial' button, the phone number will then be dialled from the extension associated with Phone Manager.

Please note that a number, either internal or external, can be entered into the Quick Directory, for example, 0906 716 0151 and when 'Dial' is selected the number will be dialled from the extension.

Q. How do I display the DSS Console?

A. To display the Phone Manager DSS Console right-click on the Phone Manager icon on the Windows taskbar and select 'Phone Manager'.

The Phone Manager will then be loaded, the DSS Console is displayed on the first tab. If this is the first time the DSS Console has been loaded no devices will be shown on the Console.

Q. How do I add a device to the DSS Console?

A. To add a device to the DSS Console first load the DSS console. Once loaded to add a device right-click on the light grey section of the DSS console to display a pop-up menu.

When the pop-up menu has been displayed navigate to 'Add Device' four options will then be available to select, 'Extensions', 'Agents', 'Speed Dials' and 'Hunt Groups'.

To add any of these devices to the DSS Console navigate across to them and another menu will be displayed which shows ranges of the device selected.

To now add one of these devices navigate to which device is required in the given range. When the required device has been found left-click on it to add it to the DSS Console.

To add more than one device to the DSS Console at the same time the 'Control' key can be held down while adding a device and the add device menu system will not close. Before the last required device is added to the DSS Console release the 'Control' key and the add device menu will disappear when the last device is added.

Q. How do I remove a device from the DSS Console?

A. To remove a device from the DSS Console, first load the DSS Console. When loaded to remove a device from the DSS Console right-click on the device to remove and select the 'Remove Device' option.

Once 'Remove Device' is selected the device will be removed from the DSS Console.

More than one device at a time can be removed by highlighting more than one device.

To highlight more than one device at a time the user can select one device and then by either holding down the 'Shift' key if the devices to remove are adjacent to each other or the 'Control' key if the devices are not adjacent to each other and then select the next device by clicking on it so that the device becomes highlighted.

To illustrate that the device have been selected they will be highlighted in blue. Once all the devices have been selected right click on one of them and select 'Remove Device'. The selected devices will now be removed from the DSS Console.

Q. How do I dial a device from the DSS Console?

A. The DSS Console allows the you to dial a device that is listed on the DSS Console. To dial someone on the DSS Console first load the DSS Console and then right-click the device to dial and select 'Dial'.

By double-clicked on the device it will be dialled from the extension associated with Phone Manager.

If a System Speed Dial, Personal Speed Dial number, agent or Hunt Group has been added to the DSS Console this can also be dialled by the same process.

Q. How do I reverse transfer a call using the DSS Console?

A. When a call is on hold at an extension it is possible to reverse transfer the call to your extension by using the DSS Console.

When a call is on hold at an extension you can right-click on the extension and then select 'Reverse Transfer' the call will then be transferred to the extension associated with Phone Manager.

If a call is not on hold at the extension when the extension is right-clicked the 'Reverse Transfer' option will not be available for selection as it will be greyed out.

Q. How can I retrieve voicemail on someone else's extension using the DSS Console?

A. If a Professional Integrator or higher license is being utilised on Phone Manager it is possible to retrieve voicemails from another user's mailbox.

To retrieve a user's voicemail a message must be on the user's extension. The number of voicemails on a user's extension can be shown when the DSS Console is shown in 'Details' view.

When a user has a voicemail on their extension it can be retrieved by right-clicking on the extension and then selecting 'Retrieve Voicemail'. The extension associated with the Phone Manager will then automatically dial into the user's voicemail box, and the user will be asked to enter the voicemail box password to retrieve the voicemails, the password has to be entered via the keys on the phone's keypad.

Q. How do I change the layout of the DSS Console?

A. The layout of the DSS Console can be changed to suit a user's preference. The layout options that are available are list, details, large icons, small icons and tile.

To change the layout of the DSS Console right-click on the light grey area of the DSS-Console, and navigate to 'Layout', the desired layout can then be selected.

Q. How do I create notes against devices on the DSS Console?

A. When the DSS Console layout is in 'Details' or 'Tile' mode it is possible to see user entered notes against devices.

To add a note to a device right-click on the device and select 'Add Note', a dialogue box will then appear so that the user can enter a note. Once 'Ok' is selected the note will appear on the DSS Console when it is in 'Details' or 'Tile' mode.

Please note that it is possible to add notes when in any layout is being displayed on the DSS Console, but the note is only visible when the layout selected is either 'Details' or 'Tile'.

