

MXIE User's Guide

Introduction

MXIE is the software interface by which system users can access MX services and resources. This guide introduces the most frequently used MXIE operations. Refer to the MXIE User's Manual for detailed information about the interface and all available MXIE functions.

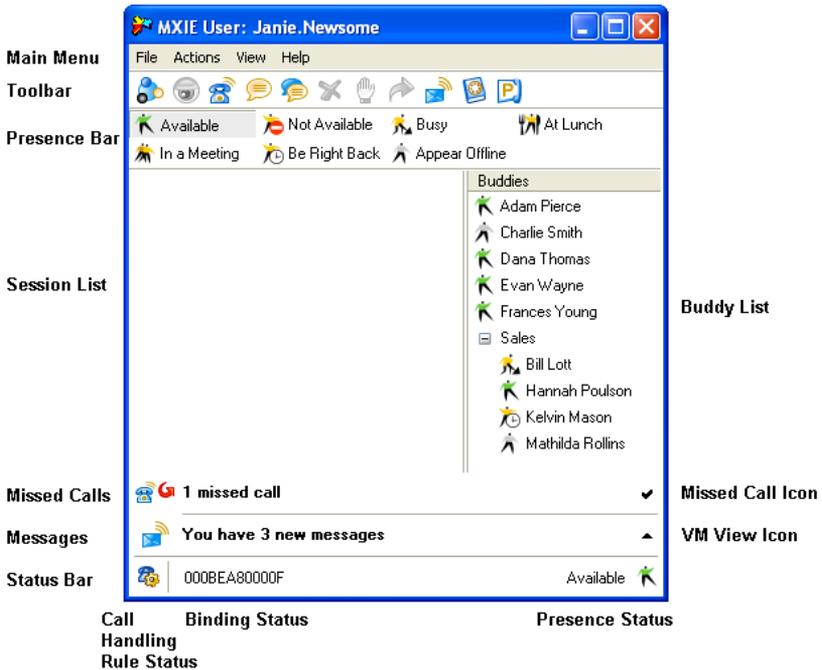


Figure 1 MXIE Window

MXIE Window Components

The MXIE users window (figure 1), is the primary window for accessing MX services. The following sections describe window components.

Toolbar

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

Presence Bar

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

Session List

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

Keyboard Shortcuts

Figure 2 lists the available MXIE keyboard shortcuts.

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

Figure 2 Keyboard Shortcut definitions

Session Control Buttons

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



Figure 3 Session Control Buttons

- **Transfer (1)** sends a voice call to another user.
- **Hold (2)** places a voice call on hold.
- **Disconnect (3)** rejects a chat invitation, sends an incoming voice call to voice mail, or disconnects a session.
- **Answer (4)** accepts a chat invitation.
- **Retrieve (5)** resumes a call previously placed on hold.

Buddy List

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

To add a user to the buddy list, open the address book and display the contact list. Highlight the name of the person that you wish to add, press the right mouse button, and select **Buddy**. You cannot modify the buddy list for operator and agent roles.

To add a buddy group to the list, point at the buddy list, click the right mouse button, and select **Create a Group**.

To initiate communication sessions with buddy list members, point at a buddy and click the right mouse button.

To perform Buddy Group operations, right click on your buddy list and select the desired operation. You can drag and drop buddy list members into any group. Users can belong to more than one buddy group.

Status Bar

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

Instant Messages and Chats

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

Message Window

The message window exchanges text with other MXIE users.

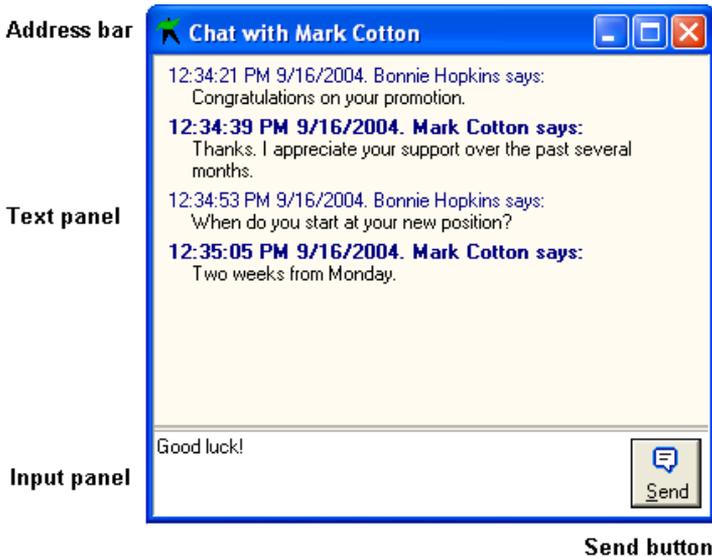


Figure 4 Message window

Message Window Components

As shown in figure 4, this window comprises four components:

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

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

Docking Message Windows

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

Instant Messages

An instant message is a single text message.