Q. How do I remove notes from devices on the DSS Console?

A. If a note is no longer required against a device it can be removed. To remove a note from a device right-click on the device that the note is required to be removed from and selected 'Clear Note'.

Q. How do I edit a note on a device on the DSS Console?

A. Once a note has been assigned to a device it is possible to edit the note. To edit a note that is assigned to a device right-click on the device and select 'Edit Note'.

A dialogue box will then appear so that you can edit the note. When 'Ok' is selected the edited note will appear on the DSS Console when it is in 'Details' or 'Tile' mode.

Q. How do I send SMS messages using the DSS Console?

A. It is possible to send SMS messages to phone numbers if SMS integration is enabled on the Xarios Application Server.

To send a SMS message to a phone number via the DSS Console right click on the Speed Dial that the message is required to be sent to and then select 'Send SMS'.

A dialogue box will then be displayed where the user can enter the message to be sent. To send the message select the 'OK' button.

Q. Is it possible to group devices on the DSS Console?

A. Phone Manager DSS Console allows the user to choose how to group devices either by type or users can group devices manually.

To change the grouping that is displayed on the DSS Console right-click on the light grey section of the DSS Console and navigate to 'Grouping' you can then select 'Group by Type' or 'Manual Grouping'.

Q. How do I group devices on the DSS Console?

A. To change the grouping that is displayed on the DSS Console right-click on the light grey section of the DSS Console and navigate to 'Grouping' you can then select 'Group by Type' or 'Manual Grouping'.

When 'Group by Type' is selected the devices shown on the DSS Console will be grouped by extensions, agents, speed dials and hunt groups.

When 'Manual Grouping' is selected the groups are set by the user and any device can be added to any group set up by the user.

Q. What is 'Manual Grouping' on the DSS Console?

A. When 'Manual Grouping' is selected it is possible to group the devices to the users choosing, so that extensions, agents, speed dials and hunt groups can appear in the same group.

Any devices that are not allocated to a user specified group will appear at the top of the DSS Console in the 'Default' group.

Q. How do I add a 'Manual Group' to the DSS Console?

A. To add a manual group right-click on the light grey section of the DSS Console and navigate to 'Grouping' then navigate down to 'Select / Add Group' you can then enter the name for the new group to be created so that devices can then be categorised into the new group.

When a manual group has been created devices can then be assigned to the group.

Q. How do I assign a device to a 'Manual Group' on the DSS Console?

A. To assign a device to a manually created group right-click on the device that is required to be assigned to a group then select the drop-down box that is labelled 'Select / Add Group' you will now be shown all of the manually created groups from which you can select a group to assign the device to.

Q. How do I remove a 'Manual Group' from the DSS Console?

A. To remove a group from the DSS Console right-click on the light grey area of the DSS Console and navigate to 'Grouping' then to 'Remove Group' and select the group that is to be removed.

Once the group has been removed any devices that were in that group will be placed back into the 'Default' group.

Q. How do I apply DND (Do Not Disturb) to other people's extensions?

A. To apply DND to other people's extensions a 'Team Leader' license must be utilised with Phone Manager.

If a Team Leader license is being used to change the status of an endpoints DND status right-click on the device that is to be set in DND navigate to 'Team Leader' and then select 'Apply Do Not Disturb' from the pop-up menu the desired DND message can then be selected.

Q. How do I remove DND (Do Not Disturb) from other people's extensions?

A. To remove DND from other people's extensions a 'Team Leader' license must be utilised with Phone Manager.

To change the status of an endpoints DND status right click on the endpoint that is currently set in DND and navigate to 'Team Leader' then select 'Remove Do Not Disturb' from the pop-up menu. The device will then be taken out of DND and placed in a free state.

Q. How do I assign ACD status to other users?

A. To assign ACD status to other people's extensions a 'Team Leader' license must be utilised with Phone Manager. The 'Team Leader' license allows the ability to log agents in and out of all hunt groups that the agent is a member of as well as the ability to log agents in and out of selected hunt groups that the agent is a member of.

Below is listed how to control the ACD status of agents:

Log Agent into Extension:

To log an agent into an extension right click on the extension that is required to have the agent logged in on and navigate to 'Team Leader'. Select 'ACD Status' and then select 'Log Agent In'. In the next box enter the agent ID to login to the extension and press the 'Enter' key to perform the login of the agent on the extension.

Log Agent out of an Extension:

To log an agent out of an extension right click on the extension that the agent

is currently logged into and navigate to 'Team Leader'. Select 'ACD Status' and then select 'Log Agent out' to log the agent out completely.

The agent can be logged out from selected hunt groups by clicking on the hunt group name instead of selecting the 'Log out' button. To indicate if an agent is logged into a particular group green and red coloured buttons are used. If the button is green next to the hunt group name the agent is currently logged into that hunt group, if the button is red the agent is currently logged out of that hunt group.

Log Agent in:

If an agent is being displayed on the DSS Console and is not currently logged in the agent will be brown and have a red cross to indicate that it is not currently logged in. To log an agent in that is currently brown on the DSS Console right click on the agent and navigate to 'Team Leader' then select 'ACD Status' and then click 'Log in to Extension'. In the next box enter the extension number to log the agent into and press the 'Enter' key to perform the login of the agent on the extension.

Log Agent out:

If an agent is being displayed on the DSS Console and is currently logged in the agent can be logged out from the extension by right clicking on the agent and navigating to 'Team Leader' then select 'ACD Status' and then click 'Log out'. The agent will then be logged out from the extension.

The agent can be logged out from selected hunt groups by clicking on the hunt group name instead of selecting the 'Log out' button. To indicate if an agent is logged into a particular group green and red coloured buttons are used. If the button is green next to the hunt group name the agent is currently logged into that hunt group, if the button is red the agent is currently logged out of that hunt group.

Q. How do I send a message to a user's phone display?

A. To send a message to a user's phone display a 'Team Leader' license must be utilised with Phone Manager.

To send a message to a device right click on the device that you require to send a message to and navigate to 'Team Leader' and then click 'Send Message'.

When selected a dialogue box will be displayed. Enter the message that is required to be sent and select 'OK'. The message will then be displayed on the device that was selected on the top two lines of their digital phone display.

Please note that if you send a message to a Hunt Group the message will be displayed on all devices contained in that Hunt Group.

Q. How do I silent monitor an extension using Phone Manager?

A. To silent monitor an extension you are required to have silent monitoring set up on your extension and you also have to be utilising a 'Team Leader' license.

To silent monitor an extension the extension has to be on a call.

Right click on the extension that is required to be silent monitored and navigate to 'Team Leader' then click 'Silent Monitor' to start a silent monitor on the extension. When selected the conversation will be able to be heard through the extension number associated with Phone Manager.

Q. How do I add columns to the DSS Console?

A. Columns can be added to the DSS Console when the DSS Console is in the 'Details' view.

To add a column, right click on one of the columns being displayed on the DSS Console and navigate to 'Add Column'. The available columns that can be added to the DSS Console will then be displayed. To add one of these columns left click on the new column name and it will be added to the DSS Console.

Please Note: When running in 'Standard' license mode the available columns on the DSS Console are, 'Name', 'Description', 'Direction', 'Calls Waiting' and 'Call Type'.

Q. How do I remove columns from the DSS Console?

A. Columns can be removed from the DSS Console when the DSS Console is in the 'Details' view.

To remove a column, right click on the column that is required to be removed and select 'Remove Column'. The columns will then be removed from the DSS Console.

Note: When running in 'Standard' license mode the available columns on the DSS Console are, 'Name', 'Description', 'Direction', 'Calls Waiting' and 'Call Type'.

Q. How do I change the order of columns on the DSS Console?

A. Columns can be ordered to a user's specification. To change the order of the columns the column name can be left clicked on and then dragged either to the right or the left to change the order of the columns when displayed on the DSS Console.

Q. How do I see the calls that have been made and received on my extension with Phone Manger?

A. Phone Manager enables users to see calls that they have made, received and missed, these functions are available by using the 'Phone Manager' option.

To access call history right-click on the Phone Manager icon next to the Windows clock and select 'Phone Manager'. When this has loaded the first screen to be shown is the DSS Console, to display the Call History select the tab, 'All Calls'.

Q. How do I see that calls that I have missed on my extension with Phone Manager?

A. Phone Manager enables users to see calls that they have made, received and missed, these functions are available by using the 'Phone Manager' option.

To access call history right-click on the Phone Manager icon next to the Windows clock and select 'Phone Manager'. When this has loaded the first screen to be shown is the DSS Console, to display the Missed Call for your extension select the tab, 'Missed Calls'.