To send an instant message:

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

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

Chat Sessions

A chat is a series of messages exchanged between two parties.

To initiate a chat session:

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

MXIE opens a message window if the recipient accepts the invitation.

Receiving a Chat Invitation

When you receive a chat invitation, MXIE displays a chat invitation block in your session list and a popup dialog panel next to your system tray.

To accept a chat invitation:

- **Chat Invitation Block:** right click the mouse and select **Accept** or (if visible), click the answer button
- **System Tray:** press **Answer** in the popup dialog panel



Figure 5 Chat Invitation Session block

To reject a chat invitation:

- **Chat Invitation Block:** right click the mouse and select **Reject** or (if visible) click the disconnect button
- **System Tray:** press **Reject** in the popup dialog panel

- *Keyboard*: type 'R' or 'r'

If you have multiple session blocks in your session list, highlight the appropriate block before accepting or rejecting the chat invitation.

To terminate a chat session:

- *Session Block*: right click the mouse and select **Disconnect** or (if visible) press the disconnect button
- *Message Window*: right click the mouse and select **Disconnect**
- *Keyboard*: type 'D' or 'd'
- *Toolbar*: select the session block and press the Disconnect icon

Voice Calls

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

Device Management

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

An *unmanaged device* is a device that is connected to the MX but is not listed in the MX device database and is not assigned an MX device ID. Unmanaged devices can perform voice calls using system resources if its address of record is configured as a registered contact.

A *registered contact* is either:

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

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

Binding a Phone

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

To access the Bind a Phone window:

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

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

Device. MXIE is bound to a managed device. You can bind to any managed device that has not been restricted by another user through a *Device Access Policy* (File | Preferences) assignment.

Contact. MXIE is bound to a registered contact. The Device Access Policy panel controls access to your registered contacts.

Softphone

The MXIE Softphone allows you to perform voice calls through MXIE without using a hardware device. The Softphone utilizes MXIE call appearances for handling individual calls. An advanced MXIE license is required to use the MXIE Softphone. You access the Softphone by binding it to your MXIE instance. You initiate and control Softphone calls through MXIE interface commands.

Contact Information Formats

When entering contact information for a voice call to a device that is connected to the same MX system, the following formats are permitted:

- user_name
- extension
- user_name@domain.com
- extension@domain.com

When entering contact information for all other devices that can be accessed by the MX, the following formats are permitted:

- any valid telephone number recognized by the PSTN and permitted by the MX dial plan
- any valid SIP address that connects to a voice call device

Initiating a Voice Call

To dial a number from the MXIE interface, the device through which the conversation will take place must be bound to the MXIE instance. A MXIE instance cannot properly originate a call if it is bound to a SIP device that has call forwarding or DND enabled.

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

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

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

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

After you initiate the call, the MXIE window displays a session block that represents the call. Figure 6 displays session blocks at the various stages of a voice call: the top block was displayed after dialling the contact and before the call is answered; the bottom block was displayed during the phone conversation.

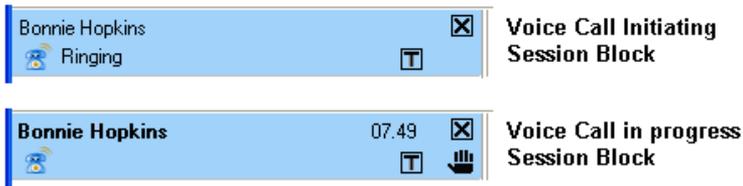


Figure 6 Phone Call Session Blocks

Receiving a Voice Call

You can receive a voice call through:

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

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

To answer a call:

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

To reject a call:

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

To send a call directly to voice mail:

- *Session List:* click the right mouse button over the ringing session block and select **Send to Voice Mail**

- *Session List:* if visible, press the disconnect button in the ringing session block
- *Keyboard:* type 'V' or 'v'

During the Call

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

Hold

After placing a call on hold, you must retrieve the call from the same phone to resume the conversation.

To place a conversation on hold:

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

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

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

To retrieve a conversation that is on hold from MXIE:

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

Blind Transfer

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

To perform a blind transfer:

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

Attended Transfer

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

To perform an attended transfer:

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

In figure 7, Bonnie Hopkins is on hold while David Messenger was called. Pressing the Transfer icon (T) transfers Bonnie Hopkins to David Messenger.