Q. How many Call History items can I store on Phone Manager?

A. The number of calls, internal, external and missed calls shown on the Call History and Missed calls is limited to 1000 items.

Q. How can I just show external calls on the Call History within Phone Manager?

A. The Phone Manager Call History can be set up to display just external calls or it can be set up to show internal and external calls.

If internal and external calls are being displayed on the call history you can show just external calls by right clicking on the call history section and selecting 'Show Internal calls' when it has a tick next to it. Only external calls will then be shown on the call history and internal calls will not be displayed.

Q. How do I show internal and external call on the Call History within Phone Manager?

A. The Phone Manager Call History can be set up to display just external calls or it can be set up to show internal and external calls.

If external calls are only being displayed on the call history you can show internal calls as well as external calls by right clicking on the call history section and selecting 'Show Internal calls'. Internal calls will then be shown on the call history as well as external calls.

Q. How do I add columns to the Call History or Missed Calls section in Phone Manager?

A. Columns can be added to the 'All Calls' and 'Missed Calls' tabs so that additional information can be displayed.

To add another column to either the 'All Calls' or 'Missed Calls' tabs right-click on one of the menus and then navigate to 'Add Column'. A list of the columns that can be added to the tab are then displayed, to add one of these columns to the tab left-click on it. The column will then be added to the tab.

Q. How do I remove columns from the Call History or Missed Calls section in Phone Manager?

A. Columns can be removed from the 'All Calls' and 'Missed Calls' tabs so that information that is not required by the user is not displayed.

To remove a column to either the 'All Calls' or 'Missed Calls' tabs right-click on the menu item to be removed and then navigate to 'Remove Column'. The column will then be removed from the tab.

Q. How do I show the Phone Manager Directory?

A. To load the Phone Manager Directory, which shows all speed dial numbers, internal extension numbers, personal directory entries and Microsoft Outlook contacts, right click on the Phone Manager icon in the Windows taskbar and select 'Phone Manager'. The initial screen loaded will be of the DSS Console, to display the Directory select the 'Directory' tab.

Q. How do I search in the Phone Manager Directory?

A. With the Phone Manager Call History Directory it is possible to search for entries to help agents find directory entries. The search can be performed on System Speed Dials, Extensions, Personal Directory entries, and Microsoft Office contacts or a combination of any of the four.

To search for an entry enter the name or number that you are searching for in the respective fields, either 'Name' or 'Number' and then select the 'Search' button.

The directory will then display the directory entries that match your search criteria.

The different types of directories can be search individually by unchecking the checkboxes, either 'System Speed Dial', 'Extensions', 'Personal Directory' or 'Outlook'.

If all four checkboxes have a tick in them all four directories will be searched. If, for example 'System Speed Dial' is the only checkbox that has a tick in it then only the system speed dials will be searched for the entry.

If you require to remove the searched items from the directory select the 'Reset' button and the directory will show all entries again.

Q. How can I dial a number from the Directory in Phone Manager?

A. With the Phone Manager Call History Directory it is possible to dial any of the numbers listed in the Call History Directory.

To dial a number from the Call History Directory double click on the telephone icon on the number that you want to dial from the directory. The number will then be dialled from the extension associated with Phone Manager. Alternatively you can right click on the desired number to be dialled and select 'Dial' from the pop-up window.

If a record has more than one number associated with it, for example Microsoft Outlook records can have 'Home', 'Work' and 'Mobile' numbers; these can also be selected individually to be dialled. To select one of these numbers right click on the record in the Directory and navigate to 'Dial' the available numbers will then be displayed that can be dialled, by clicking on one of these numbers it will be dialled from the extension.

Q. How do I add an entry to the Personal Directory within Phone Manager?

A. To add a personal entry to the directory load the Phone Manager Directory by right clicking on the Phone Manager icon in the Windows taskbar and then select 'Phone Manager'. When loaded select the 'Directory' tab and then right click on the directory area and select 'Add Personal Entry'. When selected a dialogue box will be display where the name and number can Personal Directory entry. When the Name and the Number have been entered select the 'Save' button to add the entry to the personal directory.

Q. How do I remove an entry from the Personal Directory within Phone Manager?

A. To remove a personal entry to the directory load the Phone Manager Directory by right clicking on the Phone Manager icon in the Windows taskbar and then select 'Phone Manager'. When loaded select the 'Directory' tab and then right click on the entry to be removed and select 'Delete Personal Entry'. The Personal Directory entry will now be removed.