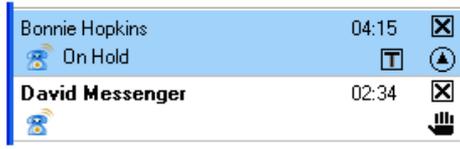


Figure 7 Attended Transfer session blocks

Park

The Park function maintains the state of a call but suspends the conversation. Park differs from Hold in that you can retrieve a Parked call from any phone on the system.

To park a call:

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

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

To pickup a parked call:

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

Call Recording

Call Recording is available to advanced ACD agents or authorized users on a system with an active call recording license. MXIE roles that are permitted to record calls display a red recording icon on the right side of all voice call session blocks, as shown in figure 8.



Figure 8 Session Block with Call Recording Icon

To record a call, press the recording icon. While recording a call, the session block extends and displays recording control icons, as shown in figure 9.



Figure 9 Call Recording Block

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

To pause recording, press the pause button in the recording block. If you resume recording after a pause, the new recording is appended to the portion recorded prior to pressing the pause button.

Terminating the Connection

To terminate a voice call:

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

Call Handling Rules

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

To view and edit your call handling rules:

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

Operators and ACD Agents

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

Callback

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

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

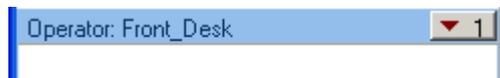


Figure 10 Callback Icon

To access the Callback panel, press the Callback icon. When any group member presses the icon, it is removed from the partition header of all members of the group. You can return the call and report the result of the call from this panel, as shown in figure 11.

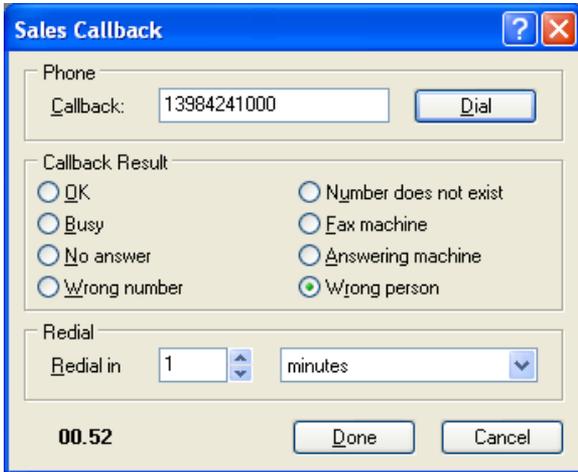


Figure 11 Callback panel

Advanced ACD Groups

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

Figure 12 displays the MXIE window for a user that belongs to two ACD groups. The session block is active for the Sales basic ACD group. The session block is inactive for the Tech_Support advanced ACD group. The arrow icon on the left side of the session control block indicates that Tech_Support is an advanced ACD group. The *Supervisor* text that is right of the arrow icon indicates that Bonnie Hopkins has supervisor rights for the group.

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

- **Silent Monitor:** The supervisor listens to both sides of an agent call. Neither party is aware of the supervisor's presence.
- **Whisper:** The supervisor can listen to both sides of the call and speak to the agent. The other party is not aware of the supervisor's presence.

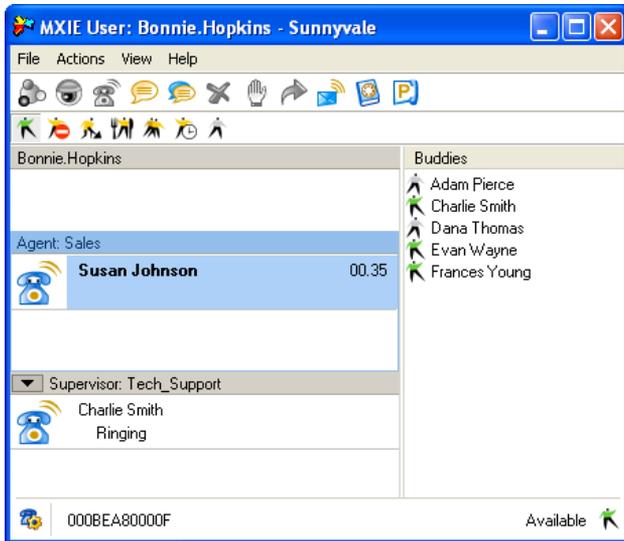


Figure 12 MXIE Window

- **Barge-In:** The supervisor can speak to both sides of the call.

To access the Advanced ACD monitors, press the arrow icon on the left side of the session control block. Supervisor functions are performed from the Advanced ACD monitors.

Presence

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

Presence States

Each user is assigned a presence state based on online status and communication availability. Users logged into MXIE as an operator or an ACD agent are assigned an additional presence state for that role.