Q. How do I add fields to the Phone Manager Call Banner?

A. To add fields to the Call Banner right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. The 'Field Choice' tab will be displayed, to add a field to the Cal Banner select the + button. When selected a pop-up box will appear with the fields that are available to add to the Call Banner. By selecting one of these additional fields it will then appear in the list of fields that will be displayed on the Call Banner on the next call event. Select the 'Save' button to commit the changes.

Q. How do I remove fields from the Phone Manager Call Banner?

A. To remove a fields from the Call Banner right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. The 'Field Choice' tab will be displayed, to remove a field from the Call

Banner highlight the field that is to be removed and then select the – button. Select the 'Save' button to commit the changes. The next time a call event occurs on the extension the field removed will not be displayed on the Call Banner.

Q. How do I change the order of fields on the Phone Manager Call Banner?

A. To change the order of how fields appear on the Call Banner right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. The 'Field Choice' tab will be displayed. To move a field up in the list, which will move it to the left on the Call Banner, highlight the field to move and then select the ^ (up) button. To move a field down in the list, which will move it to the right on the Call Banner, highlight the field to move and then select the down button.

Q. How do I add or remove buttons displayed on the Phone Manager Call Banner?

A. To add or remove buttons that are displayed on the Call Banner right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. The 'Field Choice' tab will be displayed. The buttons that are currently selected to be displayed on the Call Banner are indicated with a green tick next to the name of the button.

To add buttons to the Call Banner click the appropriate checkbox so that it appears with a green tick, and select 'Save' to add the button to the Call Banner on the next call event.

To remove buttons from the Call Banner click the appropriate checkbox that has a green tick in it so that the checkbox becomes clear, and select 'Save' to remove the button from the Call Banner on the next call event.

Q. How do I change the colour of the Phone Manager Call Banner and the Call Banner text?

A. The colours used to alert users to the state of their phone can be changed by simply selecting a different colour in the Phone Manager Call Settings and then selecting the 'Call Colours' tab. To load these settings right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Call Colours' tab for the options relating to Call Banner colours.

To change the colour of the Call Banner select the desired state either, 'In Progress', 'On Hold' or 'Ringing' and then select either the background or the text that is to be changed and then click on the appropriate >> button. This will then load a colour palette where you can choose the desired colour. To apply the changes to the Call Banner select the 'Save' button.

The opacity of the Call Banner can also be set from a range of 100 to 10; 100 being completely solid to 10 being nearly invisible.

Q. How do I change the opacity of the Phone Manager Call Banner?

A. To change the opacity of the Call Banner right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Call Colours' tab for the options relating to Call Banner colours and opacity.

The opacity of the Call Banner can also be set using the slider at the bottom of this tab and can be set from a range of 100 to 10; 100 being completely solid to 10 being nearly invisible. When the desired opacity has been set select the 'Save' button to commit the changes.

Q. How do I enable the Phone Manager Call Banner to slide out on every call event on my extension?

A. To enable to Call Banner to slide out on every call event, right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Banner' tab for the options relating to the Call Banner.

To enable the sliding Call Banner enable the checkbox labelled 'Enable sliding banner' so that it has a green tick in it. Select the 'Save' button to commit the changes.

Q. How do I disable the Phone Manager Call Banner from sliding out on every call event on my extension?

A. To disable the Call Banner from sliding out on every call event, right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Banner' tab for the options relating to the Call Banner.

To disable the sliding Call Banner disable the checkbox labelled 'Enable sliding banner' so that it does not have a green tick in it. Select the 'Save' button to commit the changes.

Q. How do I get the Phone Manager Call Banner to automatically hide after a predetermined amount of time?

A. To get the Call Banner to automatically hide after a predetermined amount of time right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Banner' tab for the options relating to the Call Banner.

To enable the Call Banner to automatically hide enable the 'Auto hide call bar' checkbox and enter the time in milliseconds when you want the Call Banner to hide, for example 5000 milliseconds is 5 seconds. Select the 'Save' button to commit the changes.

Q. How do I get the Phone Manager Call Banner to always stay on the desktop when I am on a call?

To get the Call Banner to always stay on the desktop when I am on a call right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Banner' tab for the options relating to the Call Banner.

Disable the 'Auto hide call bar' option so that the checkbox is clear and select the 'Save' button to commit the changes. The Call Banner will now stay on the desktop during the phone call and not automatically hide.