Presence states are represented by icons. Select the icon style that MXIE uses to display your presence from the *Toolbar Preferences* panel.

User presence states include Available, Not Available, Busy, At Lunch, In a Meeting, Be Right Back, Appear Offline, Logged Off, No Access, and On the Phone.

Operator presence states include Available, Not Available, On the Phone, and Logged Off.

ACD and hunt group agent presence states include Available, Not Available, Active, Wrap Up, and Logged Off.

Presence Rules

Presence rules define the automatic transitions between presence states.

Users

These conditions trigger transitions between user presence states:

Available to Not Available triggers if the user's computer is inactive for a period specified in the *Presence Preferences* panel.

Available to On the Phone triggers when the user makes or receives a voice call.

On the Phone to Busy (wrap up time) triggers when the user terminates a call if the Busy state was entered from the On the Phone state because of that call.

Wrap up to Available triggers after remaining in the Busy (wrap up time) condition for a specified period.

Available to Busy the user has a role as an operator or an agent and is busy within that role.

Operators

These conditions trigger transitions between operator presence states:

Available to On the Phone triggers when an ACD agent or operator initiates or accepts a call. This rule cannot be removed or changed.

On the Phone to Available triggers when an operator terminates a call.

Available to Not Available triggers when the user changes to a state specified by the *ACD and Operator User Preferences* window.

ACD and Hunt Group Agents

These conditions trigger transitions between agent presence states:

Available to Active triggers when an ACD agent initiates or accepts a call. This rule cannot be removed or changed.

Active to Wrap up triggers when an agent terminates a call.

Wrap up to Available triggers after remaining in the wrap up state for a period specified by the *ACD and Operator User Preferences* window.

Available to Not Available triggers when the user changes to a state specified by the *ACD and Operator User Preferences* window.

Manual State Transitions

To manually change your presence state:

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

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

Voice Mail

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

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

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

Mail Box Directory

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

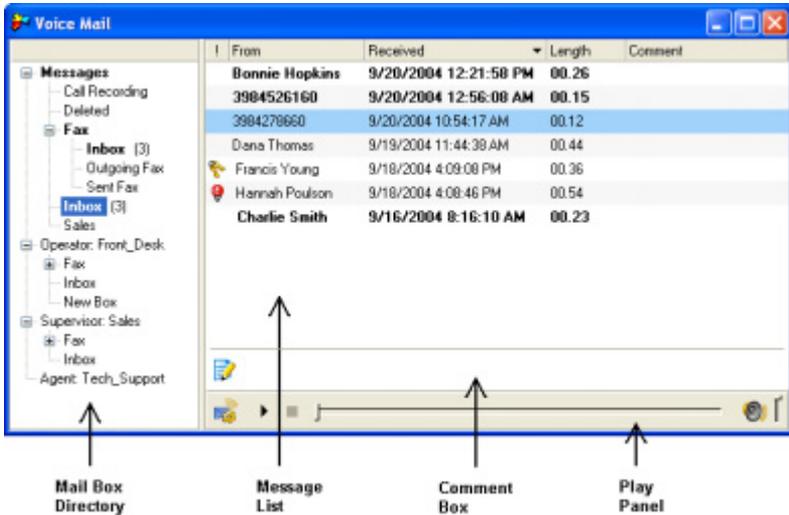


Figure 13 Voice Mail Window

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

Message List

The right side of the Voice Mail window displays all voice messages and faxes stored in the mail box selected in the Mail Box Directory panel. Message service options allow you to listen to, reply to, and forward your messages and perform message management tasks.

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

To access message services, right click the mouse button while pointing in the Message List.

To alter the saved status of a message, select the message and access message services: Press *Save* to change an unread message to a saved message. Press *Mark as Unread* to return a message to new status.

To move a message into a mail box, Drag and drop a message from the message list or a mail box into the desired mail box.

To copy a message into another mail box, Press the Shift key while moving a message into the desired mail box.

To forward a voice message to another user, right click on a message title and select *Forward* or drag and drop a voice message title line into an address book entry or buddy list contact.

To reply to a voice message from another system user, right click on a message and select *Reply*.

To save a comment with the highlighted message, click in the comment box to the right of the folder & pencil icon, then type a text message.

To listen to a voice message or display a fax, double click on the desired message or select the message and press the play button in the play panel.

To send a voice message, click the right mouse button while pointing the recipient and select **Send a Voice Mail**.

To send a fax, click the right mouse button while pointing the recipient and select **Send a fax**.

Voice Mail Settings

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

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

Message Notification

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

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

Address Book

The Address Book window, shown in figure 14, accesses the MX user directory and supports the creation of personal address books.