Q. How do I copy a call detail from the call that I am on to the clipboard automatically with Phone Manager?

A. To automatically copy a call detail from Phone Manager to the computer's clipboard right click on the Phone Manager icon that is floating on the right hand side of the desktop and select 'Settings'. When loaded the 'Field Choice' tab is displayed, select the 'Banner' tab for the options relating to the Call Banner.

Enable the 'Copy call details to the clipboard' checkbox and then from the drop-down menu select the call detail to copy to the clipboard. The available options are: Account Code, Caller ID, DDI Number, DDI Name, Trunk Number and Speed Dial Name.

Please note that for every call event that takes place on the extension the call detail will be copied, previous call details will not be stored but over written by new call details.

Q. How do I set the Phone Manager Call Banner to always be on top of other application?

A. To set the Call Banner to always be on top of other applications, so that it is visible at all times right click on the Phone Manager icon floating on the desktop and enable the 'Always on top' option. When enabled the always on top icon will be surrounded with an orange background to indicate it has been selected. The Call Banner will now always appear on top of other applications so that it will always be seen.

Q. How do I set Phone Manager Call Banner so that other applications are on top of it?

A. To set the Call Banner so that other application are on top of it to right click on the Phone Manager icon floating on the desktop and disable the 'Always on top' option. When disabled the always on top icon will be surrounded with a white/blue background to indicate it has been disabled. The Call Banner will now appear behind other applications so that it will only be seen when other applications are minimised.

Q. How do I display the Phone Manager Button Toolbar?

A. To display the Button Toolbar right click on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'. The Button Toolbar will then be loaded. Buttons can then be added, removed or edited from the Button Toolbar.

Q. How do I add a button to the Phone Manager Button Toolbar?

A. To add a button to the Button Toolbar first load the Button Toolbar by right clicking on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'.

When the Button Toolbar is loaded right click on the Button Toolbar and select 'Add'. The 'Add Button' menu will now appear. Enter a description that will appear on the button on the Phone Manager Toolbar in the 'Button Text'

option. If you require a 'Hot Key' set up for this button make sure that the 'Enable Hot Key' checkbox is checked and then select the 'Edit' button. Then in the next dialogue box select the key combination for the Hot Key and select 'Save' to apply the Hot Key to the action.

Select the 'Action' tab from the top of the dialogue box to select what action should be carried out when the button or 'Hot Key' is selected.

The available actions that can be chosen are: 'Make Call', 'Clear Call', 'Hold Call', 'Change Volume', 'Dial Digits', 'Retrieve Call', 'Run Macro', 'Transfer Call', 'Set Account Code', 'Answer Call', 'Tag Recording' and 'Set Dialler Callback'.

Dependent on which action has been selected further parameters can be set at the bottom of the 'Action' tab.

Once this has been applied select the 'Save' button to add the button to the Phone Manager Toolbar. The button will then be added to the Phone Manager Toolbar.

Q. How do I delete a button on the Phone Manager Button Toolbar?

A. To delete a button on the Button Toolbar load the Button Toolbar by right clicking on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'.

When loaded right click on the button that you require to delete and select the 'Delete' option. This button will then be removed from the Button Toolbar.

Q. How do I edit a button on the Phone Manager Button Toolbar?

A. To edit a button on the Button Toolbar load the Button Toolbar by right clicking on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'.

When loaded right click on the button that you require to edit and select the 'Edit' option. The options that are set for that button are then displayed and can be edited. When the desired changes required are entered select the 'Save' button to update the button on the Button Toolbar.

Q. How can I re-order the buttons on the Phone Manager Button Toolbar?

A. To re-order the buttons on the Phone Manager Button Toolbar load the toolbar by right clicking on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'.

When loaded right click on the button toolbar, away from a button, and select 'Re-order'. The 'Toolbar' options menu will then be displayed. To move a button highlight it and then select either the up or down arrow to move it on the toolbar. The top of the list is that left most button on the toolbar and the bottom of the list is the right most button on the toolbar. To commit the changes to the button toolbar select the 'Save' button.

Q. How can I set the Phone Manager Button Toolbar always to be on top of other applications?

A. To set the Button Toolbar to always be on top of other applications load the toolbar by right clicking on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'.

When loaded right click on the button toolbar away from a button and select 'Always on top'. This will then set the Button Toolbar always to be on top of other applications.

Q. How can I set the Phone Manager Button Toolbar so that it is hidden behind other applications?

A. To set the Button Toolbar to be hidden behind other applications load the toolbar by right clicking on the Phone Manager icon on the Windows taskbar and select 'Button Toolbar'.

When loaded right click on the button toolbar away from a button and select 'Always on top'. This will then set the Button Toolbar to be hidden behind other applications.

Q. How do I close the Phone Manager Button Toolbar?

A. To close the Button Toolbar right click on the toolbar away from a button and select the 'Close Window' the Button Toolbar will then close.

Q. How do I know that I have voicemail with Phone Manager?

A. When a voicemail is received on your extension a visual representation of this is displayed to you by means of an envelope in the taskbar next to the Phone Manager icon.

To listen to the voicemail message you can right-click on the envelope and select 'Listen to messages'. Your extension will then automatically dial into your voicemail box. You will then be asked to enter your password, please enter this on your extensions key pad. You can then listen to your voicemail.

Q. How do I listen to my voicemail messages with Phone Manager?

A. When a voicemail is received on your extension a visual representation of this is displayed to you by means of an envelope in the taskbar next to the Phone Manager icon.

To listen to the voicemail message you can right-click on the envelope and select 'Listen to messages'. Your extension will then automatically dial into your voicemail box. You will then be asked to enter your password, please enter this on your extensions key pad. You can then listen to your voicemail.

Q. How do I change the settings relating to Phone Manager?

A. To access the settings for Phone Manager right click on the Phone Manager icon in the Windows taskbar and select 'Settings'. You will then be able to enter into the 'Application Settings', 'Connection Settings' and 'Macro Design'.

Q. How do I change the 'Application Settings' of Phone Manager?

A. To access the Application Settings for Phone Manager right-click on the Phone Manager icon in the Windows taskbar and navigate to the Settings option where you can choose 'Application Settings' to load the general application settings relating to Phone Manager.

Within the Phone Manager settings it is possible to enable macros and change the general Phone Manager settings, Hot Keys, Xarios Recorder settings and Xarios Dialler settings regarding to Phone Manager.

Q. How do I enable auto login / logout on Phone Manager?

A. To enable auto login / logout on Phone Manager load the 'Application Settings' for Phone Manager. This can be done by right clicking on the Phone Manager icon in the Windows taskbar and navigating to 'Settings' and then selecting 'Application Settings'.

On the 'General' tab enable the 'Auto login / logout' checkbox so that it has a green tick in the box. Enter the agent ID that is required to be logged in when Phone Manager starts and logged out when Phone Manager exits in the 'Agent ID' box.

Q. How do I disable auto login / logout on Phone Manager?

A. To disable auto login / logout on Phone Manager load the 'Application Settings' for Phone Manager. This can be done by right clicking on the Phone Manager icon in the Windows taskbar and navigating to 'Settings' and then selecting 'Application Settings'.

On the 'General' tab disable the 'Auto login / logout' checkbox so that it does not contain a tick. The Agent ID field will then be greyed out, and auto login / logout will be switched off.

Q. How do I enable DND to be set on my PC when I lock it with Phone Manager?

A. To enable DND to be set on your PC when it is locked load the 'Application Settings' for Phone Manager. This can be done by right clicking on the Phone Manager icon in the Windows taskbar and navigating to 'Settings' and then selecting 'Application Settings'.

On the 'General' tab enable the 'Enable DND when PC is locked' checkbox so that it has a green tick in the box. Now when the PC is locked the extension will be placed into DND.

Please note this functionality only works with Windows XP.

Q. How do I disable DND being set on my PC when I lock it with Phone Manager?

A. To disable DND being set on your PC when it is locked load the 'Application Settings' for Phone Manager. This can be done by right clicking on the Phone Manager icon in the Windows taskbar and navigating to 'Settings' and then selecting 'Application Settings'.

On the 'General' tab disable the 'Enable DND when PC is locked' checkbox so that it does not contain a green tick in the box. Now when the PC is locked the extension will not be placed into DND.

Q. How do I expose TAPI with Phone Manager?

A. To use an application that includes a TAPI interface in conjunction with the Phone Manager the Expose TAPI Interface needs to be enabled within Phone Manager. To do this load the 'Application Settings' for Phone Manager. This can be done by right clicking on the Phone Manager icon in the Windows taskbar and navigating to 'Settings' and then selecting 'Application Settings'.

On the 'General' tab enable the 'Expose TAP Interface' checkbox so that it has contains a green tick in the box.

Please note that the Xarios TAPI driver is required to be installed on the machine that requires the TAPI interface.