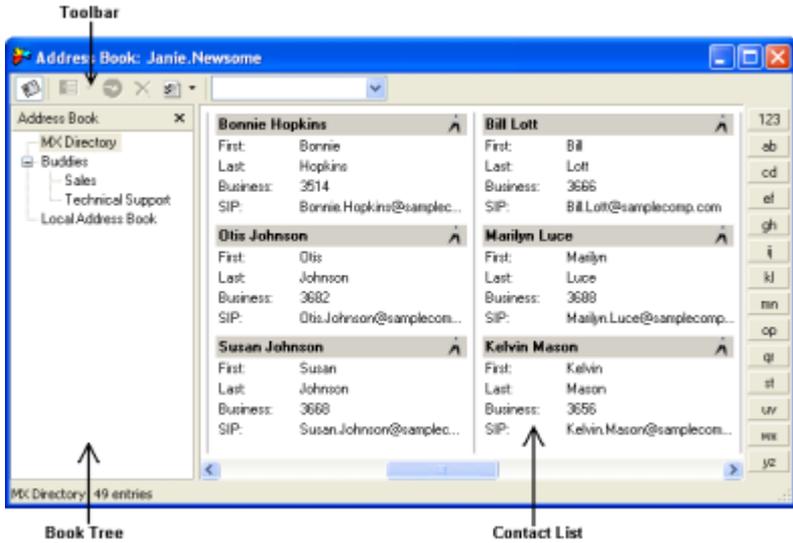


Figure 14 Address Book window

Toolbar

The following is a description of the Toolbar buttons:

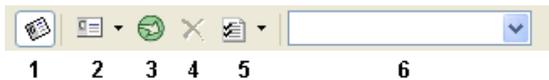


Figure 15 Address Book toolbar

Show/Hide Book Tree (1) toggles the Book Tree display status.

New Entry (2) adds an entry to the contact list. Press the arrow to add a New Address Book to the Book Tree.

Import Book (3) imports data file contents into the current address book.

Delete (4) removes the selected entity – either a book from the book tree or an entry from the contact list.

Options (5) accesses the Address Book Settings window Press the arrow to sort the Address Book contacts.

Search box (6) finds users in the contact list.

Book Tree

The book tree displays your address books. The contact list displays the content of the book highlighted in this panel. The book tree always displays the MX Directory (derived from the MX user list) and the Local Address Book; you cannot edit, move, or delete these books.

The *Show/Hide Book Tree* button is depressed when the book tree is displayed and is not depressed when the book tree is hidden.

To change the display status of the Book Tree, press the *Show/Hide Book Tree* button.

To add new books to the book tree, press the *New Entry arrow*.

To delete books from the book tree, press the *Delete* button.

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

Contact List

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

Editing the Contact List

To edit an entry, double-click the contact to access the *Entry Information* dialog panel.

To delete an entry, select the entry and press the *Delete* button.

To add an entry, press the *New Entry* button on the address book toolbar.

To import data file contents into an address book, press the *Import Book* button in the address book toolbar.

Search for a contact: Type the first or last name of the contact in the search box and press the enter key. Search box contents are case sensitive. Press the enter key again to resume the search.

Select the data fields displayed for each entry: Access the *Shown Entry Properties* panel of the Address Book Settings window by pressing the *Options* button in the toolbar.

MXIE Operations

To perform MXIE operations from the Contact List, access an operations panel (figure 16) by right clicking the mouse while pointing at a contact.

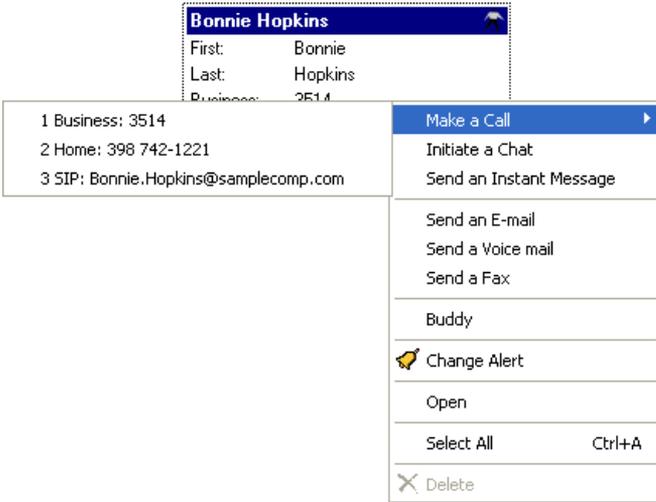


Figure 16 Contact Operations panels