Q. How do I install the Xarios TAPI Driver for use with Phone Manager?

A. To install the Xarios TAPI driver load the Control Panel on the machine that requires the TAPI driver, and then select the 'Phone and Modem' options. Select the 'Advanced' tab on the 'Phone and Modem' option, and then select the 'Add' button. A list of drivers that are available to be installed will then be listed, select the 'Xarios Phone Manager Service Provider' and select 'Add'. The Xarios TAPI driver will now be added to the 'Phone and Modem' options. Close the 'Phone and Modem' options and Control Panel. The Xarios TAPI driver is now installed on the machine and can be used from TAPI compliant applications to dial via the Phone Manager.

Q. How do I set up a Hot Key on Phone Manager?

A. To set a Hot Key in Phone Manager load the 'Application Settings'. To do this right click on the Phone Manager icon in the Windows taskbar and navigate to 'Settings' then click on 'Application Settings'.

When the 'Application Settings' have loaded select the 'Hot Keys' tab. A list of the available Hot Keys will then be shown. A description of the Hot Key is given, the Hot Key that is currently set and if the Hot Key is enabled or not.

To set a Hot Key highlight the Hot Key that is required to be set up and then select 'Edit'. A dialogue box will then be loaded where the settings for the Hot Key can be entered. Select the desired Hot Key from the drop-down menu, this will be used in combination with one of the other keys listed along the bottom of the dialogue box. Select the desired combination key from the checkboxes, the combination keys are; 'Alt', 'Ctl', 'Shift' and 'Win'. To enable the Hot Key to work check the 'Enabled' checkbox. Select 'Ok' to save the settings for the Hot Key. The Hot Key can now be used by holding down the combination key on the keyboard and pressing the Hot Key key that has been set up.

Q. How do I disable a Hot Key on Phone Manager?

A. To disable a Hot Key in Phone Manager load the 'Application Settings'. To do this right click on the Phone Manager icon in the Windows taskbar and navigate to 'Settings' then click on 'Application Settings'.

When the 'Application Settings' have loaded select the 'Hot Keys' tab. A list of the available Hot Keys will then be shown. A description of the Hot Key is given, the Hot Key that is currently set and if the Hot Key is enabled or not. Highlight the Hot Key that is required to be disabled and select 'Edit'. A dialogue box will then load and display the settings that are set for the Hot Key. To disable the Hot Key uncheck the 'Enabled' box and select 'Ok'. The Hot Key will now be disabled.

Q. How do I edit a Hot Key on Phone Manager?

A. To edit a Hot Key in Phone Manager load the 'Application Settings'. To do this right click on the Phone Manager icon in the Windows taskbar and navigate to 'Settings' then click on 'Application Settings'.

When the 'Application Settings' have loaded select the 'Hot Keys' tab. A list of the available Hot Keys will then be shown. Highlight the Hot Key that is required to be edited and select the 'Edit' button. A dialogue box will then load and display the settings that are set for the Hot Key. You can then edit the settings for the Hot Key. When all the settings have been changed to the desired settings select the 'Ok' button to save the changes.

Q. How do I use Hot Keys with Phone Manager?

A. When a Hot Key has been set with Phone Manager to use it hold down the combination key, either 'Alt', 'Ctl', 'Shift' or the 'Win' key and then select the Hot Key that has been set up. The action for the Hot Key will then be executed.

Q. How do I enable Macros with Phone Manager?

A. To enable Macros with Phone Manager right click on the Phone Manager icon in the Windows taskbar and navigate to 'Settings' then select 'Application Settings'.

When the 'Application Settings' have loaded select the 'Macros' tab. To enable macros with Phone Manager check the checkbox 'Enable event driven macros'. A file path can be specified, if one has not already been specified, for where the macro files will be saved. When the settings have been entered select the 'Save' button. Macros can now be used with Phone Manager for this client.

Q. How do I change the Macro file path for Phone Manager?

A. To change the file path that the Phone Manager macros are stored in right click on the Phone Manager icon in the Windows taskbar and navigate to 'Settings' then select 'Application Settings'.

When the 'Application Settings' have loaded select the 'Macros' tab. Select the '...' button to change the location of the file path. When the new file path has been select click the 'Ok' button and then the 'Save' button on the 'Application Settings'. The new macro file path will now be set.

Please note any files that were saved in the previous location will not be in the new location and will need to be copied from the previous location.